

**An Evening with TechMarketView 2019**  
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# Quarterly Research Summary Q1 2019

Welcome to our round-up of Q1 published research. To read more, simply click through.

KEY	Foundation Service	PublicSectorViews	FinancialServicesViews
	BusinessProcessViews	ESASViews	InfrastructureViews
	SecureConnectViews	Available in all streams	Tech User Programme



Jon C Davies | Report | 31/03/2019

## Financial Services Supplier Prospects 2019 and Beyond

This report examines each of the top ten leading Software and IT Services providers in the UK financial services market and assesses their performance to date. The analysis also examines what each of these companies will need to do, in order to secure future market success and provides a view on the potential challenges that all vendors in the financial services technology sector will face, over the medium to longer term.



Marc Hardwick | AnalystViews | 26/03/2019

## Automation – Transforming Financial Service Majors

This report examines the current state of automation within the financial services sector, examining the key players and technology providers and their strategies. We propose an evolution framework for automation and identify the financial services sector's current position within it.



Marc Hardwick | UKHotViewsExtra | 20/03/2019

## Will the Government's 'Outsourcing Playbook' put Public Sector outsourcing back on track?

The recent problems at Interserve are another reminder of the perilous state that Public Sector outsourcing finds itself in throughout the UK. Whilst Interserve has ultimately survived to fight another day, the fallout from Carillion's implosion has put an industry in real jeopardy. Here we look at how the Government and UK Plc are trying to put the sector back on track and whether these changes are likely to make the difference.



Kate Hanaghan | UKHotViewsExtra | 12/03/2019

## Q&A: Andy Isherwood, MD EMEA, Amazon Web Services

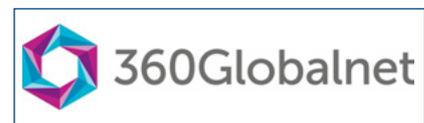
After 30 years at HP/HPE, Andy Isherwood left his role as Managing Director of EMEA to join Amazon Web Services in March 2018. Andy brings a wealth of experience to AWS, not least his years of work with large enterprise and Government customers. In this Q&A with Andy (his first with an industry analyst since starting his role), we learn a bit more about what it is like to be a leader in one of the industry's most disruptive firms.



Anthony Miller | Report | 06/03/2019

## IndustryViews Venture Capital 2018 Review

The number and aggregate value of venture capital funding deals for UK and Irish technology companies hit new highs in 2018, according to the latest data from corporate finance firm, Ascendant. This latest edition of IndustryViews Venture Capital has indepth detail, along with a handy summary of the final quarter's venture funding deals.



Jon C Davies | UKHotViewsExtra | 06/03/2019

## 360Globalnet looks to the future

Jon Davis recently caught up with the folks at insurance technology provider, 360Globalnet. The company is an independent, claims specialist providing self-service capabilities to accelerate the settlement process. As the sector evolves, and the value chain is disrupted, firms such as 360Globalnet are seeking to explore their future relevance in the marketplace. As a result, the company is working to define additional long-term revenue streams across other sectors.



Richard Holway | UKHotViewsExtra | 02/03/2019

### Share indices for February 19

2019 has got off to a cracking start for tech shares. After the travails of Q4 2018, NASDAQ is up 13.8% YTD against a 5.2% rise in the FTSE100. The FTSE SCS Index was up an even more impressive 17.3% YTD - 12.4% in Feb alone. All this relatively good news comes against the possible impending chaos of a no-deal BREXIT on 29th Mar 19. I'm afraid I am no better at predicting the outcome than anyone else. We certainly live in 'interesting times'!



PublicSectorViews Team | Report | 28/02/2019

### UK Public Sector Supplier Prospects 2019

In UK Public Sector Supplier Prospects 2019, we look at the Top 20 suppliers in the UK public sector software and IT services market. We review recent progress, look at the key market challenges and assess what suppliers need to do to maximise their potential in 2019 and beyond.



Dale Peters | AnalystViews | 15/02/2019

### Digital GP Consultations: The Expanding Influence of Babylon

NHS England has given permission for Babylon's GP at Hand service to extend outside of London for the first time. It had previously advised against expansion due to concerns about access to local clinical pathways and screening services. In this report we look at the history of GP at Hand, the impact of its expansion, the company behind the technology and concerns about how that company has been championed by the Government.



Duncan Aitchison | Report | 05/03/2019

### The Digital Skills Deficit - Breaking the Bottleneck

There is a slew of data pointing to the existence of a significant, widespread and deepening digital skills shortage. It is viewed by many as the most significant drag on both the progress of enterprise transformations and the expansion of the IT services sector. This paper examines the factors that are shaping and driving the digital skills deficit, considers the measures which need to be taken to address it and looks at how the supply side is responding to this challenge.



Martin Courtney | Report | 28/02/2019

### 5G: Opportunities in Next Generation Mobile Networks

As the headlines from this year's Mobile World Congress subside, this report takes an in-depth look at the steps mobile network operators (MNOs) are taking to prepare early implementations of fifth generation (5G) mobile networks here in the UK.



Peter Roe & Kate Hanaghan | AnalystViews | 28/02/2019

### Fast moving Lowell signs broad-ranging deal with Fujitsu

Lowell and its antecedents have been active in the credit management business for over 25 years. To build a secure technology foundation from which to continue to grow its business, the company has embarked on a far-reaching strategy. Central to Lowell's future technology plans is a new six-year €60m contract with Fujitsu. In this report, we talk to CIO Gary Edwards to understand more about the contract and his decision to go with Fujitsu.



Jon C Davies | UKHotViewsExtra | 28/02/2019

### Culture holds the key to success

In my first few weeks with TechMarketView I have been greatly impressed by the vibrancy and enthusiasm that exists within the UK technology industry. As a key to success, the word "culture" stands out more than anything else.



Anthony Miller | Report | 12/02/2019

### Musing on the Mid-Tier Indian pure-plays

While the Top 6 Indian pure-plays (IPPs) have been struggling for growth in recent times, the mid-tier suppliers have generally shown them a clean pair of heels with double-digit growth rates. In this latest edition of OffshoreViews, TechMarketView managing partner Anthony Miller takes a closer look at the mid-tier players and speculates on whether there are indeed any 'marriages to be made in heaven'!



Martin Courtney | UKHotViewsExtra | 09/02/2019

### Cogeco Peer 1 SD-WAN survey: businesses held back by SD-WOT Syndrome

Cogeco Peer 1's latest research on attitudes to software defined wide area network (SD-WAN) connectivity amongst UK organisations makes for interesting reading. Its findings resonate with our own: while technology offers potential for organisations to procure more flexible WAN bandwidth at lower cost to optimise cloud application and service performance, the technology remains in the early stages of adoption.



### TechMarketView Market Readiness Index (MRI): Top 10 UK IT & Business Process Services Providers

This report is designed to help end user organisations determine the readiness of their ICT suppliers to support them as they seek to digitally transform their organisations. The MRI models TechMarketView’s understanding of how advanced suppliers are when it comes to being able to contribute to the creation of more intelligent and more automated organisations for their customers.



### Business Process Services Supplier Prospects 2019 and beyond

Whilst shifting market dynamics remain consistent for all Business Process Services (BPS) providers, suppliers will continue to respond in different and varied ways. This report identifies the challenges facing BPS suppliers, how they can best respond to them, and the things they should be doing to thrive in the long term. It also includes profiles of the top 10 BPS suppliers to the UK.



### IndustryViews Corporate Activity - 2018 Review

After a relatively muted 2017, merger and acquisition activity in the UK software and IT services (SITS) sector during 2018 broadly recovered to 2016 levels. Underpinning the numbers was a 16% increase in UK domestic deals and a 24% increase in the number of acquisitions of UK SITS companies by overseas buyers and IT services company in 2018.



### Atos banks on transformational outsourcing

As the market continues to pivot away from contracts that simply involve “keeping the lights on”, Atos has enjoyed a number of recent successes in the financial services outsourcing space. I visited Atos recently to meet with Chris Darlington, head of UK financial services, to talk about the market and learn more about the Atos approach.



### Share indices for Jan 19

Amazon exceeded expectation in Q4 with revenues up 20% at \$72.4b yoy. Sales in North America - Amazon’s biggest market by far - were up 18.3% at \$44.1b. Read all about what’s happening with our Share Indices round-up for January.



### Enterprise Software Supplier Prospects 2019 and beyond

In this Supplier Prospects report we identify the challenges facing software suppliers, how they can best respond to them, and the things they should be doing to thrive in the long term. It also includes profiles of the top 10 enterprise software suppliers to the UK.

Not sure how to access the research?

Contact **Client Services** for details  
email [info@techmarketview.com](mailto:info@techmarketview.com)



### Atos 3-year plan reflects changed shape of business

Atos made two significant moves in 2018. The first, the acquisition by Atos Worldline of SIX Payment Services, came in May, reinforcing Worldline’s position as the largest payments business in Europe. The second was the acquisition of Syntel. Having spoken with Atos CEO UK & Ireland, Adrian Gregory about the Group’s future plans, we take a look at where Atos will be focusing its attentions in the years ahead and consider its biggest challenges and opportunities.



### NHS Long Term Plan: What does it mean for tech?

At the beginning of January 2019, the Department for Health and Social Care published the NHS Long Term Plan. The plan focuses on building an NHS ‘fit for the future’ and gives a strong indication as to how its £20.5 billion budget settlement will be spent over the next five years. In this research report we analyse some of the key points from the plan and highlight areas of opportunity for software, IT & business process services and other tech suppliers.



### FS firms learn to dig the new breed

There are significant parallels between recent news that Lloyds Banking Group has selected innovative tech start up Thought Machine as a core system provider and the recent decision by BMW Financial Services (UK) to select InsurTech, start-up Wrisk as an insurance provider. Both these developments highlight the increasing willingness of established financial services firms to work on mainstream initiatives with innovative, new providers.



Marc Harwick | UKHotViewsExtra | 24/01/2019

### Blue Prism to raise £100m with market placing

There was big news out this quarter from UK RPA player Blue Prism with the release of full year results and news that it intends to raise an additional £100m with a Stock Market placing.



Jon C Davies | UKHotViewsExtra | 23/01/2019

### TechMarketView's GDPR prediction comes to pass

As predicted by TechMarketView in 2018, it appears that the European regulators have indeed started to wave the "big stick" under the banner of GDPR with the news that Google has been fined £44m by the French data regulator CNIL.



Anthony Miller | Report | 22/01/2019

### IndustryViews Quoted Sector - 2018 review

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



Tola Sargeant | UKHotViewsExtra | 16/01/2019

### Tech Talent Charter improving gender diversity in tech

January saw the launch of the Tech Talent Charter's inaugural report on gender diversity in tech atop the iconic Gherkin building in London. TechMarketView is proud to be one of the nearly 300 organisations large and small that have signed up to the Tech Talent Charter in its first year, undertaking to drive greater gender diversity in tech roles.



Jon C Davies | UKHotViewsExtra | 14/01/2019

### Loot: The FinTech only your kids have heard of?

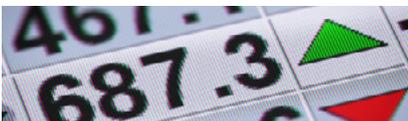
Up and coming UK fintech Loot has capped a successful 2018 by attracting additional investment funding from RBS of £3m. RBS has provided the latest investment on behalf of its own digital banking start up Bo (scheduled for launch 2019). Loot has attracted funding from another strategic partner, Canadian based Power Corporation, via their VC arm Portag3, whilst other investors are SpeedInvest and Global Founders Capital.



Richard Holway | UKHotViewsExtra | 01/01/2019

### Holway Portfolio performance 2018

2018 was the first year when the Holway Portfolio recorded a loss since its first publication in 2010. However, the Portfolio is still up 430% since 2010. But concern about the outlook has meant that a third of the value of the Holway Portfolio has been liquidated since 1st Jan 2018 and is now held in cash. You can read the full review of Richard Holway's Portfolio Performance 2018 in UKHotViewsExtra here.



Richard Holway | UKHotViewsExtra | 01/01/2019

### Share Indices for 2018

2018 was a pretty awful year for investment - in particular for UK HQed SITS companies. Is the Outlook for 2019 any better? Holway says "I don't think I have ever been so uncertain about the outlook for a New Year. I've certainly never been so pessimistic. There are so many possible negatives on the horizon and it's difficult to find any good news to report. Of course, all these fears might just blow away..."



Tech Market View  
UK DEPTH GLOBAL TRENDS

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