

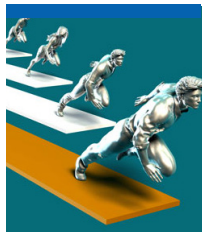


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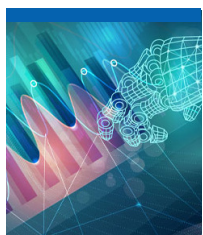


UK SITS Supplier Rankings 2024

TECHMARKETVIEW ANALYST TEAM | REPORT | 4 JULY 2024

TechMarketView's authoritative annual keynote report ranking the leading suppliers of Software, IT Services and Business Process Services to the UK market.

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Market Trends and Forecasts 2024

TECHMARKETVIEW ANALYST TEAM | REPORT | 4 JULY 2024

TechMarketView's annual report on the trends and forecasts in the UK Software and IT Services market.

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From peripheral to core business ops – sustainability beds in

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 28 JUNE 2024

We're looking forward to publishing the Q1 2024 edition of the Sustainability Technology Activity Index next month. To prepare the Index each quarter, we examine the sustainability-related activities from our worldwide watchlist of over 1,400 companies (roughly 80% being software and IT services suppliers; the remainder, tech-user organisations with a sustainability angle). Early findings so far, as we crunch the numbers on the 350+ sustainability technology activities we logged globally in the first quarter of the year, reveal a picture that's – in part – an evolution from the last Index report (which took in data from Q4 2022), but with some notable changes in the landscape for 2024.

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Access unveils its AI-powered HR solution

DALE PETERS | UKHOTVIEWSEXTRA | 26 JUNE 2024

The Access Group unveiled a new AI-enhanced software solution, Access Evo, at the recent CIPD Festival of Work. TechMarketView spoke to Charles Butterworth, Managing Director Access People, and Oliver Quayle, Senior Director Access Platform, about the upcoming launch and how they think it will support HR professionals. Access Evo will draw upon Access Workspace, the company's cloud-based single sign-on platform, to ensure customers have a common user experience, with the initial focus being on supporting HR professionals. Access People, which is one of the Group's largest divisions, will roll out PeopleHR Evo, its HR solution for SMEs, and PeopleXD Evo.

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SNP and Plaid Cymru manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 20 JUNE 2024

Part 3 of TechMarketView's General Election 2024 UKHotViewsExtra manifesto coverage looks at the pledges of the Scottish National Party (SNP) and Plaid Cymru. The SNP and Plaid Cymru manifestos have many similarities, including the desire for independence, fairer funding, increased investment in public services, a more progressive tax system, and changes to the benefits system. There is an acceptance that without independence or further devolution, many of these ambitions will be restricted to demands on the UK Government. There is also a focus on the green economy and its role in supporting the transition from heavy industries.

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DXC leverages its banking heritage for BPS success

JON C DAVIES | UKHOTVIEWSEXTRA | 18 JUNE 2024

As the banking sector continues to evolve, customer advocacy and competitive threats remain high on the agenda, alongside technology modernisation and business process change. Despite recent high interest rates having led to healthy net margins for many banks, for the most part the sector remains cautious about its prospects and there is a widespread focus on efficiency and cost control. Meanwhile, artificial intelligence [AI] is seemingly taking the world by storm and many banks are still at something of a loss as to how to best capitalise on the wealth of data they hold.

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Reform, Lib Dem and Green manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 18 JUNE 2024

Part 2 of TechMarketView's General Election 2024 manifesto coverage. In this article we look at the pledges of Reform UK, Liberal Democrats and Green Party. The manifesto promises of these three parties span a wide range of approaches to taxation, spending and policy focus. Despite the differences, there are some common themes relating to the role of technology. The Liberal Democrats and Green Party both emphasise the importance of ethical and inclusive technology, particularly in relation to AI, and propose introducing a Digital Bill of Rights.



Labour and Conservative manifestos: tech implications

DALE PETERS | UKHOTVIEWSEXTRA | 17 JUNE 2024

With most parties having published their General Election 2024 manifestos, TechMarketView looks at the implications for software and IT services suppliers. Here we look at the pledges of the Conservatives and the Labour Party. Both parties have a focus on infrastructure investment, accelerating innovation, community-based healthcare and reducing crime, particularly fraud. Technology plays a role in these plans, but it is not at the forefront of proposals for either party. How these proposals will be funded is given superficial treatment and in both cases relies on an optimistic view of economic growth and an ability to raise funds through a clampdown on tax avoidance.



Capita's big new plan

MARC HARDWICK | UKHOTVIEWSEXTRA | 14 JUNE 2024

The recent Capital Markets Day presentation was the first opportunity for new Capita CEO Adolfo Hernandez to outline to the 'City' how he plans to fix profitability and get the Group expanding in the all right areas. Hernandez has been on board for less six months but has put together a decent assessment of where the problems lie, a coherent approach to focusing the business on core and growing activities, and a credible commitment to drive the technology enablement of Capita's service delivery.



Spotlight on Einstein AI and Data Cloud at Salesforce World Tour

SIMON BAXTER | UKHOTVIEWSEXTRA | 7 JUNE 2024

Yesterday I attended Salesforce World Tour in London, with the CRM supplier heavily pushing its latest AI features, as it seeks to be a central platform for company data and interactions across Sales, Service and Marketing. The UK is Salesforce's second largest market outside North America, with a broad industry focus, and its flagship UK event certainly attracted the crowds! Salesforce was keen to show off both its latest innovations and its close relationship with UK customers, most notably car manufacturer Aston Martin who featured heavily in the keynote.



AI in Supply Chain

MARC HARDWICK | REPORT | 5 JUNE 2024

Global supply chains have faced unprecedented challenges since the pandemic, further complicated by resource shortages, geopolitical conflicts, energy crises, and inflation. This has forced a shift from traditional cost and service quality optimization towards prioritizing resilience, sustainability, and intelligence. Recently, there's been a surge of interest and investment in AI-led supply chain solutions. Building on TechMarketView's 2022 Supply Chain Resilience reports, this analysis explores how AI solutions, including both traditional machine learning and generative AI, can address critical challenges in global supply chains.



TechMarketView Market Readiness Index 2024: The road to AI

TMV ANALYST TEAM | REPORT | 31 MAY 2024

TechMarketView's highly anticipated 5th Market Readiness Index (MRI) report "The road to AI: Mapping the readiness of the Top 10 IT & Business Process Services Suppliers" is now available to download. Accenture, Capgemini, Cognizant, and TCS have emerged as the Leading Pack. The MRI report provides in-depth scoring and profiling of the largest players in the UK market, detailing their ability to support clients on their AI journey. The Leading Pack are those that have scored above the contingent average in all six segments of the MRI.



UK tech market faces slowdown as general election announced

DALE PETERS | UKHOTVIEWSEXTRA | 23 MAY 2024

Six weeks from today, the UK will be heading to the polling stations again. Speaking in Downing Street yesterday, a rain-soaked, D:Ream-serenaded Prime Minister Rishi Sunak called a general election to be held on 4 July. The campaign will be one that pitches change against stability. The Prime Minister said the country needs to "decide whether we want to build on the progress we have made or risk going back to square one with no plan and no certainty." Labour Party leader, Keir Starmer, said, "That opportunity for change is what this election is about". The election is also set to be one that feels more personal and presidential than previous campaigns.





Will AI help DXC to finally turn the corner?

JON C DAVIES | UKHOTVIEWSEXTRA | 22 MAY 2024

Announced last week, DXC Technology's latest annuals results drew a line under another twelve months of falling revenue for the US IT services giant. On the plus side, DXC's latest full-year financials also revealed a small profit of \$86m, which was a welcome improvement on the \$566m loss reported for the previous fiscal. However, despite the fact that DXC has now seen its turnover shrink every year since its formation in 2017, the latest numbers will have made disappointing reading for DXC's long suffering investors, as FY24 was meant to have been the year when the much vaunted "pivot to growth" would materialise.



HGS UK starts to step up

DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 17 MAY 2024

Customer experience specialist Hinduja Global Solutions (HGS) has its sights set squarely on building a significant position in the UK. The company currently sits just outside TMV's Top 30 in the UK BPS market but, with \$500m still in its war chest from the sale of Healthcare division in 2021 (see here), is firmly on our list of "ones to watch" in this arena. Last year Patrick Elliott was appointed as the new UK CEO charged with developing and implementing a strategy to drive higher growth. We recently sat down with Patrick to discuss the progress, priorities and ambitions in this region.



Manufacturing sector gets fired up

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 17 MAY 2024

A chink of light in an otherwise gloomy tech market

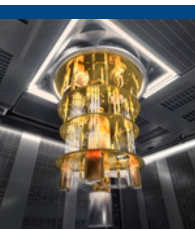
In this edition of TechMarketView's 'View from the Chief Analyst', Georgina O'Toole looks back over the last month of TechMarketView analysis – in UKHotViews, UKHotViewsExtra, and reports – to identify some of the most prominent trends we are seeing in the UK tech market. This month, Georgina highlights a chink of sunlight in an otherwise gloomy reporting period. While the dominant Q1 24 message from suppliers was of a growth slowdown, one industry stood out: the Manufacturing Sector. It proved a fertile hunting ground for a wide range of suppliers.



A new era for Civica

DALE PETERS | UKHOTVIEWSEXTRA | 15 MAY 2024

Earlier this month, Blackstone completed its acquisition of Civica from Partners Group, providing the company with the resources to pursue its goal of becoming a global GovTech champion. The alternative asset management firm announced it had entered into a definitive agreement to acquire the London-headquartered business in November 2023 (see Blackstone to acquire Civica). At the time of the announcement, Blackstone said: "Civica is a leader in the 'GovTech' space, with an excellent brand and an enviable market position and we are excited to be partnering with a stellar management team to help the business in this next phase of growth."



Is the UK Transport industry ready for Quantum?

SIMON BAXTER | UKHOTVIEWSEXTRA | 2 MAY 2024

Simon recently attended a TechUK event on Quantum readiness in Transportation, which explored how Quantum computing is already being trialled across the transportation industry and some of the many challenges the industry faces in deploying emerging technologies. Speakers at the event included the Department for Transport (DfT), Network Rail, Quantum middleware provider Q-CTRL and Quantum supplier D-Wave Systems. This article shares some takeaways from the event and my conversations with several attendees, who spanned government departments, technology providers and end users.



RM and The International Baccalaureate announce partnership

DALE PETERS | UKHOTVIEWSEXTRA | 2 MAY 2024

RM plc has secured a significant expansion to its longstanding partnership with The International Baccalaureate (IB). The new arrangement will see the Abingdon-headquartered EdTech business support IB's drive towards digital assessment. IB was founded in Geneva, Switzerland, in 1968. The non-profit foundation provides a curriculum framework through four educational programmes covering learners aged 3-19, which aims to deliver both breadth and depth of knowledge. Currently, there are more than 1.9 million IB students across 5,684 schools in 160 countries.



Totally Susted Podcast: Using AI to better understand climate policy data

CRAIG WENTWORTH | PODCAST | 29 APRIL 2024

In the latest episode in TechMarketView's series of Totally Sust podcasts, SustainabilityViews' lead analyst, Craig Wentworth, interviews Henry Franks (Chief Technology Officer at Climate Policy Radar) about how they're using AI to extract value and meaning from 100,000s pages of climate regulations and data the world over—and what uses this insight is being put to (and by whom). The discussion ranges around the issues of having data locked up in PDFs (in multiple languages), the tools required to provide interoperability across myriad sources, and how (and why) Climate Policy Radar makes its data, analyses and platform available for others to use and build on.





View from the Chief Analyst: CMA and the perceived power of GAMMA(N)

HVX [READ MORE](#)

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 25 APRIL 2024

The Competition & Markets Authority (CMA) has a headache and it's shaped in the form of GAMMA – Google, Amazon, Microsoft, Meta, and Apple. Adding Nvidia to that list makes GAMMAN. The CMA is finding that it must pedal increasingly hard to keep up with – and fully understand – developments in the Digital Market; one where the combination of these firms has significant market share and has the potential to wield substantial influence. The CMA Digital Markets Unit already has an investigation underway into competition in the Public Cloud Infrastructure market.

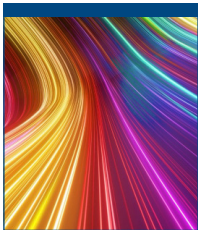


Growth Capital Partners grows its technology footprint

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TANIA WILSON | UKHOTVIEWSEXTRA | 14 APRIL 2024

Growth Capital Partners (GCP) is a UK-based Private Equity (PE) firm, specialising in providing investment to high-growth and founder-led technology and service businesses across the UK and Ireland. The firm was founded in 2009, after a partner-led buy-out from Close Brothers. Many of its then eight portfolio companies were in the industrial products and services sectors, a strategy which has evolved over the 25 years of the firm's activities. Since that 2009 buy-out, the firm has launched three further funds, the most recent of which was Fund V, in 2021.



Public Sector Supplier Prospects 2024 and Beyond

PSV [READ MORE](#)

DALE PETERS | REPORT | 10 APRIL 2024

This report should be read alongside our UK Public Sector Software and IT Services (SITS) Suppliers, Trends & Forecasts 2023-2026 report; UK Public Sector Predictions 2024, and individual subsector reports on the Central Government, Defence, Health, Local & Regional Government, Police, and Education SITS markets. In the following pages, we look at the Top 20 suppliers in the UK public sector SITS market. We review recent progress, look at the key market challenges and assess what suppliers need to do to maximise their potential in 2024 and beyond.



Version 1: Responsible AI and societal impact driving AI strategy

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SIMON BAXTER | UKHOTVIEWSEXTRA | 7 APRIL 2024

Dublin headquartered Version 1 has a 25-year history of deploying IT services and software to the UK&I market. It has grown from c.1,600 people and revenue of €141m in 2020, to over 3,200 people and €350m in revenue in 2023. Like many other UK&I technology suppliers, Version 1 is looking to AI to drive the next stage of its growth. I recently caught up with CTO Brad Mallard, to understand more about how the company is developing AI solutions for customers, embedding AI across its existing business and driving internal transformation.



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