

BUILDING RESILIENCE

TECHMARKETVIEW RESEARCH THEME 2022



Our vision

TechMarketView is one of the most influential boutique analyst & advisory firms 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

In 2021 we started to recover from C-19. Indeed, both TechMarketView and many of our tech clients have had a very successful year. We have all had to adapt to the 'new normal' and, in many ways, discovered that there were better ways of working.

I am extremely proud of the TechMarketView team and how they have risen to that challenge. I am also proud that TechMarketView has so many loyal customers – many of which have been with us since our inception in 2009 – and that they encompass practically all of the largest companies through to smaller start-ups and scale-ups.

All cementing TechMarketView's position as the most influential analyst and advisory firm in the UK.



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Foreword from the Managing Director

Welcome to TechMarketView's 2022 brochure!

In the pages that follow you will learn more about TechMarketView and the research and advisory services that we provide. We hope you'll also get a flavour of what makes TechMarketView different, and why we're trusted by a wide variety of organisations as their 'go-to' source for insight and advice on the UK tech market.

Whether you're an innovative start-up or global tech leader; public or private sector tech user; or an investor or business services firm, TechMarketView analysis can help you shape your business plan, decide your tech strategy, identify partners, or validate investments.

Talk to our clients and you'll find our analysts are recognised for their deep industry knowledge, robust analysis and opinionated commentary on the tech industry and disruptive market trends.

We also pride ourselves on being an approachable team. Indeed, the deep-rooted personal relationships that we hold with influential figures within UK tech serve to augment the depth, breadth and quality of our research.

As the world continues to navigate a period of unprecedented change and organisations strive to both adapt and build resilience, we look forward to supporting you and your organisation too by 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 tech sector (see **Advertising**).

You will find all our contact details throughout the brochure – if there is something we can help with, please don't hesitate to get in touch directly. We'd love to hear from you.



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Building Resilience

TechMarketView Research Theme 2022

TechMarketView's Research Theme for 2022 is '**Building Resilience**'. There has been a change in mindset amongst the tech suppliers and the end user community. The COVID-19 pandemic has raised the profile of low probability, high profile events, in the eyes of Government and business leaders.

This is leading to a greater focus by the public sector on national resilience, and by the commercial sector on organisational resilience. In considering a diverse array of threats, from cyber-attacks to health crises, to climate change, leaders must seek to minimise risk, prepare for disruption, and be able to rebound swiftly when faced with unexpected events.

We expect the next few years to bring an increased focus on economic/financial resilience, strategic resilience, IT resilience, workforce resilience, and supply chain resilience, to name a few. Across all these areas, technology will play a crucial role as organisations rethink every part of their operations and look to be 'future ready'.

We expect to see an increased reliance on technology in decision making, in the design of new offerings, in the delivery of goods and services, and in internal and external communications. As this happens, it will be crucial to ensure that any IT or digital strategy results in innovation that can be introduced without building in new, unexpected vulnerabilities.

Over the course of 2022 and beyond, we'll work with you to identify how tech spend will be impacted by this intensified desire to build resilience and highlight how to identify related opportunities.



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Social Value at 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.



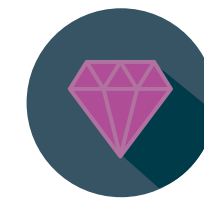
OUR PEOPLE

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 team 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.

TechMarketView aims to make a positive impact through our brand, our commercial relationships, and our voluntary contributions such as our longstanding partnerships with the Prince's Trust Technology Leadership Group and annual fundraising activities for charities including Great Ormond Street Hospital. 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 also work to promote diversity in the tech industry and are proud to be part of the TechTalentCharter and #StartsWithAName initiatives.



SUSTAINABILITY

TechMarketView recognises the responsibility organisations have in minimising environmental impact and promoting sustainability.

A pioneer of remote working, we have never had an office and encourage our employees to minimise their carbon footprint whilst working from home and use public transport to travel to client meetings where possible. 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 - with insight on global tech trends, enabling us to cut through the hype and analyse what's really going on in the sector.

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



PublicSectorViews



FinancialServicesViews



TechSectorViews

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 at any time during the subscription period



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



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:



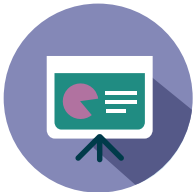
UKHotViews Archive

Access over 23,000+ UKHotViews articles



UKHotViews Extra

Delve into 700+ 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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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 and 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 Principal Analyst **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 ANALYSTS



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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, Police, 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 ANALYSTS



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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 ANALYST



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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

Whether you are an established enterprise tech company looking to bring innovative, differentiated solutions to your clients, or a growth tech company looking to expand your channels to market, the **TechMarketView Innovation Partner Programme (TIPP)** can help you find the right partners.

TIPP FOR ENTERPRISES

Designed to find partners for enterprise tech companies with a well-known brand serving leading commercial corporations and government institutions

TIPP FOR SCALEUPS

Designed to find partners for growth tech companies with a low market profile

With our unrivalled knowledge of the UK tech sector, we help you create a compelling partnership proposition to attract companies that are most likely to be a good fit for your business, and then we extensively promote your campaign through all our marketing channels.

WHY OUR PROGRAMMES WORK



Trusted Brand

The TechMarketView brand is one of the most trusted in the UK tech market, so potential partners can be confident they are responding to a genuine partnership opportunity



Proven Track Record

We have been running TIPP campaigns since 2018 and have never failed to find credible partnership candidates for our clients



Outstanding Value

We don't charge a retainer and there are no hidden costs – just one fixed fee no matter how many candidates we find for you



KEEN TO LEARN MORE?
Contact Anthony Miller, Managing Partner:
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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 ADVERTISE 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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