CCMA Contact Centre Management Association

UK Contact Centre Outsourcing Report 2026

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A CCMA Research Initiative

A Comprehensive View of the Market

You can't go forward without first looking back, and so it's upon reflecting on UK contact centre outsourcing for this report that it's become clear just how much the market is evolving into something quite different from the one that has defined it in previous years. The old playbook – anchored in scale, unit cost and labour arbitrage – has given way to a more sophisticated proposition built around quality, outcomes and the capability to handle complex, often regulated work that customers and businesses cannot afford to get wrong.

This is the role the UK is often occupying with confidence. It is one shaped by skilled people, mature regulatory environments and partnerships that increasingly look more like joint ventures than the supplier arrangements of yesteryear.

This report offers a comprehensive view of the market as it stands today. Rich in data, expert perspective and practical guidance, it is designed specifically for the buyers of outsourced services – those navigating procurement clarity, technology integration and the building of strategic partnerships they can trust. We hope it informs better decisions, sharper conversations and stronger outcomes.

Leigh Hopwood,
CEO, CCMA

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UK Outsourcing: Time to Redefine the Model?

Why should contact centre outsourcing be a priority in the age of AI? Recent predictions suggest that AI agents will soon handle the majority of simple customer requests.[1] Many of these requests are currently being handled by CX BPOs (Customer Experience Business Process Outsourcing) who, as a result, are busy navigating disruption to their core business. Does that mean AI is where everyone should place all their focus, and consign anything else associated with outsourcing to the backburner?

Of course, it's not that straightforward, and for customer service leaders who must steer their operations through the real world of complex customer needs, the answer is much more nuanced. And as a result, in an age characterised by change, not just through technological progress, but also rapidly developing economic and geopolitical challenges, CX BPOs play a role that is as just important as ever.

It is a different role, demanding different capabilities, business models and relationships. But shaping that role should be one of the top priorities for the buyers of outsourcing services, currently.

New Choices, New Models

The choices buyers make when they outsource customer service operations are changing. Until recently, these choices were shaped by three main objectives:

- Access to talent at scale
- Labour cost arbitrage
- Business continuity planning

These objectives led to strategies for outsourced customer service that follow a common pattern:

- Focus on large scale, onshore, nearshore and offshore hub locations, offering beneficial time zones, language capabilities, and incentives for investment
- A highly fragmented landscape of CX BPO service partners, primarily competing on unit price (per hour, per contact, or per full–time equivalent (FTE)
- Tasks distributed between different BPO partners to minimise single points of failure

These strategies thrive in an environment of relative stability, in which cycle times for changes to process and capacity are measured in months and weeks, rather than hours. But we are no longer operating in such conditions. Economically, wage inflation in mature offshore markets in the last five years has not been fully offset by foreign exchange rates, reducing the purchasing power of buyers seeking to source overseas.

Added to this, developing geopolitical uncertainty is affecting the ease of trade, travel and data sharing across borders. And, of course, the real–world impact of AI cannot be understated. In a recent survey, almost 90% of senior executives said they plan to continue to increase spending on customer service AI in 2026.[2] In a separate survey of CX BPOs, over 80% reported that they are now responding to RFPs (Request for Proposal) that include Agentic AI (bots that can autonomously plan and act toward defined goals, under human governance) in the requirements.[3]

Adaptable Talent and Quality Outcomes

Emerging amongst these trends are a new set of objectives for buyers:

1. **From 'scale talent' to 'adaptable talent'**
   The new talent demand is less about how quickly capacity can be ramped up at a site, and more about how quickly team members can learn and develop new skills. That means frontline teams who excel at empathy, AI literacy and problem–solving, augmented by technical specialists who deliver services to build, shape and quality assure Agentic AI solutions.

   To achieve this, buyers are investing in closer, more strategic partnerships with a more focused set of CX BPOs. There is more openness to new locations, outside traditional outsourcing hub regions, where structurally lower attrition allows for a longer–term view of talent development.

2. **From 'cost arbitrage' to 'quality outcomes at best cost'**
   Value can no longer be measured on a pure cost–per–hour comparison. A CX BPO offering a more sophisticated and flexible set of solutions needs to be valued on the outputs they deliver, not the inputs they provide, whether that is increased customer advocacy or lower customer effort.

   There is a growing industry focus on outcome–based commercial models, but in practice, adoption of these models has been slower than anticipated. That's because an outcome–based model should be downstream of a different sort of relationship between client and BPO – one which assures transparency of vision, frictionless data sharing and continuous balancing of risk and reward.

   Companies that have reached the most maturity have reimagined how they manage outsourced relationships before attempting to switch commercial models.

3. **From 'business continuity' to 'strategic resilience'**
   A focus on outcomes goes hand in hand with a focus on ownership. That means a shift away from the outsourcing of discrete tasks to different CX BPO partners, with buyers distributing workloads to manage business continuity. Instead, outsourcing partners are asked to deliver end–to–end processes, taking accountability for performance improvement and resilience.

This approach creates the conditions for joint investments in AI capabilities, taking advantage of the large–scale experience and proprietary data that CX BPOs can bring to enhance a client's processes.

In short, it's an imperative for business model transformation. A chance for customer service leaders to define and build the partnerships that support shared strategic goals, in an environment of rapid change.

This revolution needs significant drive to come from the buy side. Data shows that only 10% of CX BPOs will proactively commit to the average of 35% performance improvements that are expected by their clients.[4]

So, if you are assessing your customer service sourcing strategy in 2026, challenge your BPO partners to think bigger, invest in new capabilities, and rebalance the risk and reward model. Instead of just another RFP, this is a once–in–a–generation opportunity to shape the future.

"If you are assessing your customer service sourcing strategy in 2026, challenge your BPO partners to think bigger, invest in new capabilities, and rebalance the risk and reward model."

Nick Clark,
Partner and Director,
Boston Consulting Group

[1] https://www.anthropic.com/research/labor-market-impacts
[2] https://www.bcg.com/assets/2025/executive-perspectives-unlocking-impact-from-agentic-ai-in-customer-service-23-september.pdf
[3] https://www.bcg.com/publications/2026/the-200-billion-dollar-ai-opportunity-in-tech-services
[4] https://www.bcg.com/publications/2026/the-200-billion-dollar-ai-opportunity-in-tech-services

The Global Forces Changing Contact Centre Outsourcing

For decades, the contact centre outsourcing model relied heavily on labour arbitrage, with enterprises shifting customer service operations to lower-cost locations to achieve scale and cost efficiency.

Those foundational assumptions, however, are now shifting due to AI adoption, changing workforce dynamics, geopolitical pressures and a reassessment of commercial models. Leading providers are increasingly positioning themselves not as labour suppliers but as technology-enabled transformation partners.

The Shift to AI–Native Delivery

The most significant force reshaping outsourcing is the rise of AI–native service delivery. Generative AI, conversational AI and advanced analytics are redefining how customer interactions are managed across channels.

Traditionally, capacity was increased by hiring more people on the frontline. Now, automation resolves many routine interactions, while AI tools augment humans by summarising conversations, automating administrative work and offering real-time knowledge support. This shift means service models will depend less on workforce scale and more on effective orchestration of humans and machines.

Yet organisations often underestimate how deeply AI disrupts existing workflows. Many contact centre processes were built for manual handling and remain too complex for automation without redesign. Simply layering AI onto legacy processes rarely produces productivity benefits. UK organisations must simplify journeys, escalation paths and service policies to enable automation. Without such re-engineering, AI risks becoming an expensive bolt-on rather than a transformative capability.

This evolution is also transforming outsourcing partners themselves. Leading BPOs are investing in AI platforms, automation engineering and consulting capability. Differentiation increasingly depends on technology maturity and transformation expertise, not just labour scale.

Workforce Transformation

As AI absorbs more repetitive tasks, the role of human agents is evolving. Advisors remain essential for handling complex issues, emotional interactions and high-value customer relationships, but the profile of these roles is changing. Traditional entry-level roles are giving way to positions requiring stronger digital fluency, analytical skills and emotional intelligence. Frontline colleagues must now work alongside AI systems, interpreting recommendations and resolving cases that sit outside automated flows.

Outsourcing partners face significant challenges in upskilling their people. Reskilling, digital training and career development programmes will be essential as operating models evolve. New specialised roles are also emerging, including AI trainers, prompt engineers and automation supervisors who manage model performance and governance.

For UK enterprises, two implications stand out. First, the cost advantage of offshore locations may narrow as demand shifts toward higher-skilled labour. Second, organisations must collaborate more closely with partners to align workforce strategy with long-term service needs.

Geopolitics and Operational Resilience

Geopolitical volatility is increasingly influencing outsourcing strategy. Political instability, data sovereignty requirements, regulatory changes and security concerns are prompting businesses to reassess the concentration of their global delivery footprints.

Global disruptions of the current decade – from the pandemic through to regional conflicts and rising cyber threats – have revealed the fragility of highly concentrated delivery models. As a result, organisations are prioritising geographic diversification to strengthen resilience.

For UK organisations, this often includes balancing traditional offshore destinations with nearshore alternatives in Eastern Europe or Africa. In regulated sectors, some operations must remain in the UK to meet compliance and data security needs. Partners are responding by expanding global footprints and building distributed operating models capable of sustaining continuity during disruption. Location decisions are increasingly driven by resilience, regulatory alignment and talent availability, not labour cost alone.

Rethinking Location Strategy

Beyond geopolitics, the broader logic of location strategy is shifting as a result of AI. Historically, locations were selected based on labour availability, language support and cost. While these criteria remain relevant, automation reduces the need for large advisor populations while increasing demand for digital talent capable of managing AI infrastructure.

Partners are therefore building digital customer operations hubs that combine contact centre services with automation engineering, analytics and AI management. These hubs support advanced service delivery and complement traditional sites.

For UK buyers, selecting the right portfolio of locations now requires evaluating digital talent pools, infrastructure maturity, regulatory stability and proximity to innovation ecosystems.

Outcome–Based Commercial Models

Commercial frameworks are also evolving. Traditional contract structures built around inputs such as FTEs, call volumes and handling times are becoming less relevant in AI-enabled environments where labour intensity decreases.

Buyers and partners are increasingly exploring outcome-based models tied to customer satisfaction, first-contact resolution, digital adoption or revenue outcomes. These structures better align incentives but require mature governance, transparent data sharing and clearly defined performance frameworks.

Outsourcing partners must strengthen analytics capabilities and demonstrate confidence in delivering measurable results, while buyers must evolve vendor management practices to support collaborative, performance-driven partnerships as well as changing the way they buy complex services.

Strategic Implications

Collectively, these forces represent a structural industry transformation. AI-native models, workforce evolution, increased resilience requirements and new commercial frameworks are reshaping expectations for both buyers and partners. Partners must invest in AI, automation, digital talent and consulting capability to remain competitive and position themselves as transformation partners.

For UK BPOs, the challenge is to move beyond viewing AI as an add-on and instead redesign how customer experiences are delivered and governed. The future of contact centre outsourcing will not be defined by workforce scale alone, but by the ability to integrate human expertise, intelligent automation and resilient global operating models into a unified customer operations strategy.

David Rickard,
Partner, Everest Group

> "Political instability, data sovereignty requirements, regulatory changes and security concerns are prompting businesses to reassess the concentration of their global delivery footprints."

ventrica

BPO built for today

About us

Ventrica is a leading UK based contact centre BPO partner, specialising in transforming complex customer service operations through digital innovation and Agentic AI solutions.

We collaborate with forward thinking clients to deliver exceptional CX at scale, combining contact centre expertise with intelligent automation and process transformation. Operating across UK and offshore locations, we provide comprehensive multilingual contact centre services across digital and traditional channels.

What sets Ventrica apart is our pioneering approach to Agentic AI, deploying autonomous AI agents alongside our human agents to create friction free customer journeys.

Our digital transformation methodology balances advanced AI automation with recruiting agents with strong emotional intelligence and deep brand affinity.

This fusion of Agentic AI, BPO excellence and human centred design enables us to build intelligent ecosystems where AI agents and human experts collaborate to deliver measurable business outcomes and superior customer experiences at critical moments.

Ventrica can deliver this as a fully outsourced BPO solution or apply our contact centre learnings to transform clients' inhouse operations.

How we help our customers

Headcount was reduced by 20% while service levels improved

UK Trustpilot scores increased from 3.9 to 4.6 for service & 4.0 to 4.3 for brand

Call answer rates increased from 67% to 95%

Contact us at **hello@ventrica.co.uk**
or visit our website **ventrica.co.uk**

"

Partnering with Ventrica for our Zendesk transformation has been amazing! They truly grasped our challenges, from manual processes to peak season pressures, and have streamlined our customer journey brilliantly, enhancing everything from contact forms to ticket prioritisation and SLA tracking.

Abby Spencer

Head of Customer Experience, Dusk

Case Study:

At the Heart of Parent Care

tommee tippee®

Tommee Tippee has been making products for parents since 1965, selling into more than 40 countries. When a consumer contacts the brand, the context is rarely straightforward. They might be tracking an order, navigating product guidance or calling in a moment of genuine anxiety with a newborn baby at home and a feeding challenge they weren't expecting.

The emotional register of those interactions is what shapes the entire customer experience, and is ultimately what drove Tommee Tippee's decision to reconsider its outsourcing partnership.

Teamwork and Agility

Based in Newcastle-upon-Tyne as part of the Mayborn Group, Tommee Tippee had already been outsourcing its consumer services operation for several years, but with a new brand direction built around 'radical empathy', frictionless contact resolution and a genuine commitment to supporting parents without judgment, a change was needed.

"Emotive customer experience is at the heart of what we do," explains Karen Crosby, Global Head of Consumer Services. "We need to do it with care, and that involves actively listening to truly understand what's happening with the consumer at that moment in time."

The brief was specific and as a result Ventrica was selected. Tommee Tippee needed a partner that could transform the consumer experience to bring the new brand proposition to life, harness digital opportunities to reduce contact volumes through self-service and deliver flexible multilingual support to underpin international growth. Critically, they needed a partner whose values and ways of working matched their own.

"Teamworking was exceptionally important to us," says Karen. "Agility was also very important and being fluid in how they work. Consumer expectations are changing all the time and so we needed a company that would come along with us on the ride."

Ventrica delivered the transition within three months. New Parent Care Specialists were recruited specifically for their ability to understand the emotional context of parenting. A new case management system was incorporated into the workflow and specialists were empowered to resolve queries without unnecessary escalation. Digital translation services were introduced to enable English-speaking specialists to handle French, German and Italian contacts in real-time.

"Technology is there to enhance the human-to-human connection," says Emma Alcock, Global Head of Consumer Experience at Mayborn Group. "It's to make transactions easy and make simple solutions happen faster, in order to free up the conversation times that are really valuable between consumers and our specialists."

Wider Business Benefits

The results have been measurable, with consumer satisfaction and Net Promoter Score both rising significantly over the fourteen-month period that followed the partnership transition. Channel behaviour shifted, with consumers increasingly engaging via social media and webchat with SMS and WhatsApp on the horizon – all channels the new model was built to accommodate.

Importantly, the insight flowing from those interactions quickly started feeding back into the wider business, informing Tommee Tippee executives with product development, marketing and consumer journey design.

"The parent care team are dealing with hundreds of consumers in very different situations every single day," says Karen. "That requires a lot of resilience and determination, our consumers are happy and just as importantly, our specialists are happy in doing what we ask them to do."

Ultimately, the partnership illustrates what can be possible when an outsourcing brief goes beyond cost and capacity to focus on cultural alignment, brand embodiment and emotional customer experience.

A Deep-Dive into the UK Contact Centre Outsourcing Market

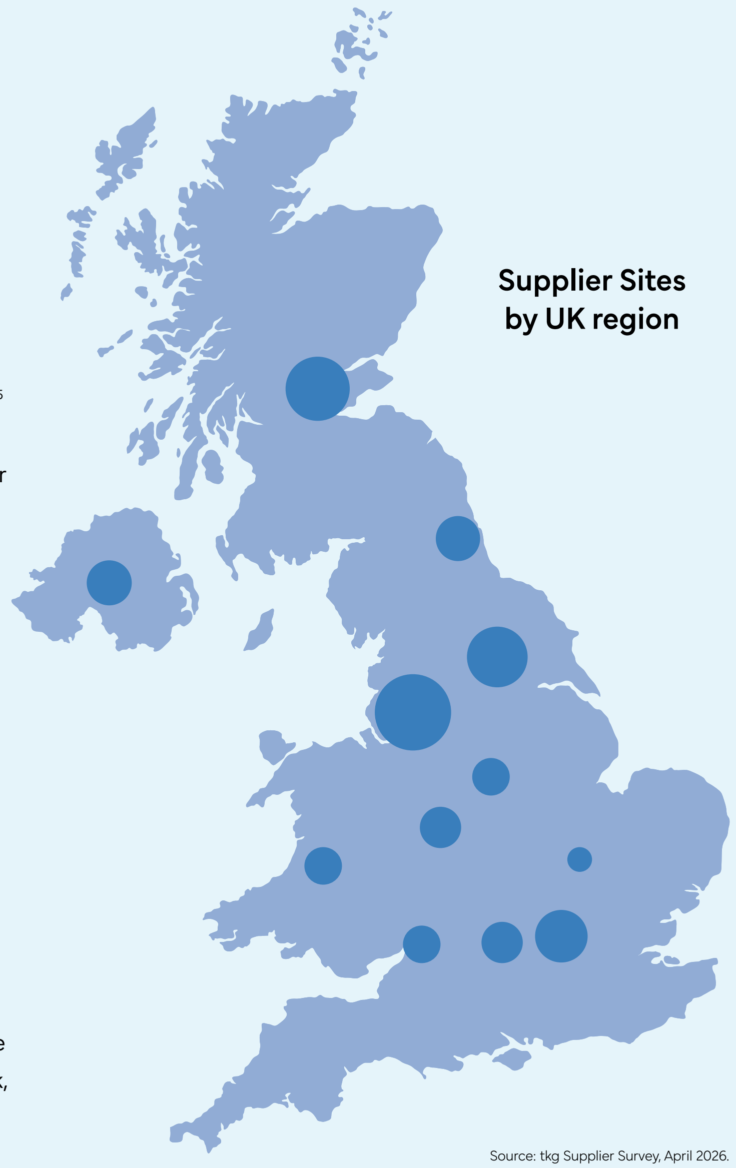
The UK outsourcing market is repricing. After two decades in which labour cost and headcount volume served as the primary logic of procurement, the market is reorienting around a different set of imperatives: specialised capability, regulatory resilience, technology-enabled differentiation and demonstrable ESG accountability.

The Knowledge Group's (tkg) 2026 proprietary supplier survey,[5] representing the majority of UK outsourcing capability, provides the empirical basis for five structural arguments: their FTE allocations, revenue trajectories, AI forecasts, offshore intentions and market sentiment.

Three data points set the frame. First, surveyed partners forecast average market growth of 8.9% which is broadly consistent with published market projections. However, their responses vary significantly, from -25% to +30%.

Second, the same partners anticipate AI will reduce addressable demand by an average of 19% with qualitative responses revealing a market that has developed a sophisticated, if somewhat inward-focused, theory of why disruption will benefit the partners.

Third, and most striking: more than 80% of partners expect UK companies to offshore more work in 2026/27, but almost everyone qualifies that view with a carve-out that defines the structural argument in a single sentence: that regulated work, sensitive interactions and complex customer journeys will stay onshore.



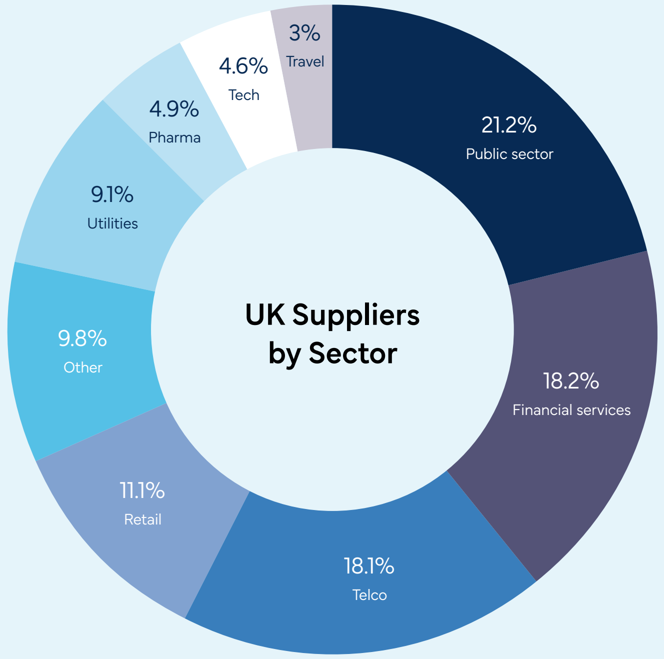
Source: tkg Supplier Survey, April 2026.

The FTE Data: What the Numbers Say

As part of the 2026 proprietary supplier survey, tkg's UK FTE (full time equivalent) mapping asked suppliers with a total of over 52,000 service UK-based FTE to describe how they see the outsourcing market changing in three words. The responses cluster around four recurring concepts: 'hybrid', 'intelligent/AI', 'consolidation' and 'outcome-driven'.

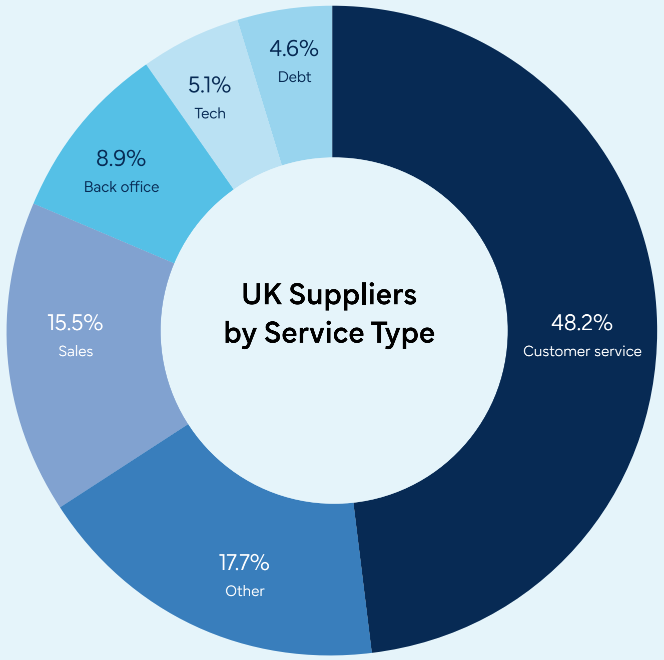
The 'consolidation' signal is the one that arguably piques the most curiosity from buyers, as it was not prompted, was not in any question framing and emerged independently across suppliers of different sizes and models.

Suppliers competing on volume, large customer service FTE counts, low cost-per-seat and geographic arbitrage are building positions in the most vulnerable segment of the market. The market is not rewarding scale, it is rewarding specificity.



Source: tkg Supplier Survey, April 2026.

Public sector and financial services together account for ~40% of all UK sector FTE, with public sector alone at 21.1% - still the largest regulated private/public vertical.



Source: tkg Supplier Survey, April 2026. UK FTE only

Regulated Sectors and a Structural Case for Onshore

When asked whether UK organisations will offshore more work in 2026/27, the overwhelming response was yes (more than 80%) - but with the previously-mentioned carve-out provision that defines the structural logic of the UK delivery market.

With this data, the offshore vs. onshore debate in the UK is seemingly over. The market has resolved to a hybrid model where the question is not whether to offshore, but which interactions can be offshored. The answer, consistently, is not the regulated ones, not the vulnerable customer ones, not the ones that carry reputational or compliance risk.

The UK sector FTE mapping makes the onshore thesis empirically concrete. Public sector and financial services together account for ~40% of all UK sector FTE, with public sector alone at 21.1% - still the largest regulated private/public vertical with a structurally onshore delivery footprint linked to government policy and regulatory risk.

Public sector at 21.1% is the headline on the regulated side. It did not grow from 2024 to 2025, but the revised government RM6295[6] should change this over the next parliament. The drivers are structural: post-pandemic service delivery pressure, digital transformation programmes, NHS-adjacent services, and an increasing political acceptance of BPO as a legitimate delivery mechanism rather than a privatisation liability.

These are relationships built over years, dependent on security clearances, data sovereignty commitments, and onshore governance structures that cannot be replicated by offshore delivery, regardless of cost.

[5] The Knowledge Group (tkg) Proprietary Supplier Survey & Market-Mapping Data, April 2026
[6] https://www.gca.gov.uk/agreements/RM6295

The Regulatory Architecture

Financial services at 18.2% of UK FTE is the most complex regulatory environment in the dataset. The FCA and PRA's operational resilience framework fully effective from 31 March 2025 requires regulated firms to identify all 'important business services', including those delivered by third parties, and demonstrate disruption containment within defined impact tolerances. The emerging Critical Third Party (CTP) designation regime extends direct regulatory oversight to BPO partners themselves.

The practical consequence is that offshore delivery of regulated financial services interactions carries governance costs that erode the headline labour arbitrage. Compliance infrastructure, audit trails, board-level accountability, FCA-supervised operational resilience testing shows these are not optional extras for financial services mandates, and they cost more to deliver offshore than the FTE saving justifies for sensitive interaction types.

The utilities sector (9.1% of UK FTE) presents a different dynamic. Some of the tkg survey responses capture this: retail and FMCG clients may be going offshore, but utilities clients are bringing vulnerable customer interactions back onshore.

Ofgem's Consumer Duty framework and the FCA's vulnerability requirements are creating a compliance floor below which offshore delivery becomes commercially unattractive not because it cannot be done, but because the cost of governing it to the required standard narrows the margin to zero.

Future Technology Investment

In tkg's survey, suppliers were asked how they saw the industry changing over the next 3 years, with technology and automation being the stand-out narrative.

As previously mentioned, suppliers anticipate AI will reduce addressable demand by close to twenty percent. And almost every supplier converged on the same structural argument: AI reduces volume but increases complexity. The remaining interactions are higher value and suppliers who can handle those interactions with quality will grow their market share even as total FTE declines. This is the 'demand shifts, not destroys' thesis, and it is repeated across the survey with enough consistency to suggest it has become the industry's settled position.

[6] https://www.gca.gov.uk/agreements/RM6295

The outliers are where the real signal is. One supplier's response is the most candid in the dataset: "I think the end state is a 70% reduction in FTE with those remaining being a human QA and intervention for the AI". No other supplier went near 70%. Their honesty is strategically important as it suggests their business model is already repositioning around AI supervision and quality assurance rather than volume FTE delivery.

The suppliers projecting 0% AI impact require the most careful interpretation. Their qualitative responses are sophisticated and internally coherent: they argue that AI expands the scope of outsourced services, creates new categories of demand (AI supervision, model training, content moderation, digital transformation delivery), and that the net effect on overall demand is neutral or positive. This may be correct for suppliers who can actually deliver those higher-value services.

The question buyers should ask is: can they evidence it? The gap between 'AI reshapes demand' as a strategic narrative and 'AI reshapes demand' as an operational reality is where the next wave of supplier differentiation will be decided.

Beyond the demand question, the data points to a commercial dynamic that buyers frequently underestimate: AI and technology investment by BPO suppliers is increasingly functioning as a client retention mechanism, not just a service differentiator.

Partners deploying integrated conversational analytics, shared knowledge platforms, real-time quality management, and agentic automation create operational interdependence that goes beyond contractual lock-in. The client who has embedded a partner's AI tooling into their customer journey faces switching costs that are operational, not merely commercial. One partner's ISO 42001 certification (AI Management Systems) - the first major certification framework specifically for AI governance - signals exactly this kind of structural positioning: governance capability that clients need and cannot easily find elsewhere.

For buyers, the implication is clear: negotiate AI roadmap commitments, co-investment provisions, and technology portability at inception. Once the dependency is established, the commercial conversation is considerably harder.

ESG: From Narrative to Procurement Architecture

ESG has completed its journey from corporate communications exercise to procurement qualifier in the UK BPO market. The ESG data covering community contribution, workforce diversity, governance frameworks, partner standards and environmental performance reveals a significant range in ESG maturity across the surveyed partners. That range is now commercially meaningful.

Social value is the ESG dimension with the most immediate commercial consequence in UK procurement, particularly for public sector and regulated private sector mandates. The responses reveal a genuine spectrum from partners with structured, evidenced social value programmes to those with brief, generic commitments.

The geographic dimension of social value is also directly relevant. The 193-site mapping (page 10) confirms that UK BPO delivery is concentrated in Manchester (18 sites), London (16), Sheffield (14), Glasgow (13), Belfast (12) with large working-age populations, above-average unemployment relative to national averages, and strong local authority social mobility frameworks. Partners with deep community roots in these cities can make demonstrable social value claims that London-centric or offshore delivery models cannot structurally replicate.

The governance dimension of ESG has acquired a new component in 2026 too: AI ethics and responsible automation frameworks. For regulated-sector buyers particularly in financial services, where the FCA expects demonstrable human oversight of AI-enabled customer interactions, these governance frameworks are not optional extras, they are threshold requirements. Partners without credible AI ethics infrastructure are finding regulated mandates increasingly difficult to win, regardless of their AI capability narrative.

For buyers, the implication is clear: negotiate AI roadmap commitments, co-investment provisions, and technology portability at inception.

Market Structure and Multi-Vendor Ecosystems

The revenue and FTE data, read together, reveals a market undergoing stratification. The partners who understand their structural position and are acting on it are pulling away from those who are not.

The UK revenue distribution across respondents is heavily skewed. A small cluster operate at significant UK scale. A long tail of partners operate in the £8-50 million UK revenue range. Between them, is a mid-market under genuine commercial pressure.

With 'consolidation' and also 'shrinking' commonly referenced words by partners within the study, it suggests the market is approaching an inflection point where the number of viable mid-tier generalist partners contracts – either through acquisition, client loss, or exit.

For buyers, consolidation has a practical implication: the partner landscape available at next renewal may look materially different from today's. Sourcing strategies should account for partner attrition risk, particularly for partners in the vulnerable middle tier, and should not assume that a partner shortlisted today will be independently viable at contract expiry.

The data also confirms that the UK BPO market is already organised around portfolio procurement. No partner in the dataset dominates across all sectors, and these are not accidents of client mix, they are deliberate specialisation strategies.

Enterprise buyers managing multi-partner ecosystems need to own what no individual partner can own: the integration architecture. Shared knowledge bases, unified quality frameworks, real-time analytics that operate across delivery partners, and operating model governance that functions regardless of which partner is handling which interaction. These are the buyer's responsibility, not any individual partner's.

The Offshore Acceleration and Its Implications

The partners expecting increased offshoring are not simply predicting a cost trend, they are describing a market in which AI is changing the economics of geographic arbitrage.

As intelligent automation handles more of the transactional volume, the remaining offshore opportunity shifts from "do this cheaper" to "do this at scale with technology at a lower total cost". The qualification regulated work stays onshore is not a limitation on the offshore trend. It is the definition of what the onshore market becomes: complex, governance-intensive, compliance-dependent, and premium-priced.

For onshore UK partners, this is not a defensive story. It is the most important commercial opportunity in the market. The partners building credible onshore capability in regulated sectors, with genuine ESG frameworks, technology maturity and governance infrastructure, are positioning for a segment that will grow in value precisely as it contracts in volume.

Strategic Checklist

The UK partner survey data does not tell an ambiguous story about the national market. And while it highlights the common theme of a market repricing, the partners who have invested ahead of that repricing in technology, governance, sector depth, and ESG infrastructure are the ones projecting 30-35% growth in a market others see as flat or declining. The strategic task for buyers is to know which category their current partners sit in, and to procure accordingly. To do this, a strategic checklist is an imperative:

- **Interrogate AI maturity with evidence, not narrative:** Ask for measured deflection rates, specific automation deployments, and the partner's own AI demand reduction forecast then probe the gap between the number and the qualitative explanation.
- **Map sector requirements against the FTE data:** Public sector, financial services, and utilities mandates have structurally different governance requirements. Match partner depth to the organisation's vertical, not just their capability claims.
- **Test the offshore carve-out explicitly:** Ask every partner to specify which interaction types they would offshore and which they would keep onshore, and why. The answer reveals their genuine operating model architecture.
- **Require evidenced ESG, not stated ESG:** Social value scoring, environmental reporting frameworks, AI governance certifications (ISO 42001), and workforce diversity data should be scored in the RFP, not assessed at due diligence.
- **Account for consolidation risk in contract design:** Include change-of-control provisions, financial covenant requirements, and continuity obligations that protect service delivery if a partner's ownership or independence changes during the contract term.
- **Own the multi-partner integration architecture:** The governance layer, shared knowledge bases, unified quality frameworks, integrated analytics must be designed and owned by the buyer. Do not outsource the design of the ecosystem to any individual participant in it.

Spencer Brook,
Group Managing Director
and Co-Founder, tkg

> "The partners building credible onshore capability in regulated sectors, with genuine ESG frameworks, technology maturity and governance infrastructure, are positioning for a segment that will grow in value precisely as it contracts in volume."

The Realities of AI and Outsourcing: What Comes Next?

Two years ago, the proliferation of AI tools that had been talked up for close to a decade was finally starting to unfold. ChatGPT, by then a year old, would see its user numbers jump to hundreds of millions. By the middle of the year, approximately 40% of organisations reported using AI to assist with some form of customer experience improvement.[7]

Spring forward to 2026 and that usage figure is now estimated to have risen to close to 65%.[8] And yet, despite the advances we've seen, the measurable impact of AI on contact centres and their outsourcing models remains incredibly varied. The wild predictions and pilot programmes of two years ago have been superseded by more solid operational data and real-world lessons. But what defines genuine success - what's changed, what hasn't and what AI's future role in customer contact outsourcing will be - remains up for debate.

Much of the debate about the future of AI centres on its impact on the workforce, but this has already been profound.

What's Changed

The productivity case for AI is now well-evidenced. A 2025 McKinsey study[9] found that deploying generative AI across a team of 5,000 customer service advisors delivered a 14% increase in issue resolution per hour and a 9% reduction in handling time – gains that translate directly into cost–per–contact improvements and greater capacity without proportionate headcount growth.

AI–powered quality management has been equally significant, enabling 100% interaction monitoring rather than the small samples human QA teams can realistically review.

Yet, already the industry's position on productivity and cost–to–serve is beginning to shift. Gartner predicted in February 2026 that by 2030 the cost per resolution for generative AI will exceed $3 – higher than many B2C offshore human advisors – citing rising data centre costs, increasingly complex use cases and profitability requirements from the vendors.[10] Instead of using AI to cut costs, leading organisations would soon be more focused on using AI predominantly to drive customer engagement.

Other 'hidden' costs are starting to emerge too – including labour associated with error correction and the cost of workforce redesign. One major BPO has already argued it is time to move beyond AI as a productivity tool, with 'decision integrity' – i.e. restricting the scope of how much of a customer interaction can be handled by AI - now as important as operational efficiency.[11]

What Hasn't Changed

At present, what's most significant about AI is not the interactions it can now handle, but those it can't. Complex queries, vulnerable customer situations, regulated activity, complaints and consultative conversations all continue to require human judgement, emotional intelligence and accountability, and matter most.

As mentioned in the previous chapter, tkg's 2026 proprietary partner survey asked whether AI would reduce demand by 0%, 25% or 50% over five years. Responses ranged widely, but the most analytically rich answers converged on the same distinction: volume and value are not the same thing. "AI is a demand shifter, not a demand destroyer," said one respondent.

Another was more direct: "AI will not reduce the importance of customer experience. It will elevate it into a more value–driven, outcome–oriented function". The most common expectation was around 19% reduction in traditional contact volumes – but almost universally, respondents noted that what replaces that volume will be more challenging to manage and more commercially significant.

Further research adds a counterpoint. Only 25% of all contact centres have actually successfully integrated AI into their daily operations. The reasons are operational rather than technological – gaps in data quality, in–house knowledge, governance frameworks and the integration of AI across complex existing environments are all proving to be the limiting factors. So, while the adoption has been reported as being widespread, the gap between implementing AI and actually making it work is a real one, and consequential for outsourcing buyers evaluating partner capability.

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The Skills Shift and Looking Ahead to 2028

Much of the debate about the future of AI centres on its impact on the workforce, but this has already been profound. The contact centre advisor of 2026 has already evolved into a complex problem–solver and human escalation point for interactions automation cannot resolve. New roles – AI quality managers, model supervisors, prompt engineers – are already emerging at the intersection of operational and technical expertise.

The World Economic Forum's Future of Jobs Report 2025 found that while technological skills are growing fastest in importance, human skills including analytical thinking, resilience and collaboration will remain critical. With 85% of employers planning to prioritise upskilling by 2030 and 59% of the global workforce requiring reskilling, who bears that cost – and how it is reflected in outsourcing contracts – is a question buyers and partners will need to resolve together.

Contracts are perhaps the most significant structural shift being driven by AI. The traditional FTE–based model becomes increasingly hard to justify where AI makes input–based pricing a poor proxy for delivered value. Looking forward two years, in 2028 the agreements that hold up best will most likely be built around outcomes – resolution rates, satisfaction scores, cost per resolved interaction – rather than headcount alone.

McKinsey's customer care research confirms that outsourcing relationships are already deepening, with buyers engaging partners for operating model design, AI–enabled delivery and continuous optimisation well beyond traditional call handling. Multiple respondents to the tkg survey noted that AI "increases client reliance on sophisticated partners" – precisely because operationalising it safely and at scale is itself a specialist capability.

Crucially, AI is not yet simplifying outsourcing models, in practice. It is adding layers of architectural and commercial complexity, and the buyers currently seeing the most success are those actively managing that complexity rather than assuming cost or efficiency gains are there from the get-go.

By 2028, the distance between partners who have built genuine AI capability and those who have not will be visible in performance data, pricing conversations and contract renewals. The past two years have established that AI can work and can assist with customer experience gains, as well as productivity improvements. However, the next two years will determine who can make it work consistently for both customer and colleague and at scale,, and that is the question that will matter most in the majority of outsourcing decisions between now and then.

Leigh Hopwood,
CEO, CMMA

"What's most significant about AI is not the interactions it can now handle, but the one's it can't. Complex queries, vulnerable customer situations, regulated activity, complaints and consultative conversations all continue to require human judgement, emotional intelligence and accountability, and matter most."

Performance you can rely on – at scale.

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Outsourced operations today must do more than reduce cost. They must perform consistently, adapt intelligently, and support the heart of the business without disruption.

TP is a global digital business services leader that partners with organisations to run and transform critical operations.

- Proven delivery in complex, regulated environments
- AI-enabled, human led models designed for consistent outcomes
- Global scale with governance, transparency and partnership focus
- 53% of the Forbes Top 100 are TP clients

Case Study:
Service Continuity Through Disruption

southeastern

Southeastern is one of the UK's busiest commuter rail operators, running over 1,700 trains a day across Kent, London and parts of East Sussex, serving 180 stations and more than 400,000 passengers a week.

The customer experience operation that supports the network consists of a 24-hour customer service centre and numerous channels of customer contact, including phone, email, chat and station-based assistance. Across a typical year, this operation handles in the region of 296,000 customer contacts.

Since 2015, customer contact has been delivered in partnership with Teleperformance, via a London-based operation that included 10 advisors and 6 support staff alongside Souteastern's 67 advisors and 16 support staff, and an additional seven support personnel in Bangor.

Its most significant test came with rail industrial action that began in April 2022 – the largest of its kind in the UK in over three decades. The challenge for Southeastern was to maintain service standards through a sustained period of disruption, while absorbing a 143% average increase in 'Delay Repay' refund claims and a sharp rise in overall customer contact volumes.

The standards themselves were not relaxed for the circumstances, with responses required within 10 working days, 80% of telephone calls answered within 30 seconds, and full and accurate resolution of complaints all remained the targets to be met.

A Scaled and Flexible Operation

The response was built around four practical changes to how the operation ran. Capacity was planned over a longer horizon, with staffing scaled across twelve months rather than reactively per strike, removing the wait-time spikes that short-notice industrial action would otherwise have caused.

Flexible contact teams were introduced who could be redeployed across departments depending on where pressure was greatest, allowing the operation to flex into whichever channels or work types were most affected at any given time. Onboarding was condensed from two weeks to two days, enabling rapid scaling into the most-impacted areas, particularly Delay Repay. And the Delay Repay system itself was enhanced through additional automation, allowing higher claim volumes to be processed accurately without proportionate increases in headcount.

Performance Throughout

During the period of disruption, the operation handled 594,541 customer communications – 270,943 more than the previous year – while maintaining an average response time of 3 days and 5 hours, inside the 10 working day industry benchmark. Resolution within 10 working days reached 100%, against an industry average of 83%, the best record for all UK rail operators during that time. Average resolution time for Delay Repay claims settled at 3 days and 11 hours.

Customer feedback held in line with the operational data, with 88% of customers rating Southeastern's service as exceptional – 14 points above the industry average – and 92% rated the team's knowledge and professionalism at 5 out of 5. The Rail Ombudsman confirmed full accuracy in complaint resolution. And what's arguably most significant is that the automation built during this period continues to deliver, processing 20% more claims automatically than the previous manual approach.

Economics: The Cost–of–Service Equation

Most outsourcing business cases are built around unit price - cost per hour, cost per contact, cost per FTE. These are the numbers compared at procurement stage, approved at board level and revisited at contract renewal, but don't always provide a complete picture when making a final decision.

Total cost of ownership in contact centre outsourcing comprises several elements that rarely appear in full in a business case. Four in particular are routinely underweighted.

1. **Unexpected transition period costs.** Recruitment, training, knowledge transfer, technology integration and the productivity dip that can often accompany a transitionary period all carry real cost. A realistic timeframe for the move to an outsourcing partner runs to months, not weeks, and is rarely at its most efficient right from the start. A joint HFS Research and KPMG study found that 52% of enterprise organisations are now adding renegotiation clauses tied to economic triggers[12] – a direct response to business cases that failed to account for early-stage transition costs and delivery failures during this timeframe.
2. **Internal governance overhead.** The cost of managing an outsourcing relationship – vendor management headcount, data and reporting infrastructure, legal and compliance review and executive time – can often be excluded from cost comparisons. Research on outsourcing governance found that without solid governance structures, partner contracts can cause combined value leakage of between 17% and 40%,[13] with mishandling of consumption management and unnecessary change orders alone capable of eliminating 5–15% of projected value. Deloitte's 2024 Global Outsourcing Survey reinforces the scale of this problem, finding that 70% of Vendor Management Office (VMO) functions are not fully mature,[14] meaning the cost of under-resourced governance can compound across a contract term.
3. **Failure demand.** When digital or AI journeys are poorly designed, the cost of resulting inbound human contact lands back into the contact centre. Research shows that the BPO industry is at a tipping point where headcount-based delivery and fixed pricing models are increasingly misaligned with enterprise needs.[15] Therefore, failure demand generated by underperforming automation is a direct economic problem, not just an operational one.
4. **AI costs.** With AI such a prominent part of the requirement now, once a partner's AI tooling, quality frameworks and data architecture are embedded into an organisation, changing partner becomes operational rather than merely commercial. Buyers have to consider including AI-specific governance in contracts from the start, defining data usage, training rights, performance standards and intellectual property terms.[16]

Total cost of ownership in contact centre outsourcing comprises several elements that rarely appear in full in a business case.

The Productivity Assumption Gap

Most outsourcing business cases are built on a single-point productivity improvement assumption that is frequently optimistic. Data indicates that 75% of enterprises plan to renegotiate their BPO contracts,[17] with many seeking to move away from traditional time-and-materials models – a clear signal that expected value may not have been realised under current structures.

A more realistic approach is to plan for a range of outcomes rather than betting everything on a best case scenario. Instead of assuming productivity jumps the moment the contract goes live, model a steady improvement over the first two years. Factor in the reality that early months are often messy, and that efficiency gains may take longer to show up than expected. In short, plan for progress, but allow time for it to happen.

The Cost of Delay

There is a cost to not acting that rarely appears in outsourcing analysis. Organisations that delay transformation decisions to avoid transition costs frequently incur higher cumulative cost through operational 'stagnation'. This can include rising attrition in retained teams, legacy technology maintenance, unresolved failure demand, and the compounding effect of a widening capability gap.

Deloitte's Global Business Services Survey found that organisations with strong governance and leadership achieved over 20% average savings – a figure that illustrates the scale of value foregone by those who delay.[18]

The commercial models discussed elsewhere in this report such as outcome-based contracts, gainshare mechanisms, AI investment co-funding, can best deliver their promised value when the underlying cost architecture is properly considered. Getting the economics right is a prerequisite for every other strategic decision in the outsourcing relationship.

"Factor in the reality that early months are often messy, and that efficiency gains may take longer to show up than expected."

Kate Knowles,
Service Director, CCMA

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A New Outsourcing Playbook for Buyers

For decades, outsourcing has been anchored in procurement discipline defined by cost benchmarks, competitive tenders, and contractual compliance. While this approach has delivered efficiencies, it is no longer sufficient in a world where customer experience, digital capability and operational resilience define competitive advantage. Now more than ever a new approach is needed to get the best possible outcomes for customers, colleagues and other stakeholders.

From Procurement Process to Strategic Partner Selection

Today, leading organisations are reframing outsourcing not as a sourcing exercise, but as the deliberate design of a partnership architecture, one that enables continuous transformation, embeds innovation, and delivers measurable business impact on an ongoing basis.

This shift is not cosmetic or a fad, it is a trend that is fundamentally changing how buyers think, decide, and engage. Given the current economic outlook, UK organisations looking to outsource or currently outsourcing will need to consider the following factors.

1 **Strategic Clarity as the Foundation**
Successful outsourcing relationships begin with absolute clarity of intent. Yet too often, organisations enter the market with fragmented objectives, namely seeking cost reduction, experience improvement and transformation simultaneously, without clear prioritisation.

Maintaining a focus on strategic clarity enables organisations to design partnerships that are aligned to outcomes, rather than constrained by legacy assumptions. These are tough discussions, often at board level not just at cost centre level but without the honest discussion the clarity is missing and the outcome undermined.

2 **Capability–Led Partner Selection**
Traditional procurement processes tend to favour scale, price and compliance. However, modern outsourcing demands a more nuanced lens that prioritises capability over commodity. Organisations are increasingly selecting partners based on their ability to:

- Orchestrate complex, omnichannel customer journeys.
- Integrate seamlessly with existing technology ecosystems.
- Apply data, analytics, and automation to drive performance.

This requires deeper engagement during the selection process, moving beyond static proposals toward dynamic collaboration, solutioning and proof of capability. Measuring price is easy. Measuring total cost of ownership is not much more difficult. However, measuring a potential partner's ability to drive the ambitions of an organisation is a much more complex exercise.

3 **Embedding AI Through Structured Roadmaps**
Artificial intelligence is no longer a future consideration; it is a present imperative. However, its value is not unlocked through isolated pilots or bolt–on solutions, it needs to be a material consideration from the earliest moments of a solution design. This includes who owns it, who drives it, where is the data domiciled, what's informing it, who trained it, who shapes its output and who benefits from its use.

High–performing partnerships are characterised by clearly defined AI integration roadmaps that set the expectations of the relationship:

- Identify high–impact use cases across the customer lifecycle.
- Balance automation with human expertise, especially for vulnerable customers.
- Establish governance around data, ethics, and performance.

Crucially, these roadmaps are co–developed and continuously refined, ensuring that innovation is embedded into the operating model rather than treated as a bolt–on.

4 Incentivising the Right Behaviour and Focus

The limitations of traditional pricing structures are becoming increasingly evident. Legacy models based purely on volume or activity can create misaligned incentives, discouraging efficiency and innovation. They were never an overly–effect way of incentivising performance, but now more than ever these legacy models are failing buyers and customers.

In contrast, outcome–based contracts align commercial structures with business objectives. These may include:

- Customer satisfaction and experience metrics.
- Revenue generation or retention outcomes.
- Productivity and efficiency improvements.

By linking value to results, organisations create partnerships that are inherently focused on impact rather than input.
It is hard for brands to let go, especially if they have never outsourced before. However, controlling every input undermines a buyer's position if they are not achieving the desired outcomes, so it's important to design an operating model and commercial mechanism that incentives the right behaviours and rewards the desired outcomes, not just buying capacity with a little risk and reward wrapped around it.

5 Redesigning Governance for Agility and Accountability

Governance has historically been viewed as a control mechanism focused on performance monitoring and issue resolution. In a partnership model, it becomes a strategic enabler.

Modern governance structures are:

- Multi layered, balancing operational oversight with executive alignment.
- Data driven, providing real–time insight into performance and opportunities.
- Oriented toward continuous improvement, not just compliance.

This shift enables faster decision–making, stronger alignment, and the ability to respond dynamically to changing business conditions.

6 Delivering Measurable Impact

The true test of any outsourcing strategy lies in its outcomes. Organisations that adopt a partnership architecture consistently report:

- Improved customer satisfaction and loyalty.
- Greater operational resilience in the face of demand volatility.
- Accelerated adoption of digital and AI capabilities.
- Sustainable cost efficiency driven by productivity, not reduction alone.

These outcomes reflect a broader truth – value is no longer created through transactional efficiency alone, but through cultural alignment between client and partner, integrated and adaptive ecosystems, and a cost conversation that has shifted from price per transaction to total value delivered over time.

A Defining Shift

Designing and implementing this new approach is not without challenge. It requires a level of strategic, commercial and operational expertise that often extends beyond traditional procurement skillsets – especially in firms who don't outsource very often.

As a business leader, organisations should be honest about their own capability. Asking for help isn't about outsourcing decision–making but about strengthening it, ensuring that organisations navigate complexity with confidence and clarity.

The evolution from procurement to partnership represents a defining shift for the industry. It reflects the growing recognition that outsourcing, when designed and executed effectively, is a powerful driver of business performance and transformation.

For organisations willing to embrace this change, the opportunity is clear. Move beyond cost, build enduring partnerships and unlock the full potential of their customer operations. The future of outsourcing will not be won by those who buy better, but by those who partner smarter.

> "The evolution from procurement to partnership represents a defining shift for the industry."

Spencer Brooks,
Group Managing Director and Co–Founder, tkg

The Smarter Buyer's Journey

Today's challenging geopolitical climate creates a volatile business environment. As trading conditions become more difficult, many more organisations are looking again at how their costs could be addressed and outsourcing their customer care function is becoming a more pressing decision.

Most organisations have customer care at the heart of their business but that's not to say it's untouchable, as staffing and technology costs grow. Choosing to outsource this critical function is no longer a tactical cost decision, but a strategic lever for resilience, growth, brand differentiation and service improvement.

Despite the decision being so important, many organisations still approach outsourcing through outdated procurement models, leaving value on the table and exposing themselves to avoidable risks.

The smarter buyer journey is about moving beyond transactional sourcing toward a structured, insight–led approach that balances commercial discipline with innovation. It recognises that the complexity of modern customer experience ecosystems with multiple points of complexity around charging structures, gainshare and incentives normally require more than internal capability alone.

This demands specialist expertise, rigorous evaluation and a forward–looking mindset. Being brave enough to change the operating model isn't to be taken for granted and if approached properly, the process of outsourcing can be transformative.

> The most common failure in outsourcing is not in partner selection – it is a problem relating to definition.

1 Defining the Right Problem

The most common failure in outsourcing is not in partner selection – it is a problem relating to definition. Buyers often begin with a preconceived solution (e.g., reduce cost through offshoring) rather than a clearly articulated challenge. Worse still, buyers sometimes have a partner in mind before starting because they will have been sold to and determined the salesperson is right.

A smarter approach reframes the question:

- What customer outcomes are we trying to improve?
- Where are the current operational bottlenecks?
- Which capabilities are missing internally?

For example, a retail brand experiencing declining customer satisfaction may initially assume staffing costs are the issue. In reality, fragmented technology and inconsistent service design may be the root cause. Without proper diagnosis, outsourcing may simply replicate inefficiencies at scale.

2 Financial Stress Testing Beyond Cost Savings

Traditional business cases tend to focus narrowly on cost reduction. However, this lens is increasingly insufficient.

Smarter buyers apply financial stress testing to model a range of scenarios:

- Demand volatility (seasonal spikes, economic downturns).
- Productivity assumptions versus reality.
- Hidden costs (transition, governance, technology integration, travel).
- Revenue impact from improved customer experience.

In the financial services sector, for instance, organisations that model customer retention improvements alongside cost savings often uncover significantly higher long–term value reshaping their outsourcing strategy entirely.

3 Evaluating Delivery Models in a Hybrid World

The evolution of remote work, AI augmentation, and global talent pools has fundamentally changed the design of delivery models.

Buyers must now evaluate:

- Onshore vs. offshore vs. nearshore blends.
- Work–from–home vs. site–based models.
- Human vs. automated interaction layers.

A telecom partner, for example, may find that a hybrid model combining offshore scale with onshore specialist escalation teams, delivers both cost efficiency and improved customer satisfaction.

The key is not choosing a single model, but designing a portfolio of capabilities aligned to customer journeys.

4 Modernising the RFP Process

The traditional RFP process often prioritises compliance over insight. Lengthy questionnaires, rigid scoring frameworks, and limited interaction can obscure true partner capability. We are increasingly seeing greater use of what we call 'constructive dialogue'. Whilst this is still somewhat unusual, it is increasingly used in complex service transformation as it lowers the need for clear requirements at the start and is focused on co–creating a solution that is perfect at the end of the event.

A smarter approach introduces:

- Outcome–based requirements instead of prescriptive inputs.
- Interactive workshops and solution co–creation.
- Shortlisted deep–dives rather than broad initial sweeps.

This shift enables buyers to assess not just what partners say, but how they think, adapt, and innovate.

5 Assessing Innovation as a Core Capability

Innovation is frequently treated as a 'nice–to–have' in outsourcing decisions. In reality, it is a critical differentiator

Buyers should evaluate:

- Partners' investment in technology and analytics.
- Track record of continuous improvement, backed up by reference checks of partners' case studies.
- Ability to embed AI and automation into operations.

In the e–commerce sector, organisations that prioritise innovation partners over low–cost partners often achieve faster resolution times, higher conversion rates, and stronger customer loyalty.

6 Aligning Commercial Risk and Incentives

Misaligned incentives are one of the most persistent challenges in outsourcing relationships. Traditional pricing models can inadvertently reward inefficiency or discourage transformation.

Smarter commercial structures include:

- Outcome–based pricing linked to customer metrics.
- Gainshare mechanisms for productivity improvements.
- Flexible capacity models to manage demand fluctuations.

By aligning financial incentives with desired outcomes, buyers create partnerships that drive mutual success rather than adversarial negotiations.

7 Designing for Long–Term Relationships

Outsourcing is not a one–time event, it is an evolving relationship. Yet many organisations underinvest in ongoing governance and partnership design. They often also lack the commercial skills to manage outsource relationships. Being a centre manager doesn't necessarily make you a perfect vendor manager, for instance.

A smarter approach focuses on:

- Clear governance frameworks with defined decision rights.
- Joint innovation roadmaps.
- Regular strategic reviews, not just operational reporting.

In healthcare, for example, long term partnerships that prioritise collaboration over contract enforcement have enabled partners to adapt rapidly to regulatory changes and patient needs.

Unlocking Greater Outcomes

The smarter buyer journey recognises that the complexity of modern outsourcing decisions often exceeds the capacity of internal teams alone. From financial modelling to delivery design and innovation assessment, specialised expertise can significantly enhance outcomes.

Organisations that embrace structured guidance, whether through internal centres of excellence or external advisory support consistently achieve better results, stronger partnerships, more resilient operations, and ultimately, superior customer experiences.

In a world where customer expectations continue to rise, the question is no longer whether to outsource, but how intelligently it is done. The smartest buyers understand that success lies not just in choosing the right partner, but in navigating the journey with clarity, discipline and the right expertise at every stage.

> "The smarter buyer journey is about moving beyond transactional sourcing toward a structured, insight–led approach that balances commercial discipline with innovation."

Joel Walker, Managing Director – Platform Services & Co–Founder, tkg

Case Study:
Customer Finance Portal Modernisation

MotoNovo FINANCE

MotoNovo Finance enables the journeys of hundreds of thousands of people in the UK. With finance delivered through an extensive dealer and broker network, excellent customer experience is critical to continued growth, enabling efficient and effective servicing through innovation and customer-focused digital services.

As part of its strategy for growth, MotoNovo's parent company, Aldermore Group, has been investing in significant digital transformation and improving experiences for its customers, colleagues, and intermediary partners. As part of that strategy, MotoNovo Finance committed to delivering a new self-service customer portal – one that would overcome the high operational costs of the existing solution, where unstructured data and a rigid platform were constraining performance and preventing meaningful insights.

Recognising the need for change, MotoNovo Finance sought a strategic partner who could design, build, and run a modern, cost-effective finance portal that would align with its target tech stack and multi-channel customer experience vision.

Built Around The Customer

By focusing on the customer journey, existing usage data and familiarity with the organisation, Concentrix designed and delivered a full-service finance portal. The solution was built with the flexibility to evolve alongside changing needs, supported by a model that extended well beyond initial delivery and was underpinned by strong technical expertise.

A multidisciplinary team was assembled from the outset, bringing together specialists in architecture, user experience, UI/UX design, production readiness, release management, and application engineering.

The platform itself was developed using a modern, scalable technology stack, enabling a seamless cross-channel experience with native-like performance. This approach not only reduced development overhead but also allowed for faster rollout of new features, ensuring the solution could keep pace with evolving user expectations.

To further accelerate development and expand functionality, advanced techniques were applied to simulate backend interactions. This made it possible to rapidly iterate and innovate, enhancing native capabilities across devices without being constrained by dependencies.

Delivery was managed through a structured, phased approach that spanned discovery and design through to documentation and hyper care. This ensured execution remained tight, transparent, and compliant throughout, including successful submission to both the Apple App Store and Google Play Store.

Momentum from Day One

Launched in September 2025, the portal saw rapid adoption – over 32,000 app downloads and 42,000 logins on day one alone. Within the first eight months, it grew to over 157,000 registered customers and 875,000 total logins. Engagement followed, with login to action rates increased by 200%, while payments handled digitally rather than via inbound calls rose by 60%. Settlements completed through the platform increased by 51%, reducing friction for customers and accelerating resolution times.

Crucially, with self-service now available, customers have been able to self-manage payments, settlements, and account updates wherever and whenever they like.

"The strong uptake of the mobile app after launch reflected a collaborative approach that's driving better outcomes for both the business and our customers."

Nikhil Date, Chief Product and Engineering Officer at Aldermore Group

About the CCMA

For more than 30 years, the CCMA has been dedicated to supporting contact centre leaders. We push ourselves to do more for our thriving membership base, which is the largest community of industry professionals in the UK.

The CCMA was founded with the goal of sharing best practice and networking to improve skills and knowledge in order to progress contact centre operations – and we live by that to this day.

We give those who work in contact centres the chance to discuss ideas and share experiences through member–only events online and in–person. Member organisations are invited to become Accredited through the Contact Centre Standards Framework and get independent guidance on where they can improve. There is the opportunity to compare operations against industry standards and 25+ KPIs, via our annual CCMA Benchmark.

Our training arm, CCMA Academy gives contact centre professionals at all levels a structured learning opportunity to support both personal and professional development for the benefit of their operations. We also celebrate the progress our industry is making through the UK National Contact Centres Awards. Those that win go on to share their stories through channels such as the UK National Contact Centre Conference, Best Practice Visits and CareerTalk, while also providing input into our CCMA Circles and other events.

In 2026, the CCMA coordinated the UK's first National Contact Centre Day, a celebration that engaged more than 4m people both within and outside the sector, via online and in–person events held by a vast range of organisations across the country. The event will take place annually, with the next National Contact Centre Day set for 3 March 2027.

www.ccma.org.uk

About The Knowledge Group

The Knowledge Group (tkg) is a practitioner-led sourcing and procurement firm specialising in contact centre outsourcing, GBS and technology services.

We help organisations design, source and manage outsourcing so it holds in delivery.

- We buy. We run sourcing processes to identify and secure the right partners.
- We build. We design the commercials and operating model, and set suppliers up to deliver.
- We operate. We manage supplier performance and delivery over time, and build internal capability where it matters

Used when complexity, risk or scale exceed internal capability. The focus is simple: better decisions, stronger supplier performance, and outcomes that hold.

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CCMA Contact Centre Management Association

0333 939 9964

www.ccma.org.uk

info@ccma.org.uk