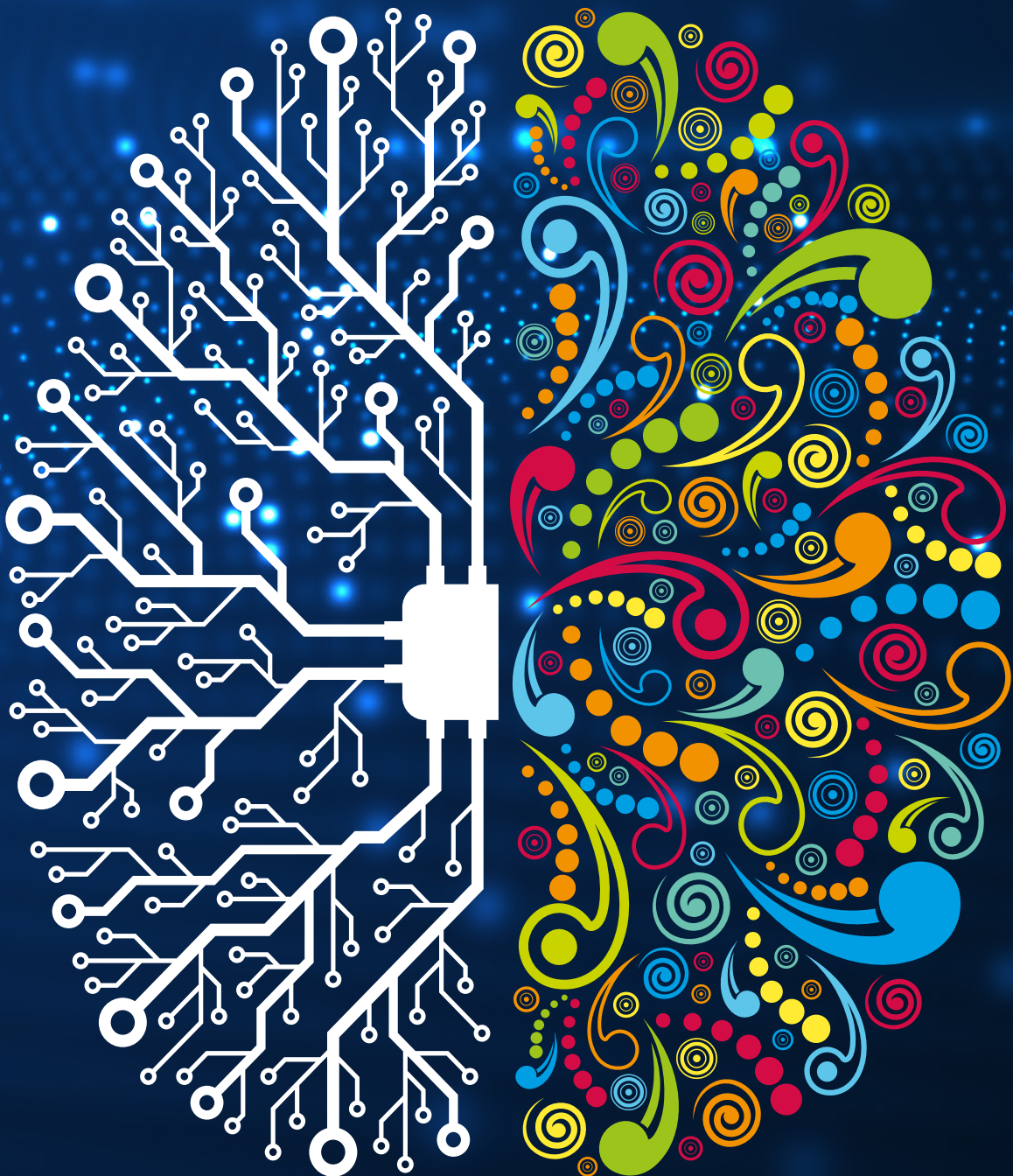


# Reset & Reimagine

TECHMARKETVIEW RESEARCH THEME 2021



## Our 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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## A word from our Chairman

2020 proved to be the most challenging year in our memory. I am really proud that the TechMarketView team of hugely respected individuals rose to that challenge and have helped our loyal and ever-growing client base to navigate through these difficult times. Practically every one of the major players on the UK tech scene is now a TechMarketView client across the many services we offer, all contributing to continue to make TechMarketView the most influential analyst & advisory firm in the UK.

**Richard Holway MBE**  
Chairman



**Richard Holway MBE**  
Chairman, TechMarketView LLP

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## Foreword from the Managing Director

In the foreword to last year's brochure, I began by talking about 'Digital Chaos' - our research theme for the year - and how in 2020 the task of understanding and navigating the UK tech market was to become ever more challenging. I could not have imagined though, just how challenging 2020 was to become for everybody, everywhere.

However, as COVID-19 spread around the world, tech provided the answer to many of the urgent questions that the pandemic asked. Stories of tech being used for good, and tech companies doing good, filled UKHotViews. Teams from diverse organisations - public and private sector - collaborated to 'get the job done'. Deployments and developments that would normally have taken months or years, took days or weeks. The pace of digital adoption accelerated dramatically.

Pioneers of remote working, the TechMarketView team faced relatively little disruption and we resolved to support our clients - both tech suppliers and public and private-sector tech users - as much as we possibly could. If anything, the Covid crisis brought us even closer to our clients and I'm tremendously proud of the work that TechMarketView has done with a broad range of organisations over the last year, supporting them as they support others.

As the world continues to navigate a period of unprecedented change and uncertainty, we look forward to supporting you and your organisation too - providing high-quality, robust research and analysis (see **Corporate Subscriptions**); delivering insightful and actionable custom projects (see **Custom Research**); presenting frank, independent strategic advice (see **Engagements & Exec Advisory**); identifying innovative potential partners and suppliers (see **SME Programmes**); and raising your profile in the UK & Ireland tech sectors (see **Advertising**).

Let us, together, prepare to 'Reset & Reimagine' in 2021.



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Managing Director

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## Reset & Reimagine

### TechMarketView Research Theme 2021

TechMarketView's research theme for 2021 is: *Reset & Reimagine*. Inevitably, it reflects the need for technology companies and end user organisations alike to adapt their businesses in light of the COVID-19 pandemic and its immediate, as well as longer term, effects.

Organisations are faced with financial constraints and must reassess their priorities. They are being forced to reconsider their organisational resilience and their ability to respond to new challenges quickly. Digital transformation will be at the heart of many initiatives, particularly as relationships with employees, clients, and citizens morph to support a new *modus operandi*.

But 'Reset & Reimagine' has wider relevance. While the pandemic might be accelerating certain trends, many were already in train. As last year's theme – *Digital Chaos* – highlighted, organisations had already been looking for ways to take their digital transformation initiatives to the next level. In some organisations, we have, over the last few months, witnessed an embarkation on 'drains up' re-evaluations of corporate strategies and business models. The aim has been to enable true transformation for greater impact; tinkering at the edges of 'digital' is no longer enough.

With the COVID-19 pandemic – and, indeed, Brexit – accelerating this need for change, we believe 2021 will be defined by super-charged ambitions. This will drive organisations to *Reset and Reimagine*, creating significant opportunities across the UK tech sector.



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## Why TechMarketView?

TechMarketView is defined by its people and its fiercely independent spirit. Our highly-respected analysts offer unbiased views on the UK tech sector and insightful commentary on disruptive technologies.



### OUR PEOPLE

Since its inception, TechMarketView has attracted, developed and retained one of the best teams in the business and we are proud of each and every one of our members.

Our analysts have been drawn from many backgrounds bringing different experiences and fresh perspectives to our research. Our client services team are knowledgeable and approachable and welcome close interaction with our clients. The contribution of the team is

what makes TechMarketView a great company and a great place to work.

We are an inclusive workforce recognising that our peoples' backgrounds encourage creative innovation in the workplace. We acknowledge the importance of a healthy work-life balance and love that our individual members cherish their careers - we like to think that is reflected in how we serve our clients.



### OUR VALUES

Our clients, partners and team are at the 'heart' of everything that TechMarketView does. Our ambition is to provide consistently high-quality services that drive value and trust within our community.

We always work with integrity which is central to our core beliefs and defines how all our team members behave. We are responsible and constantly seek to do the right thing for our clients. TechMarketView aims to make a positive impact through our brand, our commercial relationships, and our voluntary contributions such as our involvement with the Prince's Trust. Whilst we wish to grow and succeed as a company, we strive to do business in an open and fair way. This is evidenced by our support of tech SMEs. We respect everyone we come into contact with and we treat others, throughout our whole eco-system, in the same way that we would wish to be treated ourselves.



### SUSTAINABILITY

TechMarketView recognises the responsibility organisations have in minimising environmental impact.

TechMarketView was founded on the principles of 'remote working', having never retained an office location in all of its history. We encourage our team to reduce energy usage in their homes whilst engaged on TechMarketView business. Our company travel is limited in order to reduce our carbon footprint - we conduct most of our internal meetings using video conferencing and messenger services. Where we do travel, we recommend the use of public transport. TechMarketView's internal processes were automated and digitised from day 1. We rarely use print facilities, but if required, our people recycle any waste appropriately. We strive to achieve our clients' and partners' sustainability initiatives understanding that our whole eco-system needs to preserve natural resources whilst reducing pollution and minimising the adverse impact on climate change.





# TechMarketView Research

TechMarketView offers qualitative and quantitative research that influences how organisations achieve their goals; helping them understand market conditions and players, and evaluate potential strategy.

TechMarketView's experts blend a deep understanding of the UK tech sector and its suppliers, augmented by privileged conversations with CXOs across the industry whilst keeping a 'watching brief' on global tech trends.

We have a passion for the start-up and scale-up scene in the UK and are delighted to continue to identify and support innovative SMEs through our TechMarketView Innovation Partner Programme. Getting close to these innovators also gives us

great insight into emerging technologies and future disruptors.

With unrivalled experience and track record, the team at TechMarketView 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 tech scene. You can take advantage of our extensive knowledge and insight through a corporate subscription that allows access to differing research areas depending on needs:



### RESEARCH

- Corporate Subscriptions
- UKHotViews Premium
- Tech User Programme
- UKHotViews



### ADVISORY

- Executive Advisory Service
- Analyst Engagements
- Analyst Access



### ADVERTISING SERVICES

- UKHotViews Advertising
- Website Advertising
- Event Sponsorship
- Distribution Rights



### PARTNER IDENTIFICATION

- TechMarketView Innovation Partner Programme



### BESPOKE

- Custom Research



### ANALYST SPEAKERS

- Engage an analyst for your event

## RESEARCH: CORPORATE SUBSCRIPTIONS

Our Corporate research is organised into four research streams:



Foundation Service



TechSectorViews



PublicSectorViews



FinancialServicesViews

## A SUBSCRIPTION OFFERS



Access to all research published in chosen research streams for duration of subscription



Access to the research archive within chosen streams



Unlimited user access for employees across all geographies



The ability to add users throughout a subscription



Analyst access on an 'ad hoc' basis



A dedicated Research Director to lead your account



Access to the UKHotViews Archive



Access to the client-only UKHotViewsExtra articles



Monthly research summary highlighting recent research and analysis



Client-only quarterly research agenda highlighting forthcoming publications



Discounted rates and priority scheduling for Advisory services (currently virtual)



Discounted ticket pricing to our industry leading annual event

Discover how TechMarketView is supporting organisations, both supply-side and buy-side, with actionable insights leading to better informed decisions, competitive advantage and greater brand awareness.

## UKHotViews – ‘must read’ comment and opinion

For tens of thousands of tech executives and professionals, UKHotViews is their first and definitive source of informed opinion and comment on the events, issues and players that drive the UK tech sector. UKHotViews is delivered free of charge every morning via email, or it can be accessed at any time via our website, RSS and Twitter.

Subscribers to any TechMarketView research stream, including our new UKHotViews Premium service, can also enjoy searchable access to every UKHotViews post we have ever written, including the subscriber-only UKHotViewsExtra archive. We've already published well over 20,000 comments on company results, funding activity, acquisitions and trends in the UK tech sector, and add dozens more each week. We're often told that the UKHotViews archive is the best source of 'instant' market intelligence on the UK tech scene.



## UKHotViews Premium

The individual subscription service for entrepreneurs and tech professionals

Our UKHotViews Premium service is available to individuals\* (not companies) on an annual basis. A subscription includes access to the UKHotViews archive, all UKHotViewsExtra articles

plus our IndustryViews research. In addition, subscribers benefit from preferential rates for TechMarketView events and a 50% discount on one individual report purchase per annum.

### A UKHOTVIEWS PREMIUM SUBSCRIPTION INCLUDES:



#### UKHotViews Archive

Access over 20,000+ UKHotViews articles



#### UKHotViews Extra

Delve into 400+ exclusive UKHotViews Extra articles



#### IndustryViews

M&A, divestments, IPOs & stock market performance



#### Discounts on report purchases and events

Special rates to all TMV events

\*The subscription fee is per person and the usage rights are not transferrable to other individuals.

## Subscription Research: Foundation Service

The Foundation Service is the cornerstone of TechMarketView research – a go-to source of insight and analysis on the UK tech sector for tech suppliers, investors and professionals.

Encompassing four interrelated streams, the Foundation Service covers significant market trends and supplier activity, as well as industry dynamics across corporate activity, stock market performance and VC investment.

A subscription to the Foundation Service is also the only way to access TechMarketView's keynote annual reports for the UK Software

and IT Services (SITS) market as a whole: **Market Trends & Forecasts, Predictions and Supplier Rankings.**

Pair a Foundation Service subscription with TechSectorViews and our vertically-focused research streams – PublicSectorViews and FinancialServicesViews - for the complete, in-depth view of the UK tech market.

### FOUNDATION SERVICE FOUR INTER-RELATED RESEARCH STREAMS



#### MarketViews

Provides views, analysis, market sizing and forecasts for the UK SITS sector



#### CompanyViews

Ranks and comments on the performance of the main providers of Software and IT Services to the UK market



#### IndustryViews

Analyses all the corporate activity (M&A, IPOs, stock market performance) that affects the sector



#### OffshoreViews

Looking at the role that both offshore resources and offshore companies play in the sector

### FOUNDATION SERVICE ANALYSTS



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Managing Partner

**Research focus:** SME Programmes, VC investment, Indian pure-plays

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**Tania Wilson**  
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# Subscription Research: TechSectorViews

Designed for the digital age, TechSectorViews is home to TechMarketView's detailed 'horizontal' research and analysis on the UK tech market.

Bringing together an expert team of highly experienced analysts, the research programme covers a broad spectrum of technologies & services, trends and suppliers; from design thinking to cloud-based platforms, AI to quantum, and innovative start-ups to established global players.

Core reports provide market sizing and forecasts, market trends and supplier landscape analysis for the Consulting, Cyber, Enterprise Software, Solutions, Infrastructure Operations, Application Operations and Business Process Operations segments of the UK tech market.

Essential reading for anybody operating in the tech market, TechSectorViews' unique research

also provides insight into the disruptive suppliers, emerging technologies and business issues that will shape the market in years to come, helping you to identify opportunities early and smoothly navigate change.

Chief Research Officer, **Kate Hanaghan**, and Research Directors **Angela Eager**, **Duncan Aitchison**, **Marc Hardwick**, and **Martin Courtney**, all contribute to TechSectorViews. A senior and formidable team with many years' experience between them, they are never happier than when working directly with clients providing strategic advice, custom research projects, or keynote presentations.

## TECHSECTORVIEWS RESEARCH ANALYSTS



**Kate Hanaghan**  
Chief Research Officer

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## Subscription research: PublicSectorViews

The PublicSectorViews research stream provides in-depth analysis of the UK public sector tech market. You'll find market sizing, forecasts, supplier and market trend analysis covering the Central Government, Local Government, Defence, Justice, Education and Health & Care sectors in the UK.

Spanning software, IT services, business process services and emerging tech, the research provides a comprehensive picture of the UK public sector market and the opportunities and challenges it presents.

Our expert team of public sector-focused analysts – including the stream's lead Research Director

Dale Peters and TechMarketView's Chief Analyst Georgina O'Toole - have tracked the market for more decades than they care to remember. They are frequently called up to provide independent insight on the sector in the UK and Ireland, informing the decisions of both tech suppliers and public sector organisations alike.

### PUBLICSECTORVIEWS RESEARCH ANALYSTS



**Dale Peters**  
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**Georgina O'Toole**  
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**Tola Sargeant**  
Managing Director

**Research focus:** Health & Care

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## Subscription Research: FinancialServicesViews

The FinancialServicesViews stream is where you'll find TechMarketView's in-depth analysis of the tech market for the financial services vertical. Alongside core research covering market trends, forecasts and the supplier landscape, you can expect analysis of hot topics and disruptors across the sector.

Led by Research Director **Jon Davies**, who has more than 30 years' experience in the sector, FinancialServicesViews covers the established areas of Banking, Insurance and Financial Markets, as well as the emerging FinTech and InsurTech scene.

Whether you're a tech supplier, end-user of technology or investor in the sector, you'll benefit from actionable insight on the evolving supplier landscape, emerging market trends and latest tech developments.

### FINANCIALSERVICESVIEWS RESEARCH ANALYST



**Jon C Davies**  
Research Director

**Research focus:** Banking, Insurance, Financial Markets, Fintech & InsurTech

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## Engage Us

TechMarketView's team of experienced analysts has been helping organisations understand what's really going on in the UK tech market for many decades.

Our analysts carry out a range of speaking and custom engagements for our subscription clients, delivering in-depth sector knowledge, independent analysis and honest opinion, and fostering collaborative discussions to help you meet your business objectives. By way of example, these include:



### Strategy Sessions

TechMarketView Research Directors have honest and open discussions with the management team, providing an external view of the market and your positioning to challenge your thinking and support the strategic planning process.



### Keynote Presentations

Presenting our views on important market trends and shifts in the competitive landscape, our experienced speakers provide a perfect foundation for discussion and debate at your sales conference, strategy planning day or customer and partner event.



### Graduate Induction

Sharing our expertise and an independent view of the market with your new joiners, graduates and apprentices, our analysts can provide essential insight into the UK tech market in a tailored briefing session.



### Webinars

Book one of our analysts to deliver a virtual keynote speech or presentation at your customer, partner or marketing event and, optionally, combine it with a package of advertising in our UKHotViews email to raise the profile of the event and attract high quality attendees from our readership.

## EXECUTIVE ADVISORY SERVICE

We also offer an annual Executive Advisory Service, which can be tailored to your needs. Traditionally the EAS comprises a series of advisory dinners attended by key members of your management team and senior members of the TechMarketView team, selected according to the topic under discussion. However, it can also be delivered as a programme of 'virtual' analyst engagements and sounding board sessions with great success. Whatever the format, TechMarketView acts as an independent, objective and experienced partner, highlighting strengths and areas for optimisation, and offering research-backed insight that can be leveraged to enhance the overall strategy.

## CUSTOM RESEARCH

Experts in their fields, our analysts are also frequently called upon to support our clients with bespoke research assignments. We'll work alongside your business to offer insight and guidance to assist with strategic decision making through custom research where the topic is a natural fit with our expertise. Typical projects might, for example, include advising a supplier on its approach to the UK public sector or financial services market; identifying potential providers in a particular software niche for an end-user organisation; or sizing a discrete area of the UK or Irish IT or business process services market to support business planning.



Contact us to learn more and discuss your requirements in detail.



## Tech User Programme

The Tech User Programme supports the end-user community with their digital transformation and technology agendas by taking advantage of our knowledge and expertise in this sector. Members to the programme access research that draws upon our unique position in the UK tech sector.

### BECOME A MEMBER

To become a member of the Tech User Programme and read the Market Readiness Index (MRI) reports (and other research) your organisation must be an 'end-user' of tech.

Membership is on an annual basis and once an organisation is set up, individuals within that organisation can enjoy access to the Tech User Programme research and analysis.

### BENEFITS OF MEMBERSHIP



Access to all Tech User Programme reports



Access to one-off end-user research notes



Discounted subscriptions to our supplier research



Preferential client rates for ticketed events



Preferential client rates for other TMV services



Potential speaker opportunities at TMV events



TechMarketView's Market Readiness Index (MRI) is designed to help end user organisations – tech buyers – determine the readiness of their ICT supplier ecosystem and to support them as they seek to transform their organisations.

The MRI applies our highly regarded, rigorous, research approach to assess suppliers across six key areas: Corporate Resilience; Suitability of Offerings; Skills & Resources; Partner Ecosystem; Industry Expertise; and Delivery & Execution.

If you are a supplier organisation and wish to read our MRI reports then each report is available for a one-off fee.



## TechMarketView Innovation Partner Programme

TechMarketView have been supporting UK tech SMEs since its inception in 2009, providing insightful commentary on early-stage companies through to well-established mid-size software & IT services suppliers.

Over the years we have run a number of Programmes to support ambitious SMEs from 'Little British Battlers' to 'Great British Scaleups'. Our latest Programme is the **TechMarketView Innovation Partner Programme**. Launched in 2018, the TechMarketView Innovation Partner

Programme is helping some of the UK's leading enterprise software & IT services companies find innovative startups and scaleups as potential partners to bring exciting and differentiated solutions to their customers.

### WHY OUR PROGRAMMES WORK



**TechMarketView is a trusted brand**

We are respected in the industry for our support of UK startups and scaleups, through our proactive programmes.




**We have a proven track record**

TechMarketView has been running programmes since 2012, attracting innovative applicants that are often not yet on the radar.

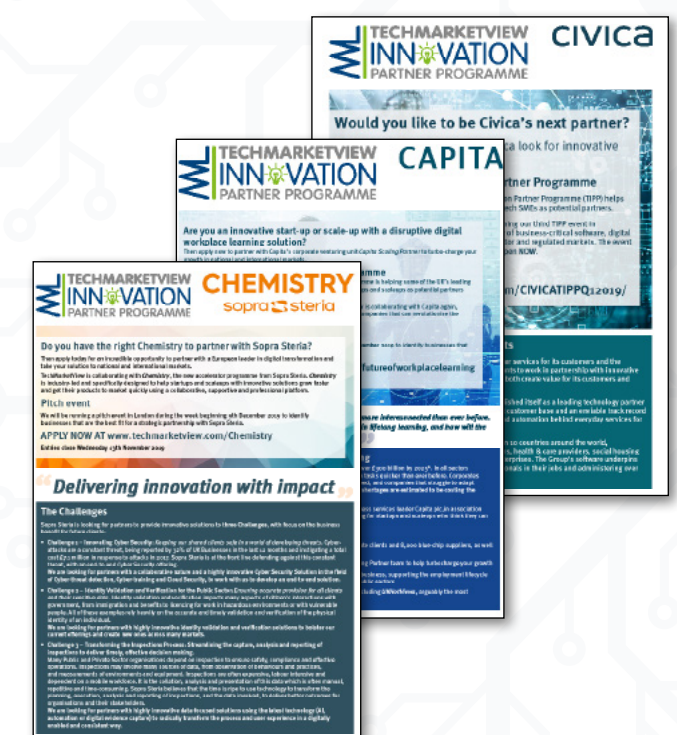


**There are no hidden costs**

With an agreed fee up front budgeting is easy. We don't charge retainers or success fees so there are no hidden costs.




**WANT TO LEARN MORE?**  
**Contact Anthony Miller,**  
**Managing Partner:**  
**amiller@techmarketview.com**





## Advertising

Our flagship product, UKHotViews, is a daily newsletter boasting a monthly readership of over 20,000 individuals. Delivered by email, published to the website and sent via our Twitter stream, it covers the latest, breaking news on the UK SITS scene as it happens and is a must have resource for anyone with an interest in this market.

By advertising with TechMarketView, you can take advantage of this high calibre audience including the most senior executives of the largest SITS players and emerging SMEs; as well as key players in the investment community, the press, government users and CIOs.

### WHY ADVERTISER WITH US



Reach the business elite and key influencers in the UK SITS market



Cost effective solutions to reach new audiences



Experience and support from the TechMarketView team



Grow your business support network



Lead generation



Promote an event, product or service



Build your brand or service



Launch a new product



Fast, effective and measurable results

## 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.



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## AN EVENING WITH TECHMARKETVIEWS 2021 Reset & Reimagine

16 September 2021 | 6.30pm–11.00pm  
RIBA, Portland Place, London



## SAVE THE DATE!





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