



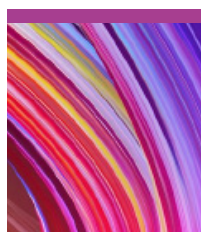
TECHMARKETVIEW RESEARCH THEME 2025:
SINK OR SPRINT
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UK Police Suppliers, Trends & Forecasts 2024

DALE PETERS | REPORT | 30 DECEMBER 2024

PublicSectorView's UK Police Software and IT Services (SITS) Suppliers, Trends & Forecasts report analyses the sector from a market and supplier perspective. The report includes TechMarketView's Top 10 Police SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise', and a handpicked selection of suppliers that are worth keeping a close eye on. Subscribers will also find our latest forecasts for the UK Police SITS market.

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UK Infrastructure Operations: Suppliers, Trends, and Forecasts 2024

KATY RING AND KATE HANAGHAN | REPORT | 18 DECEMBER 2024

This report details TechMarketView's market size and growth data for the UK Infrastructure Operations market. It provides expert analysis of the key trends that are shaping the market, providing insights for suppliers. There are also recommendations and advice for vendors, making this research both informative and practical. In addition, the report contains commentary on the Top 20 suppliers.

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1Password expands in the UK targeting SMBs

SIMON BAXTER | UKHOTVIEWSEXTRA | 18 DECEMBER 2024

1Password, a provider of identity and access management solutions, is making the UK a key part of its expansion strategy in the EMEA region. Spearheading the effort is former Cisco executive Ollie Cheal, now General Manager for EMEA at 1Password. Simon recently caught up with Cheal to understand more about the company's growth plans and how 1Password can help improve the overall security posture of UK businesses. Password managers are tools that have seen significant growth both in the workplace and our personal lives over the past few years.

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UK Financial Services SITS - Ten Predictions for 2025

JON C DAVIES | REPORT | 17 DECEMBER 2024

Jon's latest report contains TechMarketView's predictions for UK Financial Services SITS in 2025 and is designed to add context to the current fervour around AI by highlighting some of the key areas of focus within the sector. Our latest Financial Services Predictions are also intended to highlight some of the potential areas of growth and opportunity in the marketplace over the next twelve months and beyond.

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UK Public Sector Predictions 2025

DALE PETERS | REPORT | 17 DECEMBER 2024

This report provides predictions for the use of technology in the public sector in 2025 and beyond. It provides six predictions for each of the six subsectors TechMarketView tracks (Central Government, Defence, Health, Local & Regional Government, Education, and Police).

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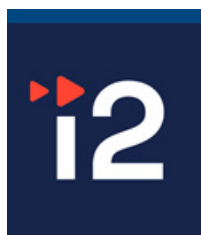


SustainabilityViews Predictions 2025

CRAIG WENTWORTH | REPORT | 16 DECEMBER 2024

The SustainabilityViews Predictions report for 2025 looks at ten (unranked) predictions for sustainability technology, looking at changes in policy, practice, products, and players that are most likely to move the dial when it comes to tech user outcomes and supplier opportunities in 2025.

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i2 providing actionable intelligence for key policing priorities

DALE PETERS | UKHOTVIEWSEXTRA | 16 DECEMBER 2024

i2 has been providing visual analysis solutions for law enforcement, defence, national security, government and financial services for decades. Its software collects, manages, and organises information and intelligence, making it easier for analysts and investigators to identify networks, patterns, and trends in structured and unstructured data. In January 2022, IBM sold the i2 product portfolio, including Analyst's Notebook, iBase, Connect, and Enterprise Insight Analysis, to Constellation Software subsidiary Harris Group (see IBM divests of i2 analytics business). Since the acquisition, i2 has been evolving rapidly, becoming a more agile and innovative business, that can provide the actionable intelligence to address many of the biggest challenges in policing.



InterSystems' healthcare heritage powers multi-sector data expansion

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 12 DECEMBER 2024

TechMarketView recently sat down with InterSystems' UK&I Country Manager, Colin Henderson to discuss both the company's momentum in the UK health market, and also its plans for wider deployment of the underpinning InterSystems IRIS data platform in other sectors. In this UKHotViewsExtra article subscribers learn about how InterSystems is fast-tracking customers to activate more functionality from their existing implemented systems, where the company is deploying AI across its offerings, and how it's looking to Systems Integrator partners to expand the reach of the InterSystems IRIS data platform further into Supply Chain and Financial Services markets.



AI Impact: Back Office Operation

SIMON BAXTER | REPORT | 11 DECEMBER 2024

This report is the first in the AI Impact report series from TechMarketView. It is focused on Back Office Operations and draws on in-depth interviews and proprietary analysis to provide greater insight into the true disruption AI poses. The report looks at the disruption of AI tech on services and solutions, key trends, real world examples, disruptive and innovative suppliers and provides recommendations and advice for technology suppliers and end user organisations on how to exploit the growing AI opportunity.



Proof points and potential: Netcompany's hyper-transferability mission

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 10 DECEMBER 2024

Craig recently met with Netcompany's Managing Partner for the UK, Richard Davies, to talk about the company's four main areas of focus, and how they're influencing how it approaches opportunities in UK public sector. He also discussed barriers to transformation in the UK public sector, and innovative approaches to re-use which can help shift departments out of the digital doldrums. According to Davies, one of the biggest barriers to transformation in the UK public sector (versus other countries) is the way that functions are still geared up to procure resources, not outcomes.



COP29: Money, markets, and momentum

CRAIG WENTWORTH | REPORT | 6 DECEMBER 2024

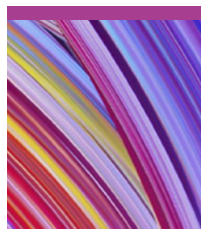
This COP29: Money, markets, and momentum report looks at the climate-related commitments agreed at COP29, explores where technology can play a part in emissions-reduction in the wake of COP's first Digitalisation Day, and looks ahead to the preparations for COP30 (taking into account anticipated early actions following the public declarations of the incoming Trump administration in the US).



Totally Sust #6: Wind-as-a-Service: Wing-sail solutions to decarbonise global shipping

CRAIG WENTWORTH | PODCAST | 5 DECEMBER 2024

The sixth episode in TechMarketView's Totally Sust podcast series features an interview with Di Gilpin (Founder & CEO at Smart Green Shipping) and Henry Smith (Chartering Manager at MOL, the Mitsui O.S.K. Lines shipping business). Listen here to the full version of their conversation with the research stream's lead analyst Craig Wentworth about how Smart Green Shipping's FastRig wing-sail is being used to decarbonise commercial shipping, and the company's innovative Wind-as-a-Service business model that helps de-risk adoption of such innovative new tech.

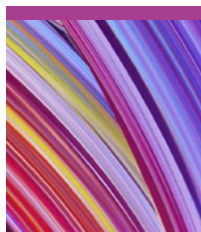


Defence SITS: Suppliers, Trends & Forecasts 2024

GEORGINA O'TOOLE | REPORT | 29 NOVEMBER 2024

In this latest report from the PublicSectorViews team, we provide TechMarketView's view of the UK Defence Software and IT Services (SITS) market from a market and supplier perspective. The report includes TechMarketView's Top 10 Defence SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise' and, therefore, threatening to unseat the leading players, plus a handpicked selection of suppliers that are worth keeping a close eye on, due to their renewed interest in the sector, recent successes, or differentiated approach. Subscribers will also find our latest forecasts for the UK Defence SITS market.





UK Local & Regional Government Suppliers, Trends & Forecasts 2024

CRAIG WENTWORTH | REPORT | 29 NOVEMBER 2024

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This report provides TechMarketView's view of the UK Local & Regional Government Software and IT Services (SITS) market from a market and supplier perspective. It includes our Top 10 Local & Regional Government SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise' and, therefore, threatening to unseat the leading players, and a handpicked selection of suppliers that are worth keeping a close eye on, due to their renewed interest in the sector, recent successes, or differentiated approach. It also includes our market outlook for the 2024-27 forecast period.

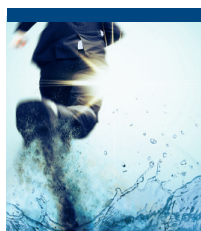


TechMarketView Predictions 2025

TMV ANALYST TEAM | REPORT | 28 NOVEMBER 2024

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TechMarketView's Predictions for 2025 reflect the breadth of the challenge for tech buyers who must simultaneously embrace change, demonstrate value, and move at pace. Organisations that have invested in robust digital foundations are now better positioned to accelerate rapidly, particularly in AI and GenAI deployment. But success in 2025 demands more than just speed - it will require precision in execution and, crucially, clear evidence that technology investments directly improve financial performance.



TechMarketView Research Theme 2025: Sink or Sprint

GEORGINA O'TOOLE | REPORT | 27 NOVEMBER 2024

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TechMarketView's new theme "Sink or Sprint" captures a critical market shift: rapidly accelerating technology deployment is becoming essential for survival. Crucially, our analysis reveals why 2025 brings unique market conditions that will create a stronger sense of urgency. A temporary economic uplift will combine with significant legislative changes to create distinct opportunities - and pressures - across the UK tech market.



NECSWS + SSS: Integration and Innovation

DALE PETERS | UKHOTVIEWSEXTRA | 22 NOVEMBER 2024

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Just over a year ago, NEC Software Solutions UK (NECSWS) completed the acquisition of Capita's SSS Public Safety business (see NEC Software Solutions UK completes acquisition of SSS Public Safety), a deal that strengthened the company's public safety business significantly. NECSWS and SSS are now operating as a single entity, but getting to this point has taken time and considerable effort. TechMarketView sat down with Steve Ainsworth, Executive Director for Public Safety, to discuss the progress NECSWS has made since the deal completed and the prospects for the new-look organisation.

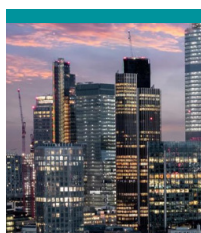


Policing reforms: Implications for tech suppliers

DALE PETERS | UKHOTVIEWSEXTRA | 20 NOVEMBER 2024

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Speaking at the Association of Police and Crime Commissioners (APCC) and National Police Chiefs' Council (NPCC) Partnership Summit the Home Secretary Yvette Cooper set out a new road map for policing reform across England and Wales. The changes announced align to Labour's 'Safer Streets' mission to halve serious violent crime and raise confidence in the police and criminal justice system. At the heart of these plans is a focus on neighbourhood policing, including the government's commitment to deliver an additional 13,000 police officers, PCSOs and special constables in neighbourhood policing roles; however, the plans for reform go much further than that.



UK Financial Markets SITS, Trends and Forecasts 2024

JON C DAVIES | REPORT | 18 NOVEMBER 2024

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This report provides insights into the key business and technology trends impacting the Financial Markets sector in the UK. It includes an analysis of spending patterns within the associated software and IT services (SITS) market and includes TechMarketView's latest forecasts for expenditure through to 2027.

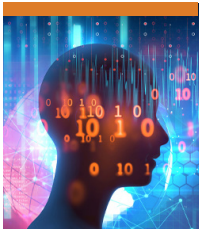


MPs debate live facial recognition technology

DALE PETERS | UKHOTVIEWSEXTRA | 15 NOVEMBER 2024

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On 13th November, Dame Siobhain McDonagh chaired a Westminster Hall debate on the use of live facial recognition (LFR) technology by police. This is a topic that TechMarketView has been tracking for several years and it is one that has raised significant concerns about bias, privacy, and human rights and led to legal challenges.



More than a Feeling: GenAI and Sentiment Analytics in CX

DUNCAN AITCHISON | REPORT | 15 NOVEMBER 2024

The advent of the GenAI era will have a profound impact on both the Customer Experience (CX) domain as a whole and the hyper-personalisation of experiences in particular. The latter has placed Sentiment Analytics (SA), which seeks to enable businesses to track and react to the emotional state of customers at each stage of their journey, high on the list of CX GenAI investment priorities. This report is focused on the GenAI-led advances in Sentiment Analytics and assesses if and how they are redefining the art of the possible in the CX area. The analysis contains details of some of the more innovative, real world CX use cases for GenAI-driven Sentiment Analytics and identifies a number of the disruptive tech companies which are leading the charge in this rapidly evolving field



Scottish Fire & Rescue turns to Motorola for new mobilising system

DALE PETERS | UKHOTVIEWSEXTRA | 12 NOVEMBER 2024

Scottish Fire & Rescue Service (SFRS) has selected Motorola Solutions to provide its new command and control mobilising system (CCMS). The deal is worth £29.5m over its seven-year term (with the option to extend for a further three years). The contract was awarded under a negotiated procedure without the prior publication of a contract notice on grounds of extreme urgency. TechMarketView subscribers, including UKHotViews Premium subscribers, can read more about the convoluted history of procuring a new CCMS for Scotland in our expanded UKHotViewsExtra article here.



Google Cloud: Products and progress at the new frontier for AI

CRAIG WENTWORTH | REPORT | 12 NOVEMBER 2024

This report looks at Google Cloud's momentum, focusing on how the company is delivering AI services (with supporting data infrastructure) across a range of sectors. It explores Google's AI deployments with Kingfisher and WPP, and provides analysis on how the company's deep technology heritage, its customer relationships, and its AI product strategy, are all influencing a consulting-led go-to-market approach.



Managing the sustainable AI paradox: Harnessing AI while hitting sustainability goals

ANGELA EAGER | REPORT | 8 NOVEMBER 2024

In this report we take a look at the sustainability challenges that suppliers and tech user organisations face when deploying AI, given the technology's energy-intensive nature. It explores a range of potential responses to the "sustainable AI paradox", including data centre design and operations, energy-efficient coding, and right-sized model selection; as well as making the case for AI lifecycle environmental assessments that can identify areas where sustainability could be improved (and provide insight into unintended consequences).



Totally Sust #5 - Sustainability intelligence & product impact scoring (Dayrize & Products of Change)

CRAIG WENTWORTH | PODCAST | 7 NOVEMBER 2024

The fifth episode in TechMarketView's Totally Sust podcast series features an interview with Bart Nollen (Co-Founder of Dayrize) and Helena Mansell-Stopher (Founder & CEO of Products of Change). Here subscribers to SustainabilityViews can hear the full version of their conversation with the research stream's lead analyst Craig Wentworth about how about sustainability intelligence, product impact scoring, and how technology can help brands track, measure, and reduce their Scope 3 emissions – amongst other things.



UK Health Suppliers, Trends & Forecasts 2024

PSV ANALYST TEAM | REPORT | 5 NOVEMBER 2024

This report provides TechMarketView's view of the UK Health Software and IT Services (SITS) market from a market and supplier perspective. The report includes TechMarketView's Top 10 Health SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise', and a handpicked selection of suppliers that are worth keeping a close eye on. Subscribers will also find our latest forecasts for the UK Health SITS market. Our view of 2023, and our forecasts through to 2027, are based on our proprietary Digital Evolution Model (DEM).



FD Technologies looks to the future

JON C DAVIES | UKHOTVIEWSEXTRA | 4 NOVEMBER 2024

Jon recently caught up with Seamus Keating, CEO of Newbry based, FD Technologies. The topic of our conversation was the company's decision to restructure by completing its second major divestment in six months and its plans for the future with FD Technologies looking to go it alone, as a pure play provider of advanced analytics software, focused on opportunities around AI. In early October the news broke that, FD Technologies had agreed to sell its Financial Markets consultancy business, First Derivative, to US-based EPAM Systems. The deal expands EPAM's financial services portfolio and broadens its global footprint with the acquisition providing more than 100 new clients.





Ignitho targets UK market with Agentic AI

SIMON BAXTER | UKHOTVIEWSEXTRA | 1 NOVEMBER 2024

Ignitho Technologies specialises in AI-driven data engineering services, in particular providing businesses with Agentic AI, backed by 3rd party LLM's, to boost productivity and reduce operational costs. The company is HQ'ed in Tampa, USA, despite its UK origins, yet is now starting to turn its focus towards the UK again, with Co-founder and Chief Commercial Officer Roney Solomon coming back on board to spearhead the effort. I recently caught up with Soloman to understand more about the business and how Agentic AI will be of benefit to current and prospective customers.



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A new approach to regular recurring payments

JON C DAVIES | UKHOTVIEWSEXTRA | 1 NOVEMBER 2024

Jon recently caught up with the folks at Atos to discuss the vendor's new open banking solution, Intelligent FlexiPayments. Facilitated by its a partnership with UK fintech, The Smart Request Company (trading as Ordo), Intelligent FlexiPayments provides an alternative to the somewhat prescriptive established methods for processing regular recurring payments. Established in 2018, Ordo is an FCA regulated payments and data as a service provider that facilitates direct payment between businesses and customers in real-time.



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Microsoft Q125: AI continues to boost Cloud revenues

SIMON BAXTER | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

Microsoft posted a solid start to FY25 with its AI business on track to surpass an annual revenue run rate of \$10 billion next quarter, which will make it the fastest business in the company's history to reach this milestone. AI (including its partnership and investment in LLM supplier OpenAI) remains central to Microsoft's plans across all areas of its business and continues to act as an accelerator for growth. Its various flavours of Copilot are all growing in high double digits, with a positive knock-on effect for demand across hybrid cloud, analytics and low code business technologies. Read our further analysis here.



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Autumn Budget: UK SITS market and sustainability

DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

The first budget of the new Parliament saw Chancellor Rachel Reeves raise taxes by £40.1bn a year in 2028-29 to help deliver the government's plans for economic stability and boost public investment. In this Autumn Budget: UK SITS market and sustainability article we look at how measures put forward by the Chancellor are likely to impact both overall demand going forward and the shape of sustainability agenda in the UK.



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Autumn Budget: A technology-enabled future on the horizon

DALE PETERS | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

In this companion piece to the Autumn Budget: UK SITS market and sustainability insights, we explore how the Budget – which saw significant increases in departmental spending limits - will shape technology adoption in public services. Digital technologies will be expected to facilitate many of the changes required to deliver the government's plans for reform. However, much of the detail about what exactly this will entail was put off until spring 2025 with the promise of a new technology-enabled settlement for public services.



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UK Enterprise Software: Suppliers, Trends, and Forecasts 2024

ANGELA EAGER | REPORT | 29 OCTOBER 2024

This report details TechMarketView's latest market size and growth data for the UK Enterprise Software market. It provides expert analysis of the key trends that are shaping the market, providing insights for suppliers. There are also recommendations and advice for vendors, making this research both informative and practical. In addition, the report contains commentary on the Top 20 suppliers.



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Highlights from AI Sector study

SIMON BAXTER | UKHOTVIEWSEXTRA | 24 OCTOBER 2024

The Department for Science, Innovation and Technology (DSIT) has released its 2nd iteration of the UK AI sector study yesterday, giving us some insight into the current growth and composition of the UK AI market. According to the latest stats there are now more than 3,000 AI companies in the UK, generating more than £10bn in revenues, employing more than 60,000 people in AI related roles, and contributing £5.8bn in Gross Value Added (GVA). Compared to the 2022 study, aggregate numbers of AI companies, revenues, employment and GVA are all higher in 2023.



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UK Insurance SITS Suppliers, Trends and Forecasts 2024

JON C DAVIES | REPORT | 22 OCTOBER 2024

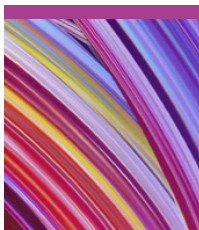
This report provides details of TechMarketView's latest analysis of software and IT services (SITS) expenditure in the UK Insurance sector. The document contains our forecasts for how the market is expected to perform over the period 2024-2027. The report also contains an update to our UK Insurance SITS supplier rankings, based on the latest available financial information and incorporates data up to the end of June 2024, where available.



The green, green growth at home – techUK's Tech and Net Zero conference

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 18 OCTOBER 2024

techUK held its annual Tech and Net Zero conference earlier this week, bringing together technology practitioners and policy advisors for a day of sessions looking at how the tech sector is approaching net zero in its own back yard, and also how it's helping to deliver net zero improvements for customers in other industries. Many of the sessions explored access to greener energy to fuel tech's contribution to the UK's economic growth, but also with concerns about the impact (especially of AI) on demand for compute and storage infrastructure.



UK Education Suppliers, Trends & Forecasts 2024

CRAIG WENTWORTH | REPORT | 16 OCTOBER 2024

This report provides TechMarketView's view of the UK Education Software and IT Services (SITS) market from a market and supplier perspective. The report includes TechMarketView's Top 10 Education SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise' and, therefore, threatening to unseat the leading players, and a handpicked selection of suppliers that are worth keeping a close eye on, due to their renewed interest in the sector, recent successes, or differentiated approach.



£6.3bn investment in UK data centres to power AI innovation

SIMON BAXTER | UKHOTVIEWSEXTRA | 15 OCTOBER 2024

The UK government has announced £6.3bn of foreign investment into UK Data centre infrastructure, as part of a total £63bn in private investment committed at the International Investment Summit. The new data centre investment will provide the UK with more computing power and data storage, so that Britain has the necessary infrastructure to train and deploy the next generation of AI technologies.



The Accountancy Industry's Automation Revolution

MARC HARDWICK | UKHOTVIEWSEXTRA | 10 OCTOBER 2024

The accountancy industry is at a critical juncture, facing a perfect storm of challenges that threaten to undermine its traditional business model. Productivity challenges, talent shortages, and increasing work demands are forcing firms to reassess their operations and seek innovative solutions. I spoke recently with Andrew Guy (pictured), CEO and founder of niche Accountancy Automation specialist FD Intelligence, to understand how and why intelligent automation is being adopted in the accounting sector.



Cognizant UK positions for growth

DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 4 OCTOBER 2024

Earlier this month Duncan had the pleasure of spending some time with Cognizant at their UK Analyst & Advisor Summit event in London. The firm has been having a tougher time of it for the last eighteen months or so, albeit the company's latest set of quarterly results both saw an acceleration in sequential revenue growth and pointed to an improving outlook for the remainder of the year. Although reporting that both the strong trading headwinds in this country persist and client purse strings around discretionary expenditure here remain tightly drawn, UK Head, Rohit Gupta had positive news to report. There have been notable recent successes on the large deal front here.

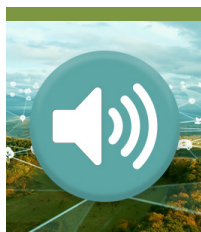


Roc targets growth via four big bets

MARC HARDWICK | UKHOTVIEWSEXTRA | 3 OCTOBER 2024

Marc recently caught up with Simon Furber, his ex-Capita colleague and newish CEO of Roc Technologies, the Greenham Common-based IT and managed services provider, to hear about their plans for growth via a differentiated offer. Furber is an experienced tech CEO and CFO with 30 odd years' experience in senior roles behind him, including with the likes of Capita IT Services, Call Centre Technology, Harmony Fire and Cloud Direct, before taking over the reins at Roc early this year. Read more about our views on Roc Technologies in an expanded UKHotViewsExtra article here.





Totally Sust #4: River Deep Mountain AI (Cognizant Ocean & Northumbrian Water)

CRAIG WENTWORTH | PODCAST | 3 OCTOBER 2024

The fourth episode in TechMarketView's Totally Sust podcast series features an interview with Stig Martin Fiskå (Global Head of Cognizant Ocean) and Nigel Watson (Chief Information Officer at Northumbrian Water). Hear the full version of the podcast with lead analyst Craig Wentworth about how the "River Deep Mountain AI" project is leveraging AI and machine learning techniques to develop open source, scalable, digital models that track river health trends and the pollution patterns associated with storm overflows, agriculture and road run-offs.



Is AI the fuel that will power Altimetrik's market push?

JON C DAVIES | UKHOTVIEWSEXTRA | 2 OCTOBER 2024

Jon recently caught up with Vikas "Vik" Krishan, Chief Digital Business Officer and Head of UK and EMEA, at US-headquartered technology company, Altimetrik. Vik was in London for a few days before flying out to India, for a leadership meeting, and among other things we spoke about Altimetrik's push into Europe off the back of its recently completed strategic investment from US private equity firm, TPG Capital. This latest HotViewsExtra explores Altimetrik's market priorities and Krishan's views on the prospects and opportunities around AI in the Financial Services sector.



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