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Education Suppliers, Trends, and Forecasts 2023-2026

CRAIG WENTWORTH | REPORT | 31 OCTOBER 2023

PSV  **READ MORE**

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

DUNCAN AITCHISON | REPORT | 30 OCTOBER 2023

TSV  **READ MORE**

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?

TANIA WILSON | REPORT | 29 OCTOBER 2023

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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

DALE PETERS | REPORT | 27 OCTOBER 2023

PSV  **READ MORE**

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

MARC HARDWICK | REPORT | 27 OCTOBER 2023

TSV  **READ MORE**

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

SIMON BAXTER | UKHOTVIEWSEXTRA | 25 OCTOBER 2023

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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

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

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

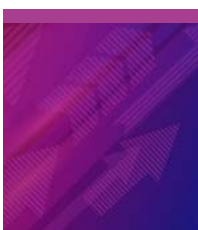
The annual Police Digital Summit took place in Brighton last month. More than 500 people from across the world of policing, including representatives from many of the UK police forces and the supplier community, came together to discuss the progress and prospects associated with digital technologies 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

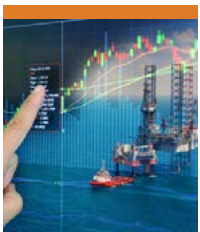
TechMarketView's data and trends analysis for the UK Telecoms, Technology, & Media market.
**Extract from our overall Market Trends & Forecast report.*



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.*



UK SITS Consulting Market: Suppliers, Trends and Forecasts 2023

DUNCAN AITCHISON | REPORT | 30 AUGUST 2023

This report details TechMarketView's latest market size and growth data for UK SITS Consulting 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 SITS Consulting market, together with commentary on the up-and-coming players making noteworthy progress in this most competitive of arenas.



Top 5 Tips for effective win/loss reviews

JON C DAVIS | UKHOTVIEWSEXTRA | 29 AUGUST 2023

Of all the many types of research that I have been involved with over the years, I believe that the greatest direct business value of all of these is to be derived from an effective win/loss review process. Some SITS vendors spend many (£) millions pursuing a single large bid and so the stakes are high, as is the value of any lessons learned. Thus insights that help a vendor to improve their win rate and/or client satisfaction can potentially deliver a significant RoI. Regardless of any direct monetary value associated with this type of analysis, anything learned can be extremely useful to the business from the perspective of process improvement.





UK Cybersecurity Suppliers, Trends and Forecasts 2022-26

SIMON BAXTER | REPORT | 25 AUGUST 2023

The report provides an overview of the UK Cybersecurity market size in 2022, an analysis of the market shaping trends, our forecast for how the market will perform over the 2023-26 period, and who the key suppliers are in the market. The report also contains an update to our UK Cybersecurity Top 20 rankings, which also includes a separate breakout of the Top 15 UK Cybersecurity services providers. This year we have also spotlight several suppliers, where we take a deeper dive into performance and strategic developments.



G-Cloud - Framework Spending Review 2022-23

DALE PETERS | REPORT | 24 AUGUST 2023

This data-driven report reviews G-Cloud sales figures covering the financial year 2022-23. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.



Digital Specialists - Framework Spending Review 2022-23

DALE PETERS | REPORT | 24 AUGUST 2023

This data-driven report reviews Digital Specialists (Digital Outcomes & Specialists, Digital Outcomes 6 and Digital Programmes & Specialists) sales figures covering the financial year 2022-23. It includes analysis of lots, supplier size, leading suppliers and buyers, and subsector (central government, defence, health etc.) variability.



IndustryViews Corporate Activity Q2 2023

TANIA WILSON | REPORT | 18 AUGUST 2023

Merger and acquisition (M&A) activity in the UK software and IT services (SITS) sector declined for the fourth successive quarter in Q2 2023, remaining considerably lower than the peak level of activity seen in 2021 and early 2022. This is according to data from Silverpeak, the mid-market technology specialists that represent European growth businesses in M&A and financing transactions. The continuing decline in deal activity comes amid higher interest rates and ongoing economic uncertainty, which have hit market confidence. However, it is worth noting that Q2 2023 deal volumes are still in line with those seen in the pre-pandemic period.



OneID looks to fill gap in UK digital infrastructure

SIMON BAXTER | UKHOTVIEWSEXTRA | 17 AUGUST 2023

UK startup OneID is looking to fill what it sees as a key gap in the UK's digital infrastructure and make the world a safer place through its Digital identity service. According to OneID, we should be using banks as a means to verify our digital identity, sparing consumers (and businesses) from the laborious task of submitting and reviewing passports and other identity documents. TechMarketView recently caught up with the team at OneID to understand more about how the business is looking to change identity verification, and how its plans for growth are progressing.



OffshoreViews Q2 2023 Review

ANTHONY MILLER | REPORT | 14 AUGUST 2023

OffshoreViews includes our regular summary of the top-tier and mid-tier Indian SI reporting season, along with insightful charts showing multiyear trends for the Top Tier players and a clickable index to relevant UKHotViews posts.



Temenos on the up as sale talks continue

JON C DAVIES | UKHOTVIEWSEXTRA | 14 AUGUST 2023

The latest results from Swiss-based Temenos reflect an improved performance by the global banking technology vendor, despite the challenging macro-economic environment. For the six months ended 30 June 2023 revenue was \$465.5m, up 1.5% on the same period last year, as total software licensing grew by 5.7% to \$195.1m. Temenos also delivered an increased profit of \$68.9m (up 7.2%). Temenos suffered something of a dip in its performance during FY22, which contributed to the departure of former CEO, Max Chuard. However, the latest numbers paint a more encouraging picture, and as a result, the vendor has enhanced its outlook for the rest of the year ahead.





Hitachi Vantara – digital services with engineering in its DNA

MARC HARDWICK | UKHOTVIEWSEXTRA | 11 AUGUST 2023



[READ MORE](#)

Hitachi Vantara is a significant global player in the systems integration and digital services space, that nonetheless sometimes goes under the radar when we profile the marketplace. The firm also has a significant presence in UK digital services with some interesting clients and a differentiated service offer. To understand more, and to get a view on where the business is heading, Marc sat down recently with President and Board Member of Hitachi Vantara, Roger Lvin. Lvin has been with the company just shy of 3 years and has a background covering a range of different roles within Cognizant over a 16-year period.



Public Sector SITS Suppliers, Trends and Forecasts 2023-26

GEORGINA O'TOOLE & DALE PETER | REPORT | 10 AUGUST 2023



[READ MORE](#)

This report consolidates TechMarketView's analysis of the UK public sector software and IT services (SITS) market in 2022 and forecasts how the market will perform over the period 2023-26. It also contains an update to our UK public sector SITS Top 20 supplier rankings based on the latest available financial information (as at end of June 2023). Top 20 rankings for central government and Top 10 rankings for each of the remaining subsectors (local government, health, education, police and defence) are also provided.



UK Financial Services SITS Suppliers, Trends and Forecasts 2022-2026

JON C DAVIES | REPORT | 8 AUGUST 2023



[READ MORE](#)

This report provides details of TechMarketView's latest analysis of software and IT services (SITS) expenditure in the UK Financial Services Sector. The document contains our forecasts for how the market will perform over the period 2023-2026. The report contains an update to our UK financial services SITS supplier rankings, based on the latest available financial information and incorporates data up to the end of June 2022, where available.



Conduent in the UK – A Company snapshot

MARC HARDWICK | REPORT | 7 AUGUST 2023



[READ MORE](#)

Whilst Conduent has successfully raised its profile and is gaining traction in the UK market it can sometimes fly 'below the radar'. This profile looks at how Conduent serves its European and UK markets, bringing this to life with some key UK-based case studies in the Transportation and Commercial, Customer Experience Management (CXM), space.



Breakthrough year driving growth at bolder Pulsant

KATE HANAGHAN | UKHOTVIEWSEXTRA | 7 AUGUST 2023



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Pulsant's FY22 results for the 12 months to the end of December 2022 show revenue was roughly static at £74.8m. EBITDA before exceptional items was up c.15%. The top line was boosted predominantly by acquisitive growth; however, there has since been a marked underlying improvement in the business, with an acceleration in organic growth kicking in from Q4. That growth trajectory was sustained into the current year, marking a critical milestone given organic growth has eluded the company for almost five years. The real story, however, is what has been going on behind the scenes to drive those numbers.



Cutting carbon across the telco supply chain (and beyond)

CRAIG WENTWORTH | UKHOTVIEWSEXTRA | 4 AUGUST 2023



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The Joint Alliance for CSR (JAC) has called for telecoms suppliers to work together to reduce greenhouse gas (GHG) emissions across the industry, highlighting in particular the contribution of Scope 3 emissions in companies' carbon accounting / reporting / reducing cycle. Although its vision and mission span all aspects of CSR (across human rights, social, labour and environmental standards), it's the industry's focus on net zero – and a desire to align industry practice with the latest science-based decarbonisation approaches – which has prompted this latest campaign.



Capita grows on improving Experience

MARC HARDWICK | UKHOTVIEWSEXTRA | 4 AUGUST 2023



[READ MORE](#)

Business process services (BPS) player Capita continues its return to growth with outgoing CEO Jon Lewis (Capita CEO to retire) pointing to an "acceleration in financial performance" in H1. Adjusted revenue for the group ticked up 5.8% YoY to £1,402.4m (H1 2022: £1,326m), underpinned by an improving picture at the firm's Experience division. Capita now operates through two main divisions. Capita Public Service grew revenue by 2.4% to £731m helped by growth in its Royal Navy training contract and additional volumes in its Personal Independence Payments contract with the DWP offset by attrition within Local Government.