Tech Market View

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Q1 2013

Quarterly Research Summary

Welcome

With 2013 promising to be a 'make or break' year for the software and IT services (SITS) industry, spring has seen the TechMarketView team of analysts get off to a flying start with focused reports in all streams. Here are just a few of the highlights:

BusinessProcess*Views* research director John O'Brien's report *General Insurance BPS opportunities in a rapidly changing market* is one not to be missed. With major changes on the way in 2013 for the UK general insurance BPS market, John's report highlights opportunities for BPS suppliers, as new UK and EU regulations are brought in to force, allowing general insurers and their ecosystem partners to evolve.

With Cloud computing, and the SaaS in particular, being key disruptors in this watershed year, the latest report from Angela Eagar, research director for ESAS*Views*, is a must read for those involved in the Enterprise Software and Application Services (ESAS) sector. *Cloud UK 2013: going wider and deeper into the enterprise* focuses on just how suppliers can achieve wider and deeper infiltration into the structure of the UK's public and private sector oranisations.

As leading suppliers to UK government and the broader public sector are adjusting to a different operating environment, directors Georgina O'Toole and Tola Sargeant bring you invaluable, in-depth analysis on how they're faring in the *2013 UK Public Sector SITS Supplier Landscape* report. It looks to be a long journey ahead for those involved.

At the end of last year we introduced Kate Hanaghan, research director for Infrastructure Services. Kate's latest report entitled *How will the IT support services firms outside the top tier fare in 2013?* looks at the companies who sit just outside the tier one 'big boys' and highlights some of the challenges they face in this 'make or break' year.

Then we come to our Little British Battlers (LBBs). February saw our second LBB event take place and what a day it was. We had the pleasure and privilege of hosting CEOs from twelve of the UK's up and coming software and IT services companies. You can read the full report on all our LBB companies (see page 3) to find out what the future holds for these innovators of the future SITS market.

And finally don't forget that our June event, **Make Or Break: An evening with TechMarketView** is coming up fast. With tickets nearly sold out you can look forward to a full report on the 'not to be missed' event in our next Quarterly Research Summary (or try to bag one of the last few seats by emailing tina.compton@intellectuk.org).

What a year it is shaping up to be!

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

UK public sector SITS supplier landscape 2012-13
Georgina O'Toole, Tola Sargeant   **January 2013**

The leading suppliers to UK government and the broader public sector are adjusting to a different operating environment. The Government ICT strategy, the implementation of which is being led by the Cabinet Office, is dictating that the money spent on ICT products and services should be going to a broader range of suppliers, including SMEs. TechMarketView's latest analysis of the UK public sector software and IT services (SITS) supplier landscape highlights that translating policy to reality is a long journey.

ESAS Predictions 2013
Angela Eagar   **January 2013**

This year will be a pivotal period for enterprise software and application services suppliers as they continue to grapple with the disruptive implications arising from cloud, mobile, social media, and big data/analytics. The scale of change has forced suppliers to think differently about what they deliver and how they charge and support it. Cloud computing continues to be the catalyst for wider change and the enabler for its delivery but a rising pressure is the need to predict the varying rates of adoption across these interlocking spaces.

Industry*Views* Quoted Sector 2012 Review

Anthony Miller   January 2013

Foundation Service clients can download the latest edition of **Industry*Views* Quoted Sector** to see our review of the stock performance of UK-listed software and IT services companies in 2012.

Brazil*Views* January 2013 - Pipedreaming in the Brazilian IT Market

Anthony Miller   January 2013

In his most incisive analysis yet, Anthony Miller, TechMarketView managing partner (and self-styled 'Born-again Brazilian') challenges the view propagated in the media that the Brazilian IT market remains unaffected by the global economic downturn, and casts doubt on IT industry forecasts of double-digit growth in 2013.

UK Business Process Services Predictions 2013

John O'Brien   January 2013

2013 will be a 'make or break' year for many UK BPS/BPO (business process services/outsourcing) providers as disruptive trends around platform-based BPS, Business Process-as-a-Service (BPaaS) and Software-as-a-Service (SaaS) come of age. These trends, largely driven by the cloud, are introducing new competitors into the market, new delivery and contracting models, and forcing incumbents to rethink their established operating models.

Have the India-centric suppliers come of age?

Kate Hanaghan   January 2013

This research looks at the most prevalent India-centric firms in the UK: Cognizant, iGate, Infosys, HCL, MindTree, TCS, TechMahindra and Wipro. These companies are picking their battles with care, and competitors likely to bear the brunt of this approach are tier one incumbent suppliers who are failing to deliver material cost savings and service improvements.

Infrastructure Services Predictions 2013

Kate Hanaghan   January 2013

This extended version looks in-depth at some of the challenges faced by suppliers in light of the macroeconomic climate and the evolving technology scene. Are infrastructure services suppliers making the right investments? Who will succeed in the Virtual Desktop Infrastructure market?

Industry*Views* Venture Capital 2012 Review

Anthony Miller   February 2013

Foundation Service subscription clients can read our succinct year-end review of venture capital investment in UK software and IT services companies in the latest edition of Industry*Views* Venture Capital. Besides key stats on VC investment last year, we also highlight some of the more interesting deals completed in Q4.

Can A&O shake up the UK IT Support Services Market?

Kate Hanaghan   February 2013

The UK IT support services market is led by a small number of larger players, including Computacenter and Phoenix. However, it is an industry that is characterised by its 'long tail' of smaller providers with a diverse range of capabilities and financial performances. In this research note we look at A&O IT Group and assess its prospects for 2013 in a market that is still not growing…

Capita buying Northgate MS puts spotlight back on ITS

John O'Brien   February 2013

Capita's purchase of Northgate Managed Services (NMS) left us with plenty of questions as to what the deal means for the future of Northgate and its other two divisions Northgate Public Services (NPS) and Northgate Arinso (NGA) now that one of its three core divisions has been cast off.

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Industry*Views* Corporate Activity - 2012 Review

Anthony Miller   **February 2013**

Foundation Service subscribers can download the latest edition of Industry*Views* Corporate Activity to see our annual review of corporate activity in the UK software and IT services market in 2012.

EMC: The big brand that's yet to go top 20

Kate Hanaghan   **February 2013**

EMC is by heritage a company that provides storage products and solutions. However, it now positions itself at the intersection of three important technology areas: Cloud, Big Data and Trust. This research note explains the company's position in the UK market and some of the activities it is undertaking to ensure revenue growth.

Offshore*Views* - 2012 Review

Anthony Miller   **March 2013**

Foundation Service subscribers can download the latest edition of Offshore*Views* with our concise review of the UK performance of the major India-centric IT services firms in 2012 here.

"Make or Break": How will the IT support services firms outside the top tier fare in 2013?

Kate Hanaghan   **March 2013**

Below top tier, well-known names that include Computacenter, SCC and Phoenix there are a lot of firms varying in size and capability providing support services to the UK market. This research note highlights some of the players who operate below tier one and the challenges they face.

Cloud UK 2013: going wider and deeper into the enterprise

Angela Eager   **March 2013**

2013 is a make or break year for cloud computing and the SaaS subsector. The challenge for suppliers is achieving wider and deeper infiltration into the structure of the UK's public and private sector organisations. While SaaS is widely accepted in areas like CRM and BI, its next move must be deeper penetration into business critical areas like ERP.

UK Defence SITS supplier landscape 2013

Georgina O'Toole   **March 2013**

In the latest report from TechMarketView's PublicSector*Views* team, Georgina O'Toole identifies the leading suppliers of SITS to the UK defence sector, analyses their performance over the last few years, looks at their strategy for growth in the sector, and considers their chances of success.

General insurance BPS opportunities in a rapidly changing market

John O'Brien   **March 2013**

The UK general insurance BPS market is at the cusp of major change in 2013. New UK and EU regulations are forcing general insurers and their ecosystem partners to evolve, reducing fraud, driving out cost for the consumer and improving transparency.

Could cloud help telecoms providers achieve a break-through in the UK infrastructure services market?

Kate Hanaghan   **March 2013**

Telecoms providers serving the UK market have for some time attempted to identify ways to offset their traditional, declining voice revenue streams. However the transition into IT services it not an easy one. As buyer strategies around cloud start to take shape, has the time now come for these players to play a greater role in the UK infrastructure services market?

Little British Battlers - The Second Coming!

After our second hugely successful Little British Battler Day in February we are delighted to announce the publication of the accompanying report, which provides concise snapshots of the twelve companies that we met.