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## Immersive Customer Experiences: Progress, Possibilities and Prognosis

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**DUNCAN AITCHISON | REPORT | 22 DECEMBER 2023**

Customer Experience (CX) is one of the most dynamic and significant parts of the SITS market. Expectations regarding the transformative impact of immersive technologies in this arena are high and the ability to deliver immersive experiences is already an essential part of the kit bag for suppliers seeking to build their presence in the CX world. This report contains our analysis of the progress that the leverage of immersive technologies has made in the CX arena together with examples of the uses to which they are being put. The commentary also considers "where next?" for immersive CX and looks at the emerging technologies that are likely to impact developments.

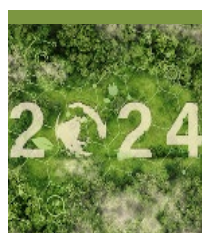


## Police Suppliers, Trends, and Forecasts 2023-2026

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**DALE PETERS | REPORT | 22 DECEMBER 2023**

This report provides TechMarketView's view of the UK Police Software and IT Services (SITS) market from a market and supplier perspective. The report includes TechMarketView's Top 10 Police SITS rankings for 2022, 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.



## Sustainability Predictions 2024

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**CRAIG WENTWORTH | REPORT | 21 DECEMBER 2023**

In this report Craig covers TechMarketView's Sustainability predictions for 2024. As COP28's renewable energy capacity and energy efficiency targets range out to 2030 (with a checkpoint at COP30 in 2025) there are many scenarios which could run their course and affect SITS suppliers over the longer term. However, in this report, we focus on six areas that we consider to be the most pressing and the most likely to affect the UK market in 2024.



## The Legal Landscape for ESG

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**CRAIG WENTWORTH | REPORT | 19 DECEMBER 2023**

This report looks at the various policy and legal frameworks, and emerging standards, in the field of environmental social governance (ESG) reporting—in the UK, across Europe, and in the US. We analyse the implications for organisations of all shapes, sizes, and sectors (when they're likely to be impacted, and how; and where their SITS technology partners can help customers turn a bane into a boon by capitalising on the data they collect).



## COP28's Call to Arms for the Tech Industry

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**CRAIG WENTWORTH | REPORT | 18 DECEMBER 2023**

This report looks at the climate commitments agreed at COP28, and explores where technology can play a part in helping countries meet their renewed obligations (specifically around data – collection, disclosure, and action, biodiversity and habitat protection in support of carbon removal, enabling renewables, greening IT, and making buildings smarter).



## Disposal complete: The future for Parity and Pathway

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**GEORGINA O'TOOLE | UKHOTVIEWS/EXTRA | 14 DECEMBER 2023**

At the end of November 2023, we reported on Parity selling its recruitment business for £3m. On 8th December Parity completed the disposal of Parity Professionals, receiving the initial £2m consideration from the buyer – recruiter, Pertemps Network Group (PNG Network Ventures) - and changed its name, effective 11th December 2023, to Partway Group. Following completion of the sale, Partway Group has been reclassified as a cash shell on the AIM market. For Chairman of Parity Group, and now Chairman of Partway Group, Mark Braund, this moment is bittersweet. Read our views on the disposal and what the future holds for Parity in this UKHotViewsExtra article.



## TechMarketView Predictions 2024

**TECHMARKETVIEW ANALYST TEAM | REPORT | 8 DECEMBER 2023**

TechMarketView's annual Predictions for the forthcoming new year.



## Market Outlook Update 2023

**DUNCAN AITCHISON | REPORT | 6 DECEMBER 2023**

TechMarketView's update on the outlook for the UK Software and IT Services market. In this report we update our forecasts published in June 2023 to reflect current economic conditions and market activity in Q3 and Q4.



## Atos Tech Foundations: Picture of clarity and investment focus emerging

**GEORGINA O'TOOLE | REPORT | 6 DECEMBER 2023**

Report looking at the portfolio and investment focus of the Atos Tech Foundations business. We highlight the renewed clarity that is emerging in relation to the Tech Foundations portfolio of offerings and look closely at the targeted investment that is being made in pursuit of operational efficiencies and market differentiation.



## TechMarketView Research Theme 2024: Enabling Acceleration

**GEORGINA O'TOOLE | REPORT | 4 DECEMBER 2023**

We are excited to launch TechMarketView's research theme for 2024: Enabling Acceleration. Committed followers of TechMarketView will be aware that every year our theme is designed to sum up in a few words the key trends that we think will impact the tech market in the year ahead. Our 2024 research theme – Enabling Acceleration – highlights the intense pressure that organisations feel to keep pace with the speed of technological innovation and make a transformation step change.



## Artificial Intelligence: Market Trends, Use Cases and Suppliers

**SIMON BAXTER | REPORT | 1 DECEMBER**

Artificial Intelligence (AI) continues to dominate the market narrative, influencing digital transformation investment across all industries and market segments. With AI set to be a key theme for 2024 and beyond, this report will review current market trends, break down the myriad new terminologies, and look at some of the main use cases and suppliers for AI across the UK software and IT services market. This report will be supported by forthcoming research that will look deeper at innovative start-ups, market demand and key trends at both a technological and industry level.



## Offsetting carbon, and understanding sustainability sentiment, from TechMarketView Evening

**CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 30 NOVEMBER 2023**

Earlier in the Autumn, we held our annual TechMarketView Evening event at RIBA in London. Those of you who joined us in person will know that we pledged to offset the greenhouse emissions from the event ('Sustainability' was the topic of the fireside chat segment that evening). We ran a survey on the night, in part to find out where people travelled into London from – and by what means of transport – so we could offset the carbon; but also to ask about environmental sustainability in people's organisations.



## UK SITS Solutions Market Suppliers, Trends, and Forecasts 2022–2026

**MARC HARDWICK | REPORT | 28 NOVEMBER 2023**

This report details TechMarketView's latest market size and growth data for the UK SITS Solutions market. It provides expert analysis of the key trends that are shaping the market, providing insights for Solutions suppliers. There are also recommendations and advice for vendors, making this research both informative and practical. In addition, the report contains a Top 20 Supplier Ranking by UK Solutions revenue, together with commentary on the up-and-coming players making noteworthy progress in this space.





## Insurance Sector SITS - Trends, Forecasts & Ranking

**JON C DAVIES | REPORT | 27 NOVEMBER 2023**



This report analyses the business and technology trends within the UK insurance sector and includes TechMarketView's latest forecasts for software and IT services (SITS) expenditure. The analysis examines the main market segments that constitute the UK insurance sector and provides commentary on the major themes. The research also provides a ranking (in terms of revenue) of the leading SITS suppliers in the sector. This research contains a variety of data drawn from TechMarketView's proprietary market model.

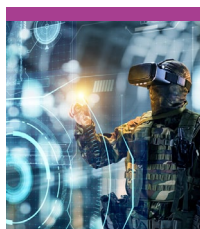


## IndustryViews Corporate Activity Q3 2023

**TANIA WILSON | REPORT | 23 NOVEMBER 2023**



Merger and acquisition (M&A) activity in the UK software and IT services (SITS) sector continued to decline in Q3 2023. This is according to data from Silverpeak, the mid-market technology specialists that represent European growth businesses in M&A and financing transactions. There were 62 acquisitions by and 68 sales of UK SITS companies in Q3 2023, compared to 68 and 90 respectively in Q2. The drop relative to recent quarters is largely due to fewer acquisitions by North American companies, with M&A by UK players remaining fairly steady. See more in this edition of IndustryViews Corporate Activity, our quarterly review of UK SITS M&A.

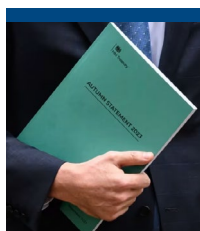


## Defence Suppliers, Trends, and Forecasts 2023-2026

**GEORGINA O'TOOLE | REPORT | 23 NOVEMBER 2023**



This report provides 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 2022, 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.



## A pro-business Autumn Statement

**DALE PETERS | UKHOTVIEWSEXTRA | 23 NOVEMBER 2023**



Chancellor, Jeremy Hunt, placed innovation at the centre of his Autumn Statement 2023 announcements. Tax cuts for business, the pursuit of productivity and investment in technology were key factors in his growth plan; however, this meant there was little additional money to protect public services. In our latest UKHotViewsExtra – A pro-business Autumn Statement – we review the latest economic and fiscal outlook; changes to National Insurance Contributions, a tax break for business and reform to welfare spending; the ongoing investment in innovation and the pursuit of productivity; the impact on public services; and what it all means for tech suppliers.



## NHS Federated Data Platform winners announced

**DALE PETERS | UKHOTVIEWSEXTRA | 22 NOVEMBER 2023**



After months of speculation, NHS England has announced it has awarded the NHS Federated Data Platform & Associated Services (FDP-AS) contract to a group led by Palantir Technologies. The US-headquartered data software business will be supported by Accenture, PwC, NECS and Carnall Farrar in delivering the contract, which is worth £330m over its 7-year term. In the first contract year, investment is expected to be at least £25.6m. It has also been announced that IQVIA has secured the NHS Privacy Enhancing Technology (NHS-PET) contract. NHS-PET will initially be deployed as part of the Federated Data Platform (FDP) programme.

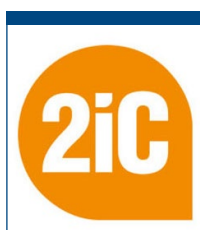


## Policing Productivity Review calls for greater investment in innovative technology

**DALE PETERS | UKHOTVIEWSEXTRA | 21 NOVEMBER 2023**



The Policing Productivity Review, published yesterday, highlights the critical role technology must play in enhancing police productivity and improving the outcomes policing delivers for the public. It forms part of the UK Government's wider Productivity Programme. The Review was commissioned by the Home Office in August 2022. The department asked the National Police Chiefs' Council (NPCC) to conduct an independent review and make recommendations on how to improve effectiveness and productivity in policing.



## 2iC: Big opportunities in battlefield interoperability

**GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 13 NOVEMBER 2023**



It's been 18 months since I last met up with Graham Booth, CEO, and co-founder of 2iC, one of our early Little British Battlers (see here and work back), and a provider of digital interoperability software. A lot has happened for the company in that time. From new office premises, to doubling the size of its employee base, to becoming increasingly strategic. And, as they say, the truth is in the numbers. The company is on track to deliver over £1m of revenue in its latest financial year.





## International expansion fuels Kainos's growth

**DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 13 NOVEMBER 2023**

A 22% yoy increase in sales outside the UK in the first half of FY24 lifted overall revenue for the period at Kainos to £193.2m. The 8% constant currency (ccy) rise in firm-wide turnover for the six months ended 30th September was accompanied by an even better bottom line improvement. Adjusted profit before tax was up by 11% yoy (19% at ccy) to £37.9m. This drove the associated margin ahead by 100 bps against the same period in the prior FY to 20%. There was positive news too in terms of the contracted backlog of work which was up by 6% yoy to £327m at the end of H124.



## TechnologyOne: Connected systems for seamless digital experiences

**CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 8 NOVEMBER 2023**

TechMarketView recently sat down with TechnologyOne's Leo Hanna (Executive Vice President, UK) and Ian Owen (Industry Director, Public Sector) to talk about the momentum the Australian-headquartered company is seeing with its 'SaaS Plus' ERP offer in the UK, and how shifts in the education and local & regional government markets are affecting customer demands (and how to meet them). TechnologyOne describes SaaS Plus as its 'Solution-as-a-Service' offering, but that's not the whole story. It's all part of the company's approach of "de-productising" ERP and thinking about the desired outcomes in a broader sense.



## AI Safety summit concludes, but was it a success?

**SIMON BAXTER | UKHOTVIEWSEXTRA | 3 NOVEMBER 2023**

With the AI Safety Summit concluded there were some interesting developments but the discussion on many key topics remain largely unresolved. This was to be expected given the summit focused on a more long-term perspective (Frontier AI) than that of immediate challenges. One of the first statements that came out of the summit was the announcement of The Bletchley Declaration on AI safety, which sees 28 countries agreeing to the urgent need to understand and collectively manage potential risks, through a new joint global effort to ensure AI is developed and deployed in a safe, responsible way.



## Education Suppliers, Trends, and Forecasts 2023-2026

**CRAIG WENTWORTH | REPORT | 31 OCTOBER 2023**

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 2022, 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.



## UK Applications Operations Market: Suppliers, Trends and Forecasts 2023

**DUNCAN AITCHISON | REPORT | 30 OCTOBER 2023**

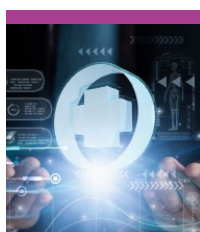
This report details TechMarketView's latest market size and growth data for UK Applications Operations services. It provides expert analysis of the key trends that are shaping the market, providing insights for suppliers operating in this segment. The report also contains the Top 20 Supplier Ranking (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.



## Data Insights - Solving the UK's productivity puzzle?

**TANIA WILSON | REPORT | 29 OCTOBER 2023**

In recent years, the UK economy has experienced historically low unemployment. The resulting labour shortages have led organisations to seek a higher rate of output through improved workforce productivity. But with the UK in the grip of a prolonged period of depressed productivity growth (known as the Productivity Puzzle), it is far from clear how such improvements can be achieved. Yet, despite the UK's poor track record on productivity growth, the UK software and IT services (SITS) market experienced its highest annual rate of growth in 2022, up 12.2% year-on-year, valuing it at almost £68bn.



## Health Suppliers, Trends, and Forecasts 2023-2026

**DALE PETERS | REPORT | 27 OCTOBER 2023**

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 2022, 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.





## Data Insights - UK HyperAutomation Market Forecasts

**MARC HARDWICK | REPORT | 27 OCTOBER 2023**



This HyperAutomation Data Insights report is the third in a series of reports looking at the UK Software and IT Services (SITS) automation market. This report is designed to help readers understand the market opportunity and scale of investment flowing into HyperAutomation, and which segments of the market – be that technology, process or industry sector – offer the greatest market potential. The report offers detailed market forecasts across three segmentations for the period 2023 to 2026 allowing readers to understand the current and future size of the opportunity and challenges posed by HyperAutomation.



## Microsoft Cloud fuels growth as Copilot release imminent

**SIMON BAXTER | UKHOTVIEWSEXTRA | 25 OCTOBER 2023**



Microsoft is off to a strong start in Q1, driven by continued strength in its Cloud business, with the pending release of its workplace Copilot solution just around the corner, and the closing of the acquisition of Activision Blizzard, both looking like strong tailwinds moving forwards. Overall revenue for Q1 was \$56.5bn, up 12% in constant currency, Operating income was \$26.9bn up an impressive 24%, though the company has reduced total headcount, which is 7% lower than a year ago. Revenue for Productivity and Business Processes was \$18.6bn. Growth continues to be driven by healthy renewal execution and strong E5 momentum.



## The impact of quantum computing on law enforcement

**DALE PETERS | UKHOTVIEWSEXTRA | 24 OCTOBER 2023**



Europol has published a new report on the impact of quantum computing and quantum technologies on law enforcement. The report, which was authored by the European Commission's Joint Research Centre (JRC), Europol's European Cybercrime Centre (EC3), and the Europol Innovation Lab, warns the technology poses a serious threat to security but could also bring significant advancements to policing and wider law enforcement agencies. It highlights the impact of quantum computing on cryptography, including 'store now, decrypt later', password guessing, digital forensics, and post-quantum cryptography.



## techUK's 2023 Cyber Innovation Den

**SIMON BAXTER | UKHOTVIEWSEXTRA | 16 OCTOBER 2023**



techUK recently held its fifth Cyber Innovation Den, with 10 different Cybersecurity start-ups and SME's short-listed to pitch their businesses, each vying to be chosen as the winner, as well as demonstrate how they stand out in an increasingly competitive and crowded cybersecurity supplier landscape. The UK has proven to be a great environment for creating innovative startups and we continue to see significant investment into early-stage innovation, as venture capital and corporate backed funds increasingly look to find the next disruptive players, especially in the cybersecurity space.



## UK BPS Operations Market - Suppliers, Trends, and Forecasts 2022–2026

**MARC HARDWICK | REPORT | 5 OCTOBER 2023**



This report details TechMarketView's latest market size and growth data for the UK SITS Business Process Services (BPS) Operations market. It provides expert analysis of the key trends that are shaping the market, providing insights for BPS suppliers. There are also recommendations and advice for vendors, making this research both informative and practical. In addition, the report contains a Top 20 Supplier Ranking by UK BPS Operations revenue, together with commentary on the up-and-coming players making noteworthy progress in this space.



## Government's productivity drive: civil service headcount focus

**GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 4 OCTOBER 2023**



A Government productivity drive has been on the cards for a while. Indeed, at the beginning of the summer, Chancellor Jeremy Hunt, announced a Productivity Review, being led by Chief Secretary to the Treasury, John Glen. Expected in the autumn (so any time from now), it has yet to be published. However, at the Conservative Party Conference being held in Manchester, which has so far been dominated by the future of HS2, Prime Minister Rishi Sunak is likely to use the final day of the conference to announce some initial steps.



## Stimulating the Future of Police Technology

**DALE PETERS | UKHOTVIEWSEXTRA | 4 OCTOBER 2023**



The annual Police Digital Summit took place in Brighton last month. More than 500 people from across the world of policing, including representatives from many of the UK police forces and the supplier community, came together to discuss the progress and prospects associated with digital technologies in the sector. Ian Bell, Chief Executive at Police Digital Service (PDS), said: "This year's summit was the most successful one yet and I'm delighted to see how the event grows each year. It was a great opportunity to bring together colleagues across policing and technology and discuss how we can work together to enable UK policing to safely harness technology to protect the public."