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Research Summary February 2021

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Share Performance in February 2021

A glance at the Share Indices for Feb 21 might leave you thinking that not much happened. But there was real 'excitement' in the last few days as NASDAQ slumped 4.8% in the last week of Feb. However, NASDAQ is still up 3.1% YTD and up an astonishing 85% since its low in Mar 20. Every part of the economy has seen digital transformation at a pace never witnessed before. Peak growth has probably passed and expectations for the coming year might just be over exuberant!



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Granicus facilitating channel shift during the pandemic

Granicus has seen a significant increase in the adoption of its citizen service solutions during the pandemic. TechMarketView spoke to Ian Roberts, Managing Director at Granicus UK, about how the company has performed during the crisis. The company, which is now headquartered in Denver, specialises in cloud-based communication, transparency, legislative management and digital self-service solutions for the public sector.



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IndustryViews Quoted Sector Q4 2020

Our quarterly review of the UK software and IT services quoted sector scene with comparative share price performance against leading international software and IT services stocks. The strong performance of UK listed software and IT services shares seen in recent quarters slowed slightly in the final quarter of 2020.



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Buoyant BJSS set fair for growth

Leeds-based IT and business consultancy BJSS is one of a handful of newer wave SI's to be cutting a dash in the UK SITS market. Being privately-owned, the firm attracts fewer headlines than its publicly quoted peers Endava and Kainos. Its recent progress is, however, no less impressive. We caught up with the BJSS Managing Director, Stuart Bullock and its Chairman, Glynn Robinson to find out how both the company has been faring during the pandemic and the prospects for the business are shaping up.



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Digital Marketplace Review 2020

This data-driven report reviews the Digital Marketplace sales figures covering the period from 01 January 2020 to the 31 December 2020. It includes data from two Crown Commercial Service (CCS) frameworks: G-Cloud and Digital Outcomes & Specialists (DOS).



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Solutions Supplier Prospects 2021

In this report, we look at the Top Ten leading players (by revenue) in the UK SITS Solutions market, and assess what they will need to do to be successful now and beyond. We also provide our analysis of the potential hurdles that will prevent suppliers reaching their potential in the short and mid-term.



Making Tax Digital - HMRC puts the bean counters in the shade

My recent article (*Flux brings digital receipts to Barclays customers*), touched on "Making Tax Digital" (MTD) and the efforts by HMRC to modernise the UK tax system. The MTD initiative is fast approaching another important milestone - just like high street banks, HMRC is being dragged into the 21st Century. As a result of this and the wider impact of digital technology and API dataflows, the accountancy and tax market is beginning to look very different.



Enterprise Software Supplier Prospects 2021

This forward looking report analyses the Top Ten leading suppliers (by revenue) in the UK Enterprise Software market, assessing what they need to do to be successful in 2021 and beyond in individual profiles. It also provides analysis of the likely hurdles that will prevent suppliers reaching their potential in the short and mid-term, along with an overview of the Enterprise Software market size and forecast.



Cyber Security Market Trends and Forecasts to 2023

This report contains TechMarketView's latest market size and forecast data alongside an analysis of the trends shaping the UK enterprise security hardware, software and services market. The ongoing requirement for effective cyber security protection did not dissipate with the onset of the coronavirus pandemic at the start of 2020, but it did lead to a fall in spending within certain categories.



Atos & DXC: UK public sector perspective

Last month, we commented on the friendly takeover approach of DXC by Atos. A few days later, TechMarketView Research Director, Jon Davies, ran a slide rule over the proposed merger in 'Running the rule over Atos & DXC'. Here, we take a closer look at the impact from a UK public sector perspective. Should the proposed merger go ahead, it would push Atos to the very top of our UK public sector SITS rankings.



Share Performance in January 21

Nothing much happened in the various indices we follow in Jan 21. A 2.4% rise in NASDAQ and a 0.8% fall in the FTSE100 is hardly exceptional. The FTSE SCS Index rose by a respectable 2.3% in Jan 21. We reported share fluctuations at Triad and the gains at Aptitude, Access, Aveva, Softcat etc. Also falls at ATOS, Capita. As the Oct-Dec 20 quarterly reporting season is in full swing, we report on Big Tech and look forward to a bumper period of London IPOs.



Customer Onboarding in Retail Banking "Pandemic exposes enduring challenges"

Problems relating to customer onboarding have still not been resolved satisfactorily by the established high street banks in the UK. These failings have been badly exposed by the impact of the coronavirus pandemic and lockdown. Learn how and why these challenges prevail and explore some of the possible alternative approaches.



Pivoting to "Digital BPO" – Capita's new Grant Management platform Grants

Recently, we have seen the Business Process Service (BPS) market migrate away from heritage "lift and shift" style operations. When Capita CEO Jon Lewis took over the reins at the UK SITS market leader three years ago, he committed the firm to developing "Digital BPO" offerings. A new strategy soon followed, specifically moving away from developing bespoke solutions towards a more reusable platform-based approach.



Reset and Reimagine: Predictions Compendium 2021

This report consolidates our predictions (including those for Public Sector and Financial Services) for the UK Software and IT services market in 2021 and beyond. The Predictions Compendium is available to all TechMarketView subscribers.



Edge AI: Pushing Workload Boundaries

The larger and more complex the data set involved, the harder applications have to work to ingest, process and analyse the information, putting strain on the underlying network, storage and server architecture. This report discusses how and where edge compute architectures can help to solve those performance issues by processing data in distributed locations, particularly when it comes to the use of artificial intelligence (AI) technology.



ECS acquisition by GlobalLogic oozes logic

In November, it was announced that ECS had been acquired by GlobalLogic. ECS has numerous FTSE 100 customers, in financial services and other highly regulated sectors. It is also one of a small number of UK-headquartered businesses to be awarded the DevOps competency partner status by AWS. This research note looks at some of the implications of the acquisition for the companies and their customers.



Running the rule over Atos and DXC

The motivating factors behind the estimated \$10bn bid for DXC Technology by Atos are intriguing. As is the likely impact on the SITS market. In the UK, the estimated revenue of Atos, combined with the larger DXC, is likely to exceed £3.5bn per annum, making the merged company the largest SITS vendor in the UK. Learn more about the various considerations surrounding the merger and read our perspective on the proposed deal here.



New UK Government Central Digital & Data Office

Digital-related announcements in Government often leave me unconvinced that anything will change, however, the recent announcement by Alex Chisholm, COO for the Civil Service and Permanent Secretary for the Cabinet Office, feels different. The big news is the Central Digital and Data Office (CDDO) for Government, which will be launched in early February, with significant appointments supporting its creation.



Review of Share Price Performance in Dec 20 and 2020 as a whole

NASDAQ continued its Bull run rising another 6.2% in December making it a massive 43.6% gain in 2020. Set this against the FTSE100 which, although rising 3.1% in December, still registered a 14.3% fall in 2020 as a whole. The FTSE SCS Index, which most closely tracks the Software & IT Services companies on the LSE that we follow, also rose 3.3% in December. But is also down 11.8% in 2020. So the place to be in 2020 was in US Big Tech!



UK Police Supplier & Market Analysis

This report provides TechMarketView's view of the UK police software and IT services (SITS) market from a market and supplier perspective. It includes our Top 10 police SITS rankings for 2019, as well as our view of those suppliers that are 'On the Rise' and 'Ones to Watch'. Subscribers will also find our latest forecasts for the UK police SITS market. Our view of 2019, and our forecasts through to 2023, are based on our new proprietary Digital Evolution Model (DEM).



Public Sector Market Forecast Update 2020-2023

This report updates TechMarketView's analysis of the UK public sector software and IT services (SITS) market for 2019 and forecast period to 2023. It revisits the analysis we published in July (*Public Sector Software and IT Services: Suppliers, Trends and Forecasts 2020-2023*), as well as our series of reports that deep dive into the six public sector subsectors. In those reports you will find additional detail on the trends impacting the market.



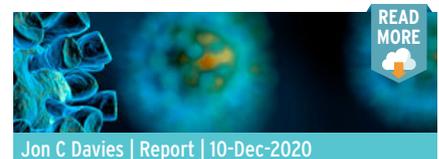
Timico straps on the profit rocket boosters

Following on from the news that Timico is to buy Arcus Cloud Services, we caught up with Neil Muller (CEO) and Paul Farrelly (Chief Digital Officer). The firm is just posting accounts for FY19, showing revenue up 25% to £55m and Adjusted EBITDA up by a whopping 162% to £7.6m. Of course, we're now largely through FY20, and forecasts are indicating a 9% increase in the top line to c£60m.



Transforming Public Procurement: Green Paper

The Cabinet Office recently published a Green Paper on proposed changes to Government procurement. It's not the first time that UK Government has tried to improve the way it procures goods and services. However, the backdrop is now different. Firstly, the COVID-19 pandemic brought into stark light some of the issues with the current procurement regime. Secondly, having left the European Union, the Government has a wider range of options.



Reset & Reimagine: Financial Services Predictions for 2021

The unprecedented global impact of the coronavirus has made 2020 a year like no other and surely no company will end the year quite the same as it started it! As we look forward to the future and consider some of the key developments and trends that may come to the fore, it is clear that the effects of the pandemic will be felt well into 2021 and beyond. The pandemic has provided significant impetus to digital adoption and the transformation agenda.



Reset & Reimagine: Public Sector Predictions for 2021

When we published our Public Sector Predictions report last year we planned to examine the disordered rush toward digital transformation of public services. Little did we know of the rush to come. During the pandemic, new technology has been introduced at a previously unthinkable pace. Speed of execution was key, but something much more fundamental happened: a new perspective on the possibilities came to the fore.



Reset & Reimagine: Top Ten Predictions for 2021

2020 was a year like no other many of us have experienced. While TechMarketView had predicted that it would be defined by Digital Chaos, we had no idea that COVID-19 would bring such an intense and different sort of chaos. Out of that chaos and uncertainty came a desperate need for technology to keep day-to-day life afloat, but also to support the drive for coronavirus treatments and vaccines.



360Science: stepping up to the enterprise

Data specialist HelpIT has rebranded as 360Science, a move that reflects a step up from a departmental to an enterprise level focus based around a common (360 degree) view of customer data. The company is still committed to its foundation IT data matching software but has expanded its data quality footprint and ambitions, with a particular focus on data preparation. This is one of those burdens enterprises find hard to manage.



UK Cyber Security Supplier Rankings 2020

This report contains the Top 20 UK supplier ranking (by revenue) for the UK Cyber Security market in the 12 months ending March 2020, alongside our forecasts for market size and growth for the period between 2019 and 2023.



OffshoreViews Q3 2020 Review

It was 134 days after assuming the role of CEO at Bangalore-based top-tier offshore services firm Wipro that ex-Capgemini CXO Thierry Delaporte presented his strategic priorities to the analyst community along with the operating model that will take Wipro through to 2025. The changes that Delaporte has signalled look eminently sensible – arguably long overdue. Read Managing Partner Anthony Miller's assessment of Delaporte's plan in OffshoreViews Q3 2020 Review.



Share Performance in Nov 20

I can't recall the last time the FTSE100 (up 12.4% in Nov) beat the NASDAQ (up 11.5% in Nov). Indeed, apparently the 'FTSE100 had its best month in more than 30 years'. Although the TechMark100 was also up a respectable 10%, the joy did not spread to the FTSE SCS Index which was only up 1.6%. Of course, the picture YTD is somewhat different! The two main reasons behind this bumper month are both well publicised and, indeed, trailed in my previous monthly share price updates.