

Quarterly Research Summary

Welcome

What a quarter it's been here at TechMarketView, culminating in our inaugural *MakeOrBreak: An Evening with TechMarketView* presentation and dinner in the magnificent surroundings of BAFTA in London's Piccadilly. The evening was a sell-out with some 200 of our customers and friends in attendance.

It was really great to see so many of the CEOs from the UK's leading players give up an evening to attend and judging by the noise generated from lively conversation over dinner, we certainly raised some pertinent points in our presentations! TMV subscribers who missed the event can download the edited highlights PDF of slides on page 3.

There was further excitement with the release of our most eagerly awaited reports: *UK Software & IT Services Market Trends and Forecasts*, and *UK Software & IT Services Rankings*. Faced with the longest slump in the last 100 years, technology company managers are faced with more challenges to hit growth targets than ever. Read an overview of these reports on page 3 but only TechMarketView subscribers will be able to download the full reports.

Aside from these key reports our research directors have been very busy keeping abreast of the latest developments in the SITS Market in their individual streams. With a lot to report on in the UK Central Government market *PublicSectorViews* research director Georgina O'Toole and *BusinessProcessViews* research director John O'Brien released reports on the rise of digital and Business Process services opportunities in the sector.

InfrastructureViews research director, Kate Hanaghan, released an eagerly awaited company report on Computacenter, offering her insight into how the company is currently performing and the challenges it faces ahead in her report: *Computacenter: Focus and growth*.

There have been some interesting developments within the health sector too. *PublicSectorViews* research director, Tola Sargeant examines the state of NHS IT in light of the Public Accounts Committee hearing on the National Programme for IT in the NHS in *NHS IT: Plus ça change...?* And takes a closer look at SME Kainos in *Kainos: Healthcare and Public Sector fuel growth*.

There have been some significant developments in the ESAS sector as reported by research director, Angela Eager in her report *Zuora: more than a new back-end for the SaaS model?* and *NorthgateArinso: shaping the HR market?*

Q3 is set to be equally busy as we are running a second Little British Battlers event this year, to take place late Autumn. If you are interested in being a contender, please contact Deb Seth. We are particularly excited to be running this event with our new sponsors MXC Capital. To read more our about new partnership in this event click [here](#).

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

Outcome-based business process services – what's it all about?

John O'Brien

8th April 2013

All business process services (BPS) suppliers want to talk about 'business outcomes' in relation to their BP service delivery says *BusinessProcessViews* research director, John O'Brien. They want to engage with clients on matters that directly impact their business performance and success; issues that matter at the CxO level. Subscribers to TechMarketView's *BusinessProcessViews* research stream can read the full analysis and implications [here](#).

Kainos: Healthcare & Public Sector fuel growth spurt

Tola Sargeant

10th April 2013

In April, *PublicSectorViews* research director, Tola Sargeant, caught up with erstwhile 'Little British Battler' Kainos, who have been active in the UK SITS market for over a quarter of a century. From her meeting with CEO Brendan Mooney, Tola learned more about the business and how it has evolved and grown in recent years. To read the full report *PublicSectorViews* subscribers should click [here](#).

Zuora: more than a new back-end for the SaaS model?

Angeal Eager

10th April 2013

As well as using the SaaS model itself, Zuora provides a SaaS-based back office system for subscription management, which presents a direct challenge to traditional business and financial management systems, and in doing so tackles the back office penetration issue. Eligible ESASViews subscribers can find out more [here](#).

UK central government: the rise of 'digital'

Georgina O'Toole

23rd April 2013

With the significant changes in Whitehall having a huge impact on all suppliers targeting central government departments and agencies, PublicSectorViews research director, Georgina O'Toole, outlines many of the changes being driven by the Digital by Default agenda and considers the impact they will have.

IndustryViews Corporate Activity - Q1 2013

Anthony Miller

23rd April 2013

The year got off to a good start for UK software and IT services (SITS) mergers and acquisitions, with 78 UK buyers and 93 UK sellers (including 60 domestic deals) making it the best first quarter since 2008 according to data from corporate finance firm Regent Partners. In this report we consider the most popular targets and deals made in Q1 2013.

IndustryViews Quoted Sector Q1 2013

Anthony Miller

29th April 2013

This latest analysis of how the stock performance of UK software and IT services companies listed on the London Stock Exchange compares with the international peers indicates a slowing of growth. TechMarketView subscription service clients can read the full report [here](#).

Computacenter: Focus and growth

Kate Hanaghan

9th May 2013

Computacenter is one of the few remaining home-grown brands in the TechMarketView rankings of leading suppliers to the UK IT services market. In the report *Computacenter: Focus and growth*, InfrastructureViews research director, Kate Hanaghan, looks at how Computacenter is currently performing and examines the challenges it faces.

Business process services opportunities in UK central government

John O'Brien

14th May 2013

UK central government is shaping up to be one of the stand out sectors for growth in the UK BPS market thanks to some big wins over the past year from the likes of Capita, Atos and new entrant Arvato. New types of deals are presenting opportunities around shared services, SME partnering and 2nd/3rd generation BPS renewals. Subscribers to BusinessProcessViews or PublicSectorViews can read John's full report [here](#).

OffshoreViews Q1 2013

Anthony Miller

20th May 2013

In the latest edition of OffshoreViews, Anthony Miller, looks at the issues raised by the proposed US immigration reform bill and the potential impact on the offshore services industry as well as giving his opinion on companies suffering a severe case of the 'Bangalore Blues' and the usual review of the financial performance of the key India-centric players both globally and here in the UK. It's essential reading and Foundation Service subscribers can download OffshoreViews [here](#).

NorthgateArinso: shaping the HR market?

Angela Eager

31st May 2013

As a player in the cloud-based HR market, HR and payroll specialist NorthgateArinso (NGA) is well placed in one of the most rapidly developing enterprise SaaS areas. Although it is not free of challenges, NGA is a company worth watching because it provides early insight into how the various technologies and trends could come together. Eligible TechMarketView subscribers can read 'NorthgateArinso: shaping the HR market?' [here](#).

CGI's challenge: harnessing its local expertise globally

Georgina O'Toole

6th June 2013

While establishing itself as a global leader, more able to compete head to head on worldwide deals with the likes of IBM and Accenture, CGI is also determined to differentiate by ensuring intimate client relationships based on local proximity. In this *CompanyViews* note, Georgina O'Toole considers the challenges CGI faces in realising its global ambitions. *PublicSectorViews* subscribers can download the full analysis [here](#).

IndustryViews Venture Capital - Q1 2013

Anthony Miller

10th June 2013

In our regular, concise review of venture capital investment in UK software and IT services companies, we conclude that a modest start suggests a slower year ahead. *Foundation Services* subscribers can download the report [here](#).

Business process automation - a BPO industry game changer?

John O'Brien

10th June 2013

Having recently met with a number of start ups and new entrants in the emerging space of business process automation (BPA), we believe BPA is going to create serious disruptive change to the UK BPO/BPS sector over the next few years. Incumbent BPO/BPS providers should see automation as an opportunity, but also as a significant threat, as their core business functions compete against cheaper, quicker and more accurate automated alternatives. Subscribers to the *BusinessProcessViews* research stream can read the analysis and implications [here](#).

NHS IT: Plus ça change...?

Tola Sargeant

17th June 2013

With key contracts in NPfIT (the National Programme for IT in the NHS) still ongoing, despite the Coalition Government's plans to scrap it, *PublicSectorViews* research director, Tola Sargeant, takes the opportunity to highlight some of the key facts to come out of the latest PAC hearing in *NHS IT: Plus ça change...?*. Tola also debates whether or not the NHS IT market has moved on and considers implications for suppliers. *PublicSectorViews* subscribers can download this research [here](#).

UK SITS Rankings 2013

All Analysts

26th June 2013

TechMarketView's authoritative annual report ranking the leading players of software, IT and business process services to the UK market finds that the top 30 companies in the UK SITS market accounted for £30.4bn of the 2012 SITS market, with half being driven by acquisitions. HP topped the rankings again even though its SITS revenues declined by 5%. HP leads IBM, Capita and BT, which retain their respective second, third and fourth places. *Foundation Service* subscribers, click [here](#), to read the report.

UK SITS Market Trends & Forecasts 2013

All analysts

26th June 2013

TechMarketView's keynote report on the trends driving the UK software and IT and business process services markets, including all our latest estimates and forecasts for market size and growth. Faced with the longest slump in the last 100 years, technology company managers face yet more challenges to hit growth targets. With the UK SITS market set to have declined by 5% from its 2011 levels by 2016, the competition for the same business is fierce and technology leaders need to be cleverer to maintain and win it. Subscribers can download the full report, click [here](#).

TechMarketView UK SITS Market Forecasts 2013 (XL)

This is the accompanying XL for the UK SITS Market Trends & Forecasts 2013 report.

TechMarketView Evening June 2013 presentation

All Analysts

26th June 2013

With our inaugural TechMarketView presentation, **MakeOrBreak: An Evening with TechMarketView**, taking place in June, those subscribers who missed out on the sell-out event can download the 'edited highlights' PDF of slides [here](#).