

## Research Summary December 2019

Welcome to our rolling monthly research round-up. To read more, simply click through.

### KEY

Foundation Service  
BusinessProcessViews  
SecureConnectViews

PublicSectorViews  
ESASViews  
Available in all streams

FinancialServicesViews  
InfrastructureViews  
Tech User Programme



Angela Eager | Report | 31/12/2019

### Enterprise Software Supplier Prospects 2020

This report highlights the challenges facing enterprise software suppliers looking to improve their performance in 2020, the response needed to secure success in the market, and the areas to focus on to win in the longer term. It also includes individual profiles and insight into the performance and prospects of the Top 10 suppliers of Enterprise Software to the UK market.



Martin Courtney | Report | 30/12/2019

### Super scale cloud service providers and edge computing

This report outlines emerging frameworks and use cases for edge computing and analyses the extent to which super scale cloud infrastructure service providers are absorbing the approach into their own commercial strategies to circumvent potential threats to their business from rival suppliers which TechMarketView believes edge now enables.



Kate Hanaghan | UKHotViewsExtra | 20/12/2019

### AWS re:Invent reflections: ECS accelerates with Amazon Connect

At AWS re:Invent in Las Vegas, CEO, Andy Jassy urged organisations to "stop procrastinating" and to transform themselves with cloud before they get left behind. One of the key areas that must be addressed is "Experiences". At re:Invent, we caught up with ECS Group Managing Director, Mark Farrington, and CTO Philip Smith. The firm is establishing a presence in Customer Experience (CX) using Amazon Connect technology.



Tola Sargeant | UKHotViewsExtra | 18/12/2019

### Hancock doubles down on tech in NHS

Matt Hancock reaffirmed his priorities for England's health and care system as he returned as Secretary of State for Health and Social Care, in his words, 'energised, excited and absolutely determined' to meet the commitments the new Conservative government has made. In a speech at the Policy Exchange the Secretary of State set out his vision afresh: a 'bold, confident and ambitious' long-term plan for health and social care.



Dale Peters | Report | 18/12/2019

### Public Sector Predictions 2020

In 2020, we will be examining the disorder associated with the rush toward the digital transformation of public services and how suppliers can position themselves to help public sector organisations tame the Digital Chaos. This report explains our Predictions for 2020, spanning government policy, consultancy, AI, analytics, cyber and ethics.



Jon C Davies | Report | 17/12/2019

### Financial Services Predictions 2020

Looking forward to 2020 and beyond, with our research theme of "Digital Chaos" in mind, it's clear that the financial services sector has already learned some important lessons about the pitfalls of business and technology transformation. As the influence of disruptive innovation on traditional business models increases, this report considers some of the changes the industry is likely to experience.



### Capita's transformation programme in practice – A new consulting business

Capita is now more than 18 months into its transformation programme and this article is the second in a two-part series exploring what that actually looks like in practice 'on-the-ground', using two very different parts of Capita to illustrate how things are changing. This case study looks at the development of Capita's new Consulting business and what this might mean for the wider business.



### 2020 Vision - Forecasting the Future

Richard Holway, Chairman of TechMarketView, has been producing predictions entitled 2020 Vision for much of the last two decades. Now that year is upon us! In 2020 Vision - Forecasting the Future, Holway revisits the technology predictions he has made over the years and assesses how right – or wrong – he was. He looks in particular at the UK Software and IT Services sector.



### TechMarketView Top Ten Predictions 2020

This report explains our Top Ten Predictions for 2020. The Predictions span our research coverage areas, but in particular play to the themes that we believe define the ultimate digital entity: it must be able to operate in real-time, and must be connected, event/outcome-driven, interactive, insightful and trusted.



### IndustryViews Venture Capital Q3 2019 Review

A number of very large deals, combined with a slightly lower volume of transactions, have lifted the average size of UK and Irish tech VC funding deals to just over £10m for the first time, according to the latest data from corporate finance firm, Ascendant. The latest edition of IndustryViews Venture Capital has more detail, along with nearly 40 pages of UK tech venture funding deals.



### AWS ReInvent 2019: Delivering value faster

AWS ReInvent 2019 has been a fast-paced dive into Amazon Web Services' most recent product releases. Recently, CEO, Andy Jassy, used his impressive three-hour keynote to walk the audience through a whole raft of new releases – and he brought various high profile brands on stage to demonstrate just how AWS is helping its customers.



### Cyber Security Market Trends and Forecasts to 2022

Adjustments in the way that UK organisations prefer to source and pay for ongoing cyber security protection have forced suppliers to adopt a more flexible approach, and subsequent changes in product and service portfolios are rebalancing the market in favour of cloud hosted and managed service solutions. This anchor report includes revenue forecast and segmentation data for the UK enterprise cyber security market to 2022.



### Share indices for Nov 19

As I have said countless times in my monthly review of the share indices the UK - indeed the world - is not only in about its most unpredictable phase ever but there always seems to be more on the 'Bad News' pile than in the 'Good'. So, it has been a constant surprise to me that the share indices we track just seem to go up and up regardless. November just continued that trend...



### OffshoreViews Q3 2019: Breaking linearity - broken!

After ten successive quarters where revenues at the top six Indian pure-plays grew faster than headcount, net linearity has once again gone negative. You can see more in this edition of OffshoreViews, along with our regular snapshots of the top-tier players and a round-up of the mid-tier scene.



### Google Next: privacy, control and explainability

As you'd expect, the London Google Next 2019 event was rich on new products and capabilities but what was notable was the determination to lift the conversation from technology nuts and bolts to strategy and business concerns, which continues the refrain CEO Thomas Kurian has established during his 12 months with the company.



### Cloud and Infrastructure Services Market Trends and Forecasts 2019-2022

This report highlights the key trends in the Infrastructure Services market and makes suggestions for how suppliers can approach these in a successful way. It is essential reading for any supplier looking to understand their place – and evolve their position – in a market that is undoubtedly full of opportunity and challenge in equal measure.



### Microsoft and Google Cloud: Operationalising AI/ML

There is little dispute about the importance and potential impact of AI/ML on organisations and the wider economy. Interest levels from both the public and private sector continue to soar and suppliers are engaged in a fast-paced AI/ML technology stack race. Although adoption levels are rising, the challenge suppliers face is supporting customers in their move to the next level.



### UK Public Sector SITS Market Trends & Forecasts 2019-22

This report consolidates TechMarketView's latest forecasts and trends for the UK public sector software and IT services (SITS) market. It provides analysis of how the pressures and priorities in the public sector across the six subsectors we track have shaped the performance of suppliers, how the market will perform between now and 2022, and how suppliers can best position themselves to take advantage of the opportunities that will arise.



### Engineering and R&D Services – the next goldrush?

Capgemini's announcement of its intention to acquire Engineering and R&D Services (ERDS) market leader Altran has caused more than a few ripples of surprise amongst its competitors. This €3.6b purchase is undoubtedly a bold move and one that, at first sight, appears to come somewhat out of left field. But how radical a departure is this?



### Vodafone and IBM: the benefits of an enduring partnership

Towards the end of the summer, Vodafone Business' Venture with IBM announced its first venture win with transport provider National Express. It offered the first major evidence that the venture is opening doors to contracts that the companies would otherwise have struggled to win on their own.



### Payments Innovation New Kids on the Block

In addition to bringing greater process efficiency to the payments space, innovative product providers have successfully been the facilitators of growth. In recent years, those market segments and territories that have embraced new payments technology have consistently demonstrated the most favourable growth in payments revenues. Here we've taken a brief look at a few of the major success stories that have been making the headlines recently.



### Google's Nightingale reignites health data concerns

In July 2019 Alphabet held its Q2 earnings call, in which it mentioned Google Cloud's AI and machine learning solutions were helping healthcare organisations like Ascension improve the healthcare experience and outcomes. Recently, its relationship with Ascension hit the headlines when the scale of the data sharing partnership was revealed by The Wall Street Journal (WSJ).



### Capita's transformation programme in practice – Security Watchdog

Capita is now more than 18 months into its transformation programme and this article is the first in a two-part series exploring what that actually looks like in practice 'on-the-ground' within the business, using two very different parts of Capita to illustrate how things are changing.



### Fujitsu Forum 2019: Human Centric Innovation

At the recent Fujitsu Forum the theme introduced by President Takahito Tokita was: Human Centric Innovation: Driving a Trusted Future. The message was that people must be put at the very heart of the process to create a successful digital future. By taking a Human Centric approach organisations will be better able to develop deeper levels of trust with customers/citizens, partners, and employees.





Marc Hardwick | UKHotViewsExtra | 5/11/2019

## The use of AI in Legal and Compliance

Following on from our spring LawTech networking event, focusing on the adoption of new advanced technologies within the legal sector, held in conjunction with Conduent, we recently caught up with Luis Parra, Head of Conduent Legal, Compliance, & Analytics Solutions, Europe, to discuss the impact that advanced technologies are having on the legal and compliance market.



Richard Holway | UKHotViewsExtra | 1/11/2019

## Share Indices October 19

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Jon C Davies | AnalystViews | 30/10/2019

## Trade finance emerges as blockchain's new sweet spot

Despite the relative lack of noise in public, there has been a great deal of activity around blockchain and distributed ledger technology (DLT) within the financial services industry of late. Whilst much of the recent development has effectively been going on "behind closed doors", one area in particular has come to the fore as a hotspot for the application of this technology.



Anthony Miller | Report | 24/10/2019

## IndustryViews Corporate Activity Q3 2019

Merger and acquisition activity in the UK software and IT services (SITS) sector remained strong in Q3 but at a lower level than in the previous quarter as UK buyers undertook the lowest number of transactions since Q1 2018. Download our quarterly review of the UK software & IT services M&A scene for more detail.



Anthony Miller | Report | 20/10/2019

## IndustryViews Quoted Sector Q3 2019 Review

Our quarterly review of the UK software and IT services quoted sector scene with comparative share price performance against leading international software and IT services stocks.



Jon C Davies | UKHotViewsExtra | 18/10/2019

## O'Connor and Trad3r look to change the rules

Following the news recently that UK startup, Trad3r, had successfully raised around £1.2m in new funding from a group of respected angel investors, Jon caught up with the company's charismatic young founder and CEO, Gianni O'Connor. O'Connor hopes that Trad3r may help transform attitudes to financial services, both inside and outside of the established investment community.



Marc Hardwick | UKHotViewsExtra | 11/10/2019

## Liberata – getting “match-fit for digital”

Following on from Liberata's renewal of its key contract with the London Borough of Bromley announced just a few days ago we spent some time with Chief Exec, Charlie Bruin to get a more detailed sense of what has been happening “under the bonnet” at the BPS specialist.



Angela Eager | AnalystViews | 11/10/2019

## Advanced: Developments and Differentiation

The £2bn vote of confidence in Advanced by existing investor Vista Equity Partners and new investor BC Partners in August 2019 was the latest in a series of developments that has seen the company expand and grow its own confidence levels. In this research note we assess the progress Advanced has made as a transforming and growing UK HQ'd company, providing software and a range of IT services in the competitive mid-market, and where its opportunities lie.



Marc Courtney | UKHotViewsExtra | 9/10/2019

## Carbon Black forms spine of new VMware Security Business

With regulators having approved VMware's offer for cloud native endpoint security specialist Carbon Black, the US\$2.1bn acquisition is set to close in January next year in time for the end of the buyer's financial year. The combination of the two companies looks likely to propel VMware into our Top 20 Cyber Security Suppliers Ranking in 2020, which means a new source of powerful competition for rivals targetting the same MSSP and enterprise markets.

## altius

Kate Hanaghan | UKHotViewsExtra | 8/10/2019

### Altius: A driving force in data science

We recently caught up with Simon Goldsmith, CEO of Altius. The firm in essence provides services to help clients get value from their data – in particular helping non-technical people understand the art of the possible. Altius works with data-driven organisations to build advanced analytical and data science solutions, with a full spectrum of services.



## Cognizant

Duncan Aitchison | UKHotViewsExtra |

### Proximity pays-off for Cognizant Europe

Cognizant has been having a tougher time of it of late. New CEO, Brian Humphries had the dubious honour of announcing an almost half growth outlook for FY19. The story since January has so far been very much a tale of two territories for this technology major. We recently caught up with Cognizant's European management team to find out more about what's behind the strength of the performance on this side of the Atlantic.



Tola Sargeant | UKHotViewsExtra | 1/10/2019

### OLM: A brave new cloud-native world

It takes a brave CEO to decide, after nearly 30 years at the helm of an SME, to go back to the proverbial drawing board and invest to develop a brand-new, cloud-native application to replace their flagship legacy product. But that is exactly the decision that Peter O'Hara, CEO and founder of social care software provider OLM, made five years ago. He realised at the time that to have a successful future in the evolving UK social care market, OLM needed a cloud-native application.



Richard Holway | UKHotViewsExtra | 1/10/2019

### Shares indices September 2019

September was a mainly positive, though relatively muted, month for the major market indices that we track. The FTSE 100 was up 2.8% ahead of Nasdaq (+0.5%) and the FTSE IT index (all but flat). FTSE SCS – our proxy for UK-listed software & IT services companies – was also flat (though still up 11.8% ytd), outperformed by tech hardware (+4.9%). BT's shares recovered by nearly 8% after last month's 14% decline, and therefore so did the FTSE Fixed Line Telecom index.

**BOOK NOW!**

## An Evening with TechMarketView 2020 DIGITAL CHAOS

10 September 2020 | 6.30pm-11.00pm  
RIBA, Portland Place, London

