ISG Provider Lens®

Future of Work — Services

Digital Workplace Operations and Support Services — Midmarket

A research guide to evaluate providers' strengths, challenges and differentiators in the digital workplace

Customized report courtesy of:

SCC

QUADRANT REPORT | JUNE 2026 | U.K.

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Modern workplace in the UK market is becoming AI-augmented work transformation

The future of work services market in the UK is moving from workplace modernisation to AI-augmented transformation. This phase is less about deploying collaboration tools or managing devices and more about redesigning the way work is performed, governed, measured and experienced across digital and physical environments.

For the ISG Provider Lens® Future of Work Services 2026 study, we have an evaluation model built around workplace strategy and enablement, digital workplace operations and support, AI-augmented collaboration and experience, and smart and sustainable workplace services. Together, these areas recognise that the workplace is now digital, physical, human, data-driven and increasingly AI-enabled.

Market context

The primary finding is the increasing expectations of enterprises in the UK — they still need providers to manage endpoints, service desks, collaboration platforms and workplace infrastructure, but these capabilities are no longer sufficient on their own. Buyers increasingly expect providers to redesign workflows, govern AI, support responsible adoption, improve EX and connect workplace data with HR, facilities, real estate, security and sustainability objectives.

These changing expectations create a more complex competitive landscape. The strongest providers will be the ones that are able to combine advisory, implementation, operations and measurable outcomes across people, processes, technologies and locations.

UK demand

The UK policy environment is supportive of future of work services as AI adoption, workforce productivity and public sector transformation have become economic priorities. Public sector experimentation with AI-enabled productivity tools, the emergence

Collaboration layer is the **workplace interface** to access **services, knowledge** and **AI-enabled** assistance.

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of large digital workplace procurement frameworks and continuing pressure on public services are creating a demand for providers that can combine technology delivery with change management, governance and value measurement.

At the same time, like the global market, the UK market is not yet at the stage of enterprise-wide AI maturity. Research indicates that many organisations are using GenAI frequently, but few have embedded AI into core operations at scale. Cultural resistance, limited upskilling, unclear governance and fragmented data remain barriers and represent opportunities for providers — clients need more than tools. They need operating model redesign, responsible AI controls, adoption programmes and measurable business outcomes.

The macroeconomic environment reinforces this shift. UK buyers remain under pressure to justify investments through productivity, resilience and security. Future of work providers must therefore show tangible value — minutes saved, ticket volumes reduced, increased adoption, improved employee sentiment, enhanced cyber posture, efficient office utilisation, low energy consumption and short business-process cycle times.

Enterprise priorities

The following five shifts are expected to be seen in the next 12-18 months:

GenAI as the operating layer of work

GenAI is the defining force in the 2026 future of work services landscape, with conversations moving from generic AI-readiness to use cases across ITSM, HR, knowledge management, collaboration, software development, service desk, procurement and employee self-service. The next stage will therefore be about AI as a controlled execution layer embedded into everyday workflows.

For providers, the battleground is workflow orchestration. Enterprises will need help identifying work suitable for AI delegation, establishing guardrails, integrating agents with enterprise systems and ensuring human oversight remains effective. They should assess providers on their ability to turn AI adoption into safe, governed and measurable changes in how work gets done, not merely on the number of licences deployed.

Hybrid work as intentional workplace design

Hybrid work has become the default model for organisations, but access remains uneven across roles, skills, income and sectors. The future-of-work agenda therefore needs to move beyond improved collaboration tools for knowledge workers and towards role-based workplace models for frontline workers, public servants, regulated-industry employees, contact centre agents, clinicians, engineers, knowledge workers and executives.

The concept of work is also getting repositioned; many employers seek higher attendance, but utilisation remains inconsistent. This creates a demand for providers that can combine workplace analytics, collaboration technologies, AV integration, space optimisation, employee sentiment and change management. The right question is no longer simply about where people work — it is what work should happen where, with what technology, under what management model and measured by which experience and productivity outcomes.

DEX, XLA and predictive support redefine workplace operations

Digital workplace operations and support are moving from reactive service management to predictive experience engineering. Traditional SLAs remain important, but they are increasingly being supplemented by XLAs that focus on the employee experience of technology. Static sentiment surveys are giving way to telemetry, behavioural analytics, proactive remediation and business-outcome reporting.

This changes the provider value proposition. The aim is no longer only to resolve tickets quickly; it is to prevent disruption, keep employees productive and connect technology experience with business outcomes. Enterprises must evaluate providers on proactive endpoint management, AI-assisted support, service-desk deflection, incident prevention, accessibility, security readiness and the ability to translate telemetry into experience and productivity improvements.

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Collaboration as the employee-service interface

The collaboration layer is becoming the front door to work. Messaging, meetings and file sharing are converging with IT support, HR workflows, approvals, learning, onboarding, knowledge management and workflow automation. In this model, platforms such as collaboration hubs and EX suites have become the interface through which employees access services, knowledge and AI-enabled assistance.

This means the AI-augmented Collaboration and Experience Services quadrant has been assessed differently in 2026. Strong providers have been recognised not only for platform migration, voice integration or meeting-room modernisation; they have been identified for being able to create role-based AI and agent use cases, improve knowledge quality, build prompt and workflow libraries, protect sensitive data, drive adoption and integrate collaboration platforms with ITSM, HRIS and business systems.

Convergence of sustainability with IT services

Smart and sustainable workplace services are becoming a priority with sustainability as a key workplace strategy; organisations are using smart building technologies, energy management systems, occupancy analytics and IoT to improve space management, reduce waste and support responsible operations.

This focus is expanding the future of work provider ecosystem beyond traditional IT services. Workplace strategy, facilities operations, AV, occupancy data, EX, energy management and ESG reporting are now interconnected. Enterprises are assessing providers on their ability to orchestrate these domains, especially in regulated industries where resilience, sovereignty, data governance and auditable AI controls are critical.

Provider dynamics

Throughout this ISG Provider Lens® evaluation, we report on the providers where the most important evidence is not simply the number of devices managed, collaboration seats deployed or AI licences sold. In the UK, measured adoption, productivity outcomes, experience improvements, AI governance and operational maturity are now enterprise priorities, with leading providers transforming from legacy services to meet enterprise demands.

The providers qualified for this report shared quantifiable UK-specific examples across a breadth of delivered results and benefits such as active AI usage, minutes saved per user, service-desk deflection, ticket reduction, device incident prevention, employee satisfaction, XLA improvement, security incidents avoided, accessibility benefits, office utilisation, carbon and energy impact, and business-process cycle-time reduction.

The most visible shift is the evolution of GenAI and agentic AI across portfolios. Enterprise priorities are developing at pace with regards to adoption of the leading-edge technologies, such as AI, with quality of services and delivered results being as critical as any conventional focus on cost take-out. The priority for providers is bringing all of the established towers or siloes across IT services into much closer alignment and integration, to deliver true observability across the enterprise landscape as a clear differentiator for the mature providers.

Strategy providers are building AI governance, human-AI role design and adoption readiness into advisory methods. Operations providers are adding AI-assisted service desks, automated remediation, self-healing endpoints and predictive support. Collaboration providers enhance Microsoft Teams, Webex, Zoom and knowledge platforms with copilots, meeting intelligence, contextual assistants and in-flow support. Smart workplace providers are applying AI to occupancy insight, space optimization, energy management and building intelligence. Providers need to demonstrate differentiation, regardless of the services or capabilities offered, and AI is an enabler of differentiated services.

Sustainability is no longer an add-on.

Device lifecycle management, circular workplace technology models, smart office analytics, energy optimisation and ESG-aligned reporting are embedded into mainstream workplace service portfolios. No longer restricted to the sustainable workplace

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quadrant, providers are shaping portfolio capabilities from workplace strategy, through operations and support and connecting sustainability with operating data, to drive increased outcomes.

Large global providers compete on scale, integrated portfolios, platform partnerships and multinational delivery. UK and regional providers often compete through local proximity and trusted execution. Product-led specialists differentiate through focused AI, DEX, collaboration or smart workplace capabilities. The leading providers will combine demonstrable regional evidence with repeatable methods, measurable outcomes and clear governance around AI-supported work. 'Digital workplace transformation' messaging is no longer enough, as enterprises demand workplace services which enable proven cost controls and governance and also improve quality of service without increasing regulatory, operational or employee-trust risk.

Outlook

The future of work services market in the UK in 2026 will reward providers that operate and deliver at the intersection of people, process, technology and location. GenAI is the catalyst, but operating model change is the real battleground. Data readiness, responsible AI, employee trust, experience measurement, workflow redesign and sustainable workplace orchestration will determine which providers create the most lasting value.

Through the emerging agentic IT configuration, any traditional digital workplace and IT service providers will risk becoming obsolete, as the operational models transform. Business advisory, the translation of advisory into agentic workloads and change management that helps employees trust, adopt and adapt AI will shape tomorrow's success for providers and enterprises alike.

Providers are investing in internal AI deployment, platform partnerships, analyst recognition and global case studies, although not much is public knowledge. Few providers showcase UK-specific client references detailing quantified and delivered outcomes. Providers that can substantiate their claims with current UK evidence into the future years will be best placed to lead the next phase of the future of work services market in the UK. As the providers demonstrate evidence of their results consistently across workplace services, this will enable clients to truly understand the art of the possible more clearly and realise their business objectives and aspirations through defined measurable productivity gains, robust governance models and proven experience improvements.

GenAI is the defining the shift in the future of work services landscape, which has moved beyond AI readiness conversations towards use-case portfolios across ITSM, HR, knowledge management, collaboration, software development, service desk, procurement and employee self-service.

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Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Accenture	Leader	Leader	Not In	Leader	Leader
Atos	Product Challenger	Leader	Not In	Leader	Leader
Bechtle	Product Challenger	Product Challenger	Rising Star ★	Contender	Rising Star ★
Birlasoft	Contender	Contender	Product Challenger	Product Challenger	Contender
BT	Market Challenger	Market Challenger	Not In	Contender	Not In
Capgemini	Leader	Leader	Not In	Leader	Leader
Capita	Not In	Contender	Leader	Not In	Not In
CGI	Not In	Contender	Leader	Not In	Not In
Coforge	Contender	Product Challenger	Product Challenger	Product Challenger	Not In

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Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Cognizant	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Computacenter	Leader	Leader	Not In	Contender	Leader
Deloitte	Leader	Not In	Not In	Not In	Not In
DXC Technology	Leader	Leader	Not In	Product Challenger	Leader
EY	Market Challenger	Not In	Not In	Not In	Not In
Fujitsu	Leader	Leader	Not In	Leader	Leader
GAVS	Not In	Not In	Contender	Not In	Not In
Getronics	Contender	Contender	Leader	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Not In	Leader	Leader

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Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Hexaware	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
Infosys	Leader	Leader	Not In	Leader	Leader
ITC Infotech	Contender	Contender	Not In	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In
Kyndryl	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Lenovo	Market Challenger	Rising Star ★	Not In	Product Challenger	Leader
LTM	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Microland	Product Challenger	Leader	Not In	Leader	Contender
Movate	Not In	Contender	Leader	Product Challenger	Not In

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Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Mphasis	Contender	Product Challenger	Product Challenger	Product Challenger	Contender
NTT DATA	Leader	Leader	Not In	Leader	Product Challenger
Orange Business	Not In	Product Challenger	Not In	Not In	Not In
PwC	Market Challenger	Not In	Not In	Not In	Not In
SCC	Rising Star ★	Product Challenger	Leader	Product Challenger	Not In
Sopra Steria	Not In	Contender	Product Challenger	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
TCS	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Contender	Product Challenger	Not In	Product Challenger	Product Challenger

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Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Unisys	Leader	Leader	Not In	Leader	Product Challenger
UST	Not In	Contender	Leader	Not In	Not In
Vodafone	Not In	Not In	Contender	Not In	Not In
Wipro	Leader	Leader	Not In	Leader	Leader
XMA	Not In	Not In	Contender	Not In	Not In
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar Technologies	Product Challenger	Product Challenger	Not In	Product Challenger	Contender

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This study evaluates providers' capabilities in delivering key **future of work services** across different regions.

Simplified Illustration Source: ISG 2026

Definition

Hybrid work continues to evolve. What started as a location-based concept is increasingly becoming a model of human-AI collaboration, where AI assistants augment everyday work. Modern work now spans interconnected physical and digital environments, as well as the human workplace, where trust, skills and psychological safety are essential for employees to accept, adopt and effectively use AI-enabled capabilities. As a result, productivity, collaboration and EX are shaped as much by human readiness as by technology, requiring an orchestrated approach rather than isolated tools or point solutions. Devices, connectivity and basic support services remain foundational, but they no longer define differentiation or long-term value. Competitive advantage now stems from the orchestration that delivers consistent, secure and sustainable work experiences.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following five quadrants for services/solutions: Workplace Strategy and Enablement Services, Digital Workplace Operations and Support Services — Large Account, Digital Workplace Operations and Support Services — Midmarket, AI-augmented Collaboration and Experience Services, and Smart and Sustainable Workplace Services

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the UK market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Digital Workplace Operations and Support Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **digital workplace operations and support services — midmarket** in the **U.K.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Workplace technology leaders

Including CIOs and heads of workplace services, should read this report to understand how service providers deliver scalable, resilient and experience-centric workplace operations. The report will help them evaluate partners that can modernise end-user support, optimise service delivery models and integrate automation and intelligence to improve productivity, operational stability and EX across distributed and hybrid work environments.

IT operations and service management professionals

Should read this report to assess providers' capabilities in managing routine digital workplace operations, including service desk, endpoint support and operational governance. The report highlights the approaches to proactive monitoring, incident resolution, automation and continuous improvement, enabling IT operations leaders to benchmark service maturity, reduce downtime and align workplace support services with evolving business and workforce demands.

Digital workplace and EX professionals

Should read this report to understand how workplace operations and support services contribute to consistent, high-quality EX across devices, locations and work models. The report provides insights into service design, experience measurement and operational practices that help enterprises improve satisfaction, reduce friction and ensure employees have reliable access to tools and support required for effective and productive work.

Security and risk management professionals

Should read this report to evaluate how providers of workplace operations embed security, compliance and risk controls into end-user support and device management services. The report outlines the operational practices that help balance secure access with usability, highlighting how providers support secure workplace operations while maintaining service continuity, regulatory compliance and positive EX in hybrid and remote environments.

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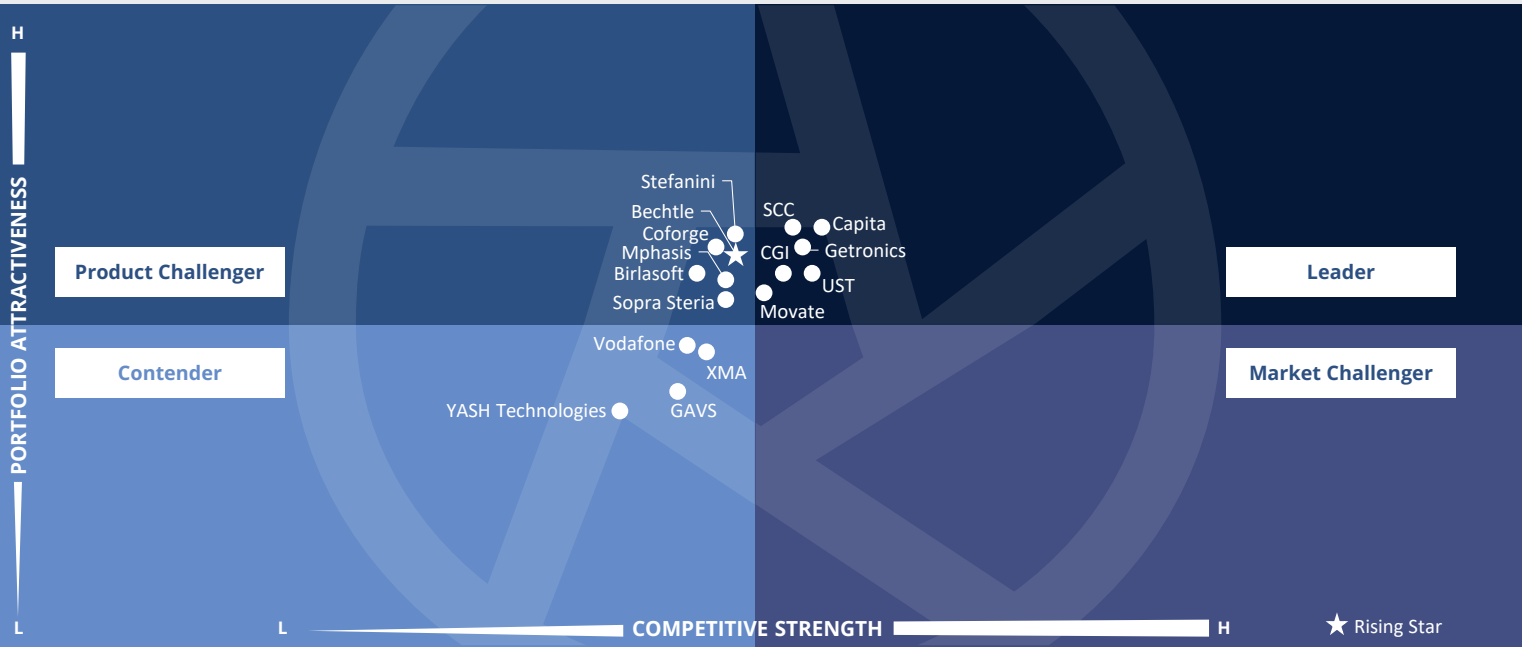
ISG Provider Lens®

Source: ISG RESEARCH

Future of work – Services
Digital Workplace Operations and Support Services – Midmarket

U.K. 2026



This quadrant assesses providers that manage enterprise **end-user technology environments, delivering deployment, configuration, security and support services for employees**, alongside localised delivery capabilities for clients with regional operations.

Kevin Turner

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Definition

This quadrant evaluates service providers that assume end-to-end responsibility for building, transitioning and operating the digital workplace at scale. It spans the full lifecycle of end-user technology services, from design and transition to run, day-to-day operations, support and continuous optimization. The scope of services includes unified endpoint and application management, device as a service, virtual desktops, service desk, and field/proximity services, all leveraging digital employee experience (DEX) telemetry.

Providers in this quadrant increasingly deliver AI-powered, EX-led operations, incorporating experience management offices and XLAs to prioritize business outcomes. Key differentiators include automation, self-healing and AI-driven support, enabling proactive issue resolution and cost-efficient service delivery. The quadrant reflects the market shift towards integrated, outcome-oriented digital workplace operations, moving beyond fragmented, tool-centric services.

Eligibility Criteria

1. Provide **end-to-end digital workplace build and run services**, including transition-to-run and steady-state operations
2. Deliver **service desk services,** including omnichannel, remote and contextualized end-user support
3. Provide **unified endpoint and application management,** including staging, configuration, patching, security and application provisioning
4. Offer **device lifecycle management,** covering procurement, logistics, deployment, support, refresh, disposal and recycling, with **device-as-a-service options**
5. Demonstrate experience in delivering **virtual desktop services** across on-premises, cloud and hybrid environments, including **desktop as a service**
6. Provide field services and IMAC/R/D support, including remote and on-site break/fix services and in-person technical assistance
7. Operate **EX-led support models,** leveraging **DEX telemetry** to prioritize and improve workplace performance
8. Offer **XLA-driven service delivery** that measures outcomes, such as productivity, task success and user sentiment, beyond traditional SLA metrics
9. Leverage **automation, analytics and AI-enabled support, including** automated issue resolution, self-service and proactive remediation
10. Maintain a robust **regional delivery presence**

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Observations

This quadrant focusses on providers with a strong local presence and specialised skills in managing end-user technology services for midsize enterprises in the UK. These providers are becoming strategic partners, offering scalable and cost-effective digital workplace solutions and services.

Key services include:

- Device lifecycle management with sustainability measures.
- Cloud-based virtual desktop infrastructure (VDI) for hybrid and remote workforces.
- Unified endpoint management (UEM) for BYOD and secure access.
- Proactive digital employee experience (DEX) monitoring to enhance user satisfaction.

Quadrant highlights in 2026

- *Leaders* and Rising Stars have deep experience with UK midmarket clients, offering holistic end-user computing (EUC) services that balance cost, performance and UX. Their offerings often include Copilot integration, sustainability reporting and industry-specific device support.
- *Product Challengers* innovate with desktop as a service and full device lifecycle automation, focusing on UX optimisation and operational efficiency.
- *Market Contenders* maintain strong regional coverage and focus on expanding their DEX and endpoint analytics capabilities to support proactive and predictive service models.

Trends for the coming years include the following:

- AI copilots will standardise EUC support, reducing ticket volumes.
- Sustainability will be a major factor, with greater emphasis on sourcing transparency.
- Industry-specific EUC bundles will cater to unique sector needs.
- Composable EUC platforms will allow customised service combinations.
- Security and compliance automation will become critical as regulatory pressures increase.

This quadrant reflects the UK midmarket maturity, where digital workplace enablement is crucial for growth and talent retention.

From the 43 companies assessed for this study, 16 qualified for this quadrant, with six being Leaders and one Rising Star.

Capita

Capita is a well-established leader in providing managed end-user technology services tailored to midmarket clients across industries, including the public sector, in the UK. It has strong expertise in consulting, digital transformation and IT service delivery.

CGI

CGI has a strong reputation in the UK for delivering high-quality managed end-user technology services, particularly within the public sector. Its comprehensive suite of workplace services reflects its commitment to customer satisfaction, innovation and operational excellence.

getronics

Getronics is a leading provider of managed end-user technology services with a global footprint and a strong focus on the midmarket. It offers customised solutions that address the unique needs of clients across industries.

movate

Movate specialises in delivering managed end-user technology services tailored for small and midsize businesses (SMBs). Its offerings are designed to drive digital transformation while embedding sustainability and social responsibility into service delivery.

SCC

SCC is a leading provider of managed end-user technology services that focus on enhancing employee productivity and digital enablement. With a strong emphasis on end-to-end service management, SCC helps clients modernise their IT environments and drive EX.

UST

UST is a leading provider of managed end-user technology services for midmarket clients in the UK. It drives business outcomes for clients through seamless technology experience and AI-driven automation, elevating employee productivity and experience.

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Bechtle (Rising Star) provides managed end-user technology services underpinned by Bechtle's multi-agent architecture, which delivers as an orchestrator of AI ecosystems rather than a tool implementer.

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Leader

"SCC is a leading provider of workplace operations and support services for clients in the UK. It drives business outcomes for clients by elevating EX and delivering benefits across the entire workplace lifecycle."

Kevin Turner

SCC

Overview

SCC is headquartered in Birmingham, England, with offices and delivery centres across Europe. It has more than 7,000 employees across 45 offices in eight countries, such as the UK, France, Spain, Romania, the Netherlands, India, Slovakia and Vietnam. In FY25, SCC EMEA generated £3.5 billion in revenue (up by 2 percent compared to the previous year), with the UK contributing circa £1 billion. With over 1,100 employees in service delivery centres in Romania, SCC provides nearshore, local-language support to clients across Europe. As one of the top 10 European resellers, SCC has built a growing service business to deliver consistent value to clients.

Strengths

Digital workplace operations and support services: SCC combines strong UK market recognition with proven workplace operations capabilities across DEX/XLA, service desk delivery, device lifecycle services and AI-enabled support. Its mix of operational maturity, local delivery presence and experience-led workplace services strengthens its relevance for UK enterprises and public sector organisations.

UK market scale and public sector relevance: SCC is UK-headquartered and has substantial revenue scale in the region, making it more locally credible than many offshore-led workplace providers for midmarket enterprises and public sector organisations. Its emergency services provide support to more than 40 police forces along with numerous fire and ambulance services. SCC also lists access to UK public-sector frameworks such as G-Cloud 14, Digital Outcomes and Specialists 6, TePAS, Network Services 3 and AI DPS.

Experience-led operations: SCC's DEX/XLA narrative is mature enough to compete in experience-led workplace operations. The combination of Nexthink telemetry, persona mapping, sentiment, XLAs, automation and an experience management office model is delivering promised and contracted EX benefits to clients. SCC also focuses on collaboration and physical workplace assets, delivering a combination of Resonate, Visavvi, Teams voice, meeting rooms, AV and smart collaboration references to offer deep and broad results for enterprise clients.

Agentic AI investment: SCC is investing in agentic AI-enabled service desk capabilities to improve ticket deflection, accelerate resolution and enhance user experience. This investment supports its broader strategy of delivering experience-led workplace operations through automation, intelligent orchestration and scalable support efficiency across enterprise environments.

Caution

While SCC is recognised as a leading provider in the UK, it could showcase more success stories demonstrating the value delivered to clients through its recent developments and investments to attract new clients and gain further market share.

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Appendix

Methodology & Team

The ISG Provider Lens 2026 – Future of Work — Services study analyzes the relevant software vendors/service providers in the U.K market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Future of Work — Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Lead Analyst

Kevin Turner
Principal Analyst

Kevin Turner brings more than 40 years of experience spanning digital advisory, IT sourcing, technology and industry research. He is a digital expert at ISG, responsible for authoring thought leadership papers and ISG Provider Lens® reports around Future of Work. Kevin's remit includes advising senior executives on digital strategy, product planning, emerging tech, and IT procurement. Kevin has authored research reports in the realm of the Future of Work and IT outsourcing.

Research Analyst

Varsha Sengar
Research Specialist

Varsha Sengar is a Research Specialist at ISG and is responsible for supporting ISG Provider Lens® studies on Chemicals and Manufacturing Services and Solutions. She has also co-authored the Public Sector and Retail & CPG Services Studies. She has over 9 years of experience in technology research and consulting. At ISG, she is responsible for delivering enterprise' perspective for IPL and collaborates with analysts, advisors and enterprise clients on various research requests including primary and secondary research. She supports the lead analysts across multiple regions in the research process and authors the global summary and focal points. Prior to this role, she has carried out multiple ad-hoc projects and competitive benchmarking reports delivering industry level actionable insights and recommendations.

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Study Sponsor

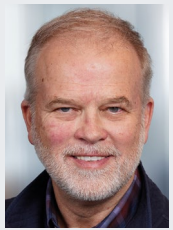
Iain Fisher

Director and Principal Analyst

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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