



AN EVENING WITH TECHMARKETVIEW 2024: Autumn Networking Event
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UK SITS Supplier Rankings 2024

TECHMARKETVIEW ANALYST TEAM | REPORT | 4 JULY 2024

TechMarketView's authoritative annual keynote report ranking the leading suppliers of Software, IT Services and Business Process Services to the UK market.



Market Trends and Forecasts 2024

TECHMARKETVIEW ANALYST TEAM | REPORT | 4 JULY 2024

TechMarketView's annual report on the trends and forecasts in the UK Software and IT Services market.



UK Applications Operations Market: Suppliers, Trends and Forecasts 2024

DUNCAN AITCHISON | REPORT | 29 AUGUST 2024

This report details TechMarketView's latest market size and growth data for UK SITS Applications Operations services. It provides expert analysis of the key trends that are shaping the market, providing insights for suppliers operating in this segment. The report also contains the Top 20 Supplier Ranking (by revenue) for the UK Applications Operations market, together with commentary on the up-and-coming players making noteworthy progress in this most competitive of arenas.



Public Sector Software & IT Services Suppliers, Trends & Forecasts 2024-27

DALE PETERS, CRAIG WENTWORTH, GEORGINA O'TOOLE | REPORT | 28 AUGUST 2024

This report consolidates TechMarketView's analysis of the UK public sector software and IT services (SITS) market in 2023 and forecasts how the market will perform over the period 2024-27. It also contains an update to our UK public sector SITS Top 20 supplier rankings based on the latest available financial information (as at end of June 2024). Top 20 rankings for central government and Top 10 rankings for each of the remaining subsectors (local government, health, education, police and defence) are also provided.



OneID: Regulatory reform to boost adoption of digital identity services

SIMON BAXTER | REPORT | 26 AUGUST 2024

UK startup OneID is seeking to establish itself as one of the primary providers of digital identity services. Its unique approach involves using banks as a means to verify a person's identity, sparing consumers (and businesses) from the laborious task of submitting and reviewing passports and other identity documents. Simon recently caught up with OneID CEO Paula Sussex, along with Keith Mabbit (CCO), Stuart Kempster (CPO) and Adrian Field (Director of Market Development), to understand how the adoption of digital identity services has progressed over the past year, why changes in regulation are driving growth, and what this means for the future of OneID.



UK Cybersecurity: Suppliers, Trends and Forecasts 2024

SIMON BAXTER | REPORT | 22 AUGUST 2024

The 2024 version of the UK Cybersecurity: Suppliers, Trends, and Forecasts report includes our latest market size and forecast data, alongside analysis of the market dynamics over the past 12 months, and the key trends that will shape the market to 2027. The report also contains rankings for the Top 20 Cybersecurity suppliers & Top 15 UK Cybersecurity services providers (by revenue) for the UK market, together with commentary on the performance of SME suppliers and innovative startups that you need to have on your radar.





View from the Chief Analyst: The tech market story so far in 2024

GEORGINA O'TOOLE | REPORT | 21 AUGUST 2024



As we make our way through the summer months, UKHotViews has been filled with financial results from the tech companies covering the first half of this calendar year. Those results provide a good opportunity to assess how the GenAI story is playing out. We have spent some time analysing results from the 40+ companies that have landed so far. The list includes a mix of large multinational corporations (like Amazon, Microsoft, Atos, and Capgemini), mid-sized companies (like Mastek, Coforge, and Sage), and smaller specialised firms across various sectors of the tech industry (the likes of TPXimpact, Made Tech, and K3 Business Technologies).

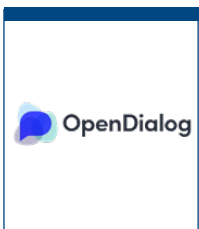


AI in Financial Services - "Where the rubber hits the road"

JON C DAVIES | REPORT | 14 AUGUST 2024



For those seeking a better understanding of AI's current, real-world potential within the Financial Services sector, this report explores some of the established applications of this technology alongside a selection of the many emerging use cases. The document also highlights a number of the innovative technology providers that have brought new solutions to market in these areas.



OpenDialog: Conversational AI for regulated industries

SIMON BAXTER | UKHOTVIEWSEXTRA | 12 AUGUST 2024



UK startup OpenDialog has developed a conversational AI platform enabling organisations in regulated industries to incorporate the latest GenAI LLM models into their processes safely and with full transparency. Simon recently caught up with Chief Customer Officer, Danny Major, and CEO Terry Walby, to understand more about the growth of the business so far, and how it is seeking to stand out in a crowded market for conversational AI suppliers. In this UKHotViewsExtra article, we explore how conversational AI can be delivered in regulated environments, how OpenDialog is differentiating through explainability and interoperability and what (if anything) is holding back AI.



Operational Technology (OT) Cybersecurity: Market Trends & Suppliers 2024

SIMON BAXTER | REPORT | 8 AUGUST 2024



This report forms part of TechMarketView's coverage of the UK Cybersecurity market and takes a deeper dive into the current trends and suppliers focused on the provision of security for Operational Technology (OT). For a long time, the domains of IT and Operational Technology (OT) systems have remained separate, but these two distinct areas are beginning to blur together, and in doing so are bringing a new security threat to organisations that few are prepared for.



UK SITS Consulting Market: Suppliers, Trends and Forecasts 2024

DUNCAN AITCHISON | REPORT | 7 AUGUST 2024



This report details TechMarketView's latest market size and growth data for UK SITS Consulting services. It provides expert analysis of the key trends that are shaping the market, providing insights for suppliers operating in this segment. The report also contains the Top 20 Supplier Ranking (by revenue) for the UK SITS Consulting market, together with commentary on the up-and-coming players making noteworthy progress in this most competitive of arenas.



Accessibility - yesterday's assistive tech is today's emerging trend

MARC HARDWICK | UKHOTVIEWSEXTRA | 6 AUGUST 2024



TCS's accessibility research, led by Dr Charudatta Jadhav, is driving innovation beyond traditional assistive technology. Their "Inclusive Thinking" approach designs for limitations rather than specific disabilities, benefiting a broader user base. This taps into the UK's £274bn accessibility market potential. TCS views accessibility tech as emerging trends, with applications for ageing populations and Gen Z's multimodal expectations. By linking accessibility to inclusion and innovation, TCS aims to shift perceptions from compliance to opportunity, potentially transforming sectors like financial services.



Atos H1: Work remains to get back on track

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 1 AUGUST 2024



Following the news in mid-July of the successful funding of Atos' financial restructuring plan, and the announcement of a new Group CEO, today Atos announces its results for H1 2024 (to end June). The results are a good reminder of the work that remains to get Atos back on track. While some of Atos' difficulties can be attributed to the impact of the ongoing corporate distractions and uncertainty, that is clearly not entirely to blame.



Agilisys Product becomes Agilisys Transform

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 30 JULY 2024

Most people will associate Agilisys with IT and business process services. Unsurprising considering that is where most of its revenues come from. Focused on the public sector the company has delivered a range of multi-year deals supporting public sector organisations as their IT services and digital transformation partner. Today, those long-term relationships are complementary to its nascent Product business. This month, Agilisys has rebranded Agilisys Product as Agilisys Transform, a move that seeks to underline the transformative impact that Agilisys' products are already having on its clients.



Mastek Q1: Solid revenue growth and squeezed profits

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 26 JULY 2024

Mastek recently reported its financial results for the quarter ending 30th June 2024 (its Q1 FY25). The quarter was defined by solid revenue growth combined with a squeeze on profits. Revenue growth for the quarter was 12.1% to Rs812.9 Crore, with quarter-on-quarter growth of 4.3%. This represented an improvement on Q4 performance. Mastek points to four key growth drivers: Healthcare in the US, Central Government in the UK, Account Mining, and Data/AI Solutions globally. Meanwhile, the EBITDA operating margin shrank to 15.2%, down from 16.0% in the previous quarter, and 17.0% in FY24.



Insight closes NWT acquisition to boost Services journey

KATE HANAGHAN | UKHOTVIEWSEXTRA | 24 JULY 2024

Solutions Integrator, Insight, has acquired Brighton, UK-based New World Tech (NWT) in an important step to expand its Services capability in the UK/Europe. Terms of the deal were not disclosed. NWT is a 50-person consultancy working across all industries (with a notable presence in Public Sector). It helps customers deliver complex, strategic technology projects and programmes. Staff are typically highly experienced advisors/practitioners such as CTOs, programme/project managers, and solutions architects. The firm also has a growing concentration of expertise around ServiceNow and cloud technologies.



Digital centre of government starts to take shape

DALE PETERS | UKHOTVIEWSEXTRA | 23 JULY 2024

The new government's plans to create a modern digital government are starting to take shape. Earlier this month, it was revealed that digital government expertise from Government Digital Service (GDS), the Central Digital and Data Office (CDDO) and the Incubator for AI (i.AI) will move to Department for Science, Innovation and Technology (DSIT). These organisations are expected to transfer in their entirety from the Cabinet Office (and Prime Minister's Office in the case of i.AI) to DSIT, although the timescales for this move have not been confirmed.



TPXimpact: Onwards and upwards

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 19 JULY 2024

On 9th July, we published TPXimpact's foundation for growth, highlighting a strong performance for TPXimpact in its FY24 (to end March). The self-styled "technology-enabled services company focused on people-powered digital transformation" revealed strong double-digit revenue growth, an improved EBITDA margin, and its lowest level of net debt in over three years. Following the results announcement, this week, TechMarketView Chief Analyst, Georgina O'Toole, caught up with CEO, Bjorn Conway, and CFO, Steve Winters, to delve deeper into the numbers and further explore the management team's positive outlook.



UK Financial Services SITS - Suppliers, Trends and Forecasts 2024

JON C DAVIES | REPORT | 18 JULY 2024

Growth within the UK Financial Services SITS market slowed significantly during 2023, driven largely by the challenging global economic climate and its impact on end-user organisations. However, despite the inhibiting factors dampening spend, the technology-led transformation of the UK Financial Services sector continued, albeit at a reduced rate. Recognition of the limitations of outdated technologies and analogue business processes, coupled with the volume of in-flight projects, prevented the sector from turning its back on the transformation imperative.



IBM Consulting Defence increases coverage with SiXworks acquisition

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 9 JULY 2024

IBM Consulting has added significantly to its UK Defence business with the acquisition of SiXworks. The 175-person strong tech consultancy will sit within the IBM Consulting business and be known as SiXworks, an IBM Company, in the medium term. All SiXworks people will have transitioned into IBM by April 2025. Established seven years ago by Founder & CEO, Steve Rawsthorn, SiXworks has always focused purely on the Defence and Security & Intelligence market, where its biggest clients are the Royal Air Force (RAF) and Stratcom. Its forte is in early concept demonstrators – with "fail-safe-fast development" – in high security environments.





From peripheral to core business ops – sustainability beds in

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 28 JUNE 2024

We're looking forward to publishing the Q1 2024 edition of the Sustainability Technology Activity Index next month. To prepare the Index each quarter, we examine the sustainability-related activities from our worldwide watchlist of over 1,400 companies (roughly 80% being software and IT services suppliers; the remainder, tech-user organisations with a sustainability angle). Early findings so far, as we crunch the numbers on the 350+ sustainability technology activities we logged globally in the first quarter of the year, reveal a picture that's – in part – an evolution from the last Index report (which took in data from Q4 2022), but with some notable changes in the landscape for 2024.



Access unveils its AI-powered HR solution

DALE PETERS | UKHOTVIEWSEXTRA | 26 JUNE 2024

The Access Group unveiled a new AI-enhanced software solution, Access Evo, at the recent CIPD Festival of Work. TechMarketView spoke to Charles Butterworth, Managing Director Access People, and Oliver Quayle, Senior Director Access Platform, about the upcoming launch and how they think it will support HR professionals. Access Evo will draw upon Access Workspace, the company's cloud-based single sign-on platform, to ensure customers have a common user experience, with the initial focus being on supporting HR professionals. Access People, which is one of the Group's largest divisions, will roll out PeopleHR Evo, its HR solution for SMEs, and PeopleXD Evo.



SNP and Plaid Cymru manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 20 JUNE 2024

Part 3 of TechMarketView's General Election 2024 UKHotViewsExtra manifesto coverage looks at the pledges of the Scottish National Party (SNP) and Plaid Cymru. The SNP and Plaid Cymru manifestos have many similarities, including the desire for independence, fairer funding, increased investment in public services, a more progressive tax system, and changes to the benefits system. There is an acceptance that without independence or further devolution, many of these ambitions will be restricted to demands on the UK Government. There is also a focus on the green economy and its role in supporting the transition from heavy industries.



DXC leverages its banking heritage for BPS success

JON C DAVIES | UKHOTVIEWSEXTRA | 18 JUNE 2024

As the banking sector continues to evolve, customer advocacy and competitive threats remain high on the agenda, alongside technology modernisation and business process change. Despite recent high interest rates having led to healthy net margins for many banks, for the most part the sector remains cautious about its prospects and there is a widespread focus on efficiency and cost control. Meanwhile, artificial intelligence [AI] is seemingly taking the world by storm and many banks are still at something of a loss as to how to best capitalise on the wealth of data they hold.



Reform, Lib Dem and Green manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 18 JUNE 2024

Part 2 of TechMarketView's General Election 2024 manifesto coverage. In this article we look at the pledges of Reform UK, Liberal Democrats and Green Party. The manifesto promises of these three parties span a wide range of approaches to taxation, spending and policy focus. Despite the differences, there are some common themes relating to the role of technology. The Liberal Democrats and Green Party both emphasise the importance of ethical and inclusive technology, particularly in relation to AI, and propose introducing a Digital Bill of Rights.



Labour and Conservative manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 17 JUNE 2024

With most parties having published their General Election 2024 manifestos, TechMarketView looks at the implications for software and IT services suppliers. Here we look at the pledges of the Conservatives and the Labour Party. Both parties have a focus on infrastructure investment, accelerating innovation, community-based healthcare and reducing crime, particularly fraud. Technology plays a role in these plans, but it is not at the forefront of proposals for either party. How these proposals will be funded is given superficial treatment and in both cases relies on an optimistic view of economic growth and an ability to raise funds through a clampdown on tax avoidance.



Capita's big new plan

MARC HARDWICK | UKHOTVIEWSEXTRA | 14 JUNE 2024

The recent Capital Markets Day presentation was the first opportunity for new Capita CEO Adolfo Hernandez to outline to the 'City' how he plans to fix profitability and get the Group expanding in the all right areas. Hernandez has been on board for less six months but has put together a decent assessment of where the problems lie, a coherent approach to focusing the business on core and growing activities, and a credible commitment to drive the technology enablement of Capita's service delivery.





Spotlight on Einstein AI and Data Cloud at Salesforce World Tour

SIMON BAXTER | UKHOTVIEWSEXTRA | 7 JUNE 2024

Yesterday I attended Salesforce World Tour in London, with the CRM supplier heavily pushing its latest AI features, as it seeks to be a central platform for company data and interactions across Sales, Service and Marketing. The UK is Salesforce's second largest market outside North America, with a broad industry focus, and its flagship UK event certainly attracted the crowds! Salesforce was keen to show off both its latest innovations and its close relationship with UK customers, most notably car manufacturer Aston Martin who featured heavily in the keynote.



AI in Supply Chain

MARC HARDWICK | REPORT | 5 JUNE 2024

Global supply chains have faced unprecedented challenges since the pandemic, further complicated by resource shortages, geopolitical conflicts, energy crises, and inflation. This has forced a shift from traditional cost and service quality optimization towards prioritizing resilience, sustainability, and intelligence. Recently, there's been a surge of interest and investment in AI-led supply chain solutions. Building on TechMarketView's 2022 Supply Chain Resilience reports, this analysis explores how AI solutions, including both traditional machine learning and generative AI, can address critical challenges in global supply chains.



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