

Quarterly Research Summary

Q4 saw the third Little British Battlers event take place. The calibre of candidates didn't disappoint and we were impressed by the wealth of SMEs present in the UK. See below to find out more about our 12 Little British Battlers.

Also in Q4 we launched our latest research stream, FinancialServicesViews; a dedicated stream focused on the supply of software and IT services (SITS) to the UK Financial Services sector (banking, financial markets and insurance businesses). To accompany the launch, research director, Peter Roe, released two flagship reports: *Financial Services SITS Market Trends and Forecasts* and *Financial Services Supplier Landscape*. For more information on our newest stream, click [HERE](#).

Our other streams have been equally busy. In PublicSectorViews (PSV) Georgina O'Toole, released high profile reports on **UK Local Government SITS Supplier Landscape 2013-14** and **Scottish Public Sector SITS Market: Trends and Opportunities**. Georgina also wrote some key analysis covering **Steria & SSCL: a pivotal deal** and **Agilisys leverages Blenheim Chalcot relationship**. Fellow PSV director, Tola Sargeant, brought us news of Dell in **Dell Surprises in UK Public Sector**. While Georgina and ESASViews research director, Angela Eager, combined their knowledge in **HP and Norfolk County Council: Big data ambitions**. Other pieces from the PSV team include: **Autumn Statement 2013: implications for public sector SITS** (Georgina O'Toole), **US healthcare IT woes carry lessons for the UK** (Tola Sargeant) and **Alliantist readies for next phase of growth** (Georgina O'Toole).

In ESASViews research director, Angela Eager, brought us the second of her key reports, **ESAS Supplier Landscape 2013/2014**, as well as her in-depth analysis in **SAP Business ByDesign: Direction and market impact**. Angela also reports on **PE firm Advent International offers €1.17bn for UNIT4** and **Servicing the cloud SMB accountancy market** in her UKHotViewsExtra articles.

InfrastructureViews research director, Kate Hanaghan, released a key report on **Mid-market Data Centre Services: Opportunities and Competitors**, and in-depth analysis of Colt in **The IT services piece in the Colt growth puzzle**. Kate followed these up with reports on **Memset: On a government growth curve** and **SCC sets sights on 46% growth**.

While in BusinessProcessViews research director, John O'Brien, brings us his analysis of BPS suppliers in **How are BPS suppliers responding to the rise of BPM?**, reports on Genpact in **Genpact's challenges and opportunities in UK BPS** and analyses the Indian players in **What does the future look like for India HQ'd players in UK BPS?**.

Finally, there's the indispensable, views and analysis from the Foundation Service with regular reports from managing partner, Anthony Miller, including **OffshoreViews Q3 2013**, **IndustryViews Venture Capital - Q3 2013**, **IndustryViews Quoted Sector Q3 2013** and **IndustryViews Corporate Activity**. Anthony also gives us his in-depth analysis on **Clear Books Growing with the crowd**.

Look out for our **2014 Predictions** report out soon and we wish you all best wishes for a successful 2014!

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

Little British Battlers - The Thirds Wave

TMV Analyst Team

Report

17/12/2013

This is the third report in our Little British Battler series providing concise profiles and opinion on the twelve companies that participated in our third Little British Battler day in November 2013.

UK Local Government SITS supplier landscape 2013-14

Georgina O'Toole

Report

17/12/2013

With the landscape remaining dominated by IT and business services players benefiting from the steady flow of revenues attributable to multi-million pound and multi-service line (IT services and BPO) contracts signed over the last decade, this report looks at how the fortunes of some of these suppliers have deteriorated significantly in the past couple of years both through the effect of market forces and from self-inflicted wounds.

Financial Services Supplier Landscape 2013/2014

Peter Roe

Report

17/12/2013

This report profiles the key vendors in the UK Financial Services sector, across the SITS market as a whole and in the individual areas of Enterprise Software, Infrastructure Services, Applications Services and Business Process Services.

OffshoreViews Q3 2013

Anthony Miller

Report

16/12/2013

Picking up on the analysis we published earlier this year on the infrastructure services of the major India-centric suppliers (see *Have the India-centric suppliers come of age?*), and how one player has broken away from the pack.

IndustryViews Venture Capital - Q3 2013

Anthony Miller

Report

09/12/2013

We look towards the heavens in the latest edition of IndustryViews Venture Capital - our quarterly review of the start-up and venture capital side of the UK software and IT services market - with a special focus on 'angel' investing.

Financial Services SITS Market Trends and Forecasts

Peter Roe

Report

11/11/2013

This flagship report from new research stream *FinancialServicesViews* presents a heat map of SITS activity, identifying key areas for investment and focus and describing the key issues and outlook for each of the Banking, Financial Markets and Insurance sub-sectors and across the major sub-divisions of the SITS market.

ESAS Supplier Landscape 2013/2014

Angela Eager

Report

30/10/2013

A key message from the new ESAS 2013/14 Supplier Landscape report is that the fundamentals of the market – what to supply, how to supply it, and who should supply it - are under scrutiny.

Mid-market Data Centre Services: Opportunities and Competitors

Kate Hanaghan

Report

27/10/2013

With the mid-market (100-1000 employees) often referred to as if it is a single market sector, such as financial services or manufacturing, this report tells us it is not and looks into what is actually a highly fragmented market consisting of a large number of enterprises with different business and technology challenges.

IndustryViews Quoted Sector Q3 2013

Anthony Miller

Report

22/10/2013

The aggregate value of UK software and IT services (SITS) companies listed on the London stock market (Main and AIM) hit a two-year peak last quarter, reaching £22.3bn. The number of quoted companies rose again for the second successive quarter to 98. Find out why in the latest Quoted Sector report from IndustryViews.

Scottish Public Sector SITS Market: Trends and Opportunities

Georgina O'Toole

Report

20/10/2013

The Scottish Public Sector SITS market, despite its small size and modest growth, is attracting great interest from the leading UK SITS providers. The Top Ten suppliers to the market currently derive c£250m of revenues from this market. But most have bold ambitions to grow their Scottish public sector business.

IndustryViews Corporate Activity

Anthony Miller

Report

15/10/2013

The number of SITS mergers and acquisitions in Q3 was the highest since Q4 2006. Most in demand were Vertical Software companies comprising 25% of all UK SITS deals in Q3. Find out why in this latest offering of Corporate Activity from IndustryViews.

How are BPS suppliers responding to the rise of BPM?*AnalystViews***John O'Brien**

19/12/2013

Business process management (BPM) is seeing an increase in adoption in the UK business process services (BPS) market as suppliers attempt to respond more quickly and efficiently to clients' process challenges.

The IT services piece in the Colt growth puzzle*AnalystViews***Kate Hanaghan**

30/11/2013

In FY12, Colt hit the significant milestone of returning to growth (in Euros) for the first time in seven years. However, management's ambition doesn't stop there. The objective is to achieve compound growth of mid-to-high single digits to 2017. Find out how they can make this a reality in this analysis from *InfrastructureViews*.

Genpact's challenges and opportunities in UK BPS*AnalystViews***John O'Brien**

27/11/2013

We recently attended the European analyst event of offshore centric BPS provider Genpact, where we heard from two major UK customers and top management about its plans for growth. Genpact is of real interest to us because it is something of an anomaly in the UK.

Steria & SSCL: a pivotal deal*AnalystViews***Georgina O'Toole**

20/11/2013

At the beginning of the month Steria confirmed that it had won a ten-year contract with the UK Cabinet Office to set up a joint venture called Shared Services Connected Ltd (SSCL). This report outlines more details on the contract for Steria and SSCL.

SAP Business ByDesign: Direction and market impact*AnalystViews***Angela Eager**

08/11/2013

At the start of 2013 we predicted a make or break year for SaaS ERP. For SAP it looked like it was the year its mid-market SaaS business applications suite Business ByDesign (BBD) broke when it announced in October that it was moving some of the development resources away from BBD and would be using its partner ecosystem to support "current functionality and scope" of the product. Find out how BBD is changing form quite radically.

Dell Surprises in UK Public Sector*AnalystViews***Tola Sargeant**

06/11/2013

As the dust settled after Dell's high profile move back into private hands (see Dell ding dong done and dusted), we caught up with Dell's UK public sector team and were surprised to find a business that is outperforming the market in many areas.

What does the future look like for India HQ'd players in UK BPS?*AnalystViews***John O'Brien**

24/10/2013

India HQ'd business process services (BPS) suppliers are facing increasing threats to their position in the UK market today. Many have built up their UK businesses and client relationships via an offshore-centric delivery model, however leading India HQ'd player TCS and smaller peer Firstsource have taken a different approach, investing in onshore UK delivery operations. Read the full report to find out more.

Agilisys leverages Blenheim Chalcot relationship*AnalystViews***Georgina O'Toole**

22/10/2013

In 2011 we reported that public sector-focused IT services and BPO player, Agilisys was rapidly becoming a viable alternative as a BPO provider to the local government market. Since then, the company has continued to grow despite an increasingly tough local government outsourcing market.

Memset: On a government growth curve

UKHotViewsExtra

Kate Hanaghan

16/12/2013

We recently caught up with Memset CEO and co-founder, Kate Craig-Wood, at the company's new offices. Find out all about their recent relocation in this report from InfrastructureViews.

HP and Norfolk County Council: Big data ambitions

UKHotViewsExtra

Georgina O'Toole / Angela Eager

09/12/2013

HP has won a £26m, five-year, contact with Norfolk County Council to support its Digital Norfolk Ambition (DNA) programme. Following the announcement of the contract, Georgina O'Toole spoke in detail to Norfolk CIO Tom Baker and HP Enterprise Services Director of Strategy, Civil Government, James Johns, about the deal.

Autumn Statement 2013: implications for public sector SITS

UKHotViewsExtra

Georgina O'Toole

05/12/2013

Three and a half years ago the Chancellor George Osborne set out his long-term economic plan in the Emergency Budget. Part of the plan focused on addressing the problem of unreformed public services. The Autumn Statement highlights how that endeavour is ongoing.

Clear Books Growing with the crowd

UKHotViewsExtra

Anthony Miller

25/11/2013

You have to tip your hat to Tim Fouracre, co-founder and CEO of UK accounting software SaaS start-up Clear Books. He set out to raise over £800k through DIY 'crowdfunding' (see here) and by gosh he did it! In fact, when the fundraising closed on 31st October, it was oversubscribed.

PE firm Advent International offers €1.17bn for UNIT4

UKHotViewsExtra

Angela Eager

18/11/2013

UNIT4 is setting up to be acquired by private equity firm Advent International for €1.17bn. The offer is conditional but as it follows a structured sales process, has the backing of the board and represents a 32% premium on the share price prior to UNIT4 announcing interest from potential acquirers (see here), there is not much to impede it.

SCC sets sights on 46% growth

UKHotViewsExtra

Kate Hanaghan

13/11/2013

Further to our note on SCC's FY13 (see SCC reveals "stable" FY13 numbers), we have spent some time with James Rigby, MD of the UK business. With SDG at its new home, the objective now is to build the SCC brand in the market and achieve substantial growth, aided by the funds from the SDG sale.

Servicing the cloud SMB accountancy market

UKHotViewsExtra

Angela Eager

08/11/2013

It's a dynamic period in the cloud SMB accounting and ERP software market. This analysis of the market covers moves by Xero, Sage and Intuit. Read the full report to find out what they've been up to.

US healthcare IT woes carry lessons for the UK

UKHotViewsExtra

Tola Sargeant

22/10/2013

With 'NHS IT disasters' regularly hitting the headlines in the UK, it's almost reassuring to see similar issues plaguing the US government's high profile Healthcare.gov website which went live on October 1. SITS suppliers CGI and Serco are amongst those bracing themselves for bad press.

Alliantist readies for next phase of growth

UKHotViewsExtra

Georgina O'Toole

03/10/2013

Cloud-based collaboration platform provider, Alliantist, has achieved G-Cloud accreditation IL3 for multi-agency working. We spoke to CEO, Mark Darby, about the company's 'pam' offering and future plans.