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### UK SITS Consulting Market: Suppliers, Trends and Forecasts 2023

**DUNCAN AITCHISON | REPORT | 30 AUGUST 2023**

**TSV**

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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.



### Top 5 Tips for effective win/loss reviews

**JON C DAVIS | UKHOTVIEWSEXTRA | 29 AUGUST 2023**

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Of all the many types of research that I have been involved with over the years, I believe that the greatest direct business value of all of these is to be derived from an effective win/loss review process. Some SITS vendors spend many (£) millions pursuing a single large bid and so the stakes are high, as is the value of any lessons learned. Thus insights that help a vendor to improve their win rate and/or client satisfaction can potentially deliver a significant RoI. Regardless of any direct monetary value associated with this type of analysis, anything learned can be extremely useful to the business from the perspective of process improvement.



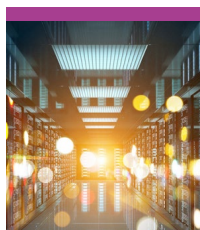
### UK Cybersecurity Suppliers, Trends and Forecasts 2022-26

**SIMON BAXTER | REPORT | 25 AUGUST 2023**

**TSV**

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The report provides an overview of the UK Cybersecurity market size in 2022, an analysis of the market shaping trends, our forecast for how the market will perform over the 2023-26 period, and who the key suppliers are in the market. The report also contains an update to our UK Cybersecurity Top 20 rankings, which also includes a separate breakout of the Top 15 UK Cybersecurity services providers. This year we have also spotlight several suppliers, where we take a deeper dive into performance and strategic developments.



### G-Cloud - Framework Spending Review 2022-23

**DALE PETERS | REPORT | 24 AUGUST 2023**

**PSV**

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This data-driven report reviews G-Cloud sales figures covering the financial year 2022-23. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.



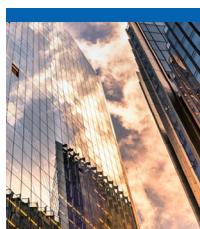
### Digital Specialists - Framework Spending Review 2022-23

**DALE PETERS | REPORT | 24 AUGUST 2023**

**PSV**

**READ MORE**

This data-driven report reviews Digital Specialists (Digital Outcomes & Specialists, Digital Outcomes 6 and Digital Programmes & Specialists) sales figures covering the financial year 2022-23. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.



### IndustryViews Corporate Activity Q2 2023

**TANIA WILSON | REPORT | 18 AUGUST 2023**

**FS**

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Merger and acquisition (M&A) activity in the UK software and IT services (SITS) sector declined for the fourth successive quarter in Q2 2023, remaining considerably lower than the peak level of activity seen in 2021 and early 2022. This is according to data from Silverpeak, the mid-market technology specialists that represent European growth businesses in M&A and financing transactions. The continuing decline in deal activity comes amid higher interest rates and ongoing economic uncertainty, which have hit market confidence. However, it is worth noting that Q2 2023 deal volumes are still in line with those seen in the pre-pandemic period.



## OneID looks to fill gap in UK digital infrastructure

**SIMON BAXTER | UKHOTVIEWSEXTRA | 17 AUGUST 2023**



UK startup OneID is looking to fill what it sees as a key gap in the UK's digital infrastructure and make the world a safer place through its Digital identity service. According to OneID, we should be using banks as a means to verify our digital identity, sparing consumers (and businesses) from the laborious task of submitting and reviewing passports and other identity documents. TechMarketView recently caught up with the team at OneID to understand more about how the business is looking to change identity verification, and how its plans for growth are progressing.



## OffshoreViews Q2 2023 Review

**ANTHONY MILLER | REPORT | 14 AUGUST 2023**



OffshoreViews includes our regular summary of the top-tier and mid-tier Indian SI reporting season, along with insightful charts showing multiyear trends for the Top Tier players and a clickable index to relevant UKHotViews posts.



## Temenos on the up as sale talks continue

**JON C DAVIES | UKHOTVIEWSEXTRA | 14 AUGUST 2023**



The latest results from Swiss-based Temenos reflect an improved performance by the global banking technology vendor, despite the challenging macro-economic environment. For the six months ended 30 June 2023 revenue was \$465.5m, up 1.5% on the same period last year, as total software licensing grew by 5.7% to \$195.1m. Temenos also delivered an increased profit of \$68.9m (up 7.2%). Temenos suffered something of a dip in its performance during FY22, which contributed to the departure of former CEO, Max Chuard. However, the latest numbers paint a more encouraging picture, and as a result, the vendor has enhanced its outlook for the rest of the year ahead.



## Hitachi Vantara – digital services with engineering in its DNA

**MARC HARDWICK | UKHOTVIEWSEXTRA | 11 AUGUST 2023**



Hitachi Vantara is a significant global player in the systems integration and digital services space, that nonetheless sometimes goes under the radar when we profile the marketplace. The firm also has a significant presence in UK digital services with some interesting clients and a differentiated service offer. To understand more, and to get a view on where the business is heading, Marc sat down recently with President and Board Member of Hitachi Vantara, Roger Lvin. Lvin has been with the company just shy of 3 years and has a background covering a range of different roles within Cognizant over a 16-year period.



## Public Sector SITS Suppliers, Trends and Forecasts 2023-26

**GEORGINA O'TOOLE & DALE PETER | REPORT | 10 AUGUST 2023**



This report consolidates TechMarketView's analysis of the UK public sector software and IT services (SITS) market in 2022 and forecasts how the market will perform over the period 2023-26. 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 2023). 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.



## UK Financial Services SITS Suppliers, Trends and Forecasts 2022-2026

**JON C DAVIES | REPORT | 8 AUGUST 2023**



This report provides details of TechMarketView's latest analysis of software and IT services (SITS) expenditure in the UK Financial Services Sector. The document contains our forecasts for how the market will perform over the period 2023-2026. The report contains an update to our UK financial services SITS supplier rankings, based on the latest available financial information and incorporates data up to the end of June 2022, where available.



## Conduent in the UK – A Company snapshot

**MARC HARDWICK | REPORT | 7 AUGUST 2023**



Whilst Conduent has successfully raised its profile and is gaining traction in the UK market it can sometimes fly 'below the radar'. This profile looks at how Conduent serves its European and UK markets, bringing this to life with some key UK-based case studies in the Transportation and Commercial, Customer Experience Management (CXM), space.



## Breakthrough year driving growth at bolder Pulsant

KATE HANAGHAN | UKHOTVIEWSEXTRA | 7 AUGUST 2023

Pulsant's FY22 results for the 12 months to the end of December 2022 show revenue was roughly static at £74.8m. EBITDA before exceptional items was up c.15%. The top line was boosted predominantly by acquisitive growth; however, there has since been a marked underlying improvement in the business, with an acceleration in organic growth kicking in from Q4. That growth trajectory was sustained into the current year, marking a critical milestone given organic growth has eluded the company for almost five years. The real story, however, is what has been going on behind the scenes to drive those numbers.



## Cutting carbon across the telco supply chain (and beyond)

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 4 AUGUST 2023

The Joint Alliance for CSR (JAC) has called for telecoms suppliers to work together to reduce greenhouse gas (GHG) emissions across the industry, highlighting in particular the contribution of Scope 3 emissions in companies' carbon accounting / reporting / reducing cycle. Although its vision and mission span all aspects of CSR (across human rights, social, labour and environmental standards), it's the industry's focus on net zero – and a desire to align industry practice with the latest science-based decarbonisation approaches – which has prompted this latest campaign.



## Capita grows on improving Experience

MARC HARDWICK | UKHOTVIEWSEXTRA | 4 AUGUST 2023

Business process services (BPS) player Capita continues its return to growth with outgoing CEO Jon Lewis (Capita CEO to retire) pointing to an "acceleration in financial performance" in H1. Adjusted revenue for the group ticked up 5.8% YoY to £1,402.4m (H1 2022: £1,326m), underpinned by an improving picture at the firm's Experience division. Capita now operates through two main divisions. Capita Public Service grew revenue by 2.4% to £731m helped by growth in its Royal Navy training contract and additional volumes in its Personal Independence Payments contract with the DWP offset by attrition within Local Government.



## Has DXC Technology reached a fork in the road?

JON C DAVIES | UKHOTVIEWSEXTRA | 3 AUGUST 2023

DXC Technology has reported its latest Q1 earnings, revealing that it has revised its outlook downwards for the year ahead, having missed its targets by a significant margin. DXC's global revenue for the three months ended 30 June 2023 was down 7% at \$3.45bn. Meanwhile, on an organic basis (taking account of DXC's divestments) revenue was down by 3.6%. This reflects a deterioration on the same time last fiscal when the decline was 2.6%. Net income was just \$42m compared to \$103m in Q1 FY23.



## Predyktable looks to differentiate in Retail through Prescriptive analytics

SIMON BAXTER | UKHOTVIEWSEXTRA | 31 JULY 2023

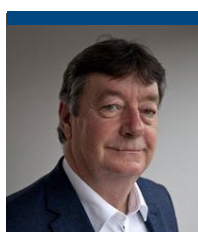
UK startup Predyktable is looking to help retail and hospitality organisations become more data driven through its prescriptive analytics solution. Simon recently caught up with CEO and co-founder Phillip Sewell and Chief Product Officer, Andrew Kohter, to understand more about the business and the value of prescriptive analytics. Predyktable was formed mid-way through 2022, but with decades of industry experience through its leadership team. The company is funded through angel investors and has been operating off the radar so far, spending its time since inception building up its software and prescriptive models, and testing the waters with potential clients.



## NEC Software Solutions: Performance and Prospects

DALE PETERS | UKHOTVIEWSEXTRA | 25 JULY 2023

It has been two years since Northgate Public Services adopted the branding of its parent company and became NEC Software Solutions UK Ltd (NECSWS). In this HotViewsExtra article, we take a closer look at the progress it has made and its prospects for the future. It has been a pivotal two years for NECSWS. As well as rebranding, the company has developed stronger synergies with the wider NEC group and made significant leadership changes. NECSWS added scale to its Health division through the acquisition of Vantage Health, which is now fully integrated under the NECSWS brand.



## OLM's Peter O'Hara recognised for services to social care

TOLA SARGEANT | UKHOTVIEWSEXTRA | 20 JULY 2023

It was a joy to see Peter O'Hara, CEO and founder of care tech business OLM, recognised in the King's first Birthday Honours list with an MBE for services to social care last month. A pioneer of 'tech for good', Peter founded OLM in 1991 with the aim of using technology to make a positive difference to people's lives. Despite adult social care being one of the biggest service challenges facing local authorities and a key barrier to reducing pressure on NHS services, social care remains the poor relation of healthcare in the UK when it comes to tech investment and strategic action from central government.







## Nexor invests for growth

**GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 18 JULY 2023**

Nexor has been in existence since 1989 in various guises and has a well-established brand amongst its existing client base. However, the company's performance has been unexciting for some time, and we have questioned why it has struggled to move beyond a £5m-revenue business. However, Nexor achieved 15% growth in revenue in its last financial year, grabbing our attention. Chief Analyst, Georgina O'Toole met with MD, Tim Thompson, and Head of Portfolio, Marketing, and Partners, Danny Wootton, and discovered a company committing to significant investment, targeting narrower markets, and predicting strong growth.



## Productivity, partnerships, and pervasive-yet-pragmatic AI with IBM Consulting

**CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 9 JULY 2023**

IBM Consulting shared details of some generative AI developments and customer momentum as part of its Analyst Summit in London recently. The company revealed that 48% of the 3,000 CEOs surveyed for the IBM Institute for Business Value report on CEO decision-making in the age of AI now rank productivity as their highest business priority (up from sixth place last year). IBM also outlined how AI (and generative AI in particular) is now a major plank of its offer (multi-model, to match Big Blue's hybrid multi-cloud ethos), and how partners are key to delivery.



## Triad Group: A challenging year but a positive outlook

**DALE PETERS | UKHOTVIEWSEXTRA | 7 JULY 2023**

Triad Group plc had a challenging start to FY2023 but improved in the second half of the year and it continues to make positive progress towards its aim of sustainable organic expansion. We recently spoke to Managing Director Adrian Leer about Triad's performance and prospects. Founded in 1988, Triad has long been focused on technology-based business change. Consultancy has always been at the heart of the business, but it has also provided staffing services. Over the last few years, it has moved away from transactional IT recruitment to higher-margin consultancy services. Despite the challenges, the Group achieved a significant increase in consultant headcount.



## Salesforce bets big on the AI-data-CRM triumvirate

**CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 3 JULY 2023**

Salesforce brought its World Tour to London recently. Now also branded 'AI Day', in honour of the inevitable focus on the technology (particularly of the generative variety) permeating much of UK&I CEO Zahra Bahrololoumi's keynote – and many of the breakout sessions besides. Whilst AI was indeed a main topic of the day, there were also announcements around Salesforce Net Zero Cloud - with news of standards-based extensions and case study examples of sustainability reporting in action at sustainability-led alternative assets and SME investment manager, the Foresight Group.



## Trustmarque relaunches: "Delivering the value of technology"

**GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 3 JULY 2023**

Trustmarque is piquing our interest of late. Most recently, it has involved investors, One Equity Partners (OEP), extracting it from Capita in April 2022, the subsequent acquisition of Livingstone Group in February 2023, and the appointment of a new CEO, Simon Williams, in March 2023. Having known Simon for several years, we are not surprised he's shaking things up. Naturally, much of his attention since joining has been on successfully integrating Livingstone into the fold. But that hasn't stopped him—and his team—making some fundamental decisions about the company's brand, image and associated strategy under its new ownership.



## UK SITS Market Forecasts 2023 (Excel)

**TECHMARKETVIEW ANALYST TEAM | EXCEL SPREADSHEET | 26 JUNE 2023**

The accompanying Excel spreadsheet for the UK SITS Market Trends & Forecasts 2023 report.



## XAI helps users avoid the hype and focus on their business challenges

**JON C DAVIES | UKHOTVIEWSEXTRA | 21 JUNE 2023**

AI offers significant opportunities to address some very real business challenges. However, the explosion of hype around ChatGPT threatens to potentially distract from the progress that is being made in that regard. Similarly, the understandable risks and concern associated with "black box" type AI propositions has the potential to tar this whole area of technology with the same brush. Of course, not all AI is opaque and risk-laden. In fact currently, some of the most persuasive offerings out there are in the field of Explainable AI (XAI). Indeed regulators are increasingly mandating that institutions be able to explain automated decisions that affect their customers.





## Greater Manchester Police: Pursuing Productivity Through Digital Transformation

DALE PETERS | REPORT | 20 JUNE 2023

This report reviews the history of digital transformation at Greater Manchester Police (GMP), discussing the troubled iOPS implementation and its impact on the organisation. It looks at the positive progress GMP has made in recent years through a new approach to digital transformation and how this has contributed to His Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HMICFRS) removing the force from enhanced monitoring. It also reviews the reasons behind these successes.



## Government announces £54m for "trustworthy" AI research

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 15 JUNE 2023

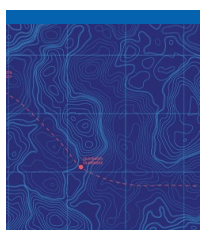
The Secretary of State for Science, Innovation and Technology, Chloe Smith, used her keynote speech on day 3 of London Tech Week to set out the Government's plans for a series of measures designed to beef-up the UK's emerging technology sector (principally AI). This includes £54m package of investment in AI and data science, delivered to universities through UK Research & Innovation (UKRI); the launch of a new UK Geospatial Strategy (bringing together satellite imaging, AI, and real-time data); and a pilot programme to accelerate new research ventures with industry, philanthropic organisations and the third sector (backed by up to £50m in government funding).



## Carbon accounting the focus of techUK's showcase

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 14 JUNE 2023

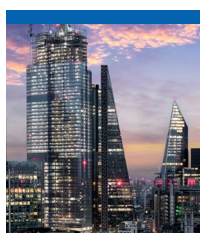
techUK held its biannual Technology Led Decarbonisation Showcase in London recently, giving suppliers the opportunity to explain their wares to businesses (particularly an SME audience) looking to better understand how to measure, report, and reduce their carbon emissions. In this UKHotViewsExtra subscribers to TechMarketView research services can learn about the offerings presented on the day – many of which with a focus on the carbon accounting cycle (measure & understand, report & communicate, reduce & offset) – and why these tools are growing in importance to organisations of all sizes, in all sectors.



## OffshoreViews Q1 2023 Review

ANTHONY MILLER | REPORT | 09 JUNE 2023

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## IndustryViews Corporate Activity Q1 2023

TANIA WILSON | REPORT | 05 JUNE 2023

Merger and Acquisition (M&A) activity in the UK software and IT services (SITS) sector declined again in Q1 2023, remaining considerably lower than the peak level of activity seen in 2021 and early 2022. This is according to data from Silverpeak, the mid-market technology specialists that represent European growth businesses in M&A and financing transactions. However, although this represents a drop from pandemic deal volumes, this activity is in line with pre-Covid norms. See more in this edition of industryViews Corporate Activity, our quarterly review of UK SITS M&A.



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