Welcome

January saw the analyst team get 2016 off to a flying start with the launch of our TechMarketView Predictions 2016 Compendium, the must read report to help you catch the right waves in the year ahead.

Hot on its heels came the PublicSectorViews UK Local Government SITS Supplier Landscape 2015-16 report, featuring top 10 supplier rankings as well as challengers to this competitive market. Also in PublicSectorViews research director, Georgina O’Toole, brought us the 3Ds in Local Government: Devolution, Data and Digital, analysing how these three market shaping trends are causing turbulence for local authorities and suppliers.


In ESASViews, research director Angela Eager, brings us reports on Machine Learning in Analytics, as well as two CompanyViews research notes on Digital Transformation featuring Accenture and CGI respectively.

In our InfrastructureViews stream new principal analyst, Martin Courtney, kicks of his reports with an in-depth look at our Predictions highlighting Networks, Cloud and Security. While stream research director, Kate Hanaghan, has been focusing company notes on Daisy Group, Skyscape, Adapt and Lemongrass.

In FinancialServicesViews, research director Peter Roe brings us company focused analyst views on HPE, Atos, Infosys and SopraSteria. While Richard Johnson reports on Finovate 2016, assessing how the fintech innovators can help the financial services sector "surf the waves of disruption".

The analyst team have also brought you a number of Company Snapshots, bite size reports covering all you need to know about some of the key companies making waves this year. These include Netsuite, Emis, BJSS and Little British Battler Carrenza.

PublicSectorViews released their seventh Opportunities Bulletin, this time looking at the central government health, and local & regional government markets. And the Foundation Service released annual reviews for IndustryViews Venture Capital, OffshoreViews, IndustryViews Quoted Sector and IndustryViews Corporate Activity. Invaluable roundups of the performance and activity in the UK SITS market.

Looking ahead to Q2 keep an eye out for our eighth Little British Battler event report and the hotly anticipated flagship reports Market Trends and Forecasts 2016 and Supplier Landscape 2016. All reports you can’t afford to miss!

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

IndustryViews Venture Capital Q4 2015
Anthony Miller
18/03/16
The latest edition of IndustryViews Venture Capital, our annual round-up of activity in the UK software and IT services venture capital scene, including a succinct analysis of the year’s key numbers and a compendium of recent UKHotViews funding posts.

UK Local Government: The 3Ds - Devolution, Data & Digital
Georgina O’Toole
15/03/16
In this PublicSectorViews research note, we assert that there are three key local government sector shaping trends; the waves crashing on the UK local government SITS market. They are the ‘Three Ds’: devolution, data and digital. This research note outlines their impact on UK local authorities and the associated opportunities for SITS suppliers.

OffshoreViews Q4 2015 Review
Anthony Miller
02/03/16
Our regular quarterly review of the India-centric offshore services scene, including our latest analysis of the aggregate growth rate of the leading Indian pure-plays.
## Business Process Automation - the future of white-collar BPS

**John O'Brien**

Part-Two of our report series into Business Process Automation (BPA), assesses the impact BPA will have on the white-collar business process services (BPS) workforce of the future.

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## Industry Views Quoted Sector - 2015 Review

**Anthony Miller**

Our annual review of the stock performance of UK-listed software and IT services companies in 2015.

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## TechMarketView Predictions 2016 Compendium

**TechMarketView Team**

The Predictions 2016 compendium report significantly expands on and consolidates TechMarketView’s Predictions 2016 commentary originally published in UKHotViews in December 2015.

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## UK Local Government SITS Supplier Landscape 2015-16

**PublicSectorViews Team**

Based on our analysis we provide the latest ranking of the Top 10 providers of UK SITS to local government and consider how they match the market environment in which they are operating. We also look at the ‘challengers’ to the market—those that are challenging the status quo and offering a different proposition to the leading suppliers.

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## Industry Views Corporate Activity - 2015 Review

**Anthony Miller**

Our annual review of corporate activity in the UK software and IT services market, including ‘trade’ M&A and private equity deals.

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## Machine Learning in Analytics: Grasping its Disruptive Force

**Angela Eager**

Machine learning as part of the analytics portfolio has hit the topical chatter list in a major way. It has also become a focus for start ups, PE and VC investments, and the object of a growing number of acquisitions. Suppliers of all types are rushing to show off their credentials. This is Part One in a series of research notes exploring machine learning.

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## Predictions 2016: Networking, cloud, security

**Martin Courtney**

In this research note we dive into the infrastructure services market, taking a closer look at the space where cloud, networking and security technologies converge. Principal Analyst, Martin Courtney, explains what he considers to be some of the most important movements in the market and the implications for suppliers.

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## Daisy Group must ride market disruption to accelerate its transformation

**Kate Hanaghan**

Via the acquisitions of Damovo and Phoenix IT, Daisy Group has expanded from its original markets in telco and mobile services into IT services. In this research note we examine the challenges Daisy faces as well as some of the opportunities for both the Group and the industry more broadly.

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## Digital Transitions, Supplier Progress: Accenture

**Angela Eager**

This note provides a snapshot of the demand for digital transformation and how it is being met, illustrated through Accenture’s approach to market. Here we take a deep dive into its digital capabilities as part of TechMarketView’s work on tracking the fast moving digital market.

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## Disruption in Banking - A European Perspective

**Richard Johnson**

TechMarketView aims to keep an eye on the European scene to look for insights which might be applicable to the UK
market. This year’s “Future of Retail Banking: Europe” event in Vienna was a good opportunity to see what challenges are facing European Banks, and how they are tackling them. Richard Johnson was there, chairing several of the workstreams, and provides his analysis in a new report for TechMarketView.

**HPE - Benefiting from the Deutsche Bank deal**

**Peter Roe**

A year ago, Deutsche Bank and HP announced a ten-year, multi-billion dollar IT infrastructure deal, centred on private cloud, to transform the bank’s cost base and ability to compete in the rapidly changing financial services sector. Now as part of the newly-formed Hewlett Packard Enterprise, the Financial Services practice is able to leverage the scale, experience and credibility gained through this flagship contract as other major financial services companies look to modernise their IT and delivery capability.

**Public Sector Opportunities Bulletin - March 2016**

**PublicSectorViews Team**

Our seventh Opportunities Bulletin looks at the central government health and local & regional government markets. Fitting with our 2016 theme—Surfing the Waves of Disruption—all the opportunities point to some sort of disruption in the market and it is our view that the potential may extend far beyond these initial contracts.

**Atos - New FS propositions providing a cutting edge**

**Peter Roe**

At the centre of Atos UK’s strategy in Financial Services is a new set of higher value propositions incorporating the skillsets of new partners and specialist suppliers. Atos is looking to re-position itself in the growth areas of this competitive sector and build new dialogues with the larger customer organisations around key business issues.

**Skyscape and Adapt join forces in Government cloud**

**Kate Hanaghan**

As customers start to shift more infrastructure into a cloud environment they will increasingly need suppliers that can provide the enabling services. The pure-play cloud firms are steering clear of providing these ‘wrap-around’ services, instead maintaining laser-like focus on their product and pulling in partners for the complementary services.

**Digital Transitions, Supplier Progress: CGI**

**Angela Eager**

This report identifies some of the top digital transformation challenges and requirements impacting the progress of digital transformation in the wider market and the impact on suppliers, paying particular attention to how CGI is addressing them.

**Can Finacle drive growth for Infosys in Financial Services?**

**Peter Roe**

The Finacle subsidiary of Infosys is at the core of its EdgeVerve software products business. One-third of Infosys Group revenue is from the wider Financial Services sector where the provision of software and the associated implementation and services is seen as a key generator of revenue and value-add.

**Company Snapshot: BJSS**

**Tola Sargeant**

Founded in Leeds in 1993, BJSS has grown organically from its roots to a 550 person ‘full service IT company’. Despite its rapid growth, the SME has maintained its entrepreneurial spirit and is renowned for its technical excellence, cost-effective delivery and ‘Enterprise Agile’® approach to IT delivery.

**Liberata aiming for success via BPO, BPaaS and Automation**

**John O’Brien**

Liberata is mid-way through a strategic turnaround led by long-time executive and recently appointed UK CEO Charlie Bruin. Under Bruin’s leadership, Liberata is transforming itself into a new type of public sector BPS player, focused around innovations in Business Process Automation (BPA) and Business Process-as-a-Service (BPaaS).
February's Finovate event in London was a chance to take the temperature of the fintech scene at the start of 2016. We comment on the key themes of this year's conference and how the fintech innovators can help the sector "surf the waves of disruption".

**Company Snapshot: NetSuite**

*Angela Eager*  
29/01/16

With its back office focus, cloud pure play NetSuite did not choose an easy path for itself. Nevertheless it is achieving consistently high growth in FY15. International growth is high on its agenda and there is scope to do much more. This Company Snapshot provides an analysis of NetSuite's market position and opportunities and key UK competitors.

**Lemongrass Consulting: Driving SAP into the cloud**

*Kate Hanaghan*  
29/01/16

Last year Lemongrass Consulting caught our eye following our discovery that it had landed what was probably Europe's largest AWS/SAP implementation. In this short SME Snapshot research note, we take a closer look at Lemongrass Consulting to understand a little more about the company and its activities.

**Company Snapshot: EMIS**

*PublicSectorViews Team*  
25/01/16

EMIS Group (EMIS) is looking to be at the heart of interconnected health agenda. EMIS is aiming to help deliver a paperless NHS with solutions underpinning how medical information flows between doctors, hospitals, community care providers and pharmacies. This Company Snapshot provides our view on the company.

**Sopra Steria - Working together in UK Financial Services**

*Peter Roe*  
22/01/16

The Financial Services sector is seen as a source of significant growth and margin for the recently merged Sopra Steria group and there is substantial potential in the UK. It is looking to build out its banking software business and to provide specialist solutions across the wider banking sector, thus generating a greater share of wallet within established banks and laying the foundations for a strong position with sector newcomers.

**CACI UK: well known in its target niches**

*Georgina O'Toole*  
22/03/16

Following the announcement of the acquisition of Little British Battler, Purple Secure Systems, by CACI Limited, we managed to catch up with Jeet Khaira, Managing Director & Executive VP, at CACI Limited. Khaira heads up the UK business’ Information and Management Solutions (IMS) division, where Purple now resides.

**Servelec's business of two halves**

*Tola Sargeant*  
02/03/16

The benefits of Servelec’s diversified business model are plain to see within its FY15 results. The business is now split roughly 50/50 in revenue terms between the Health & Social Care and Automation divisions but the fortunes of the two halves of the business could not have been more different in FY15.

**Serco FY15: much better than expected (update)**

*John O’Brien*  
02/03/16

Serco issued its full year results which turned out to be 'much better than expected' according to CEO Rupert Soames. Even though the results were met with a significant boost to Serco’s share price, Serco is nonetheless, in the midst of a long and painful transformation, to become a more stable and focused Business to Government (B2G) services supplier.

**Capita predicting slower organic growth (update)**

*John O’Brien*  
29/02/16

Capita released its full year 2015 results, which highlighted a few trouble spots, and slower organic growth for 2016. Underlying performance across the group remains solid and margins are back on the up, enabling Capita to continue outperforming most of the competition.
Update: Capgemini bets on digital & cloud for growth
Georgina O’Toole
22/03/16
In our initial write-up of Capgemini’s FY15 results last week, we left a few questions hanging in the air such as how much of the 7.5%-9.5% growth predicted for FY16 would be organic? And secondly, what is the underlying picture in the UK market and how will the region contribute in 2016?

NHS IT funding boost creates SITS opportunities
Tola Sargeant
09/02/16
NHS IT was hitting the headlines again as momentum builds behind the government’s push to use technology to ease pressure on the NHS frontline. Here we delve more into how the money will be spent, and where it will come from.

Ones to watch from BETT
PublicSectorViews team
28/01/16
Recently we attended BETT, the education and technology trade event. The show offers a first glance at some of the more innovating and exciting solutions from ICT suppliers. This UKHotViewsExtra note presents our takeaways from BETT 2016.

LBB Carrenza: continuing to innovate
Georgina O’Toole
21/01/16
We first met Little British Battler (LBB), Carrenza, back in November 2013. Recently we met with Matt McGrory, new UK MD, to better understand his new role and responsibilities and to learn more about recent corporate developments. In Matt’s words, “Dan sets the vision; I am responsible for making that vision a reality”.

SAP & Unit4: self driving, self learning
Angela Eager
21/01/16
In Predictions 2016: Enterprise Software & App Services, we flag up data intelligence and tools such as machine learning, and the early signs of convergence of software and business processes to serve business outcomes, as key themes for 2016. Subsequent catch ups with SAP SuccessFactors and Unit4 provided some compelling examples of how these themes are starting to play out.

Six Degrees steps up growth plans with Charlesbank backing
Peter Roe
08/01/16
Six Degrees has announced that its new owner, Charlesbank Capital Partners, will be contributing a further £12m to support the company’s organic growth plans. Charlesbank is a US private equity firm with offices in Boston and New York. Here we look at the plans ahead for Six Degrees with Charlesbank as its new owner.