RESEARCH SUMMARY
SEPTEMBER – NOVEMBER 2024

Tech Market View
UK DEPTH GLOBAL TRENDS

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BTEWSON@TECHMARKETVIEW.COM

TechMarketView

TECHMARKETVIEW PREDICTIONS 2025
SINK OR SPRINT
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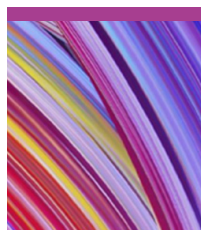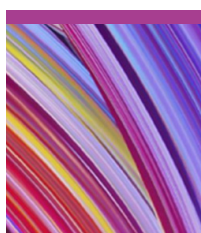

Defence SITS: Suppliers, Trends & Forecasts 2024
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GEORGINA O'TOOLE | REPORT | 29 NOVEMBER 2024

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
PSV   READ MORE

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.
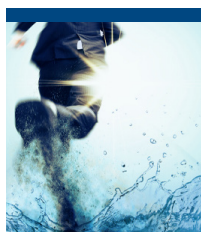

TechMarketView Predictions 2025
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TMV ANALYST TEAM | REPORT | 28 NOVEMBER 2024

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.

TechMarketView Research Theme 2025: Sink or Sprint
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GEORGINA O'TOOLE | REPORT | 27 NOVEMBER 2024

In seeking to sum up in a few words the key trends that we think will impact the UK tech market in 2025, TechMarketView has chosen its new research theme: **Sink or Sprint**. This launch paper explains why.

NECSWS + SSS: Integration and Innovation
HVX   READ MORE

DALE PETERS | UKHOTVIEWSEXTRA | 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
HVX   READ MORE

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.

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UK Financial Markets SITS, Trends and Forecasts 2024
**JON C DAVIES | REPORT | 18 NOVEMBER 2024**

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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

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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.
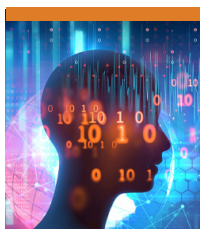
More than a Feeling: GenAI and Sentiment Analytics in CX
DUNCAN AITCHISON | REPORT | 15 NOVEMBER 2024

TSV | READ MORE

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**

HVX | READ MORE

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

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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.
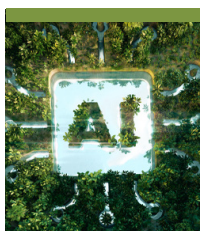
Managing the sustainable AI paradox: Harnessing AI while hitting sustainability goals
ANGELA EAGER | REPORT | 8 NOVEMBER 2024

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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).
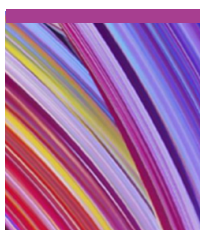
UK Health Suppliers, Trends & Forecasts 2024
PSV ANALYST TEAM | REPORT | 5 NOVEMBER 2024

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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).

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FD Technologies looks to the future
JON C DAVIES | UKHOTVIEWSEXTRA | 4 NOVEMBER 2024

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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

HVX READ MORE

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

HVX READ MORE

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.

Microsoft Q125: AI continues to boost Cloud revenues
SIMON BAXTER | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

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Microsoft posted a solid start to FY25 with its AI business on track to surpass an annual revenue run rate of $10 billion next quarter, which will make it the fastest business in the company's history to reach this milestone. AI (including its partnership and investment in LLM supplier OpenAI) remains central to Microsoft's plans across all areas of its business and continues to act as an accelerator for growth. Its various flavours of Copilot are all growing in high double digits, with a positive knock-on effect for demand across hybrid cloud, analytics and low code business technologies. Read our further analysis here.

Autumn Budget: UK SITS market and sustainability
DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

HVX READ MORE

The first budget of the new Parliament saw Chancellor Rachel Reeves raise taxes by £40.1bn a year in 2028-29 to help deliver the government's plans for economic stability and boost public investment. In this Autumn Budget: UK SITS market and sustainability article we look at how measures put forward by the Chancellor are likely to impact both overall demand going forward and the shape of sustainability agenda in the UK.

Autumn Budget: A technology-enabled future on the horizon
DALE PETERS | UKHOTVIEWSEXTRA | 31 OCTOBER 2024

HVX READ MORE

In this companion piece to the Autumn Budget: UK SITS market and sustainability insights, we explore how the Budget – which saw significant increases in departmental spending limits - will shape technology adoption in public services. Digital technologies will be expected to facilitate many of the changes required to deliver the government's plans for reform. However, much of the detail about what exactly this will entail was put off until spring 2025 with the promise of a new technology-enabled settlement for public services.

UK Enterprise Software: Suppliers, Trends, and Forecasts 2024
ANGELA EAGER | REPORT | 29 OCTOBER 2024

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This report details TechMarketView's latest market size and growth data for the UK Enterprise Software 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.

Highlights from AI Sector study
SIMON BAXTER | UKHOTVIEWSEXTRA | 24 OCTOBER 2024

The Department for Science, Innovation and Technology (DSIT) has released its 2nd iteration of the UK AI sector study yesterday, giving us some insight into the current growth and composition of the UK AI market. According to the latest stats there are now more than 3,000 AI companies in the UK, generating more than £10bn in revenues, employing more than 60,000 people in AI related roles, and contributing £5.8bn in Gross Value Added (GVA). Compared to the 2022 study, aggregate numbers of AI companies, revenues, employment and GVA are all higher in 2023.

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UK Insurance SITS Suppliers, Trends and Forecasts 2024
**JON C DAVIES | REPORT | 22 OCTOBER 2024**

This report provides details of TechMarketView's latest analysis of software and IT services (SITS) expenditure in the UK Insurance sector. The document contains our forecasts for how the market is expected to perform over the period 2024-2027. The report also contains an update to our UK Insurance SITS supplier rankings, based on the latest available financial information and incorporates data up to the end of June 2024, where available.

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The green, green growth at home – techUK's Tech and Net Zero conference
CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 18 OCTOBER 2024

techUK held its annual Tech and Net Zero conference earlier this week, bringing together technology practitioners and policy advisors for a day of sessions looking at how the tech sector is approaching net zero in its own back yard, and also how it's helping to deliver net zero improvements for customers in other industries. Many of the sessions explored access to greener energy to fuel tech's contribution to the UK's economic growth, but also with concerns about the impact (especially of AI) on demand for compute and storage infrastructure.

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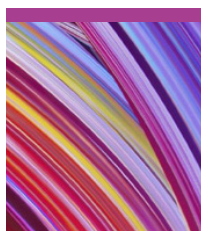
UK Education Suppliers, Trends & Forecasts 2024
CRAIG WENTWORTH | REPORT | 16 OCTOBER 2024

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 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.

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£6.3bn investment in UK data centres to power AI innovation
SIMON BAXTER | UKHOTVIEWSEXTRA | 15 OCTOBER 2024

The UK government has announced £6.3bn of foreign investment into UK Data centre infrastructure, as part of a total £63bn in private investment committed at the International Investment Summit. The new data centre investment will provide the UK with more computing power and data storage, so that Britain has the necessary infrastructure to train and deploy the next generation of AI technologies.

HVX — READ MORE

The Accountancy Industry's Automation Revolution
MARC HARDWICK | UKHOTVIEWSEXTRA | 10 OCTOBER 2024

The accountancy industry is at a critical juncture, facing a perfect storm of challenges that threaten to undermine its traditional business model. Productivity challenges, talent shortages, and increasing work demands are forcing firms to reassess their operations and seek innovative solutions. I spoke recently with Andrew Guy (pictured), CEO and founder of niche Accountancy Automation specialist FD Intelligence, to understand how and why intelligent automation is being adopted in the accounting sector.

HVX — READ MORE

Cognizant UK positions for growth
DUNCAN AITCHISON | UKHOTVIEWSEXTRA | 4 OCTOBER 2024

Earlier this month Duncan had the pleasure of spending some time with Cognizant at their UK Analyst & Advisor Summit event in London. The firm has been having a tougher time of it for the last eighteen months or so, albeit the company's latest set of quarterly results both saw an acceleration in sequential revenue growth and pointed to an improving outlook for the remainder of the year. Although reporting that both the strong trading headwinds in this country persist and client purse strings around discretionary expenditure here remain tightly drawn, UK Head, Rohit Gupta had positive news to report. There have been notable recent successes on the large deal front here.

HVX — READ MORE

Roc targets growth via four big bets

MARC HARDWICK | UKHOTVIEWSEXTRA | 3 OCTOBER 2024

`HVX` `READ MORE`

Marc recently caught up with Simon Furber, his ex-Capita colleague and newish CEO of Roc Technologies, the Greenham Common-based IT and managed services provider, to hear about their plans for growth via a differentiated offer. Furber is an experienced tech CEO and CFO with 30 odd years' experience in senior roles behind him, including with the likes of Capita IT Services, Call Centre Technology, Harmony Fire and Cloud Direct, before taking over the reins at Roc early this year. Read more about our views on Roc Technologies in an expanded UKHotViewsExtra article here.
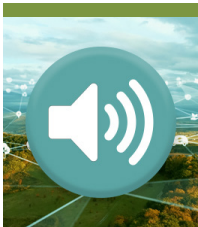
Totally Sust #4: River Deep Mountain AI (Cognizant Ocean & Northumbrian Water)

CRAIG WENTWORTH | PODCAST | 3 OCTOBER 2024

`SV` `LISTEN HERE`

The fourth episode in TechMarketView's Totally Sust podcast series features an interview with Stig Martin Fiskå (Global Head of Cognizant Ocean) and Nigel Watson (Chief Information Officer at Northumbrian Water). Hear the full version of the podcast with lead analyst Craig Wentworth about how the "River Deep Mountain AI" project is leveraging AI and machine learning techniques to develop open source, scalable, digital models that track river health trends and the pollution patterns associated with storm overflows, agriculture and road run-offs.

Is AI the fuel that will power Altimetrik's market push?

JON C DAVIES | UKHOTVIEWSEXTRA | 2 OCTOBER 2024

`HVX` `READ MORE`

Jon recently caught up with Vikas "Vik" Krishan, Chief Digital Business Officer and Head of UK and EMEA, at US-headquartered technology company, Altimetrik. Vik was in London for a few days before flying out to India, for a leadership meeting, and among other things we spoke about Altimetrik's push into Europe off the back of its recently completed strategic investment from US private equity firm, TPG Capital. This latest HotViewsExtra explores Altimetrik's market priorities and Krishan's views on the prospects and opportunities around AI in the Financial Services sector.

Tech Confidence Index 2024

TECHMARKETVIEW ANALYST TEAM | REPORT | 25 SEPTEMBER 2024

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Tech Confidence Index (TCI) is a new initiative launched in 2024, with a goal to create a bellwether for the state and prospects of the UK tech sector. This six-monthly survey of UK technology sector leaders is tracking the confidence of the UK technology scene to help both Software & IT Services (SITS) suppliers and end users understand market sentiment, whilst planning and preparing for the period ahead. This first edition of the TCI includes the results of a major survey of c.250 business leaders, including CEOs, VPs, MDs and Sales and Finance heads, serving all major SITS sectors and end user industries.

G-Cloud - Framework Spending Review 2023-24

DALE PETERS | REPORT | 23 SEPTEMBER 2024

`PSV` `READ MORE`

This data-driven report reviews G-Cloud sales figures covering the financial year 2023-24. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.

Sustainability Technology Activity Index Q1 2024

CRAIG WENTWORTH | REPORT | 20 SEPTEMBER 2024

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The Sustainability Technology Activity Index is TechMarketView's unique take on the sustainability technology landscape. The Index analyses how emerging and enabling technologies (such as AI, IoT, cloud, blockchain, 5G, etc.) are being used worldwide in a variety of environmental sustainability use case areas; capturing data about project milestones, partner involvement, and product launches, spanning activities in ESG reporting, nature monitoring, supply chain innovations, the circular economy, smart buildings, micromobility, energy grids, and carbon removal (to name a few).

Digital Specialists - Framework Spending Review 2023-24

DALE PETERS | REPORT | 19 SEPTEMBER 2024

`PSV` `READ MORE`

This data-driven report reviews Digital Specialists (Digital Outcomes & Specialists, Digital Outcomes 6 and Digital Specialists & Programmes) sales figures covering the financial year 2023-24. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.

UK Central Government Suppliers, Trends & Forecasts 2024

GEORGINA O'TOOLE | REPORT | 19 SEPTEMBER 2024

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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 20 Central 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.

techUK Building the Smarter State – reflections and future directions

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 16 SEPTEMBER 2024

HVX READ MORE

techUK recently held its annual Building the Smarter State conference. The event – now celebrating its tenth anniversary – is an opportunity for public sector digital leaders and tech industry insiders to showcase how technology is shaping today's (and tomorrow's) public services. Being a milestone anniversary gathering, it was inevitable that a number of sessions reflected on the past ten years of digital government as much as they provided a look-ahead to the challenges to come, with speakers and panelists considering how government departments and agencies might best work together to deliver "mission-led government" digital services.

UK BPS Operations Market: Suppliers, Trends, and Forecasts 2024

MARC HARDWICK | REPORT | 13 SEPTEMBER 2024

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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.

Civil Service Data Challenge: Winner revealed

GEORGINA O'TOOLE | UKHOTVIEWSEXTRA | 13 SEPTEMBER 2024

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This article covers the Civil Service Data Challenge 2024, a competition for UK civil servants to propose data-driven solutions to government issues. The winner, Project Constellation, addresses prison overcrowding through optimised cell allocation. The piece highlights the competition's role in fostering innovation and discusses the need for better sharing of solutions across government departments.

UK Banking SITS Suppliers Trends and Forecasts 2024

JON C DAVIES | REPORT | 12 SEPTEMBER 2024

FSV READ MORE

This report provides details of TechMarketView's latest analysis of software and IT services (SITS) expenditure in the UK Banking sector. The document contains our forecasts for how the market is expected to perform over the period 2024-2027. The report also contains an update to our UK Banking SITS supplier rankings, based on the latest available financial information and incorporates data up to the end of June 2024, where available.

A Major Tilt Towards Technology in the NHS

DALE PETERS | UKHOTVIEWSEXTRA | 12 SEPTEMBER 2024

HVX READ MORE

This article examines Prime Minister Starmer's ambitious plan to reform the NHS, informed by Lord Darzi's recent investigation. It explores the proposed 10-year strategy, which emphasises digitalisation, community-based care, and preventative health. The analysis highlights the critical role of technology in the NHS's future, including the potential of data utilisation and AI. While noting these priorities aren't novel, the article discusses why previous reform attempts have fallen short and considers the challenges ahead in implementing such sweeping changes across the health service.

UK SITS Solutions Market: Suppliers, Trends, and Forecasts 2023–2027

MARC HARDWICK | REPORT | 3 SEPTEMBER 2024

TSV READ MORE

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.