

Quarterly Research Summary – Q1 2011

A review of research Reports and Analyst Views notes from TechMarketView – Q1 2011

Welcome

Welcome to the quarterly round-up of news, views and reports from TechMarketView. It has been a very busy quarter with the launch of [BusinessProcess Views](#), along with the publication of our first in-depth report on the sector.

We also examine the UK Local Government SITS Supplier Landscape for 2011 and have the end-of-year round-up of the UK SITS quoted sector. Read all our reports for this, and previous quarters, at www.techmarketview.com.

OffShore Views Q4 & 2010

28th March 2011

2010 was another year of UK market share gain for the major India-based IT services players, with aggregate growth at 16% versus a headline 4% decline in the UK IT services market. For further analysis, read our quarterly and year-end review of the offshore scene.

IndustryViews M&A Review – Q4 & 2010

24th March 2011

Now there's something we haven't seen before. For the first time since we started publishing IndustryViews M&A, the top ten acquisitions involving UK SITS (software and IT services) companies in a quarter were all conducted by UK players.

EMIS: Laying the foundations in cross-organisational healthcare

22nd March 2011

EMIS' maiden annual results since its listing on AIM last March might only have revealed flat-ish organic revenue growth but the GP software provider looks well positioned to grow in 2011 and beyond.

IndustryViews Private Equity Q4 & 2010

17th March 2011

Earlier this year we voiced concern as to whether the winding down of the Regional Development Agency (RDA) network might exacerbate the venture capital funding gap. In its place, the government is 'devolving' responsibility to a new network of Local Enterprise Partnerships (LEPs), "locally-owned partnerships between local authorities and businesses".

Capita's European ambitions

15th March 2011

The surprises just keep coming from Capita. First it warned on full year revenues in late 2010, and now following its FY10 results announcement, we learn it

is seeking further expansion outside of the UK. In this Analyst Views note we discuss Capita's areas of opportunity and the challenges it faces as it seeks to generate growth both organically and through acquisition.

Social Care IT: OLM evolves with the market

15th March 2011

Developments in government policy – including a planned £1b investment in the closer integration of health and social care in England – have ignited interest in the UK social care IT sector. In this research note we analyse the strategy of OLM Group, a privately-held UK-based software and services firm focused on the social care sector, and share our views on how its plans to fit with emerging trends in the UK social care IT sector.

The UK Cloud Software Market

10th March 2011

The market for Cloud software is set to grow rapidly over the next decade. By contrast, the non-Cloud software market will decline. Most forward-thinking software companies are moving their products into the cloud as quickly as possible.

This report examines the size and development of the Cloud Software Market including SaaS (Software as a Service) and PaaS (Platform as a Service) and looks at the implications for software suppliers

Logica's margin challenge

2nd March 2011

There's no doubt that Andy Green's ambition to move Logica's 'adjusted' operating margin into double digits in the medium term is a fine and noble cause. Indeed, to do so could start to put Logica on a similar footing with Accenture, which at 13-14% margins is surely the gold standard for a (non-Indian) global IT services pure-play.

But is this merely a pipedream?

UK local government SITS supplier landscape

22nd February 2011

The UK local government SITS supplier landscape is dominated by IT and business services players that continue to benefit from the steady flow of revenues attributable to the raft of multimillion and multibillion multi-service line contracts signed over the last decade. However, our analysis highlights some significant changes to market dynamics and to supplier strategies that could result in a shake-up in the rankings.

IndustryViews Quoted Sector – 2010 Review

21st February 2011

Investors' love affair with UK SITS (software and IT services) stocks continued throughout 2010, which saw the benchmark FTSE SCS (software and computer services) index rise by 23%. In this report Anthony Miller analyses the UK Quoted Sector, commenting on the 'Rising Stars' and why BPO was not the place to be.

Steria's Platform-based shared services strategy

15th February 2011

We recently attended Steria's analyst event in the north of England, from where it is performing two of its biggest outsourcing deals – NHS Shared Business Services (NHS SBS), the long-running shared services joint venture with the Department of Health (DoH), and the more recent £219m BPO contract with Cleveland Police Authority (CPA). John O'Brien explains the challenges ahead.

Waiting for the Cloudburst

4th February 2011

"When the music stops...all change!" Read Anthony Miller's presentation from the 2010 Regent Conference. Take a moment to consider the suppliers heading for the clouds and what Anthony thinks will be a major factor in determining the winners in this cloud reaching race!

Agilisys: successfully taking on the big boys

1st February 2011

We first wrote about privately-held, public sector-focused IT services and BPO player, Agilisys, in November 2009 when we described CEO, Kay Andrews, as "high-voltage"! We recently met up with Andrews again and she's lost none of her energy or enthusiasm. Indeed, she's got a lot to be smiling about, as Agilisys has gone from strength to strength.

'Ed-Cloud before G-Cloud?'

26th January 2011

Changes to the UK education market — tighter budgets, the end of the Building Schools for the Future programme, and greater autonomy for schools to name but three — look set to drive schools, colleges and universities towards the early adoption of cloud computing. Does this mean we will see an 'Ed-Cloud' before a G-Cloud? How might the market evolve and what would this mean for SITS suppliers?

UK Business Process Services – Spotting the Opportunities

25th January 2011

As the UK public and private sectors prepare for another difficult year in 2011, suppliers of business process services (BPS) are well placed to benefit. In this report, we introduce the term BPS, examine the key trends affecting the market, and ask where growth will come from in 2011 and beyond.

What's become of the UK Government's G-Cloud Programme?

16th January 2011

To understand recent developments within the Cabinet Office Efficiency & Reform Group and to discuss the future of UK Government ICT, we spoke to UK Government Deputy CIO, Bill McCluggage. We were particularly keen to get his take on the G-Cloud 'programme', its progress to date and its future. Following our conversation, TechMarketView provides our views on 'G-Cloud'.

Oracle & SAP in the UK Public Sector

6th January 2011

We recently caught up with two of the men behind the UK Government businesses of ERP giants SAP and Oracle: Munir Ismet, Vice President EMEA Public Sector and Education Industry Business Unit at Oracle; and Mark Kenyon, Public Sector Director, SAP UK & Ireland. Here's how we see the lay of the land.

UK Education SITS Supplier Landscape 2011

5th January 2011

The UK education software and IT services (SITS) supplier landscape has changed rapidly over recent years as the £45 billion+ Building Schools for the Future Programme (BSF) re-shaped the market. With that programme now a shadow of its former self, this report reveals the leading SITS suppliers to the UK public sector education market in 2011 and examines their strategies as the market re-fragments.