

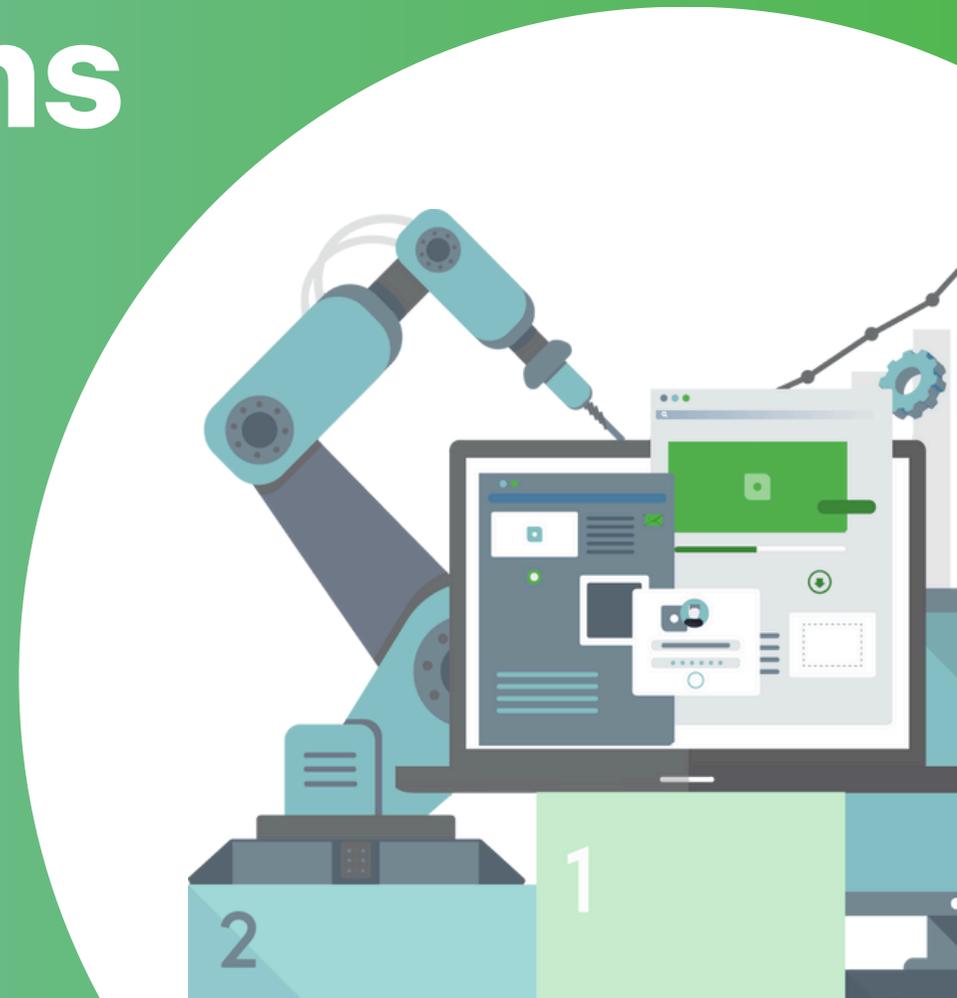
JUNE 2025

tussell<sup>o</sup> techUK

# The Tech Titans

The UK public sector's top 150  
technology suppliers

2025 Edition.



## Introduction

# Welcome to The Tech Titans report.

**Thank you for downloading the latest edition of Tussell's Tech Titans report - produced in partnership with techUK.**

Inside, you'll uncover the 150 highest-earning tech suppliers to the UK public sector, the Tech Titans. This isn't a sponsored list; it's an objective, data-driven analysis of who's winning in the public sector tech market today, and the story behind their success.

We break down the frameworks, key buyers, category specialisms and contract trends that have powered their public sector growth - insights you can't afford to miss if you want to compete at the top.

**Powered by Tussell's market-leading data, this report will sharpen your strategy and equip you with the intelligence you need to make confident, data-driven decisions that fuel growth.**

***If public sector technology is your battleground, this report is your tactical briefing.***



**Gus Tugendhat**  
Founder  
(Tussell)

*"In challenging market conditions, public sector demand for tech is a safe harbour. The market is huge, persistent and growing steadily due to reform and digital transformation. This report will provide fresh insight into your customers, prospects, partners and competitors - positioning you for success based on evidence, not anecdote."*



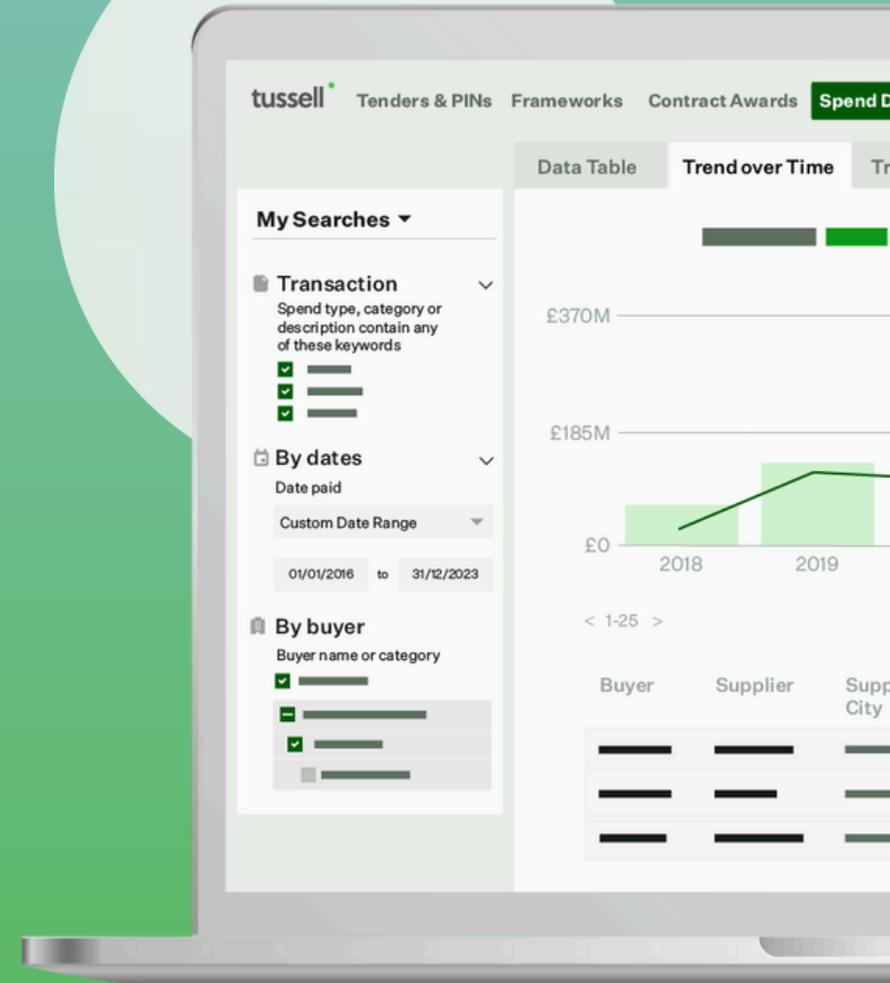
**Heather Cover-Kus**  
Head of Central  
Government Programme  
(techUK)

*"The Tech Titans Report offers a valuable look at the UK public sector's top 150 technology suppliers, providing insights into how government procures and uses technology. At techUK, we know that understanding the key players - their market share, influence, and approaches - is an essential part of building a strong and competitive tech environment across the UK. This report is a helpful resource for anyone working in public sector technology."*

All of the analysis in this report was produced using

tussell

Discover why top firms rely on our insights



## Our key findings:

1

### **The Tech Titans punch well above their weight**

Though they make up just 2% of all public sector tech suppliers, they account for a commanding 84% of direct public sector tech spending.

2

### **UK-based Tech Titans are losing ground**

Over the past four years, their share of total group revenue has dropped from 45% to 42% - signalling a gradual shift in market power away from domestic suppliers.

3

### **IT Resellers are the fastest-growing supplier type**

Between FY19/20 and FY23/24, they increased their direct public sector revenue by 77% - outpacing all other Tech Titans.

# The UK public sector tech market, today

UK contracting authorities are spending more with technology suppliers than ever before.

In FY23/24, public sector bodies spent a record £19.6 billion directly with tech firms - with a compound growth rate of 8% over 4 years.

Despite representing just 2% of tech suppliers, 84% of this sum (£16.5bn) went to the 150 'Tech Titans'.

## So what?

The public sector is betting big on transformation, automation and AI to drive productivity. **At the forefront of this shift? The Tech Titans.**

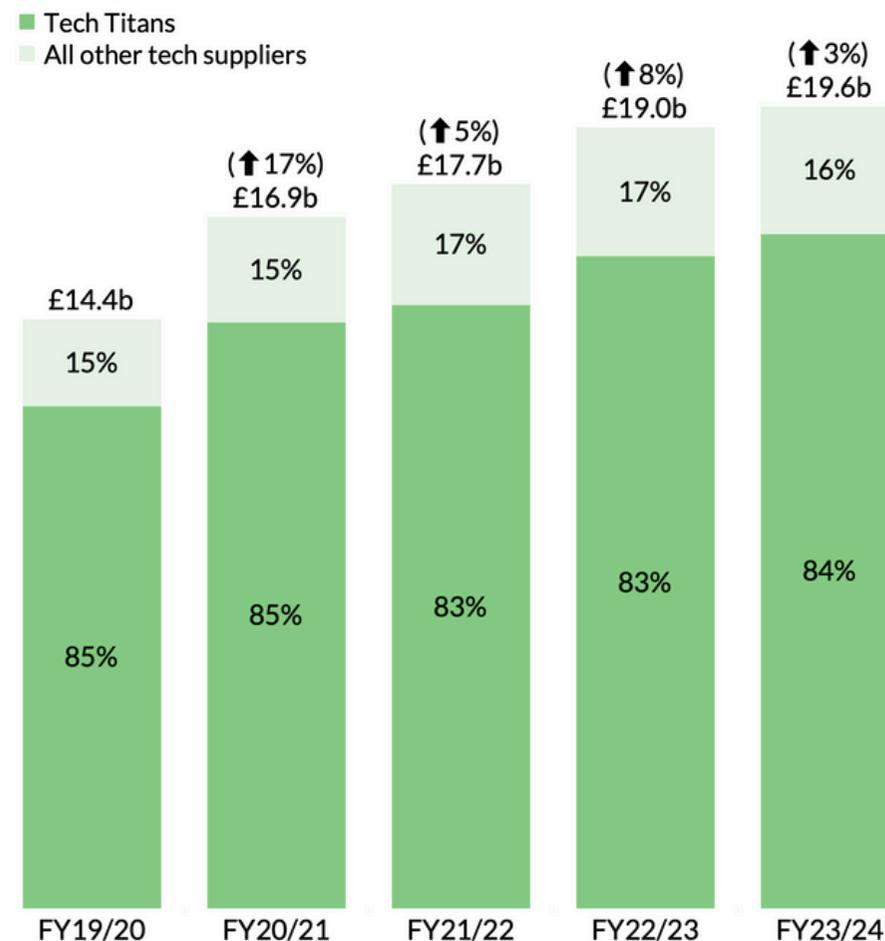


Chart: Total direct procurement spend, Tech Titans vs. other IT suppliers, FY19/20 - FY23/24

# Who are the Tech Titans?

The Tech Titans are the 150 highest-earning technology suppliers to the UK public sector, ranked by their direct public sector revenue in FY23/24.

They include household names like Vodafone, IBM and Dell, as well as fast-growing, specialised SMEs making their mark in key niches.

While their offerings vary - from infrastructure to AI - they share one thing in common: each earns millions in revenue from the UK public sector.

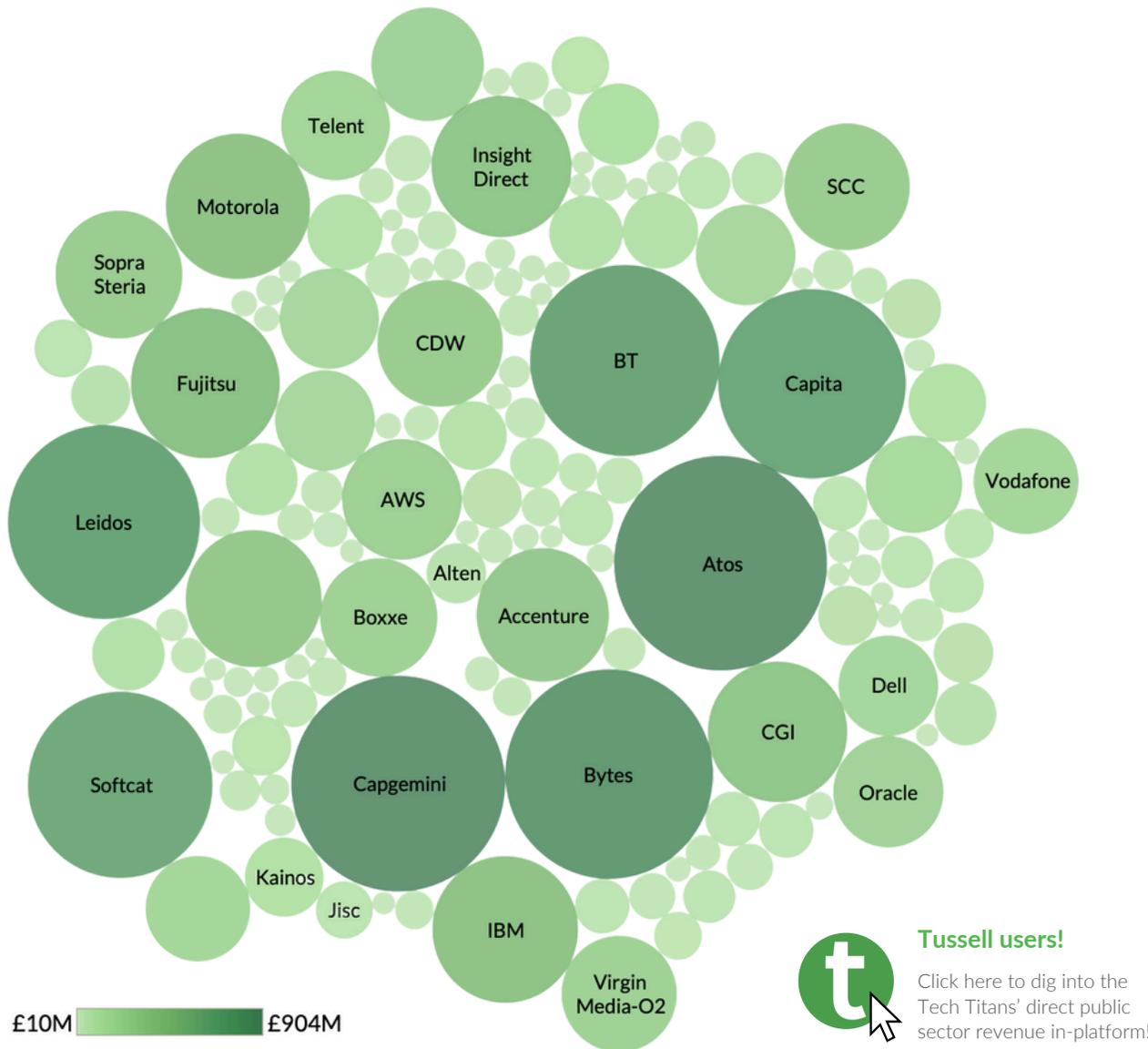
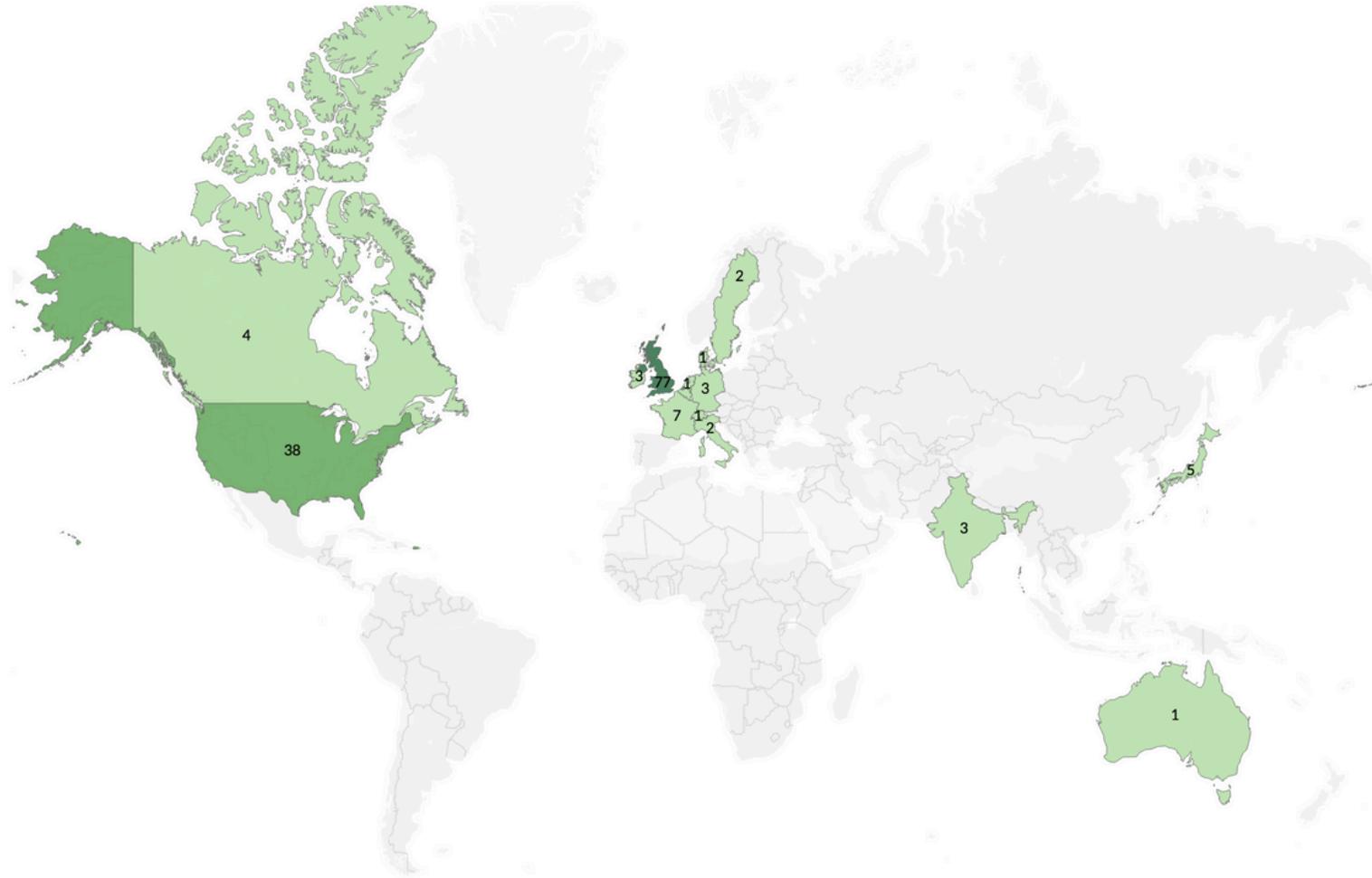


Chart: Tech Titans' direct public sector revenue, FY23/24

# While a majority of Tech Titans are homegrown, a quarter are based in the US



Map: Tech Titans' ultimate owner location, FY23/24

# UK-based Tech Titans generate just 42% of total group revenue

While homegrown firms make up over half of the Tech Titans by number, their share of public sector tech revenue is shrinking - down from 45% four years ago to 42% today.

## So what?

Amid rising geopolitical tensions and renewed calls to 'Buy British', the UK's own tech champions are losing ground. This trend raises critical questions about resilience, domestic capability, and the future shape of public sector supply chains.

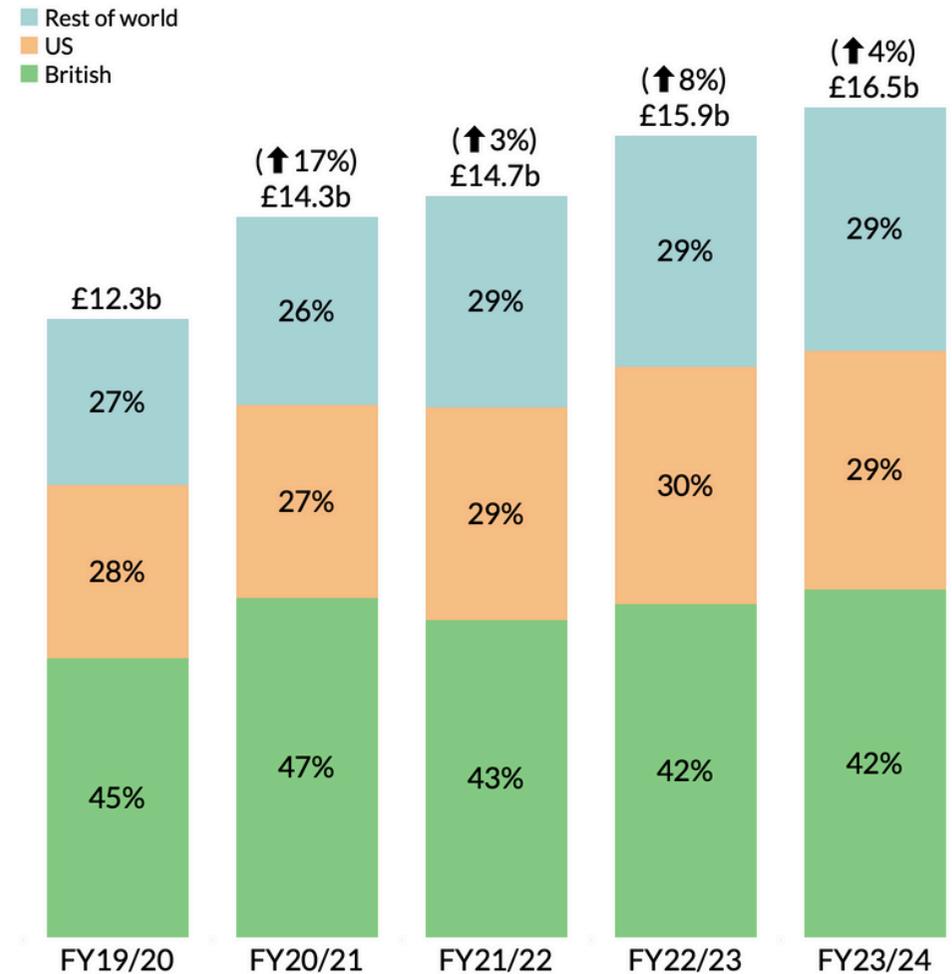


Chart: Total direct procurement spend with the Tech Titans, by ultimate owner location, FY19/20 - FY23/24

Category	Spend	Growth	Volume
 IT Services	£6.2b	(↑23%)	41
 IT Resellers	£3.7b	(↑77%)	16
 Telecoms	£2.1b	(↓6%)	14
 Software & Systems	£2.0b	(↑71%)	46
 Defence & Security	£1.1b	(↑34%)	8
 Cloud, Data & Infrastructure	£0.9b	(↑72%)	17
 Hardware Products	£0.5b	(↑20%)	8

Table: Tech Titans categories, inc. category's total direct public sector revenue in FY23/24, growth rate from FY19/20, and volume.

For a full breakdown of how we categorised each Tech Titan, please refer to this report's methodology.

# IT Resellers are experiencing the most public sector growth

Each Tech Titan was categorised into one of seven groups based on their primary public sector activity.

Among them, IT Resellers stand out, growing their direct public sector revenue by 77% over the past four years. In contrast, Telecoms providers saw a 6% decline in the same period.

## So what?

As software and data infrastructure shift to the cloud, public sector tech procurement is becoming increasingly modular and off-the-shelf. This trend plays directly to the strengths of IT Resellers, who are capitalising on demand for scalable, ready-to-deploy solutions.

# IT service providers lead, despite a shrinking market share

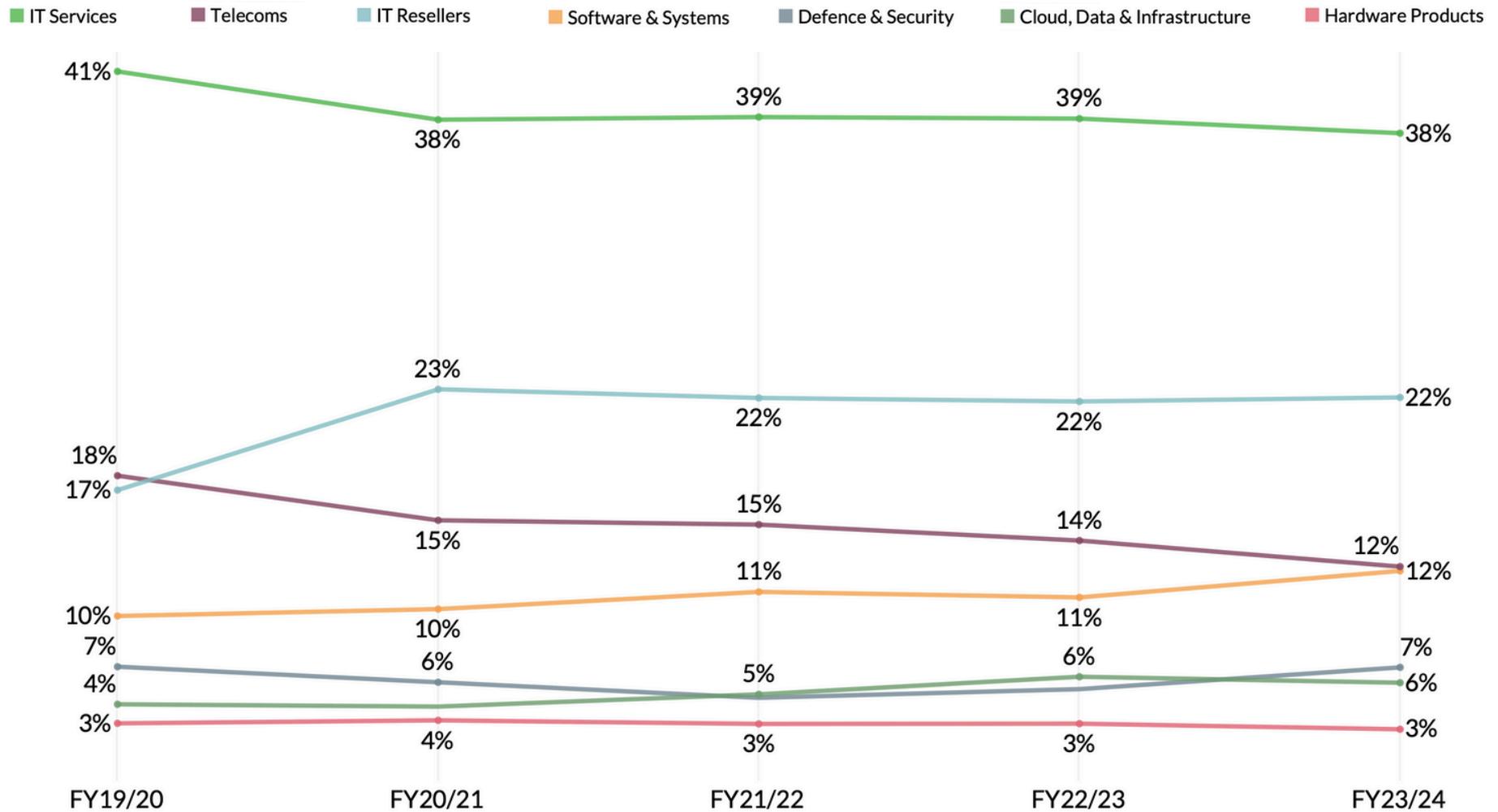


Chart: Share of Tech Titans' direct public sector revenue, by Titan category, FY19/20 - FY23/24

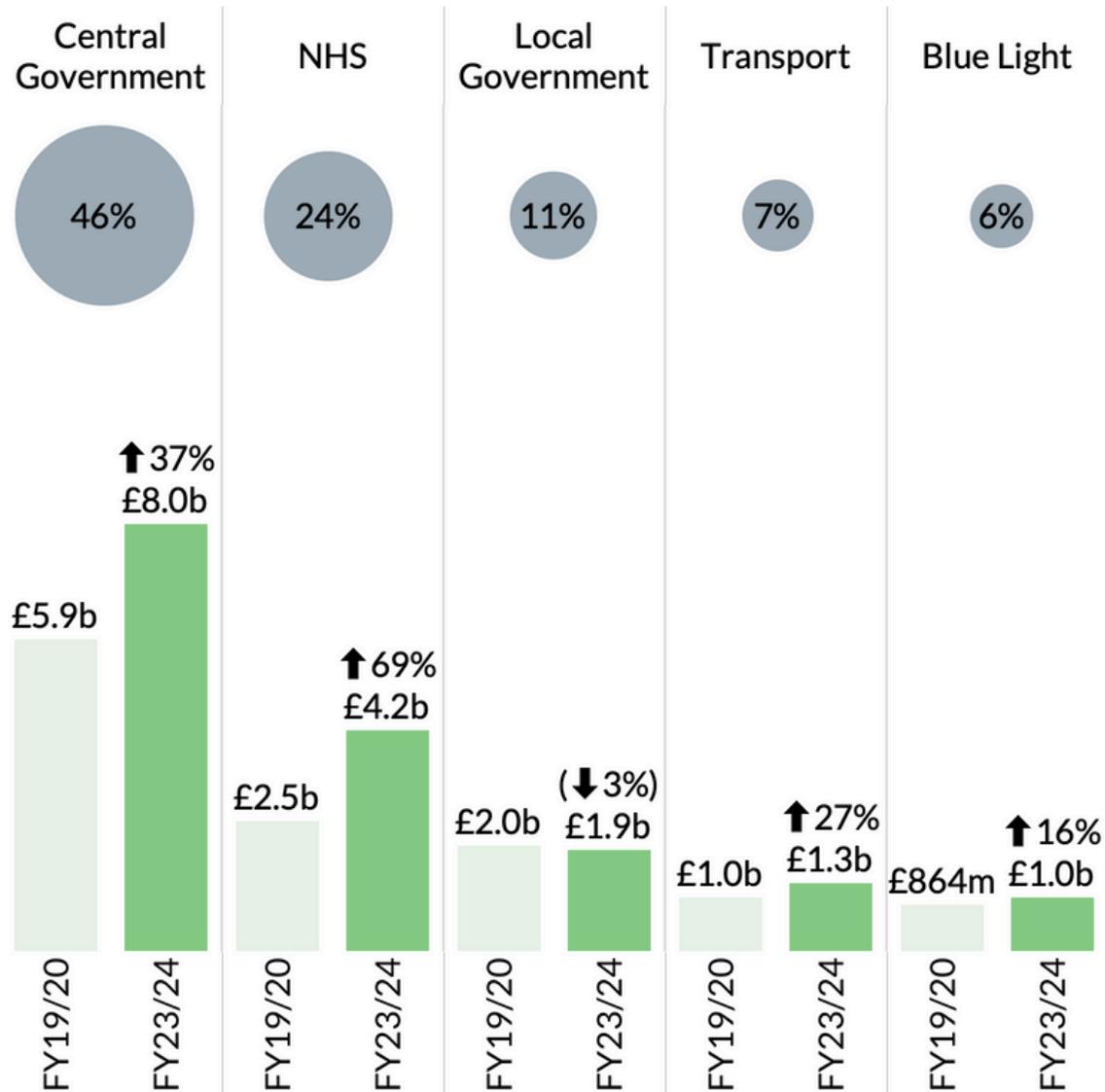


Chart: Total direct procurement spend with the Tech Titans, by buyer category, change over time, and proportion of market in FY23/24

# The NHS is powering Tech Titan revenue growth

As the NHS and Central Government ramp up investment in technology and productivity, Tech Titans are seeing significant revenue growth from these public sector verticals.

## So what?

Amid austerity and rising social care demands, local authorities have slowed investment into technology and transformation.

# The top 10 Titans rely more heavily on Central Government

With the exception of IT Resellers, the larger the supplier, the more concentrated their revenue is in Central Government - a key route to achieving scale.

In contrast, resellers like Bytes and Softcat reach scale through a broader customer base, with a strong focus on the NHS and wider public sector.

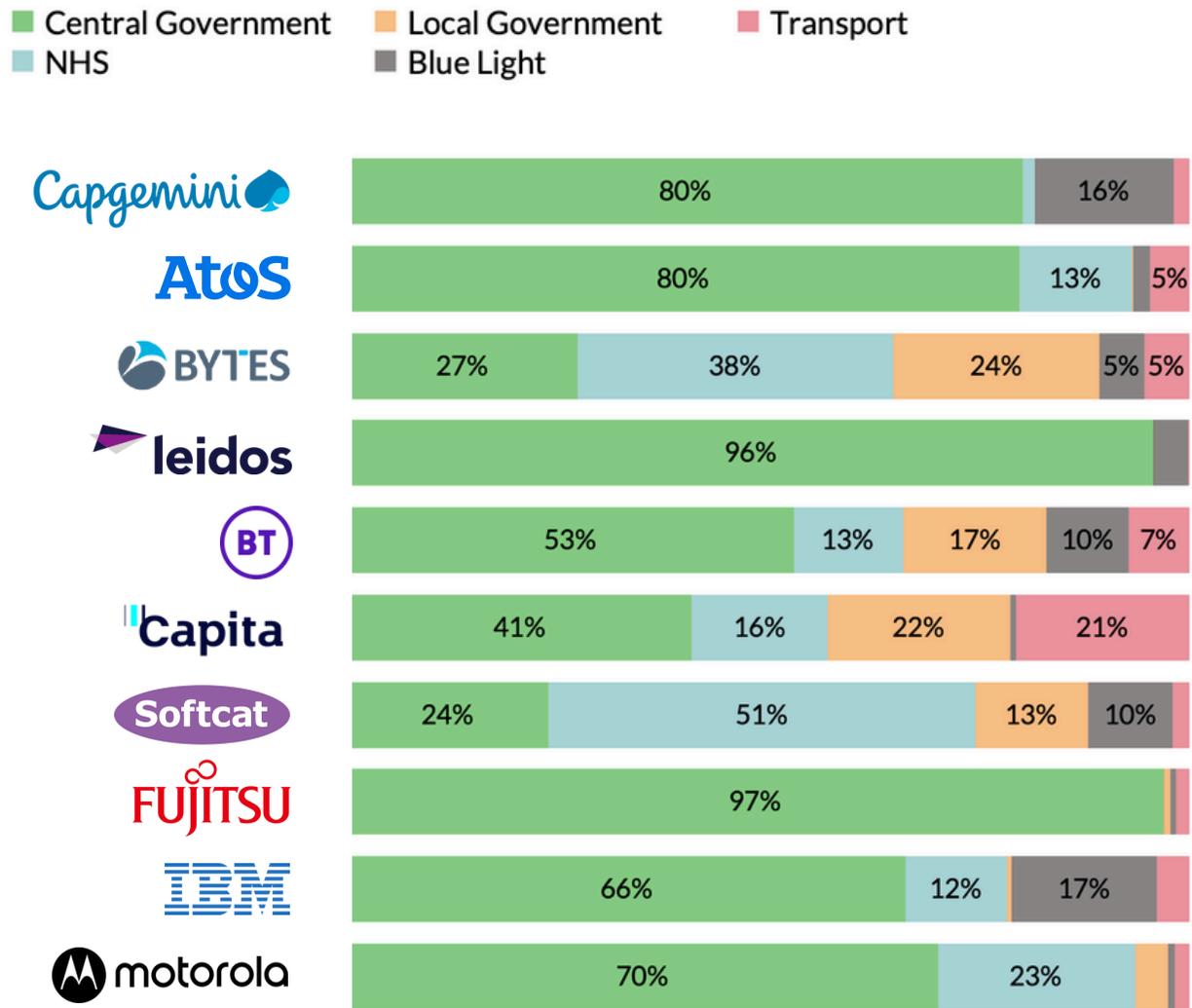


Chart: Top 10 Tech Titans by direct public sector revenue, and source of revenue by buyer category, FY23/24

# MOD re-emerges as the top tech spender as focus shifts from COVID-19 to national security.

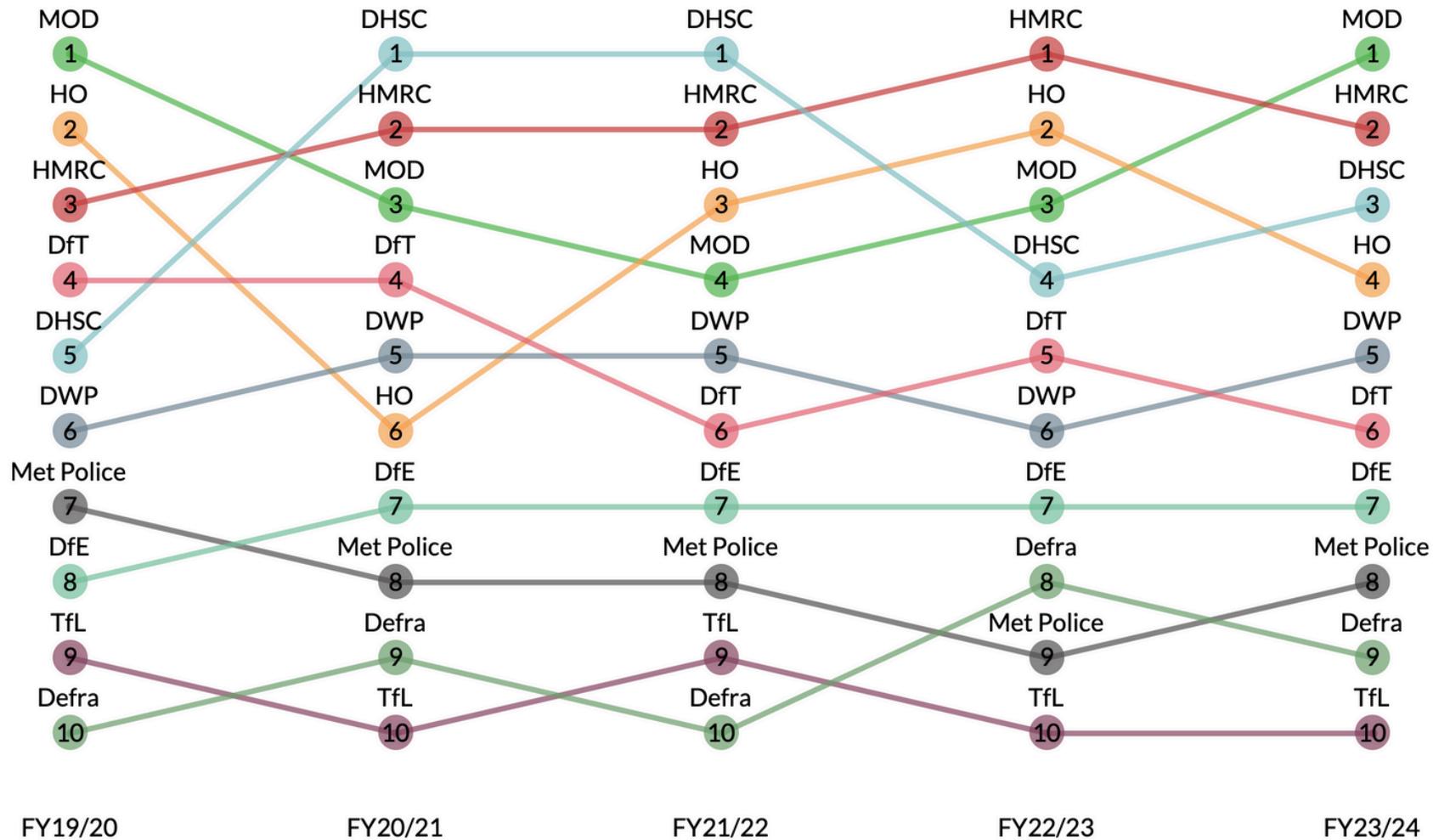


Chart: Ranking of top 10 buyers by direct Tech Titans procurement spend, FY19/20 - FY23/24

# Frameworks are the Tech Titans' preferred route to market

The Tech Titans are increasingly reliant on framework agreements, using them far more than the rest of the market.

By FY23/24, 56% of their contracts were awarded via frameworks or Dynamic Purchasing Systems, compared to just 35% for other tech suppliers across the 5-year period.

## So what?

A strong framework strategy is key for suppliers looking to scale, but is widespread framework usage locking smaller firms out of the market?

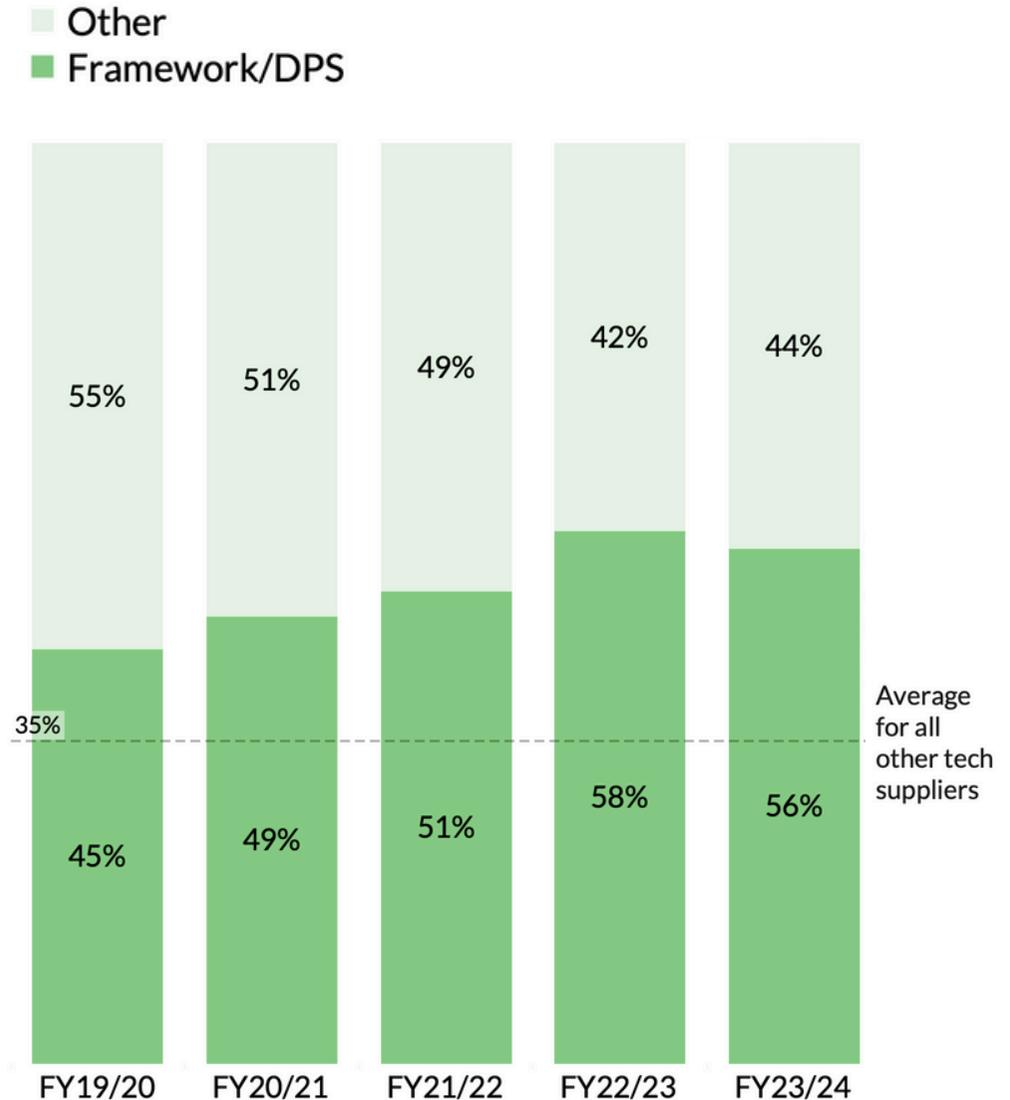


Chart: Proportion of Tech Titans' contract volume awarded via a framework or DPS agreement, FY19/20 - FY23/24



Chart: Tech Titans categories, top 3 frameworks by value of call-offs, FY23/24



**Tussell users!**

Click here to dig into the Tech Titans' call-off contracts and frameworks!

# A range of frameworks are used across Tech Titan categories

With 396 live public sector tech frameworks as of June 2025, knowing which ones unlock opportunities in your market is crucial to success.

## So what?

Suppliers missed out on £11.4bn in public sector tech contracts in FY23/24 by not being on the right frameworks. Discover which ones your target accounts are *actually* using - and never miss an opportunity again - **with Tussell.**

Discover the frameworks that unlock your market, with

tussell

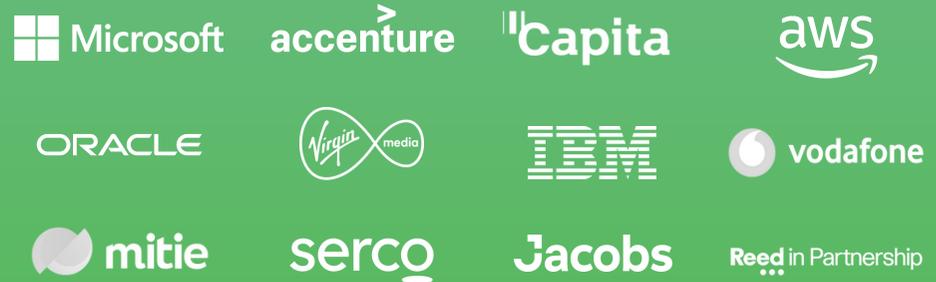
Find out why top firms rely on Tussell's framework intelligence

**Framework 1** (marked with a red X)

- Call-off Value: £50M
- Call-off Volume: 25 Call-offs
- Target Accounts
- Competitors & Partners

**Framework 2** (marked with a green checkmark)

- Call-off Value: £105M
- Call-off Volume: 56 Call-offs
- Target Accounts
- Competitors & Partners



## £28.2bn of Tech Titan contracts are set to roll off by July 2029. Find upcoming contract renewals to build your public sector pipeline.

	2025	2026	2027	2028	2029 January to July	Grand Total
IT Services	£2.8b	£1.8b	£3.8b	£1.9b	£2.0b	£12.3b
IT Resellers	£1.6b	£2.5b	£1.4b	£3.8b	£327m	£9.7b
Cloud, Data & Infrastructure	£475m	£1.1b	£617m	£53m	£91m	£2.4b
Software & Systems	£341m	£463m	£447m	£228m	£72m	£1.6b
Telecoms	£82m	£118m	£60m	£775m	£33m	£1.1b
Defence & Security	£207m	£149m	£417m	£98m		£871m
Hardware Products	£92m	£59m	£93m	£50m	£42m	£336m
<b>Grand Total</b>	<b>£5.6b</b>	<b>£6.3b</b>	<b>£6.8b</b>	<b>£7.0b</b>	<b>£2.6b</b>	<b>£28.2b</b>

Chart: Value of Tech Titans' contracts expiring in this parliament, by Titan category.



**Tussell users!**

Click here to dig into the Tech Titans' upcoming contract expiries in-platform!

# Turning these insights into action

## What have we learnt from this report?

- Tech Titans captured 84% of public sector IT spend in FY23/24 - *partnering with them is a proven growth strategy.*
- Cloud and IT Resellers are well-positioned to grow as the public sector shifts to off-the-shelf, cloud-based solutions.
- Central Government is the key to scale across most tech verticals.
- A comprehensive framework strategy is essential for market access and growth.
- £28.2bn in contracts are due to expire during this Parliament - a major opportunity for challengers to disrupt incumbents.

Want to break into the Tech Titans - or stay part of the club? **Preparation is everything.**

- Use market intelligence to pinpoint who's buying what you sell.
- Identify the frameworks your buyers use - and get on them.
- Discover the key stakeholders and decision-makers across target accounts.
- Track competitor contracts to engage customers early - *long before renewals.*

Do all of this in one place, **with Tussell.**

**techUK**

*Connect, network & learn from fellow tech suppliers with a techUK membership. For more info, reach out to **[membership@techuk.org](mailto:membership@techuk.org)***

# Grow your public sector book of business with tussell

**Book a chat with the team**

Discover top frameworks and DPSs you can join straight away

Track upcoming contract expiries to fuel your sales pipeline

Know your customers inside-out and find the stakeholders who matter most

Run detailed competitor analysis to outpace the competition

Collaborate by sharing key opportunities

Turn complex data into clarity with fast, visual insights

Download Tussell's market-leading data, or stream it directly into your favourite tools

Get expert support and tailored training from a hands-on team

Find out which frameworks unlock growth in your market

Get alerted of upcoming opportunities automatically and before anyone else

Gain deep market insight to guide partnerships, acquisitions, and strategy

The screenshot shows the Tussell Spend Data dashboard. At the top, there are navigation tabs: Tenders & PINs, Frameworks, Contract Awards, Spend Data (highlighted), Buyers, Suppliers, My Hub, and My Account. Below the navigation, there are tabs for Data Table, Trend over Time (selected), Trend by Buyer Type, Buyer Ranking, and Supplier ranking. The main content area features a bar and line chart showing spend data from 2018 to 2023. The y-axis ranges from £0 to £370M. A 'DOWNLOAD SPEND DATA' button is visible below the chart. On the left side, there are filter sections: 'My Searches' with a 'Transaction' filter, 'By dates' with a 'Date paid' filter and a 'Custom Date Range' dropdown (set to 01/01/2016 to 31/12/2023), and 'By buyer' with a 'Buyer name or category' filter. A chat icon is located in the bottom right corner of the dashboard.

Buyer	Supplier	Supplier City	Supplier Country	Total transactions	Total value
██████████	██████████	██████████	██████████	██	██
██████████	██████████	██████████	██████████	██	██
██████████	██████████	██████████	██████████	██	██

# What the Tech Titans say about Tussell



*"Tussell has helped us break into new markets."*

**Manager Account Executive**



*"Other vendors may have limited Framework functionality, but having worked with Frameworks for over 25 years, I can tell you the Tussell information is truly market-leading."*

**Framework Specialist**



*"Tussell has been instrumental in helping us understand the public sector IT market. We would recommend the platform to any organisation looking to achieve their public sector revenue targets and beyond."*

**Business Development Executive**



## Discover why 39 Tech Titans are already using Tussell's market intelligence

[Book a chat with the team](#)

### Trusted by:



# Who are the Tech Titans?

## Listed alphabetically : A-J

2i Group	BT	Commsworld	FourNet
8x8	Bytes	Computacenter	Fujitsu
Accenture	CAE Technology Services	Conduent	Granicus
Accurx	Cantium Business Solutions	Constellation Software	HCL
Advanced 365	Capgemini	Converge (Stone Technologies)	Hewlett Packard (HP Inc.)
Advanced Business Solutions	Capita	Convergence Group	Hewlett Packard Enterprise (HPE)
AGFA	Causeway Technologies	Dedalus	Heywood Pension Technologies
Agilisys	Ccs Media	Dell	Hippo Digital
Aire Logic	CDS	Digi2al Limited	Hitachi
Akhter Computers Limited	CDW	DrDoctor (ICNH)	IBM
Alten	Centerprise International	DXC Technology	Identity E2E
ANS	CGI	EMIS (UnitedHealth)	Idox
Arvato	Channel 3 Consulting Ltd	Epic Systems	Informatica
Atos	Chemring Group	Equal Experts	Informed Solutions Limited
AWS	Cisco	Esri	Insight Direct
BAE Systems	Civica UK	esynergy	Intersystems
Bentley Systems	Cloud 21	European Electronique Limited	Iron Mountain
Block Solutions	Cognizant	Experian	Jenoptik
Boxxe	Cohort	First Databank UK (FDB)	Jisc



### Tussell users!

Click here to dig into the Tech Titans' direct public sector revenue in-platform!

# Who are the Tech Titans?

## Listed alphabetically : K-Z

Kainos	NEC Corporation	Redcentric	Tecknuovo Ltd
Kcom	Netcall	Reply	Telent
Kerv Group	Netcompany	Resonate	Teleperformance
L3harris Technologies	NICHE TECHNOLOGY INC	Ricoh	The Phoenix Partnership
Leidos	Node4	RLDatix	Tpximpact
Little Fish (UK) Limited	OLM	Roper Technologies	Trustmarque
Lumen Technologies	Opencast Software	Rowden Technologies	Unisys Limited
MACS	Oracle	SAP	Unit4
Made Tech	Outcomes Based Healthcare	SAS	Valtech
Maintel	Outsourcing Inc	Sectra AB	Version 1
Mastek	Palantir	Securecloud+ Limited	Virgin Media-O2
MHR International	ParentPay Group	Softcat	VitalHub
Microsoft	Pegasystems	Softwareone	VIX Technology
Mongodb	Pitney Bowes	Softwire	Vodafone
Monitor Intelligence Services	Proact IT	Sopra Steria	Wavenet
MOODY'S CORPORATION	Probrand	Specialist Computer Centres (SCC)	Xerox
Motorola	QinetiQ	Switchshop	Zellis
MRI Software	Qodea	System C and Graphnet Care Alliance	
NCC	Quadient	Tata Consultancy	



### Tussell users!

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# Methodology

This report is based on open procurement data from official sources aggregated, organised and augmented by Tussell.

There are two datasets used in this report. Spend data is gathered from the invoices published by public sector bodies for transparency purposes. Contract award data is primarily from Find a Tender Service, Contracts Finders as well as more than 90 other local, regional, or sector-specific public sector procurement portals. Publication follows the transparency requirements set out in PCR 2015.

In this report, we have analysed spending over financial year periods e.g. FY23/24 relates to invoices paid, or contracts awarded between 01st April 2023 and 31st March 2024. Data is accurate as of the date of download: 7th March 2025 for spend data, 22nd May 2025 for contract data. As of the spend download date, not all contracting authorities had published full invoices for FY23/24, namely: MOJ department. This may under-represent some of the public sector spending in FY23/24. These buyers have been included in this report, despite their spend gaps.

Public sector buyers named in the report are shown on a consolidated basis, including their arms-length bodies and executive agencies. The consolidation is based on the government's own classification system available on gov.uk.

The list of the largest 150 Technology suppliers - the Tech Titans - is based on the total value of their direct public sector invoices, published by contracting authorities, and paid in FY23/24. Suppliers are shown on a consolidated basis, including relevant subsidiaries (i.e. entities or subsidiaries within our Technology definition). Technology suppliers have been identified based on their SIC code, contract and framework analysis and manual verification. We have taken a broad view of the Technology market, including some Telecommunications service suppliers such as Vodafone and BT, but have removed installation-based Telecoms providers.

This report covers only direct procurement with suppliers, not revenue earned by sales of their products/services indirectly by third-party partners or resellers. For this reason, the revenue attributable to technology vendors like Microsoft and Oracle is under-represented as much of their sales are made by channel partners.

The Tech Titans have been categorised into sub-sectors, using a combination of contract titles and descriptions, invoice descriptions, public-facing websites and desktop research. Classification is difficult, and where suppliers fit into multiple categories, a decision has been made to assign them based on their 'core' public sector offering. Suppliers have been assigned an ultimate owner location based on the headquarters country of the ultimate owner of each Tech Titan. This data is originally sourced from Moody's Analytics and validated through desktop research.

If you have any questions, or are looking for a more detailed methodology, please contact our research team on [contact@tussell.com](mailto:contact@tussell.com)

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