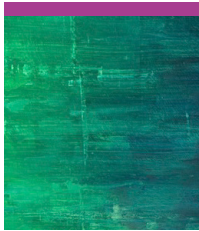




Mastek GoCodeGreen
TOTALLY SUST #8: An EPC rating for software
How GoCodeGreen is helping Mastek lower the carbon footprint of its software development lifecycle

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NAO: Government must act now to build cyber resilience

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DALE PETERS | REPORT | 30 JANUARY 2025

This short report discusses the NAO's findings and recommendations regarding government cyber security, considers the current state of cyber resilience in the public sector, and provides a view on the likely impact on supplier opportunities.



CGI to buy BJSS: UK headcount boost of 40%

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GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 29 JANUARY 2025

CGI is to acquire BJSS, the Leeds-based IT and business consultancy. Once the necessary regulatory approvals are cleared, the deal is expected to close next month. This is significant. More than 2,400 BJSS employees will join CGI's 6,000-strong employee base in the UK, i.e., growing headcount by 40%. CGI's acquisition of SCISYS in 2019 is dwarfed in comparison; it added 'just' 670 to the headcount. CGI highlights that the move will "accelerate CGI's UK-wide expansion, deepening the firm's presence across key commercial industry sectors as well as the public sector."

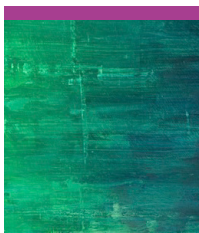


DeepSeek – is all the fuss warranted?

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SIMON BAXTER | UKHOTVIEWSEXTRA | 28 JANUARY 2025

Chinese AI supplier DeepSeek recently caused an uproar across stock and tech markets. Tech stocks, particularly those with AI chip exposure nosedived, with Nvidia down 17% losing c.\$600bn in market value. Data centre companies also fell between 8-15%. So why now, what was all the fuss about? Well, the commotion was caused by the release of a new AI reasoning model (R1) by DeepSeek, that according to various benchmarks (which you have to take with a pinch of salt) promise to deliver capabilities on par, if not in excess of, OpenAI's latest models at significantly lower cost, sparking concerns that demand for AI compute (i.e. GPU/Chips) would fall significantly.

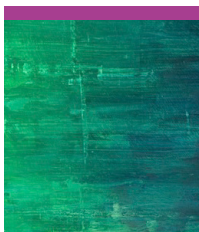


UK Public Sector SITS Market Outlook Update 2024

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DALE PETERS | REPORT | 24 JANUARY 2025

TechMarketView's update on the outlook for the UK Public Sector Software and IT Services market from 2024 to 2027. In this report we revise our forecasts published in June 2024 to reflect both market activity in the second half of the year (including the impact of the general election) and the current prospects for trading conditions, considering factors such as financial volatility (e.g., cost of borrowing), geopolitical uncertainties, the reorganisation of public services, and a lack of clarity about budget allocations and strategic direction.

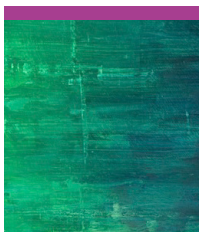


Plans and progress of UK government AI adoption

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SIMON BAXTER | REPORT | 22 JANUARY 2025

The UK government released two new reports in January 2025, the 'State of digital government review' and 'A blueprint for modern digital government', along with several further press releases, all of which further outlined the UK governments ambitions and aspirations for AI technologies. This report analyses the current progress of the UK governments AI pilots and plans to accelerate adoption across public departments and the civil service. It also explores some of the wider implications for uplifting digital maturity such as challenges surrounding data infrastructure and security, as well as our thoughts on what opportunities these create for UK SITS suppliers.



The State of Digital Government and a Blueprint for Change

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DALE PETERS | REPORT | 22 JANUARY 2025

The government's approaches to leadership, structure, measurement, talent and funding do not do justice to the potential of digital technology. This is the conclusion of the State of Digital Government Review, commissioned by the Department for Science, Innovation and Technology (DSIT), that highlights how, despite some notable successes, the public sector continues to be held back by legacy technology, outdated processes, and resource shortages. In response to these findings, the government has published a Blueprint for a Modern Digital Government, setting out its vision for the future and an outline of its plan to get there. This report reviews the two documents and provides TechMarketView's opinion of their likely impact on the public sector and its technology suppliers.



UK SITS Market Outlook Update 2024

DUNCAN AITCHISON | REPORT | 21 JANUARY 2025

TechMarketView's update on the outlook for the UK Software and IT Services market from 2024 to 2027. In this report we revise our forecasts published in June 2024 to reflect both market activity in the second half of the year and the current prospects for trading conditions.

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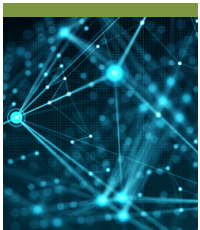
Disruptors & Innovators: AI in sustainability

CRAIG WENTWORTH AND ANGELA EAGER | REPORT | 21 JANUARY 2025

This report looks at ten disruptive and innovative suppliers in the field of AI in sustainability whose offerings leverage the technology across a number of use cases. Some bring sector-specific applicability – in manufacturing, energy, agriculture, etc.; others have more general appeal, with focus on widespread challenges around ESG reporting, strategy, and planning, for example.

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Totally Sust #7: Sustainability tracking and circularity

CRAIG WENTWORTH | PODCAST | 9 JANUARY 2025

The seventh episode in TechMarketView's Totally Sust podcast series features an interview with Mathias Boomah (Head of Automotive Germany for Eviden) and Christoph Sturnardle (Director of Technology Adoption at IOTA). Here subscribers to SustainabilityViews can hear the full version of their conversation with the research stream's lead analyst Craig Wentworth about the Eviden Digital Passport, a blockchain-based solution (powered by IOTA technology) which can be used to track sustainability credentials in the circular economy.

SV

 **LISTEN HERE**



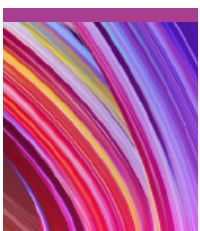
2024 Artificial Intelligence (AI) Recap

SIMON BAXTER | UKHOTVIEWSEXTRA | 8 JANUARY 2025

What a year 2024 was for AI, we saw some significant advancements across the market, including new AI models (of many shapes and sizes), a boost in AI funding for upcoming startups, government action on key issues such as copyright and crucially a lot more examples of practical real-world AI applications across nearly all industries. I thought it would be good to look back on some of the major announcements from 2024 and ponder what they might mean for the UK SITS market as we begin 2025.

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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

KATE HANAGHAN AND KATY RING | 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

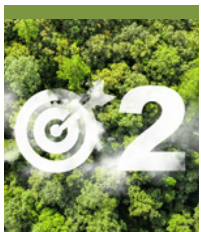
Jon's latest report contains TechMarketView's predictions for UK Financial Services SITS in 2025 and is designed to add context to the current fervour around AI by highlighting some of the key areas of focus within the sector. Our latest Financial Services Predictions are also intended to highlight some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



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).



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.



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 Operations

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.

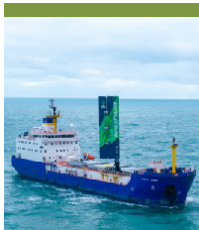




COP29: Money, markets, and momentum

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

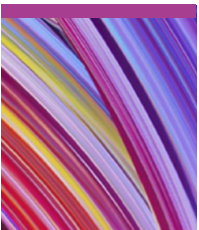
The sixth episode in TechMarketView's Totally Sust podcast series features an interview with Di Gilpin (Founder & CEO at Smart Green Shipping) and Henry Smith (Chartering Manager at MOL, the Mitsui O.S.K. Lines shipping business). Listen here to the full version of their conversation with the research 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

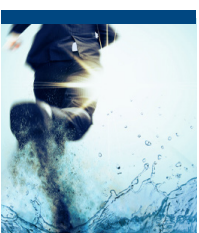
This report provides TechMarketView's view of the UK Local & Regional Government Software and IT Services (SITS) market from a market and supplier perspective. It includes our Top 10 Local & Regional Government SITS rankings for 2023, as well as our view of those suppliers that are 'on the rise' and, 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

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

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 | UKHOTVIEWEXTRA | 22 NOVEMBER 2024

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

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

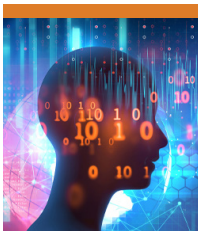
This report provides insights into the key business and technology trends impacting the Financial Markets sector in the UK. It includes an analysis of spending patterns within the associated software and IT services (SITS) market and includes TechMarketView's latest forecasts for expenditure through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



MPs debate live facial recognition technology

DALE PETERS | UKHOTVIEWSEXTRA | 15 NOVEMBER 2024

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).





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 Soloman 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.



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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