Software Market Map

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Welcome to the SEEDA Software Market Map which provides an overview of leading software companies that are located in South East England. It highlights the importance of the region where most of the top NASDAQ listed software companies have built their UK/EMEA HQ.

Customers

Individual Use

Web 2.0
- Content: Blogs, Wiki, User edit, Tagging
- Tools: Search
- Services: Content hosting

Business Use
Type, End users & Decision Makers

Multinational – Large Enterprise – Medium Sized Business – Small Business – Home Office
Office Users – Mobile Users – Flexible Staff
CTO & IT Managers – CEO & Business Managers

Mobile Data
- Content: Real time photo/video
- Tools: SMS, Presence
- Services: Content sharing, Collaboration

Individual Use

Desktops · Laptops · Servers · PDAs · Mobile Devices

Business Models

Established Players
- Vendor consolidation (M&A)
- Intellectual property rights
- Leverage Installed base
- Extend Brand loyalty

Perpetual License · Restricted Licenses · Hosted · Subscription · Pay as You Go · Free

New Entrants
- SOA architecture
- Open source
- Off shore development
- Private Equity Investors

Channel Mix

Mail Order & Online	Value Added Resellers	Direct Sales Force	Corporate Account Resellers	Retailers & Etailers	Web Downloads
Value Added Distributors	Hardware Vendors	Systems Integrators	Managed Service Providers	Volume Distributors	Handset Vendors/Operators

Business Applications

Vertical Focus

Financial Services

BottomLine	Reading	EMEA HQ
Art Technology	Reading	European HQ
Check Free	Slough	UK HQ
Mercury	Camberley	UK HQ
Sun Systems	Farnborough	HQ
ITS	Winchester	HQ
MBA Systems	Winchester	HQ
Asset Intelligence	Faversham	HQ

Manufacturing & Process

Aspen	Reading	Sales Office
KLA Tencor	Wokingham	Sales Office
Cincom	Maidenhead	Sales Office
Bentley	E. Grinstead	Sales Office
Mentor Graphics	Newbury	UK HQ
Moldflow	Orpington	UK HQ
Sopheon	Guildford	HQ
Flomerics	Hampton Ct.	HQ

Communication & Media

Verint	Weybridge	EMEA HQ
Telcordia	Frimley	European HQ
Amdocs	Reading	Sales Office
Comverse	Slough	Sales Office
Macrovision	Maidenhead	Sales Office
Fastmobile	Theale	Sales Office
Gemplus	Havant	UK HQ
AssetHouse	Guildford	HQ

Travel, Transport & Utilities

Navteq	Bourne End	Sales Office
Nammu	Oxon	Sales Office
ADP	Chertsey	UK HQ
Miracle	Oxford	UK HQ
Vettro	Reading	UK HQ
Logility	Weybridge	HQ
E-Result	Oxon	HQ
Straight Banana	Guildford	HQ

Retail & Wholesale

Micros	Slough	UK HQ
Orca	Oxford	UK HQ
Astech	Chipping Norton	HQ
CS Group	Slough	HQ
Marketworks	Guildford	HQ
Actinic	W. Byfleet	HQ
Ezi Solution	Leatherhead	HQ
Advent	Upton	HQ

Govt./ Education & Training

Sungard (iWorks)	Chertsey	Sales Office
Mathsoft (PTC)	Camberley	Sales Office
Learning Tree	Leatherhead	Sales Office
Coda Systems	Chippenham	HQ
IBS Systems	Newbury	HQ
Friendsabroad	Guildford	HQ
Camsoft	Maidenhead	HQ
Clearford	Farnham	HQ

Health & Business Services

Misys	Burgess Hill	International HQ
Agile	Bracknell	European HQ
Varian	Crawley	Sales Office
Bentley	Wokingham	Sales Office
Courage	Oxford	Sales Office
Dendrite	Henley	Sales Office
Ausped	Havant	HQ
Convergys	Guildford	Support

Horizontal Focus

ERP/CRM/SCM	Oracle – Reading (UK HQ)	Salesforce.com – Camberley (Sales & Support)	i2 Technologies – Ascot (Sales & Support)	Manugistics – Bracknell (Sales & Support)	Lawson Software – Slough (UK HQ)	Ariba – Egham (UK HQ)
Business Intelligence	Cognos – Bracknell (Sales & Support)	Business Objects – Maidenhead (UK HQ)	Hyperion – Egham (UK HQ)	Actuate – Bracknell (Sales & Support)	Insightful – Basingstoke (UK HQ)	SAS – Marlow (UK HQ)
HRM/Payroll	Kronos – Wokingham (European HQ)	Saba Software – Bracknell (EMEA HQ)	Select HR – Canterbury (HQ)	ICS Computing – Newbury (HQ)	NetTeam HR – Newbury (HQ)	Websense (Employee security) – Chertsey (Sales & Support)
Asset/Accounting	MDA – Langley (Sales & Support)	Intuit – Maidenhead (European HQ)	Concur – Amersham (European HQ)	MRO Software – Woking (Sales Office)	Datastream System – Reading (Sales & Support)	Indus – Croydon (EMEA HQ)
Content Management	Open Text – Beaconsfield (UK HQ)	Interwoven – Bracknell (European HQ)	Hummingbird – Wokingham (Sales & Support)	EMC Captiva – Guildford (UK/Ireland HQ)	Mekon – Sutton (HQ)	Media Surface – Newbury (HQ)
CAD/CAM/Modelling	Autodesk – Farnborough (UK/Ireland HQ)	Cadence Design – Bracknell (European HQ)	Synopsys – Reading (Sales & Support)	Ansys – Riseley (Sales & Support)	UGS Corporation – Camberley (UK HQ)	Pegasystems – Reading (Sales & Support)

PC Software

Productivity Applications

Multimedia	Corel	Maidenhead	Sales Office
Analytical	SPSS	Woking	Sales Office
Office Suite	Microsoft	Reading	UK HQ
Security	Trend Micro	Marlow	UK HQ
Mapping	MapInfo	Windsor	UK HQ
Accounting	Simply Books	Rattlesden	HQ

Operating System & Other

Retrieval	Convera	Bracknell	European HQ
Anti-virus	Aladdin	Windsor	UK HQ
OS/IM/Browser	Microsoft	Reading	UK HQ
Games	Kuju	Guildford	UK HQ
Defragmenter	Diskeeper	Grinstead	UK HQ
Projects	Permaster	Guildford	HQ

Supporting Applications

Security, Identification, Synchronisation & Web

Web filtering, identification & security
Data exchange & synchronization
Identification, verification, privacy & security
Digital imaging & speech technology
Content & network security
VPN & network security
Web tools for content management
ecommerce applications
Security, biometrics & image analysis

Secure Computing	Bracknell	International HQ
Intellisync	Henley	European HQ
Entrust	Reading	European HQ
Nuance Comms.	Woking	UK /Ireland HQ
Symantec	Reading	UK HQ
CheckPoint	Basingstoke	UK HQ
Oracle	Reading	UK HQ
Cybersource	Reading	HQ
Omniperception	Guildford	HQ

Mobile Applications

Business & Consumer Applications

Mobile Email	RIM	Egham	European HQ
i-mode portal	O2	Slough	European HQ
Games	Superscape	Fleet	UK HQ
Games	Kuju	Guildford	HQ
Games	Electronic Arts	Guildford	HQ
Community	Nokia	Farnborough	UK Office

Operating System & Other

OS	Palm	Wokingham	European HQ
Synchronization	Good	Maidenhead	Sales Office
Middleware	i-Anywhere	Maidenhead	UK HQ
Content Player	Volantis	Guildford	HQ
Voicemail to text	Spinvox	Marlow	HQ
Discovery	SurfKitchen	Reading	HQ

Infrastructure

Storage & Systems Management

Database & application management
Recovery & storage management
File & data management
Storage systems
Database management
Data migration, backup & archiving
System management
Mainframe migration

CA	Slough	European HQ
BMC	Egham	Sales Office
Compuware	Slough	Sales Office
Sybase	Maidenhead	Sales Office
Quest	Maidenhead	UK HQ
CommVault	Reading	UK HQ
Pillar Solutions	Tonbridge	HQ
TSG	Egham	HQ

Application Development/Integration

Server software & middleware
Application integration& management
Development software for mainframes
Date integration
Application integration
Publishing systems
Application development
Application migration

BEA Systems	High Wycombe	EMEA HQ
Tibco	Maidenhead	EMEA HQ
Compuware	Slough	Sales Office
Informatica	Maidenhead	UK HQ
Ancoris	Bracknell	HQ
Miles33	Bracknell	HQ
SAA	Tunbridge Wells	HQ
ASNA	Guildford	HQ

Network Management & Connectivity

Network load balancing & assurance
Network monitoring & trouble shooting
Network & application access
Network monitoring and detection
Multiple network access
Network optimization
Network management

F5 Network	Chertsey	Sales Office
McAfee	Slough	Sales Office
RSA	Bracknell	Sales Office
ISS	Windsor	Sales Office
Citrix	Gerrads Cross	UK HQ
Opnet	Slough	UK HQ
Extreme	Bourne End	UK HQ

Development Tools

Business Intelligence tools
Business intelligence tools
Pre-built software components
Software tools & components
Open source development tools
Tools for ISVs & enterprise
Development tools
Development tools/Optimization

QL2	Slough	EMEA HQ
Hyperion	Egham	Sales Office
Ilog Systems	Bracknell	Sales Office
Microsoft	Reading	UK HQ
Novell	Bracknell	UK HQ
Progress Soft	Slough	UK HQ
Magic Software	Bracknell	UK HQ
Borland	Twyford	UK HQ

Operating System, Database & IT Consultancy

Consulting & Outsourcing
Database management
Relational database
Linux OS
Store and access data access
IT solutions and services
IT services and solutions

CSC	Aldershot	EMEA HQ
Embarcadero	Maidenhead	European HQ
Sybase	Maidenhead	Sales Office
Red Hat	Guildford	UK HQ
Oracle	Reading	UK HQ
Wipro	Reading	UK HQ
Xansa	Reading	UK HQ

Industry Enablers

Universities/Research Centres
- University of Oxford
- University of Surrey
- University of Southampton
- University of Sussex
- University of Reading
- University of Portsmouth
- University of Kent
- Royal Holloway Information Security Group
- Oxford Computing Lab & Software Engineering Research Group, Oxford University
- Computer Science, Kent University

Science Parks
- Oxford Science Park
- Surrey Research Park
- Southampton Science Park

Talent Pool
- 70,000 graduates p.a.
- 5,600 in computer science related subjects
- Average salaries p.a. in the region are:

Graduate Developer	£20,000	Software Engineer	£30,000
IT Trainer	£27,000	IT Manager	£37,000
Data Analyst	£28,000	Project Manager	£41,200
Software Developer	£29,000	Programmer Manager	£49,000

Enterprise Hubs
- Surrey
- Reading
- Farnborough
- Gatwick Diamond
- Newbury
- Slough

23 Network hubs offering support to new companies focused on pioneering business ideas, access to contacts and expertise and access to commitment of free office space

Funding Agencies
- SFIE
- Grant for R&D
- Finance South East

Business Networks/Industry Associations
- Wired Sussex
- Wired Surrey
- Wired Kent
- Wired Wessex
- Oxford Media Network
- Wired Berkshire
- British Chamber of Commerce
- Computer Management Association (CMA)
- TIGA
- OXIT
- Intellect

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Introduction

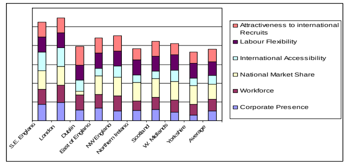
South East England is already home to many of the world's most influential and successful companies. Key factors for locating in the region include: the availability of high quality, suitably qualified staff, good infrastructure, proximity to international airports, seaports and London, high quality of life, the ability to retain highly qualified ICT staff, and the strength of academic research and technical assistance capability in the area.

Key Facts

- The South East is the largest region by size of population & workforce
- 34% of the working population holds an academic degree or equivalent
- Over 24 universities and higher education institutions
- 97 University departments undertake internationally excellent research
- University of Oxford is ranked 3rd in world university rankings
- Over 5,100 foreign owned companies are located in the region
- Over 1,600 North American owned companies
- R&D expenditure in the region was £4.7 billion in 2003

Location Benchmarking Study

Overall Location Quality Scores Analysed by factor



Source: Oxford Intelligence, Software Report 2005

South East Software Market Overview

- 28,000 ICT companies in the region employ 180,000 people.
- ICT companies generated a Gross Value Add of £10bn in 2005.
- 17,000 software companies operating in the region.
- South East software sector generates a Gross Value Add of over £4.5bn.
- c.98,000 employees in the South East software sector (c.30% of the UK industry total).
- Counties of Surrey & Berkshire are home to 47% of South East's software workforce.
- Over 12,500 students studying computer science in the South East.
- Heavy concentration of security software organisations (34%).
- South East has 38% of games software industry employment.

Source: Experian, Fortune 500, UK Security Industry Mapping Study

Global Software Market Outlook

- Software industry is expected to grow c. 6% per annum until 2009 *(Source: FirstPartner)*
- Top three software companies continue to capture more than 60% of industry profits.
- Recognition of the importance of accessing the corporate database real time and thereby dramatically improve decision making process.
- Continued expansion of software into new industries and devices:
  - Infotainment products and services in automotive industries
  - Software (e.g. VoIP) as primary driver for product development in communications
  - Software choices (DRM, file formats) in consumer electronics changing business models
- Web 2.0 for the enterprise will enable tacit interactions (involving judgment or insight in complex problem solving).
- Software as a Service (SaaS) poised to grow strongly from £300m to £1.8bn in 2009 *(Source: IDC)*
- Traditional channels will evolve and include new class of players like telcos, service providers and content providers.

Disclaimer

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