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Local Government Services Market – A Liberata perspective

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MARC HARDWICK | UKHOTVIEWSEXTRA | 31 JANUARY 2024

Whilst Local Government will remain under huge financial pressure for the foreseeable future, the sector will continue to look towards SITS suppliers as a source of innovation and as a catalyst for transformation. Business Process Services (BPS) supplier Liberata has been one of the best performing SITS suppliers in the Local Government market of late and to help understand how the market is developing we caught up recently with Charlie Bruin, long term CEO of OSUK Professional Services (the parent company of Liberata) to understand his perspective on the sector, and how his firm is adapting its service offer to best address what are increasingly complex client needs.



Financial Services Predictions 2024

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JON C DAVIES | REPORT | 24 JANUARY 2024

This report contains our predictions for Financial Services SITS in 2024. In light of the current fervour around AI, several of the predictions specifically focus on AI adoption in the context of UK Financial Services. In addition, our predictions are designed to highlight some of the potential areas of growth and opportunity in the marketplace over the next twelve months.



Orange Cyberdefense: Accelerating international scale and synergies

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SIMON BAXTER | REPORT | 22 JANUARY 2024 | TSV

Orange is still a well-known brand across the European continent, with Orange Business providing cloud, networking, workplace and infrastructure solutions for a range of organisations such as Carrefour, Maersk and Siemens. Over the past 8 years Orange Cyberdefense has built itself through a mixture of acquisitions and organic growth, with siloed geographic units integrated into the broader business. In its next phase of growth it is focusing on international scalability and achieving profitable growth to fuel reinvestment. In this report you can read more about Orange Cyberdefense's plans for growth and further analysis of its portfolio and product roadmap.



Technology firms pursue African opportunities

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JON C DAVIES | UKHOTVIEWSEXTRA | 22 JANUARY 2024

According to forecasts from the International Monetary Fund (IMF), in 2024, six of the top 10 performing economies in the world are forecast to come from Sub-Saharan Africa. Whilst South Africa and Nigeria are two of the largest established economies in the region, other developing nations appear to have immense potential. Kenya in particular is the focus of growing attention. Kenya boasts one of Africa's highest GDPs and the country is already considered to be one of Africa's main technology hubs. In 2021, Kenyan start-ups secured \$370m in funding (excluding grants, prizes, and non-equity raises) around 7% of Africa's total funding for that year.



Impact of Post Office Inquiry on Fujitsu and wider IT industry

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GEORGINA O'TOOLE AND KATE HANAGHAN | UKHOTVIEWSEXTRA | 17 JANUARY 2024

The response to the ITV drama, Mr Bates vs The Post Office, has been immense. Widespread public outrage forced both Paula Vennells to hand back her CBE and Prime Minister Rishi Sunak to announce new legislation to exonerate the people whose lives have been so deeply impacted. Meanwhile, the Post Office Horizon Inquiry is ongoing, meaning much work is yet to be done to ascertain precisely where accountability lies. On Tuesday (16th January), there was a "non-inquiry" parliamentary committee session where Paul Patterson (Director, Fujitsu Services Ltd and CEO Europe) answered questions pertaining to Fujitsu's involvement.



Local & Regional Government Suppliers, Trends, and Forecasts 2023-2026

 [READ MORE](#)

CRAIG WENTWORTH | REPORT | 12 JANUARY 2024

This report provides TechMarketView's view of the UK Local & Regional Government Software and IT Services (SITS) market from a market and supplier perspective. The report includes TechMarketView's Top 10 Local & Regional Government 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.



US tech surges in 2023 - whilst UK stocks stutter

TANIA WILSON | UKHOTVIEWSEXTRA | 11 JANUARY 2024

If 2022 was the year when tech stocks fell to earth, then 2023 was the year in which they took flight once more, with the US tech-focused Nasdaq finishing the year up 43% and not far off its 2021 peak. Interest rate increases during 2021 and 2022 took their toll on tech shares more than those of other sectors because a greater proportion of the value in technology business is predicated on future cashflows. These future cashflows are discounted back to arrive at today's valuation. The higher the prevailing interest rate, the heavier that discount.



CGI to continue working on UK's National Security Vetting System

GEOGRINA O'TOOLE | UKHOTVIEWSEXTRA | 10 JANUARY 2024

CGI has won a £47.5m, four-year, contract with the Cabinet Office for the provision of services to host, manage, maintain, and run the UK Security Vetting (UKSV) Agency's National Security Vetting System (NSVS). The contract will run from 1st March 2024 to 29th February 2028. Security Vetting provides assurance on individuals working with government assets and classified information; the three most common types are Counter-Terrorist Checks (CTCs), Security Checks (SCs) and Developed Vetting (DVs). The Ministry of Defence (MOD) accounts for 56% of all security clearance requests.



Financial Markets SITS, Trends and Forecasts

JON C DAVIES | REPORT | 3 JANUARY 2024

This report analyses the business and technology trends impacting the Financial Markets sector in the UK and includes TechMarketView's detailed forecasts for expenditure within the associated software and IT services (SITS) market.



Immersive Customer Experiences: Progress, Possibilities and Prognosis

DUNCAN AITCHISON | REPORT | 22 DECEMBER 2023

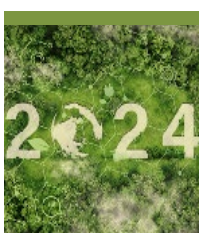
Customer Experience (CX) is one of the most dynamic and significant parts of the SITS market. Expectations regarding the transformative impact of immersive technologies in this arena are high and the ability to deliver immersive experiences is already an essential part of the kit bag for suppliers seeking 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

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

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

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

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

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 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

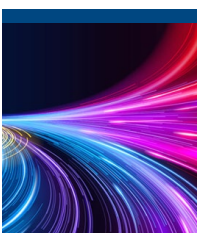
TechMarketView's update on the outlook for the UK Software and IT Services market. In this report we update our forecasts published in June 2023 to reflect current economic conditions and market activity in Q3 and Q4.



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

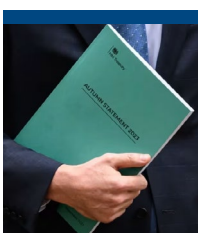
Merger and acquisition (M&A) activity in the UK software and IT services (SITS) sector continued to decline in Q3 2023. This is according to data from Silverpeak, the mid-market technology specialists that represent European growth businesses in M&A and financing transactions. There were 62 acquisitions 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.

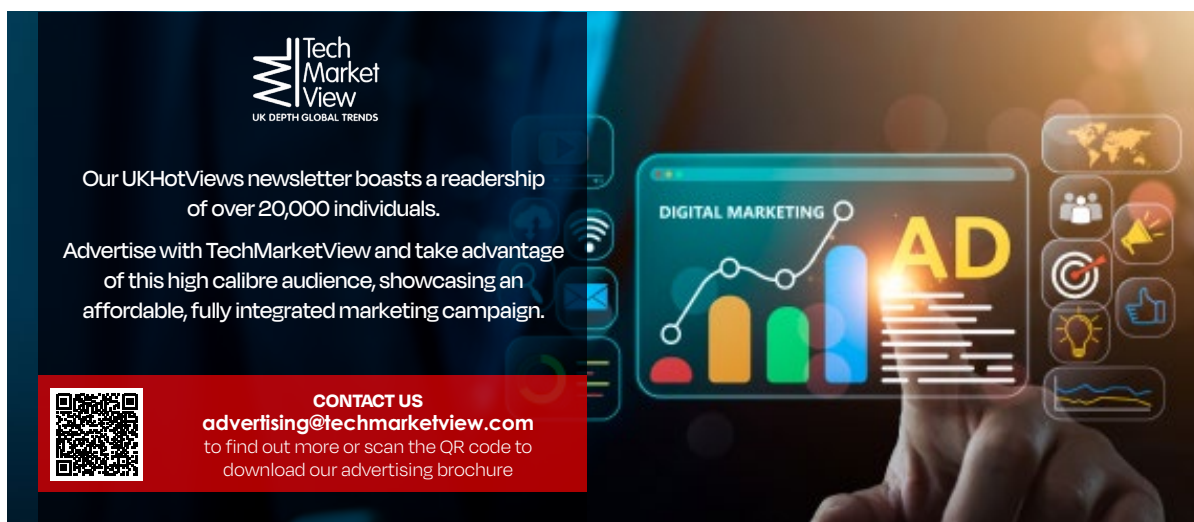


AI Safety summit concludes, but was it a success?



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.



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