

Quarterly Research Summary

Welcome

The period from July through to September has been a particularly busy time for the analyst team at TechMarketView following the release of key **Market Trends and Forecasts** and **Supplier Landscape** reports in all our streams.

In addition to this it's been a busy time in the markets resulting in the release of a number of in-depth reports and analysis. PublicSectorViews research director, Georgina O'Toole writes on *HP Enterprise Services: a mountain to climb* and releases her report on *UK Public Sector: BYOD adoption*. While fellow research director, Tola Sargeant keeps us up to date with *Allocate Software - Foundations for future growth*.

In the Enterprise Software and Application Services (ESAS) research, research director Angela Eager, shares her views in *CA Technologies remixing the business* and *Is Social Software an enterprise proposition?*

Aside from his key reports *BusinessProcessViews*, research director John O'Brien, keeps us abreast of goings on with IBM, Serco and Capita in *IBM exits customer services BPO*, *Serco CE 'saddened and appalled' by latest allegations* and *Capita delivers 'robust' first half*.

InfrastructureViews research director, Kate Hanaghan, follows up her key reports with her views on *Computacenter H1 2013* and *Getronics moves Alpha to the cloud*. Kate also writes on *Logicalis edges towards optimal services balance*, *ControlCircle: Invest to grow* and *Software and services help buoy IBM Q2 revenue*.

New recruit research director, Peter Roe, brings us his views in *Setting the Scene for Mobile Banking* and an in-depth review on *Fidessa building on solid foundations*.

Looking forward, with another Little British Battler event taking place in the autumn and the much anticipated release of our Predictions 2014 reports, Q4 2013 looks set to be as busy as ever!

For more information on any of the reports highlighted below just click the title.

UK Public Sector SITS Market Trends & Forecasts 2013

Georgina O'Toole

Report

23/09/2013

This key report presents our view of the outlook for the UK Public Sector SITS market. Read the full report to find out why we expect the market to be worth £644 million less in 2013 than in 2010.

UK Public Sector SITS Market Trends & Forecasts 2013: Data & Charts (XL)

Georgina O'Toole

25/09/2013

The data sheet (containing forecast data and charts) to accompany the PublicSectorViews UK public sector SITS market trends & forecasts 2013 report is now available to download for PublicSectorViews subscribers.

UK BPS Supplier Rankings and Landscape, 2013

John O'Brien

Report

23/09/2013

The UK business process services (BPS) supplier landscape is experiencing increasing diversity of performance as disruptive trends around mobility, analytics, social media and the cloud shake up the status quo, introducing new demand side drivers and opportunities.

ESAS Market Trends and Forecast 2013, Part 2 - Segments

Report

Angela Eager

10/09/2013

This second instalment of the 2013 ESAS Market Trends and Forecast report analyses the performance and prospects of the two segments that form the overall ESAS market and includes the latest data on market size and growth potential at the top levels, and for the sub-segments within each area.

Infrastructure Services Market Trends and Forecasts, 2013

Report

Kate Hanaghan

09/09/2013

Report covering our latest research into the UK Infrastructure Services market - the largest of the UK software and IT services market's four segments. Overall, the infrastructure services market is set to remain broadly flat to 2016, with a CAGR of just 0.4%. In real terms - in other words, excluding inflation - the market will actually shrink. Read the full report to find out why.

**UK Infrastructure Services Market Trends and Forecasts 2013:
Data and Charts (XL)**

Kate Hanaghan

09/09/2013

The data sheet (containing forecast data and charts) to accompany the UK Infrastructures market trends & forecasts 2013 report is available to download for InfrastructureViews subscribers.

ESAS Market Trends and Forecast 2013, Part One

Report

Angela Eager

29/08/2013

Part one of the ESAS Market Trends and Forecasts. Find out what happens when two mature markets come together, dynamics change and assumptions about the role of each type of supplier come under harsh scrutiny.

OffshoreViews Q2 2013

Report

Anthony Miller

27/08/2013

Foundation Service clients can download the latest edition of OffshoreViews, our concise review of the major India-centric IT services firms here.

IndustryViews Venture Capital - Q2 2013

Report

Anthony Miller

18/08/2013

Foundation Service clients can download the latest edition of IndustryViews Venture Capital to read our concise quarterly summary of venture capital investment in UK software and IT services companies.

Infrastructure Services Supplier Landscape 2013

Report

Kate Hanaghan

31/07/2013

Launching our latest research into the leading suppliers to the UK Infrastructure Services market this report covers why this mature market is struggling to grow, putting pressure on the many players that serve it.

UK Business Process Services Market Trends & Forecast 2013

Report

John O'Brien

24/07/2013

Our newly published UK Business Process Services Market Trends and Forecasts 2013 report, paints a more optimistic outlook for the UK BPS market over the next few years. Read John's full research and analysis to find out why.

UK Business Process Services Market Forecasts, 2013, Data & Charts (XL)

John O'Brien

24/07/2013

The data sheet (containing forecast data and charts) to accompany the UK Business Process Services market trends & forecasts 2013 report is now available to download for BusinessProcessViews subscribers.

IndustryViews Quoted Sector Q2 2013

Anthony Miller

Report

23/07/2013

The latest edition of IndustryViews Quoted Sector covers our analysis of how the stock performance of UK software and IT services companies listed on the London Stock Exchange compares with their international peers.

UK Public Sector: BYOD adoption

Georgina O'Toole

Report

16/07/2013

This PublicSectorViews report looks specifically at the adoption of 'Bring Your Own Device/Bring Your Own Technology' in the UK public sector market. Has BYOD really taken off? What are the barriers and challenges preventing faster adoption? Read the full report to find out our view on these questions and the issues surrounding BYOD.

IndustryViews Corporate Activity - Q2 2013

Anthony Miller

Report

15/07/2013

Our regular summary of the UK software and IT services corporate activity scene for Q2 2013 for Foundation Service subscribers.

BrazilViews September 2013

Anthony Miller

AnalystViews

17/09/2013

Anthony's usual round-up on the movers and shakers in the Brazilian IT scene including a profile on the country's largest tech hub, Porto Digital, in Recife, the state capital of Pernambuco. Read his full report to find out more on this and 'local heroes' Stefanini and Totvs, as well as HP, Tech Mahindra and Wipro.

CA Technologies: remixing the business

Angela Eager

AnalystViews

12/09/2013

CA Technologies is one of the stalwarts of the enterprise software sector but demonstrates some of the challenges long-established vendors have when adapting to the cloud environment. There are signs of progress through hard work and imagination, read the full report to find out what's in store for CA Technologies' long journey ahead.

Setting the Scene for Mobile Banking

Peter Roe

AnalystViews

11/09/2013

Read Peter's report on one of the most exciting areas of the Financial Services industry. The increase in penetration of smartphones is driving a revolution of how people bank, buy and pay. With a host of opportunities for both established and new SITS companies find out about the challenges they face.

HP Enterprise Services: a mountain to climb

Georgina O'Toole & Kate Hanaghan

AnalystViews

14/08/2013

As the UK's leading provider of Software and IT Services (SITS), HP heads towards challenging times, find out our view on the distraction of the Autonomy saga and long-standing rumours around whether HP would sell off the services business.

Allocate Software - Foundations for future growth

Tola Sargeant

AnalystViews

26/07/2013

A review of workforce and compliance optimisation software provider, Allocate Software's financial results and an interesting discussion with CEO Ian Bowles on the company's performance and strategy.

Is Social Software an enterprise proposition?

Angela Eager

AnalystViews

12/07/2013

While social media is a roaring success in the consumer world and has found a worthwhile role in the B2C environment, it is still struggling to find a position within business. Read the full report to find out why.

Learning lessons from the NHS' National Programme

UKHotViewsExtra

Tola Sargeant

18/09/2013

The Public Accounts Committee has published its latest report on the dismantled National Programme for IT in the NHS (NPfIT), which summarises the findings of the PAC hearing on the programme in June, find out what lessons have been learned and where they go from here.

Lockheed Martin acquires Amor Group

UKHotViewsExtra

Georgina O'Toole

11/09/2013

A review of the acquisition by Lockheed Martin of Scotland-headquartered, private equity-backed, Amor Group. The deal appears to be a good outcome for Amor's previous funders, including Scottish Enterprise, pleased to see another international business investing north of the border. Read the full review to find out more.

Lockheed acquires Amor: *UPDATE*

UKHotViewsExtra

Georgina O'Toole

12/09/2013

Further information and clarity around the acquisition of Amor Group by Lockheed Martin following a catch up with Amor's COO, Scott Leiper, and Lockheed Martin IS&GS VP/GM for UK & Europe, Daniel Norton.

IBM exits customer services BPO (update)

UKHotViewsExtra

John O'Brien

12/09/2013

IBM is often an innovator in the markets it sets out to dominate. So the news that it is disposing of its global customer services BPO business to US-based IT distributor and BPO player SYNnex is a major announcement. Read John's view on the potential ramifications for the broader BPO market and players.

UPDATED: Computacenter H1 2013

UKHotViewsExtra

Kate Hanaghan

30/08/2013

An in-depth review of Computacenter's financial results for the first half of 2013, to the end of June.

Mood International: optimising the outsourcing market

UKHotViewsExtra

Angela Eager

21/08/2013

Angela caught up with Mood International's CEO George Davies and his team to explore some of the options for teasing out revenue in the outsourcing market, which is currently struggling for growth.

Musings on Government procurement

UKHotViewsExtra

Georgina O'Toole

08/08/2013

Read Georgina's musings on the recent hot topic of conversation surrounding the way that UK Government, and the broader public sector, procures. There have been a number of announcements that have prompted discussion.

Serco CE 'saddened and appalled' by latest allegations

UKHotViewsExtra

John O'Brien

30/08/2013

With the recent rough times had by Serco, John takes a look at the H113 results, which got pretty well overlooked following the allegations of overcharging on its Prisoner Escorting and Custodial Services (PECS) contract with the Ministry of Justice.

Fidessa building on solid foundations

UKHotViewsExtra

Peter Roe

30/07/2013

First half figures for Fidessa, the provider of trading, investment and information solutions for the world's financial community, were, as indicated by the company's management, not particularly impressive. Read Peter's in-depth review to find out why.

Getronics moves Alpha to the cloud**Kate Hanaghan**

UKHotViewsExtra

23/07/2013

Getronics takes flight with a new £10m deal with Alpha LSG, a UK in-flight caterer. Read Kate's in-depth report to find out how Getronics is set to benefit from this high profile, new logo win.

Capita delivers 'robust' first half**John O'Brien**

UKHotViewsExtra

25/07/2013

Capita's first half results show strong momentum has returned to the UK BPS market leader. After winning a record £2bn worth of new contracts in H113, Capita has been busy replenishing its pipeline, which now stands at £4.2bn vs. £4.1bn same time last year.

IBM Q2 – software in focus**Angela Eager**

UKHotViewsExtra

18/07/2013

Following on from UKHotViews and UKHotViewsExtra posts on IBM's Q2 results, we now focus the lens on the software part of the business. Software remains a bright spot in the IBM firmament and shone a little brighter in Q2 than in Q1 as analytics-enhanced offerings eased the path to market.

Software and services help buoy IBM Q2 revenue**Kate Hanaghan**

UKHotViewsExtra

18/07/2013

Our review following a meeting with IBM CFO, Mark Loughridge, who talked analysts through Big Blue's performance for the three months to the end of June. In all, the underlying indicators of the services business are positive. In this in-depth review Kate drills down into the services numbers on IBM's Q2 revenue.

ControlCircle: Invest to grow**Kate Hanaghan**

UKHotViewsExtra

15/07/2013

Following on from a meeting with ControlCircle CEO, Carmen Carey, Kate profiles this Canary Wharf based company who provide a range of data centre services including managed hosting and co-location, disaster recovery, network services and, new to the stable, is its public cloud offering – launched last year.

Government digital services framework tender published**Georgina O'Toole**

UKHotViewsExtra

11/07/2013

As pre-empted by the Prior Information Notice (PIN) in December, the UK's Government Procurement Service (GPS) has published a tender for a nine-month "digital services" framework. Over the nine-month period of the framework, it is anticipated that up to £40m of purchases will be made. However, as this will be a recurring procurement, it may be worth more over the longer-term.

Logicalis edges towards optimal services balance**Kate Hanaghan**

UKHotViewsExtra

16/07/2013

We recently caught up with Mark Starkey, UK MD of reseller and services player, Logicalis. High quality turnover, in Starkey's view, is higher margin annuity revenues. In other words, the intention is not to grow the proportion of IT services revenue just for the sake of it. Read the full article to see Kate's view.