

## Quarterly Research Summary

### Welcome

As you get 2017 off to a flying start here is our quarterly reminder of what we released from October to December 2016.

The PublicSectorViews team published their much anticipated **UK Public Sector SITS Supplier Landscape Report 2016-17**, which is heaving with valuable insight. You will find the Top 20 UK public sector SITS rankings as well as further analysis of supplier performance by subsector, including the Top 10 rankings for central government, local government, education, police and defence. And crucially, you will find an in-depth analysis of the performance and prospects for every one of the Top 20 suppliers.

You will find similar in-depth analysis for the horizontal areas of the UK software, IT services and business process services markets in the Supplier Landscape reports published by our **Infrastructure Services, Enterprise Software & Application Services (ESAS)** and **Business Process Services (BPS)** research directors:

- **Enterprise Software & Application Services Supplier Landscape Report 2016-17**
- **Infrastructure Services Supplier Landscape Report 2016-17**
- **Business Process Services Supplier Landscape Report 2016-17.**

Subscribers to our Foundation Service stream shouldn't miss our analysis of the impact of Brexit on UK tech SMEs in **The Brexit Effect: SMEs in UK tech optimistic about their battle plans**. Foundation Service clients can also read our latest **Little British Battler report**, which profiles the 12 innovative SMEs that participated in our Little British Battler Day in November 2016, and the Q3 issue of our **IndustryViews Venture Capital** research series, which provides a regular update on activity in the UK software and IT services venture capital scene.

Finally, for an end user perspective check out the research published by our FinancialServicesViews and InfrastructureViews analysts in December. In **End User Insight: Mortgage Brain**, TechMarketView research director Kate Hanaghan talks to end user organisation Mortgage Brain as it demonstrates that cloud delivered services have an important role to play in improving both customer experience and compliancy. And in **Are the Digital Strategies of Banks Working?** the FinancialServicesViews team presents the findings of their recent roundtable event. With four banks represented, the analysis gives some clear guidance as to how software and IT services suppliers can support their banking customers.

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

KEY:  Foundation Service     PublicSectorViews     FinancialServicesViews     BusinessProcessViews  
 ESASViews     InfrastructureViews     SecureConnectViews     Available in all streams

#### **UK Public Sector SITS Supplier Landscape 2016-17**

PublicSectorViews team

Report

21/12/2016

This report contains an update to our UK public sector SITS Top 20 supplier rankings based on the latest available financial information, in-depth profiles of each of the Top 20 players, Top 10 rankings for each of the subsectors, and an analysis of the current supplier landscape, including a view of those suppliers challenging the leading pack.

#### **The Brexit Effect: SMEs in UK Tech Optimistic About Their Battle Plans**

Rebecca Johnson

Report

14/12/2016

In October 2016, 33 UK tech SMEs completed a self-selective TechMarketView questionnaire, a great opportunity to ask them about their company's experience following the Brexit vote and how they see the future outside the EU. So, what did we discover? Download a copy of the full report to find out.

#### **Little British Battler Report - LBB9 - November 2016**

TechMarketView analyst team

Report

13/12/2016

This 9th Little British Battler (LBB) report profiles the 12 companies in our LBB Day. They typify the highly innovative, UK-headquartered tech SMEs vying for attention in the local - and global - market. Each has been assessed by the TechMarketView team on its business fundamentals and market proposition, including an insightful SWOT analysis.

**FS** **IndustryViews Venture Capital Q3 2016**

Anthony Miller

Report

12/12/2016

Our regular quarterly summary of venture capital funding in the UK software and IT services scene.

**ESASV** **Enterprise Software and Application Services Supplier Landscape 2016**

Angela Eager

Report

30/11/2016

Our annual research theme 'Surfing the Waves of Disruption' was highly appropriate for Enterprise Software & Application Services (ESAS) suppliers to the UK market during 2016 as they faced yet another disruptive wave: preparation for the move to data-led intelligent applications. The ESAS Supplier Landscape 2016 report examines how these pressures are impacting the market and changing the competitive landscape.

**BPIV** **UK Business Process Services Supplier Landscape 2016**

John O'Brien

Report

30/11/2016

For UK business process services (BPS) suppliers, 2016's theme 'Surfing the Waves of Disruption' is all about how suppliers are disrupting their own business models in order to embrace Digital and Automation technologies and services, to create a step change in cost reduction, productivity improvements and customer experience.

**IV** **Infrastructure Services Supplier Landscape 2016-2017**

Kate Hanaghan

Report

30/11/2016

Much of the disruption suppliers face in the infrastructure services market is happening as end user organisations look to digitise processes and employ the cloud to help them do it. The as-a-service delivery model impacts which types of infrastructure services are deployed and therefore supplier revenue models. Now is a disruptive time indeed...

**FS** **OffshoreViews JAS 2016 Review**

Anthony Miller

Report

29/11/2016

Our quarterly review of the Indian pure-play offshore services scene for the July-September 2016 quarter.

**PSV** **UK Public Sector SITS Market Trends & Forecasts October 2016**

PublicSectorViews analyst team

Report

31/10/2016

This report consolidates TechMarketView's latest forecasts and trends for the UK public sector software and IT services (SITS) market through to 2019, segmenting the market by both subsector and by the SITS market activities as defined by TechMarketView's Asset Led Market Model (ALMM).

**PSV** **UK Public Sector SITS Market Forecasts 2015-2019 (Excel)**

PublicSectorViews team

Report

01/11/2016

Spreadsheet containing the market data to support the PublicSectorViews UK Public Sector SITS Market Trends & Forecasts 2016-17 report.

**FSV** **UK Financial Services SITS Market Trends and Forecasts 2016**

Peter Roe

Report

31/10/2016

This is the FinancialServicesViews annual overview of the UK market for Software and IT Services (SITS) within the Financial Services sector. We consider the major market shaping trends and the implications for SITS suppliers, as well as placing the developments in the key areas of the wider market in the context of this important sector.

**FS** **IndustryViews Quoted Sector Q3 2016**

Anthony Miller

Report

28/10/2016

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.

**FS** **IndustryViews Corporate Activity - Q3 2016**

Anthony Miller

Report

20/10/2016

Our quarterly summary of corporate activity in the UK software and IT services market, including both 'trade' M&A and private equity deals.

**ESASV** **Enterprise Software & App Services Market Trends & Forecasts 2016**

Report

Angela Eager

4/10/16

This is our annual report covering the c£24bn UK Enterprise Software & Application Services (ESAS) market, providing analysis of the trends shaping the sector and including our market size and forecasts for the 2015-19 period.

**FSV** **Are the Digital Strategies of the Banks working?**

AnalystViews

Peter Roe

20/12/2016

We ran a round table discussion on the important topic of whether the digital strategies of the banks are being successful, either in introducing transformation to the larger banks or in building new banks and banking propositions. In the briefing we produced following the round table we have drawn out the key themes of the discussion.

**IV** **End User Insight: Mortgage Brain**

AnalystViews

Kate Hanaghan

19/12/2016

Here we take a look at end user organisation, Mortgage Brain. Operating in the UK market for 30 years and owned by six of the big mortgage lenders, it provides software that contains mortgage product data and manages the application process by brokers. Mortgage Brain demonstrates that cloud delivered services have an important role to play in improving both customer experience and compliancy.

**SCV** **The HCL recipe for maintaining revenue growth**

AnalystViews

Martin Courtney

12/12/2016

Noida-headquartered infrastructure services supplier HCL has enjoyed spectacular revenue growth at the expense of its rivals in the last few years, but the chances of maintaining that same level of success look remote. This report explains how HCL is preparing itself to meet the challenge by expanding its portfolio and shifting its revenue mix.

**SCV** **The impact of data sovereignty on UK cloud service development**

AnalystViews

Martin Courtney

14/11/2016

The emergence of the EU US Privacy Shield and Microsoft's victory over the US Department of Justice have added a little more clarity to the data sovereignty debate. In this report we cut through the legal jargon to decipher what that means for SITS suppliers offering cloud and hosting services to UK customers.

**FSV** **Money2020 - the premier Global Fintech Event**

AnalystViews

Richard Johnson

03/11/2016

The latest iteration of Money 2020 took place recently and TechMarketView Associate Richard Johnson joined a record 11,000 attendees eager to try to make sense of the extraordinary amount of activity which is underway in the payments and Fintech space.

**PSV** **Civil service reform: what can we expect?**

AnalystViews

Georgina O'Toole

24/10/2016

In this research note, TechMarketView's PublicSectorViews' team welcomes Jo Cliff as a 'guest writer' to give her views on the current state of the Civil Service Reform agenda; her take on the objectives of the current Government; and an outline of the potential barriers to progress (including the Brexit impact!).

**FS** **Company Snapshot: Rezonance**

AnalystViews

Rebecca Johnson

10/10/2016

Rezonance is an innovative UK-based ad tech company, providing an engagement-based digital advertising platform. It is one to watch in the ad tech space, and it is well positioned to achieve its goal of making Freewall® the operating model of choice in the digital advertising arena.

**FSV** **Payments Bulletin October 2016 - Payments meet Fintech**

AnalystViews

Peter Roe

05/10/2016

Are you or your customers interested in the Payments market? Do you understand why what used to be a sleepy, boring back office function is now a hotbed of innovation and competition, even sexy? If you answered Yes to the first question and No to the other one, then we are sure that you will find this report interesting, informative and useful.

**BPV** **Wipro transforming the legacy BPS core**

John O'Brien

AnalystViews

04/10/2016

We recently met with Wipro's general manager for BPS operations Somit Kapoor, who talked us through the strategy for enterprise operations transformation (EOT), an important new initiative that lies central to many of the big themes and challenges facing Wipro, and its Indian Pure Play (IPP) peers as they attempt to transform their legacy operations.

**SCV** **Black Hat Europe: ransomware and threat hunting**

Martin Courtney

UKHotViewsExtra

15/11/2016

TechMarketView attended the Black Hat information security conference in London to find out how companies are responding to the growing tide of cyber attacks being directed against them and how UK SITS suppliers are revamping product and service portfolios to help them do it.

**SCV** **Agilisys: hybrid cloud community for the public sector**

Martin Courtney

UKHotViewsExtra

28/10/2016

Local government SITS supplier Agilisys has upgraded its public sector certified IaaS platform to include hybrid cloud hosting elements. Read our analysis of Agilisys' new Community Cloud and see how it stacks up against the opposition here.

**PSV** **Autumn statement 2016: ICT for productivity**

Georgina O'Toole

UKHotViewsExtra

24/11/2016

In this report we have studied the autumn statement and we offer our analysis of what it might mean for the UK public sector SITS market. We also look at some of the other funding commitments, related to the National Productivity Investment Fund (NPIF), which could offer significant opportunities to suppliers targeting other sectors.

**PSV** **Advanced win in education signals schools' move to cloud**

Tola Sargeant

UKHotViewsExtra

02/11/2016

UK software firm Advanced is celebrating a landmark contract win in the education sector having signed a three-year deal with the UK's largest multi academy trust, Academies Enterprise Trust (AET). AET is to use Advanced's SaaS-based Progresso management information system to support its 66 academies. Read the full article in this UKHotViewsExtra piece.

**BPV** **Capita downgrades again (update)**

John O'Brien

UKHotViewsExtra

08/12/2016

Confidence in Capita has taken a real hit following its second profits warning in as many months (see **Capita downgrades again, plans Asset Services sale**), with its shares now off c60% year to date. Capita's CE Andy Parker talked of taking 'decisive action', to reduce Capita's cost base and its improve its operating efficiency.

**BPV** **Atos secures £200m BPS partnership with Aegon (update)**

John O'Brien

UKHotViewsExtra

13/10/2016

We broke the news earlier of Atos winning a new £200m business process services (BPS) deal with insurer Aegon. Subscribers to TechMarketView's Foundation Service and BusinessProcessViews research can read the full analysis and implications of this new life and pensions BPS win in this UKHotViewsExtra article.