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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.

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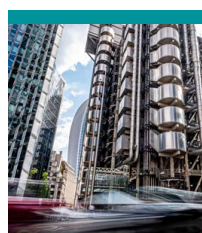


UK SITS Solutions Market Suppliers, Trends, and Forecasts 2022–2026

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.

TSV [READ MORE](#)



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.

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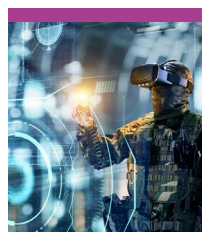


IndustryViews Corporate Activity Q3 2023

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.

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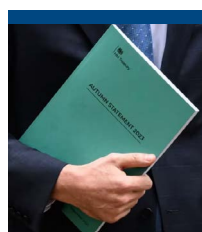


Defence Suppliers, Trends, and Forecasts 2023-2026

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.

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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.

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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.





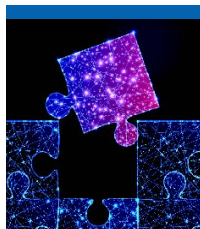
UK Applications Operations Market: Suppliers, Trends and Forecasts 2023

TSV

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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?

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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.



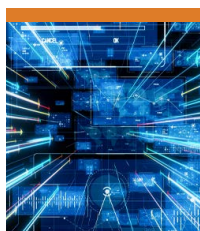
Health Suppliers, Trends, and Forecasts 2023-2026

PSV

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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

TSV

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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

HVX

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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

HVX

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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

HVX

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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."

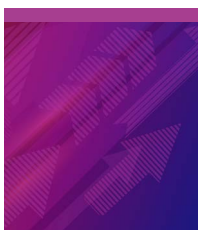


DXC goes "back to the future" for insurance success

JON C DAVIES | UKHOTVIEWSEXTRA | 3 OCTOBER 2023



Jon recently spent an interesting couple of days at the DXC Connect Insurance Executive Forum in London. The event was the last leg of a world tour by the US technology giant that had begun nine months ago and had taken in Australia, Singapore and the United States along the way. DXC Connect was also effectively a relaunch for DXC Technology's insurance business, which is worth around \$1.7bn in terms of annual revenue and remains one of the largest (if not the largest) such operations globally, employing around 20k people.

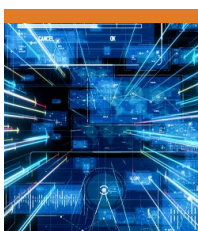


Central Government SITS Suppliers, Trends & Forecasts 2023-26

GEORGINA O'TOOLE | REPORT | 30 SEPTEMBER 2023



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



HyperAutomation - Pursuing productivity through digital transformation

MARC HARDWICK | REPORT | 29 SEPTEMBER 2023



HyperAutomation - pursuing productivity through accelerated digital transformation is the second in a series of reports looking at the UK Software and IT Services (SITS) automation market. This report defines, segments, and profiles the HyperAutomation market to help readers understand a landscape moving well beyond RPA deployment towards automations that are more strategic and by design. The UK automation scene remains a maturing market that continues to change and develop rapidly, with users, buyers and suppliers of associated solutions all struggling to surface maximum business value among the confusion and hype.



Arvato CRM Solutions – Differentiated growth through digital orchestration

MARC HARDWICK | UKHOTVIEWSEXTRA | 28 SEPTEMBER 2023



Berkshire-headquartered Arvato CRM Solutions remains one of the most important players in the UK Business Process Services (BPS) and Customer Experience (CX) sectors. It's also a business that we have not covered in detail for some time that has been going through a significant amount of change, with some key additions recently made to the management team. As such, Marc recently travelled down to Arvato CRM Solutions' new and extremely impressive headquarters in Datchet to meet James Towner, their Chief Growth Officer, Stephen Miller, the firm's IT & Innovation Director, and Mike Stewart, the Intelligent Automation Practice Lead.



Why Meta's property move may resonate with UK tech leaders

JON C DAVIES | UKHOTVIEWSEXTRA | 27 SEPTEMBER 2023

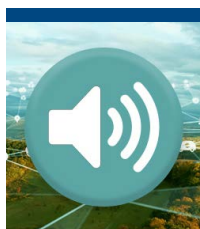
Global technology giant Meta, the parent company of Facebook and Instagram, has paid around £150m to buy itself out of the lease of one of its flagship London offices, in a move that reflects one of the unresolved challenges of the post-pandemic world. In 2021, Meta signed an eighteen-year lease on 1 Triton Square, a brand new state of the art office complex near Regent's Park, London, however the firm has never occupied the building. The amount paid to exit the contract is understood to be equivalent to around seven year's rent, meaning that Meta was willing to fork out this large amount to avoid having to pay for the subsequent eleven years.



BT Sustainability Festival: Improving data, reducing emissions

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 14 SEPTEMBER 2023

BT hosted its Sustainability Festival at the company's Adastral Park research and innovation campus in Suffolk yesterday, bringing together a wide range of sustainability-focused suppliers and end-users (there was even a sustainable farmers' market). Many of BT's partners were present to talk about their various initiatives designed to move customers into a more 'net zero state of mind' and improve the tools available to help them get there. Here we learn more about how suppliers such as BT, Johnson Controls, and SAP are looking to improve the data available to companies striving to get a handle on (and reduce) their carbon emissions.



PODCAST: Spotting sewage from space

CRAIG WENTWORTH | PODCAST | 13 SEPTEMBER 2023

TechMarketView has launched a new podcast series called Totally Sust to accompany the Sustainability Technology Activity Index, featuring interviews with key players in the sustainability technology space. In episode 1, Craig Wentworth talks to Mattie Yetta (Chief Sustainability Officer at CGI) and Donna Lyndsay (Strategic Market Lead for Environment & Sustainability at the Ordnance Survey) about their joint project using geospatial, AI, and IoT technologies that remotely detect and predict water pollution events. Listen to find out how this SEEDS Programme initiative can spot sewage from space!



UK Banking sector SITS Suppliers, Trends & Forecasts

JON C DAVIES | REPORT | 11 SEPTEMBER 2023

This report examines the business and technology trends impacting the UK Banking sector and incorporates a detailed analysis of SITS expenditure. The research includes spend forecast to 2026 and a ranking of the leading SITS vendors active in this sector.



Market Trends & Forecasts: UK Travel & Transportation*

REPORT | 8 SEPTEMBER 2023

TechMarketView's data and trends analysis for the UK Travel & Transportation market.

**Extract from our overall Market Trends & Forecast report.*

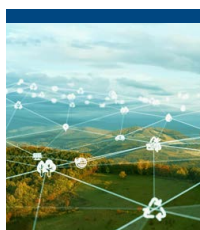


Market Trends & Forecasts: UK Telecoms, Technology, & Media*

REPORT | 7 SEPTEMBER 2023

TechMarketView's data and trends analysis for the UK Telecoms, Technology, & Media market.

**Extract from our overall Market Trends & Forecast report.*



TechMarketView Sustainability Technology Activity Index

CRAIG WENTWORTH | REPORT | 6 SEPTEMBER 2023

TechMarketView's Sustainability Technology Activity Index is part of a new stream of Sustainability research, due to be launched later in 2023. For details on how to purchase the report in the meantime (and information on the forthcoming stream), please contact Deb Seth on dseth@techmarketview.com or follow the link below to purchase the report directly via the website.





Market Trends & Forecasts: UK Energy & Utilities*

REPORT | 6 SEPTEMBER 2023

TechMarketView's data and trends analysis for the UK Energy & Utilities market.

**Extract from our overall Market Trends & Forecast report.*



Market Trends & Forecasts: UK Manufacturing*

REPORT | 5 SEPTEMBER 2023

TechMarketView's data and trends analysis for the UK Manufacturing market.

**Extract from our overall Market Trends & Forecast report.*



Market Trends & Forecasts: UK Retail & Wholesale*

REPORT | 4 SEPTEMBER 2023

TechMarketView's data and trends analysis of the UK Retail & Wholesale market.

**Extract from our overall Market Trends & Forecast report.*



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