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Research Summary **September 2020**

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

KEY	■ Foundation Service	■ PublicSectorViews	■ FinancialServicesViews
	■ TechSectorViews	■ Available in all streams	■ Tech User Programme



Marc Hardwick | Report | 30-Sept-2020

Solutions Market Trends and Forecasts 2020

Solutions services are usually conducted on a project basis and include activities such as custom systems development, platform/package software implementation, application deployment, systems renovation, testing and training. In light of the unprecedented impact of Covid-19, we have provided two sets of forecasts for the UK SITS market in our Solutions Market Trends and Forecast report for 2020.



Jon C Davies | Report | 29-Sept-2020

UK Financial Services SITS - Market Trends and Forecasts 2020

This report contains TechMarketView's latest in-depth examination of the trends impacting the UK financial services industry. The report includes a comprehensive analysis of the prospects for growth and provides detailed forecasts for SITS spend including an examination of each of the main vertical segments of the market.



Dale Peters | Report | 29-Sept-2020

Public Sector Software and IT Services: Suppliers, Trends and Forecasts 2020-2023

This report consolidates TechMarketView's analysis of the UK public sector software and IT services (SITS) market in 2019 and forecasts how the market will perform over the period 2020-23. It also contains an update to our UK public sector SITS Top 20 supplier rankings based on the latest available financial information. Top 20 rankings for central government and Top 10 rankings for each of the remaining subsectors are also provided.



Georgina O'Toole | Report | 28-Sept-2020

Central Government Software & IT Services: Suppliers, Trends & Forecasts 2020-2023

This report provides TechMarketView's view of the UK central government software and IT services (SITS) market from a market and supplier perspective. It contains the Top 20 central government SITS rankings for 2019, as well as our view of those suppliers that are 'on the rise' and 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.



Martin Courtney | UKHotViewsExtra | 28-Sept-2020

Security, remote working and automation fuel Juniper Networks progress

Flat first half sales and revenue suggest a tough year ahead for network infrastructure supplier Juniper Networks, but management have cause for optimism in router and switch bookings growth and strong demand for security, automation and remote working solutions.



Georgina O'Toole | UKHotViewsExtra | 24-Sept-2020

Accenture Q4 & FY20: Continued UK declines

Accenture delivered FY20 (to end August) revenues of \$44.3b, an increase of 4% year on year in local currency; growth would have been 1% higher had it not been for a reduction in revenues from reimbursable travel costs. The executive team pointed to the resilience of the business due to the diversity in its operations and the discipline throughout the organisation.



Jon C Davies | UKHotViewsExtra | 22-Sept-2020

Has DXC begun the “end-game” as Saleh sails away?

On 1st October, DXC Technology parted company with its US healthcare operations in the latest of a string of recent disposals by the ailing US technology company. You can learn more about what the latest DXC divestment signifies by downloading Has DXC begun the “end-game” as Saleh sails away? which also contains our perspective on the simultaneous exit of the company's longstanding CFO.



Georgina O'Toole | Report | 18-Sept-2020

Sopra Steria: Targeting ‘Net Zero’ ahead of the curve

Sopra Steria has announced its commitment to reaching “net zero” emissions by 2028. That means that any Greenhouse Gas (GHG) emissions normally generated across the organisation's value chain are reduced by emission reduction initiatives and the residual emissions are compensated by the purchase of ‘carbon removal’ carbon offsets to make the net emissions to zero.



Duncan Aitchison | Report | 18-Sept-2020

Consulting Market Trends and Forecasts 2020 - 2023

This report contains TechMarketView's latest market size and forecast data, and analysis of the trends shaping the UK SITS Consulting market. A surge in advisory services sales last year was followed by buoyant demand at the start to 2020. This expansion was quickly reversed by the advent of the COVID-19 and the ensuing lockdowns. The resulting business and economic impacts have been taking a heavy toll on the consulting sector this year.



Kate Hanaghan | UKHotViewsExtra | 17-Sept-2020

Getronics looks to next chapter

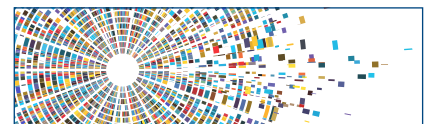
Following on from the announcement that Getronics was to be sold again, we caught up with Kenton Fine, Executive Chairman and CEO. In July, strategic investor, GSH Private Capital Ltd, took ownership of the Getronics business in Europe, Asia Pacific and Latin America in a deal worth €200m. GSH had previously been a minority investor and has now committed to supporting Getronics in the long term following what has been a very difficult period.



Marc Hardwick | Report | 14-Sept-2020

Operations Management in the “New Normal”

Many fundamentals have changed within the workplace since COVID first worked its way across Europe. Employees will expect greater flexibility and more choice of workplace, and the “special circumstances” approaches to manage work that were deployed in the crisis may not be sustainable. This shift in the fundamentals of where and how people work offers both challenges and opportunities for organisations and their staff.



Georgina O'Toole | UKHotViewsExtra | 14-Sept-2020

UK's National Data Strategy: Framing an ambitious agenda

The UK Government recently published its awaited National Data Strategy (NDS). It is described as “an ambitious, pro-growth strategy that drives the UK in building a world-leading data economy while ensuring public trust in data use.” It's a chunky document extending to over 30,000 words, and it certainly seeks to tackle some difficult issues, but if you were expecting it to have all the answers at this stage, you'll be disappointed.



TechSectorViews Team | Report | 11-Sept-2020

UK Operations Supplier Rankings 2020

This report brings together the analysis we have launched over the course of this week, namely: Infrastructure Operations Rankings 2020, Applications Operations Rankings 2020 and Business Process Operations Rankings 2020. Rather interestingly, each of these areas has a leading player that is quite significantly larger than the number two placed supplier.



Kate Hanaghan | UKHotViewsExtra | 11-Sept-2020

Fujitsu Q1: Building trust during lockdown

I recently caught up with Paul Patterson, Fujitsu's CEO for Northern and Western Europe, to hear more about how the company fared through its first quarter, which coincided with the UK's national lockdown. In terms of financial performance, the UK business put in a solid performance. Fujitsu also benefited from incremental work from the installed base to support home working.



Georgina O'Toole | Report | 10-Sept-2020

Sopra Steria: Acting on the importance of Digital Ethics

Digital Ethics has scaled the agenda of those implementing technology solutions over the last couple of years. Most often, the need to consider the ethical implications of technology has been associated with artificial intelligence (AI ethics). Sopra Steria has moved its thinking on and its approach looks more joined up than many other suppliers, acknowledging that it is about more than the technology.



Marc Hardwick | Report | 9-Sept-2020

Business Process Operations Rankings 2020

This report contains the Top 20 supplier rankings (by revenue) for the UK Business Process Operations market. Given that COVID has accelerated the shift towards digital services, BP Operations providers must adjust their offerings, shift focus, and consider changing their delivery models to meet client demands. Change management and continuous improvement will be key to driving adoption and scaling activities within contracts.



Marc Hardwick | Report | 9-Sept-2020

Business Continuity Planning: Lessons learned from COVID

In the months since the COVID-19 outbreak, Business Continuity Planning (BCP) for organisations of all shapes and sizes has taken centre stage. Many of these plans were developed with specific events in mind as opposed to a global pandemic impacting most of the world simultaneously. Organisations have had to learn quickly, thinking on their feet, adapting and refining BCP plans as they go.



Kate Hanaghan | Report | 8-Sept-2020

Infrastructure Operations Supplier Rankings 2020

This report contains the Top 20 supplier rankings (by revenue) for the UK Infrastructure Operations market. For several years, the Top 3 positions have been the domain of established data centre and end user services players – namely DXC, Fujitsu and IBM. But as a reflection of the radical change in how services are being consumed in the market, AWS has grown to become the largest provider of Infrastructure Operations.



Duncan Aitchison | Report | 9-Sept-2020

Applications Operations Supplier Rankings 2020

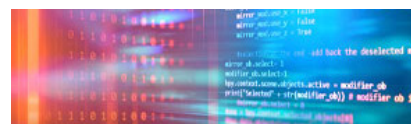
This report contains the Top 20 supplier rankings (by revenue) for the UK Applications Operations market. The report looks beyond the numbers to explain some of the market trends that are impacting supplier performance, providing advice on how players – large and small – can tackle the challenges and thrive during these difficult and extraordinary times.



Marc Hardwick | Report | 8-Sept-2020

Solutions Supplier Rankings 2020

This report contains the Top 20 UK supplier ranking (by revenue) for the UK SITS Solutions market. Solutions is the "engine room" of the SITS market and remains one of its most dynamic service lines and experienced strong growth in 2019. Covid-19 is likely to prove a 'double edged sword' for Solutions – the short-term will see a slowdown in activity with spending priorities re-assessed and non-essential and Heritage projects placed under review or scaled back.



Angela Eager | Report | 8-Sept-2020

Enterprise Software Supplier Ranking 2020

The latest Enterprise Software ranking is a stark illustration of the disruption and degree of change the top suppliers to the UK market are dealing with. It shows that the increasingly complex IT environments that have emerged as organisations tread digital pathways are causing software spend to stutter. Including top 20 ranking data, top 20 suppliers, and lessons to take through to 2020 and beyond, this report is essential reading for buyers and suppliers.



Angela Eager | Report | 2-Sept-2020

Operationalising AI/ML: ECS Partner Perspective

The latest in a series on how to take AI/ML-enabled projects into production and manage ML model lifecycles at what is a pivotal point on the adoption curve. This report explores the AI/ML partner opportunity through the approach taken by ECS Group. It provides insight into the role of MLOps in tackling complexity and driving at scale deployments and addresses lesser known issues such as stale data and data drift.



Duncan Aitchison | Report | 2-Sept-2020

Consulting Supplier Rankings 2020

The resulting business and economic impacts from COVID-19 are likely to take a disproportionately heavy toll on consulting sector, at least in the short term. This report contains a view on the performance of each of the suppliers in the Consulting Top 20. It includes the ranking table showing estimated revenue and growth, provides insight into the dynamics shaping this market and highlights the up and coming suppliers.



Richard Holway | UKHotViewsExtra | 1-Sept-2020

Share performance in August 2020

August 2020 proved to be one of the most successful months on record for tech stocks. The S&P 500 had its best performance for 30 years. The Dow had its best month in 36 years! As every month passes and Big Tech continues to soar, I get more and more nervous. I've been reluctant to liken the present situation to the dot.com madness of 1999/2000 but I think we might have entered the 'Irrational Exuberance' stage.



Leidos: Establishing an innovation mindset

It's been 11 months since Simon Fovargue took the helm at Leidos UK. His time, so far, as UK CEO, has confirmed the views of Leidos he formed while qualifying the role: "more entrepreneurial, more collaborative, more agile, more inclusive". In this latest UKHotViewsExtra, we look at Leidos' recent performance and the actions he has taken to establish an innovation and growth mindset within the company.



OffshoreViews Q2 2020 Review

Now in a new 'presentation-style' format, OffshoreViews includes our regular summary of the top tier and mid-tier Indian Heritage Provider (IHP) reporting season, along with insightful charts showing aggregate 3-year trends for the Top Tier players.



Workday challenging Oracle & SAP in large Whitehall departments

Worldwide, the HR, financials and planning cloud pure-play boasts revenues of \$3.6b in its last financial year (to end January 2020). In the UK, our estimates put its turnover somewhere sub \$500m. Here, we take a look at Workday's existing presence in the UK public sector market, UK Government's current attitude towards the company and its offering, and Workday's ambitions.



Medical imaging moves to cloud with Sectra deal

A consortium of five NHS Trusts has signed a new contract with Swedish medical imaging and cybersecurity firm Sectra. Known as SWASH, the consortium is a long-term customer of Sectra and includes Portsmouth Hospitals NHS Trust, Isle of Wight NHS Trust, Salisbury NHS Foundation Trust, Southern Health NHS Foundation Trust and University Hospital Southampton NHS Foundation Trust. Read the detail here, examining the benefits for the Trusts of moving to a single regional PACS and cloud-based VNA.



A world beating approach to contact tracing

The Department of Health and Social Care has launched a new NHS Test and Trace app for England and Wales. It will provide users with the ability to check the level of coronavirus risk in their postcode district. Like the original app it uses Bluetooth to help log the time a person has spent in close proximity with another app user. The new app appears to address many of the issues raised by the first app, but it's not without issue.



The Rise and Rise of TCS

At 2nd place in the TechMarketView SITS Rankings 2020, TCS is now one of the world's largest and most respected tech companies. This report traces the history of TCS in the UK, highlighting some of the key milestones that saw the company grow to become one of the most successful players in the UK SITS market. This report includes insight from interviews with all TCS UK Managing Directors since 1999.



Capita's challenging H1

2020 was the year that Capita was supposed to return to revenue growth - then came Covid. The BPO leader's trading update from the end of June gave us a "heads up" on what to expect in the first half results, that show adjusted revenue declined by 9% to £1,652m (H1 2019 £1,816m), impacted by 2019 contract losses and of course Covid. In response to this, Capita has taken the decision to sell some software assets that it deems "non-core", to shore up the balance sheet.



Priority Software for COVID-19 Business Recovery

As we move into COVID-19 business recovery mode, organisations are exploring the technologies that will help their operations assume the 'new normal' and help employees find the confidence to return to the workplace. This report provides insight into immediate areas of investment - from screening and biometrics to touchless tech and IoT - to supply-side opportunities, and some of the suppliers to watch.



IndustryViews Venture Capital Q2 2020 Review

Venture capital investment in UK and Irish technology companies was down 22% by value and 17% by volume in Q2 compared with Q1, according to latest data from corporate finance firm Ascendant, but this is seen as an understandable virus-induced correction rather than an existential crisis. The latest edition of IndustryViews Venture Capital has more detail, along with 50 pages of succinct commentary on UK tech venture funding deals.



UK Financial Services SITS Supplier Ranking 2020

Almost every vendor in this year's Top 20 ranking is undergoing a transformation of its own. Some are further along the road than others, however, none has reached a final destination. For those playing catchup there is cause for optimism. However, for some vendors, tough decisions need to be made. COVID-19 has added further impetus to the pace of change within the financial services industry.



The Panoply: Strong FY continues into Q1

The Panoply, which positions as an alternative provider of digital transformation to the public sector, is bullish in its financial year results announcement (to end March 2020). Its confidence is based on a strong performance in FY20 but also a positive Q1. In FY20, revenue increased 43% to £31.5m. Though difficult to determine, due to the buy and build nature of the business, organic revenues look to have been in the region of about 3%.



Cobots and the rise of tech-enabled care

COVID-19 has shone a spotlight on the challenges facing the care sector in the UK but it's also shown the potential for technology to help improve outcomes and the quality of care received. We've seen rapid growth in the adoption of technology by the care sector and also the first use of collaborative robots - or cobots - in the UK care sector.



Scotland chooses NearForm's contact tracing tech

The Scottish Government recently revealed it is developing a contact tracing app to support NHS Scotland's COVID-19 Test and Protect system. This confirms Scotland as the latest country to adopt the app technology developed by Irish digital solutions business NearForm. NearForm was founded by CEO Cian Ó Maidín in Tramore, County Waterford, in 2011. Learn more about NearForm here.



Covid-19 accelerates automation adoption for HCL's Digital Process Operations (DPO)

It's likely that one of the biggest beneficiaries from changes to the workplace post-covid will be automation technologies. The need for cost reduction, speed, consistency, reducing physical contact are all likely to help drive up adoption rates. To understand these trends, I spent time recently with the automation team at HCL to get a feel for how their automation proposition is being deployed.



UK SITS Market Trends and Forecasts 2020

In such an extraordinary year, defined by the COVID-19 pandemic and the associated global lockdowns, TechMarketview's expert analyst team has created market forecasts for the next four years based on two market scenarios. Scenario A is based on our most optimistic view of prospects for the UK SITS market. Scenario B takes a far more cautious view of the prospects for future growth and is based on the UK SITS market experiencing a sharp decline during 2020.



Share Indices in July 20

July 20, yet again, turned out to be 'A Tale of Two Economies'. Tech – particularly BIG TECH – has continued to soar. Conversely, the FTSE100 dived another 4.4% in July making it an equally massive 21.8% DECREASE YTD. The UK FTSE IT Index was up 6.7% in July but is still down 7.5% YTD. The FTSE SCS Index – which most closely tracks the UK publically quoted software and IT Services companies that we track at TMV – was also up 5.6% in July but down 10.1% YTD.



IndustryViews Corporate Activity Q2 2020

UK software and IT services (SITS) sector merger and acquisition activity in Q2 fell back to the level last seen in Q1 2018 as COVID-19 restrictions took effect. Download the latest edition of IndustryViews Corporate Activity for our quarterly review of the UK software & IT services M&A scene for more detail.



Huawei ban creates UK telecommunications headache

The total ban on Huawei equipment in the UK's fifth generation (5G) networks will have profound repercussions for the telecommunications industry, businesses and consumers alike while potentially pulling the UK into a trade war with China. Read more about its impact on 5G and full fibre network rollouts and what it might mean for Huawei's future in the UK.



Government announces additional Future Borders funding

Recently, UK Government announced another £705m of funding to ensure that the country's border systems are fully operational when the UK takes back control of its border on 1st January 2021. Around £115m of that funding is destined to be spent on IT systems. Here we look at the progress of the Future Borders programme to date, where the funding is set to go, and what Government is looking for from its suppliers.



Mastering the Art of Practical Innovation

The innovation lifecycle blends pain points and purpose, with a splash of serendipity, and the incentive to produce something that is both different and makes a positive difference to business and consumers. The challenge is building a framework to support ongoing innovation without stifling it. This research note explores how Atos approaches the task.



IndustryViews Quoted Sector Q2 2020 Review

After being caught in the huge stock market sell-off during the first quarter due to concerns about the impact of the COVID-19 coronavirus on the global economy, tech stocks have led the recovery. Indeed, the aggregate value of quoted UK software and IT services (SITS) companies was 14% higher in Q2 2020 than the prior quarter although still 17% down on the value at the end of 2019.



Accenture to make up to 900 UK staff redundant

Accenture is to cut between 700–900 UK jobs, equating to between 6–8% of its 11,000 employees in its offices across the UK. The news was picked up by the Guardian, which saw an internal note to staff. The internal note highlights that the company already had an overcapacity when the pandemic hit and over the last period, additional strain has been felt due to lower demand and reduced natural attrition.



Harrow Council looks to the future with Version 1

For the last 15 years Harrow London Borough Council has been running its IT services via large-scale outsourcing contracts. This year it is taking a different approach to support its IT estate. It has recently appointed Version 1 as its partner to support its ambitions to transform services through digital technology.



Share Indices - June 20

My self-managed Holway Portfolio is divided into Tech and Non Tech holdings. The Holway Tech Portfolio is UP 26% YTD. The Non Tech Portfolio is DOWN 23% YTD. Fortunately my Tech portfolio is 4x bigger, although when I started my own portfolio 20 years ago they were equal. This is reflected in Share Indices YTD to end June. For an extensive review of share performance in June and YTD, see Share Performance in June 20 on UKHotViewsExtra.