Tech Market View

UK DEPTH GLOBAL TRENDS

2018
Breaking
the Boundaries

Vision

TechMarketView is the most influential boutique analyst & advisory firm in the UK. Trusted by tech suppliers and tech users as they navigate change, TechMarketView analysts are known for robust analysis of suppliers and disruptive market trends, blending UK depth with forward-looking insight.

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Foreword from the Chairman

2018 marks the 10th Anniversary of the founding of TechMarketView

Back in 2008, Nokia was the out-and-out leader in mobile phones – the iPhone was not even a year old. Every executive carried a Blackberry. Facebook had less than 100m users. Amazon was just an online retailer. Nobody had heard of Tesla – the concept of the widespread adoption of electric and self-driving cars would have been met with incredulity. The same reaction would have greeted anyone who had predicted that AI would replace a majority of white collar jobs in our lifetime.

TechMarketView's first decade has been characterised by change and disruption. Indeed we have used versions of those words in many of our 'Themes of the Year'.

A search back through the TechMarketView archives shows that we discussed all these trends at their infancy. Our predictions might have looked preposterous at the time, but they have had an uncanny knack of being right!

Achieving that does not come easy. It comes because TechMarketView has assembled a superb team of high quality analysts, many of whom have been with us for much of TechMarketView's life. Our analysts spend their time out in the marketplace with the very people at the highest level in our industry who are shaping the future.

TechMarketView is proud of its loyal customer base that now embraces practically all of the main tech players, along with many mid-tier and emerging tech innovators. We are equally proud of the programmes we have initiated, like *Little British Battlers* and *Great British Scaleups*, that have enabled us to help hundreds of smaller UK tech companies reach a wider market.

TechMarketView is proud that tens of thousands of readers treat their daily dose of UKHot*Views* as their Number One source of informed news and views on the tech sector. We are proud that we seem to get more references in the quality media than organisations many, many times our size.

After 10 years we can now justifiably claim to be *the* most influential analyst firm on the UK tech scene.

What of the next 10 years?

TechMarketView is already informing you of the major changes that will affect our lives and businesses in the future. But the pace of change is accelerating at an amazing rate. We fully expect that many of the leaders in 2028 will be companies that we have never heard of today. The same applies to many of the processes and technologies that will affect your business.

But we also hope and expect that you will continue to hear about them first from TechMarketView.

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UK depth, Global trends

Defining TechMarketView in 2018

Over the last ten years, TechMarketView has grown and evolved considerably. Under the stewardship of co-founders Richard Holway MBE and Anthony Miller, we're proud to have become one of the most influential analyst and advisory firms in the UK tech market. A trusted advisor to a growing band of tech firms - from global market leaders to innovative start-ups – and to tech users, including large swathes of UK government and the financial services sector.

We are also proud to say that we now have one of the best teams in the business. A group of analysts that are high profile experts in their fields, respected for their strong opinions and for honest, independent advice that is supported by robust bottom-up research. Of course, our Client Services team is just as important to our success. We're frequently told that they help to make TechMarketView one of the most approachable and easy to deal with analyst firms around.

UK depth, Global trends

What else makes us different? As our new strapline '*UK depth, Global trends*' makes clear, TechMarketView's experts blend a deep understanding of the UK tech market and its suppliers - augmented by privileged conversations with CXOs across the industry - with insight into global tech trends.

As you read through the rest of this document, you'll see that our research directors are able to help you to navigate change and spot opportunities across a broad spectrum of markets and focus areas from Robotic Process Automation (RPA) through cyber security to cloud transformation; and from the payments market to the police market.

You will also hear from our Managing Partner, Anthony Miller, about our passion for the start-up and scale-up scene in the UK. We are delighted to continue

to identify and support innovative SMEs through programmes such as Great British Scaleups and Little British Battlers. Getting close to these innovators also gives us great insight into emerging technologies and future disruptors.

Now more than ever, this makes TechMarketView a natural partner to software, IT services and business process services suppliers in the UK market – indeed, to anyone with an interest in the sector. Let us support you in **Breaking the Boundaries** in 2018!

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Breaking the Boundaries

TechMarketView's 2018 Research Theme

Having 'joined the dots' in 2015, 'surfed the waves of disruption in 2016, and 'unlocked the intelligence' in 2017, in 2018, TechMarketView's research focus remains on digital transformation, as we watch the story further evolve. Our theme - **Breaking the Boundaries** - emphasises that, as organisations progress with their digital transformation agendas, they can no longer be insular. They must look beyond their organisational boundaries in ways that they never have before. To fully embrace the possibilities presented by digitalisation, enterprises and government organisations - and the ICT suppliers supporting them - must throw off the shackles limiting progression. They must look beyond their own four walls when it comes to *skills & resources,* to *data,* to *technology*, and to *innovation*.

With digital ***skills & resources*** scarce, creative ways to pull in digital talent must be considered. As well as traditional routes such as partnering (which need to become more innovative), that might also include the use of public freelance marketplaces or crowdsourcing. Such an approach will also allow the flexibility and agility to respond to rapidly changing digital requirements.

In a digital world, organisations are increasingly harnessing the power of ***data*** for competitive advantage. So, drawing on data from external sources – particularly if it is difficult for others to access – that can be exploited to advance organisational aims, is highly valuable. Those sources might be public, but they might also come from forming innovative - even exclusive - partnerships with data owners.

Gone are the days when all ***technology*** assets sat within internal datacentres. As organisations increasingly adopt as-a-service models, there is a growing reliance on technology in the cloud. The internet-of-things adds another dimension. Now, the source of more and more data is the raft of sensors sitting on everything from shipping containers to street lights. As organisations adapt their modus operandi to take advantage of the data collected, they become increasingly reliant on third party technology sitting in far harsher, and less secure, environments than a server room. The supplier ecosystem within which ICT suppliers reside will become increasingly complex – with more potential points of failure.

And when it comes to organisations ensuring that their use of technology is advancing at an appropriate pace, ***innovation*** can also come from 'outside'. For suppliers and end user organisations alike, drawing on ideas from academia, hackathons, or innovation hubs to keep ahead of the competition is increasingly common and will grow in popularity.

Crucially, to cope with these changes, our view is that traditional organisations – both end users and technology firms - must push their own boundaries culturally, and adopt an entirely different mindset. '**Breaking the Boundaries**' has wide implications and will be picked up in each of our research streams throughout the year ahead.

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SME Programmes

Helping UK tech SMEs break growth boundaries

TechMarketView's SME programmes have an enviable track record of championing UK tech SMEs to greater success, and afford valuable visibility to associated sponsors.

The Little British Battler programme

Since its inception a decade ago, TechMarketView has sought to champion home-grown tech companies, especially SMEs that are 'punching above their weight' in the marketplace. This culminated in 2012 with the launch of our *Little British Battler* programme, which has since seen over 100 UK tech SMEs gain the benefit of an association with TechMarketView's renowned brand, and achieve extensive market recognition. Indeed, many of our Little British Battlers have since gone on to greater things, including new partners, funding rounds and acquisitions.

The Great British Scaleup programme

Launched in mid-2017 to assist fast-growing UK tech SMEs achieve their growth potential, the TechMarketView *Great British Scaleup* (GBS) programme has already helped over a dozen companies along their scale-up journey.

CEOs from the selected GBS candidates undertake individual intensive 90-minute structured workshops with TechMarketView Research Directors and mentors from our Advisory Sponsor, **ScaleUp Group**, to help them identify opportunities for extraordinary growth, and overcome potential challenges to achieving their objectives.

Participants are assessed using the proprietary ScaleUp Growth Index® that measures a company's scale-up readiness according to specific criteria considered as being essential to successful, rapid growth.

Applicants to the Great British Scaleup Programme are also entitled to a complimentary initial review from **Coegco Peer1**, our accredited Enterprise Cloud & Infrastructure Services Technology Partner.

Sponsorship Opportunities

TechMarketView offers selected sponsorship opportunities to companies wishing to support our SME programmes. Sponsors gain high-profile visibility through GBS collateral and events. Sponsors also benefit from their association with the TechMarketView brand as well as extensive visibility as a supporter of UK tech SMEs.

Foundation Service

Setting the boundary lines

In order to break the boundaries, you first need to know where they lay. And that is the primary purpose of the TechMarketView Foundation Service: delineate the scope of our research in the UK tech market; set out the ground rules; and identify the key players.

The *Foundation Service* is an invaluable source of market insight for suppliers, investors and technology executives. Comprising four interrelated streams, the *Foundation Service* reveals the significant market trends and industry dynamics driving the UK tech sector in general, and the software and services market in particular.

Market*Views* - comprising two keynote annual reports, *UK SITS Market Trends & Forecasts*, and *Predictions*. Published at the beginning of each year, *Predictions* presents TechMarketView's informed assessment of the overarching trends shaping the UK tech market. *UK SITS Market Trends & Forecasts* is published mid-year and expands on the *Predictions* report by providing detailed estimates and forecasts for the UK market, and explains the underlying drivers and inhibitors.

Company*Views* - the home of our eagerly awaited annual *UK SITS Rankings* report. Published mid-year, *Rankings* tabulates the pecking order of suppliers in various sectors of the UK software and services market, providing short narrative on the market leaders. We also publish analyses of other tech suppliers, including reports deriving from programmes such as *Little British Battlers* and *Great British Scaleups*.

Industry*Views* - A trio of quarterly analyses of VC investment in UK tech companies (Industry*Views* Venture Capital), acquisition activity (Industry*Views* Corporate Activity), and publicly quoted UK tech companies (Industry*Views* Quoted Sector).

Offshore*Views* - Underpinned by over 15 years of detailed metrics and burnished through close relationships with the offshore services industry, Offshore*Views* is arguably the best-informed analysis of the Indian pure-play IT services scene outside of India! Published quarterly.

UKHot*Views* - puts you on top of the market each day

Widely acknowledged as unmissable reading by tens of thousands of professionals and executives in the tech sector, as well as private and public sector organisations, UKHot*Views* puts our views on the things that really matter in the tech sector into your inbox every workday morning. We are renowned for our unbiased analysis and provocative opinion, which is frequently referenced in national and international media.

Subscribers to any TechMarketView research stream can also enjoy searchable access to every UKHot*Views* post we have ever written, including the subscriber-only UKHot*Views*Extra archive. We've already published over 15,000 comments on company results, funding activity, acquisitions and trends in the UK tech sector, and add dozens more each week. We'd like to think that the UKHot*Views* archive is the best source of 'instant' market intelligence on the UK tech scene.

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The Foundation Service gives suppliers, investors and technology executives a top-level view of the significant market trends and industry dynamics driving the UK tech sector.

PublicSector*Views*

Focus on the UK public sector software and IT services market

Digital transformation has risen to the top of the agenda in the public sector. Austerity has been the catalyst, but as the benefits of digital become better understood, increasing numbers of organisations are taking bolder steps on their journey.

In many cases that means **Breaking the Boundaries** between departments, agencies, regions and partners, whether via closer collaboration, transference of skills, the re-use of technologies or the sharing of data.

Collaboration - Financial pressures and the need for greater efficiency and effectiveness, as well as demand from citizens, mean public sector organisations are questioning their traditional operating models. They will continue to investigate ways to eradicate the silo mentality resulting in greater collaboration between agencies and across regional boundaries

Skills & Resources - Pressures such as Brexit, the challenges of IR35 and a digital skills shortage (both within government and within its suppliers) mean government will need to be creative in sourcing the requisite transformation capabilities.

Data - Organisations are waking up to the value of data - pursuing the open data agenda, creating new data, and looking to external sources. The potential, if value can be unlocked, is clear. But the journey ahead is fraught with issues of governance, privacy and security.

Technology - As the adoption of as-a-service and IoT solutions, e.g. for smart cities, grows, more organisations will put their trust in infrastructure and technology beyond their four walls, giving rise to new challenges related to reliability and security.

An insular approach is not an option. So, as the public sector breaks down more boundaries, TechMarketView's PublicSector*Views* team will publish in-depth supplier and market analysis, as well as shorter viewpoints, focused on our 2018 '**Breaking the Boundaries**' theme; the result will be an invaluable mix of research designed to help government organisations and ICT suppliers understand the opportunities and threats represented by the evolution of this ever-changing sector.

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TechMarketView's dedicated research stream focused on the UK public sector software and IT services (SITS) sector. Coverage of the UK public sector SITS market enables organisations to plan their approach to the market based on realistic forecasts and easy-to-read market trend analysis that offers a consistent view of the UK market as a whole (public and private sector). Key analysis also supports your efforts to identify areas of opportunity. Our opinionated coverage of SITS suppliers is invaluable for competitor analysis and identifying potential partners or investment opportunities.

SECURITY, REGULATION AND THE VALUE OF DATA

ADDRESSING THE DIGITAL SKILLS SHORTAGE

THE BENEFITS OF BETTER COLLABORATION

Public Sector Market Shaping Trends

EFFICIENCY THROUGH INTELLIGENT AUTOMATION

MAKING OUR CITIES SMARTER

NAVIGATING THE BREXIT CHALLENGE

FinancialServices*Views*

Focus on the UK financial services sector

Companies in the Financial Services sector are moving onto the front foot in terms of investing for growth and accelerating cost and quality improvements. Many factors are even now coming into alignment.

Most companies have begun the process of digital transformation and they are gaining confidence as a result of the wider availability, and acceptance, of cost-effective, agile cloud based services.

Successive regulatory initiatives have mandated the sharing of data across the sector, opening up many areas of the banking and payments world to greater competition. In addition, the technologies underlying the areas of Artificial Intelligence and Automation have proved to be reliable and valuable sources of progress.

Established Financial Services companies will be **Breaking the Boundaries** between organisational silos and to provide the end customer with innovative, personalised and joined-up services. In many cases this will require companies

increasing their scope; moving into new value chains, accessing a wealth of new data and opening up new customer markets. To meet the ever-more demanding requirements of customers, overcome persistent legacy issues and face the increasing threat from the internet giants they will have to accelerate their rate of change and embrace innovation to a much greater degree. Companies will also increasingly partner with Fintech companies and IT Services suppliers as they attempt to infuse their organisations with new propositions, leading edge technology and a rejuvenated customer-centric culture. As well as providing specialist research of exciting and iconoclastic Fintech players, we will also be providing in-depth insight into the turbulent payments and ecommerce sectors.

Financial Services providers and their tech suppliers will be looking for the competitive edge that the well-directed use of technology, within a clear commercial, customer-focused strategy can bring. TechMarketView will be there to help them deliver.

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The FinancialServices*Views* research stream, focused on the largest private sector vertical, leverages the knowledge and insight of the wider TechMarketView team in the context of this exciting and important sector, which relies upon technology to a much greater degree than other industrial sectors.

The team of Research Director Peter Roe and Senior Associate, Richard Johnson have a detailed understanding of the specific issues within banking, financial markets and insurance as the established companies wrestle with change and as new companies enter with new business models, the latest technology and greater dynamism and agility. Working with our clients and end users we can provide clear insight to help optimise investment, partnership and competitive strategies.

GROWING THREAT FROM FINTECHS AND INTERNET GIANTS

THE DRIVE FOR INNOVATION

NEW TECHNOLOGIES CREATING NEW VALUE SOURCES

Financial Services Market Shaping Trends

BREXIT AND THE FS SECTOR

CLOUD - THE KEY TO TRANSFORMATION

THE IMPACT OF NEW REGULATIONS

BusinessProcess*Views*

Focus on the UK business process services market

UK organisations of all sizes continue to demand the delivery of ever more efficient and effective business processes – how they are going about procuring them is **Breaking the Boundaries** of the business process market.

Progress towards digital services is increasingly being underpinned by the need to automate intelligently. Whilst this opens up huge opportunities for suppliers in areas such as Robotic Process Automation (RPA), Artificial Intelligence (AI), machine learning and advanced analytics it comes at a time when buyers are demanding continuous innovation and greater flexibility as existing contracts return to market. Innovation in commercial models is becoming as important as getting the technology mix right.

The UK remains a pioneer in BPS trends globally but continues to be a market going through considerable change with Brexit, GDPR, changing user behaviour and increasing client expectations just a few examples to be considered. Opportunities for mega-contracts are few and far between and all the major BPS players are busy working through strategies to reinvent themselves to address this shift. Partnering and having the right supplier ecosystem has never been more important.

Our 2018 **BusinessProcess*Views*** research agenda will continue to look at developments in the front, middle and back office across a broad range of vertical markets and will provide the strategic context, informed analysis and insight that buyers and sellers of business processes need to navigate uncertain times. For vendors, it might be about identifying those companies with the game changing technology to partner with. Whilst for buyers it might be about contracting in a way that future proofs the service and delivers the desired outcomes.

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BusinessProcess*Views* is our dedicated research stream focused on the UK business process services (BPS) sector - led by experienced research director and BP services analyst, Marc Hardwick.

Our in-depth coverage of the UK BPS market enables organisations to plan their approach to the market based on realistic forecasts and easy-to-read market trend analysis that offers a consistent view of the UK BPS market as a whole. TechMarketView's analysis also supports your efforts to identify short-term and long-term areas of opportunity, and to respond to market threats ahead of time.

Our opinionated coverage of BPS suppliers, big and small, is invaluable for competitor analysis as well as for identifying and evaluating potential suppliers, partners or investment opportunities.

GETTING 'MATCH FIT' FOR DIGITAL

DIFFERENTIATION THROUGH COMMERCIALS

PARTNERING REPLACES OUTSOURCING

Business Process Market Shaping Trends

MOVING BEYOND THE MEGA DEAL WITH COMMODITY SERVICES

THE MATURING OF INTELLIGENT AUTOMATION

BREXIT - A GLASS HALF-FULL FOR BPS?

ESAS *Views*

Focus on the UK Enterprise Software & Application Services markets

Ignorance is no defence in the eyes of the law – and it's not something enterprises can hide behind either. With software and application services rapidly developing to support the informed, consistent, accountable decision-making that businesses need to improve performance and competitive positioning, avoidable mistakes are less and less excusable.

The shift to data-leveraging digital business lies at the heart of this change and **Breaking the Boundaries** is necessary to deal with it.

Within the ESAS market **Breaking the Boundaries** reflects the need for drastic change. The Enterprise software segment is breaking new ground as insight becomes the new interface, applications break down into malleable services and stacks, and break out into platforms and ecosystems (data, machine intelligence, APIs, skills marketplaces). Each comes with its own supply chain, forcing enterprises and suppliers to open out to a bigger and more connected environment.

Boundaries are breaking fast in the application services domain too, not only between the traditional build/run divide, but also with the other major service towers - in particular Business Process Services and Infrastructure Services. Success requires much more than the mastery of an ever expanding and developing array of intelligence techniques, automation tools and technology capabilities. It demands radical changes to current business models; software and service portfolios and mixes, skills strategies, supply chains, pricing and contractual constructs and beyond.

During 2018 we will be taking a closer look at these challenges, analysing the changes in the UK market together with wider global trends to anticipate its future direction and assess how competitive dynamics are shifting. Above all, the 2018 research programme will focus on providing the forward-looking insights that enterprises and suppliers alike will need to navigate successfully in a domain that continues to re-define the limits of its possibilities.

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Business success depends on the deployment of affordable technology platforms capable of simultaneously delivering agility and stability. These must bridge legacy and digital enablement environments that are stretching further apart but must remain connected. Run by Angela Eager and Duncan Aitchison, ESAS *Views* tackles the issues the community of enterprise software and application services suppliers and their customers need to face, if they are to avoid being pulled apart or stranded on one side of the divide. Realistic UK forecasts, sharp interpretation of shifting market and competitive dynamics and our unparalleled knowledge of players large and small, provides valuable insight to support your work around market identification and definition, competitor and vendor analyses, investment and partnering programmes, and commercial and contractual activities.

RETHINK VALUE, COMMERCIAL & DELIVERY MODELS

CAPITALISE ON CONVERGENCE AND COLLABORATION

Software and Apps Services Market Shaping Trends

DRILLING INTO DATA SUPPLY CHAINS

INSIGHT THROUGH INTELLIGENT PLATFORMS

MACHINE INTELLIGENCE AT THE EPICENTER

DEVELOPING TALENT AND TRANSFORMING CAPABILITIES

Infrastructure*Views*

Focus on the UK infrastructure services market

In 2018, TechMarketView's Cloud and Infrastructure Services research will examine market progress as organisations endeavour to *Break the Boundaries* of what has typically been possible for them.

At one end of the spectrum some have set extremely high expectations with very public promises of a wholesale move to cloud accompanied by the large-scale closure of data centre assets. For the majority, however, **Breaking the Boundaries** will initially involve taking smaller strides, which are nevertheless important first steps in breaking down their own long-standing boundaries.

However, digitisation is not easy and we've seen evidence of many failures and many more organisations that are too afraid or confused to start. Our view is that Infrastructure Services is the bedrock of digitisation and the technology component that should be addressed first off. To that end, we expect to see more mainstream organisations attempt to refine their approaches to Hybrid IT, using container-based infrastructure to enhance their control and use of cloud alongside on-premise services.

Those suppliers and buyers that have already established a genuine partnership-based approach will lead the way in benefiting from cognitive-based infrastructure solutions and more automated infrastructure. These technologies are a driving force for change that will help organisations tear down the boundaries of interaction with both their employees and customers.

Progress towards the augmented workplace of the future remains very patchy in the market, and we commonly see the co-existence of poorly delivered IT support services and transformative SaaS-based applications. However, it goes without saying that if you can't even turn on a laptop, you certainly won't be able to take advantage of newly deployed cloud-based apps. To help address the shortcomings of the traditional workplace, organisations must increase their combined use of automation, AI, and analytics (e.g. on the service desk) to build infrastructure that is continuously learning and improving. Only then can they begin to build a culture of 'super professionals' empowered by data-led decision making and unhindered by the boundaries of the enterprise.

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Infrastructure*Views* is focused on understanding the transition away from traditional Infrastructure Services to cloud services. Cloud sits at the heart of enabling the digital transformation of the enterprise and public sector organisations, but the transition to a Hybrid IT operating model is highly complex.

Infrastructure*Views* is led by Kate Hanaghan. Having tracked the UK IT Services market for more than a decade Kate has developed an extensive research base across both suppliers and end user organisations.

Now is a time of unprecedented change as buyers increasingly look to integrate new services into their existing infrastructure landscape. Not all suppliers will thrive in this context, so our research is on hand to help you with your decision-making.

Our analysis brings insights on the players and trends that matter, and our ability to spot change and opportunity will make all the difference to your business – as a buyer or a supplier.

Infrastructure Market Shaping Trends

- THE SLOW BURN TO CLOUD
- AUTOMATION-POWERED DIGITAL CHANGE
- PAAS: UNLEASHING THE POWER OF DATA
- THE CONNECTED WORKPLACE: AN UNHELPFUL DICHOTOMY
- LEGACY IS NOT A DIRTY WORD!
- DIGITISATION HAS GOT TO BE AFFORDABLE

SecureConnect*Views*

Focus on the UK data security, connectivity and cloud services markets

Just as the formidable array of cyber criminals, hackers and state sponsored groups are continually searching for new ways to breach enterprise infrastructure defences, IT managers and cyber security solution suppliers alike must break their own boundaries to find new, more effective ways of stopping them.

The borders are no longer defined by the network perimeter – incidents of unauthorised access, system disruption and the theft of sensitive data can originate from any source, whether inside or outside the firewall. Every device must be protected and managed - from the server to the smartphone, on fixed and wireless networks, but without compromising application usability or limiting business productivity.

That presents a significant challenge for buyers and suppliers alike who must figure out the optimal, most cost effective way to embed and maintain adequate levels of security in distributed hardware, software and service estates that frequently extend beyond their own control into the domain of third party providers.

New data protection legislation in the form of the EU GDPR (compliance with which becomes mandatory in May 2018) will also push many companies to take a closer look at how and where they store and process their data next year. And the automated provisioning and management of cloud-hosted workloads which span on and off-premise infrastructure significantly complicates those operations.

Suppliers must now find and implement technology solutions able to solve arguments over national and legal data boundaries which are already causing tension between their customers and partners. Greater attention to the specific terms and conditions of individual outsourcing contracts will be needed, as the prospect of larger fines for data breaches crystallises the need to establish respective liabilities.

Greater co-operation and collaboration will also be needed to predict and neuter cyber threats before they have a chance to do significant, widespread damage. No one organisation will be able to provide all of the protection required, meaning rival suppliers must bury their differences to join forces with each other, and foster links with police, government and trade organisations to maximise data security defences wherever possible.

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Since the launch of our Infrastructure-*Views* research stream in 2012, the importance of security and networking has come into much sharper focus as organisations take a more strategic approach to cloud-delivered services and digital transformation.

To address this, TechMarketView has launched a complementary research service called SecureConnect*Views*. The stream examines the interconnect between cloud, the network and cybersecurity. For example, how the network is evolving to better support cloud delivery, or the emerging security offerings that provide better protection for end user organisations as they develop digital offers for their customers.

SecureConnect*Views* is led by Research Director, Kate Hanaghan and Principal Analyst Martin Courtney.

ENABLING GDPR COMPLIANCE

MANAGING RISK FROM EVERY ANGLE

ADDRESSING THE SECURITY SKILLS GAP

Secure Connect Market Shaping Trends

FOSTERING GREATER COLLABORATION

CREATING NEW VIRTUALISED SERVICES

KEEPING UP TO DATE WITH CYBER THREATS

Industry Membership Community

An exciting new initiative from TechMarketView

Launching in early 2018, the membership will enable the end-user community to come together to facilitate genuine cross-industry sharing via peer-to-peer dialogue, underpinned by specific technology insight delivered by our respected analysts.

TechMarketView is passionate about supporting organisations as they seek to progress their digital agendas. With our unique insights into the UK tech scene we will be understanding and translating the challenges organisations face as they drive for innovation, capture and retain scarce resources and exploit the power of data.

From its inception, Industry Members will be privy to research that will draw upon and leverage our unique position in the UK tech sector. We see the community evolving and growing to encompass senior IT decision makers across all industry sectors; creating an environment for discussion and collaboration with peers. Over time we expect to offer peer-to-peer events and networking forums hosted by our highly experienced analysts.

Whichever industry you operate in, digital transformation is undoubtedly a key area of focus. Now more than ever, organisations need to operate outside of their industry boundaries to leverage the wealth of established knowledge available. Sharing technology advancements and innovation across-industry will make the UK a leading force for industry and commerce.

To find out how you can become part of this new community contact TechMarketView today.
Be part of a trusted network and help to shape the future, end-user agenda.

Why TechMarketView?

Circular diagram with outer ring labeled: Custom Engagements, Executive Advisory Services. Segments include:

- **SecureConnectViews** – UK Security, Network & Cloud market & industry trends
- **Foundation Service** – MarketViews, IndustryViews, CompanyViews, OffshoreViews
- **PublicSectorViews** – UK Public Sector SITS market & industry trends
- **FinancialServicesViews** – UK Financial Services SITS market & industry trends
- **BusinessProcessViews** – UK Business Process Services market & industry trends
- **ESASViews** – UK Enterprise Software & Application Services market & industry trends
- **InfrastructureViews** – UK Infrastructure Services market & industry trends
- Inner ring: UKHotViews+, UKHotViewsExtra, UKHotViewsArchive, **UKHotViews** (center)

Research

TechMarketView offers qualitative and quantitative research that influences how organisations achieve their goals; helping them understand market conditions and players, and to evaluate potential strategy. In a 'nutshell', TechMarketView can help to focus a company's 'mind'.

UKHot*Views* (complimentary)

Our flagship product, UKHot*Views*, is a daily newsletter boasting a readership of over 20,000 individuals. Delivered by e-newsletter, website and our Twitter feed, it covers the latest, breaking news on the UK tech scene as it happens and is a must have resource for anyone with an interest in this market.

UKHot*Views*Extra (subscription required)

TechMarketView analysts will, from time to time, write longer articles known as UKHotViewExtras. After the breaking news they may speak to company CEOs or attend analyst briefings to gain more in-depth understanding of a topic. Our analysts also visit private companies, influencers and attend conferences. This will give rise to more thoughtful and longer opinion pieces which are published exclusively for TechMarketView subscription clients.

UKHot*Views* Archive (subscription required)

The UKHot*Views* Archive provides subscription clients with unlimited access to all UKHot*Views* and UKHot*Views*Extra articles. With more than 100 UKHot*Views* posts every month, it already contains over 15,000 entries. Although UKHot*Views* is available for free, only subscribers to our subscription services can access the searchable archive and benefit from this incredibly valuable resource.

Research subscription service

Are you looking to:

- *Capitalise on 'real-world' Market Intelligence*
- *Stay relevant and Future-Oriented*
- *Receive Objective, External Viewpoints*
- *Take advantage of up-to-date Competitor Intelligence*
- *Enhance Decision Making Capabilities*
- *Validate strategy through Independent Analysis*
- *Target market opportunities relevant to your business*
- *Understand current and future threats*
- *Work with a valued and trusted analyst team*

Then TechMarketView is ideally placed to support you. With unrivalled experience and track record, the team offers clients a unique perspective of the tech sector; one that combines corporate, market and financial analysis of the software and services companies operating in the UK market. Choose from a combination of 'vertical' and 'horizontal' research streams to tailor the appropriate product to your needs.

Engagements

Custom Engagements (available to all)

TechMarketView's team of experienced analysts has been helping organisations understand what's really going on in the UK tech market for over 20 years. Engagements such as the following are driving tangible benefits for our clients right now:

- **Sounding board sessions:** Regular briefings with the UK management at which TMV analysts act as an independent sounding board
- **Strategic planning input:** Interactive presentations on the state of the UK SITS market to kick-off the strategic planning process
- **Roundtables:** Facilitating or participating in roundtable discussions on hot SITS topics & sitting on relevant judging panels
- **Graduates and Apprentices:** Bringing your new recruits up-to-date on the UK tech scene so that they have the wider knowledge to give context to their roles
- **Sales & Marketing teams:** Research-backed insight to support client-facing teams in sales pursuits and focused marketing

Executive Advisory Service (subscription client)

TechMarketView offers our subscription clients the Executive Advisory Service to leverage the full scope of our research knowledge. Our analysts' forthright views on topics such as the outlook for the sector, disruptive trends that are shaping the market, areas of opportunity & threat and the evolving supplier landscape, enable organisations to make informed business decisions and set their strategic direction with confidence. We are respected for our top level contacts in the tech sector and spend much time in one-to-one discussions with industry CEOs. This provides a unique insight into the market. The Executive Advisory Service provides senior UK management with a regular series of discussions.

Advertising & Sponsorship

We offer a number of advertising and sponsorship options to help you achieve your goals. Our daily newsletter, UKHot*Views*, boasts a monthly readership of over 20,000. Delivered by email, published to the website and Twitter, it covers the latest, breaking news on the UK SITS scene and is a must read resource for anyone with an interest in this market.

Advertising Options

Sponsored Posts

Resembling other UKHot*Views* articles, Sponsored Posts are embedded within the newsletter's text stream but are differentiated by a coloured box surround and the sponsor's name. Copy, links, and images are provided by the advertiser.

Banner Adverts

Two banner options are available. Gold banners appear at the top of the page and Silver banners at the bottom. These are displayed on the UKHot*Views* newsletter, and on the UKHot*Views*, News and UKHot*Views*Extra webpages.

Sponsorship

We also offer a variety of sponsorship packages to our events including our flagship *Evening With TechMarketView*. This is an ideal way to get your name in front of some of the most influential senior executives of both the largest SITS players and a broad cross section of SMEs'; as well as key players in the investment community, the press, government users and CIOs.

❚❚ *TMV is well known as a highly trusted and go to site for the latest industry news. In addition, I find the TMV team's ability to provide further insight, detailed analysis and opinion helps us to better plan for the future in this very fast moving market* **❚❚**

Kulveer Ranger FRSA, Vice President Strategy & Communications, Atos UK & I

Client Services Team

Our Client Services team covers all the support disciplines required to underpin our research services, from subscription account management through sales & marketing to advertising, sponsorship and engagements. The team exists to ensure that our clients enjoy the best possible service experience.

Contact us personally to discuss your needs or send an email to Info@techmarketview and one of the team will get back to you.

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An Evening with TechMarketView

Join us at our annual Presentation and Dinner 2018

We are delighted to announce that the **2018 Evening with TechMarketView** will take place on Thursday 13th September 2018.

This will be our sixth annual TechMarketView Presentation and Dinner and promises to be another enjoyable evening of analyst insight and quality networking over drinks and dinner. The venue will once again be the magnificent Royal Institute of British Architects (RIBA) in Portland Place, London.

So, mark your calendars now and email **tx2 Events** to express interest in the event and receive notification when tickets go on sale.

If your organisation would be interested in sponsorship opportunities at the 2018 event please contact **Tola Sargeant** for further details.

We look forward to seeing you at RIBA in September 2018!