Sopra Steria lights the way with Lumina

From BPS heritage to AI platform: inside Sopra Steria's Lumina

Sopra Steria has chosen to build on two decades of UK business process services (BPS) heritage as it launches Lumina, a new AI-enabled business support proposition that the company intends to use to drive its next phase of growth.

The ambition is to become the "leading UK provider of AI-enabled business support services" by 2030 by combining insight, tech and transformation to deliver meaningful outcomes for clients and society, and to become the partner of choice for organisations tackling the most complex problems. Conceived from the outset as a group asset with European relevance, the offer has been incubated and industrialised in the UK, drawing on Sopra Steria's depth of BPS expertise and operational track record.

It would be easy to file Lumina under another supplier launching another platform, and there is always a risk of it being read that way. However, we think that would be a mistake. There are two stories worth telling here.

The first is a SITS supplier story about how a mature, successfully scaled BPS player is choosing to evolve in a complex market. The other is a demand-side piece about why the market increasingly needs this kind of offer to deliver value in an environment demanding more for less. Lumina is interesting, because if done well, it has the potential to bring both sides together in a mutually beneficial way.

From springboard to platform

Sopra Steria's strength in the UK SITS market has long rested on its large-scale BPS operations, much of it delivered through joint ventures across central government and the NHS.

The secrets of success fifteen years ago — offshore capability, robust processes, labour arbitrage and operating at scale — are no longer the differentiators they once were. Sopra Steria knows this, and to its credit has not looked for an incremental shift.

The company has spent the best part of two years quietly building the assets and the know-how required to move credibly into this space, standing up next-gen tech practices spanning AI, ServiceNow, Salesforce and the hyperscaler platforms, and then, crucially, applying that capability back into its own installed base.

Rather than productising an abstract reference architecture, Sopra Steria has moved pragmatically from small AI point solutions to larger-scale implementations within live, often heavily regulated, contracts across the NHS, government shared services and policing, building a body of demonstrable use cases before going to market.

The output is a technical reference architecture with repeatable patterns across functions such as finance, HR, debt management and recruitment, which now forms the core of the Lumina platform. The logic being that two years of at-scale deployment in real (and complex) client environments gives it a deep bank of credible use cases.

In a market awash with platforms that demonstrate well in a sandbox but stall on the way to production, evidence of having done this for real is no small thing.

Three parts, one vision: from insight to impact

Under the banner "from insight to impact", Lumina comes in three components, and it is this breadth of the service offer that we find most compelling.

Lumina starts with the platform and Sopra Steria describes embedding AI, automation, data and orchestration directly into live operations rather than as bolt-on tools, shifting delivery from activity-based execution to outcome-led performance, and providing a secure, governed and resilient operating layer for regulated environments. This is designed to support enterprise-scale modernisation that does not fragment existing processes or platforms — in short, turning AI from experimentation into a repeatable, industrialised operating model. That last phrase is the one that matters most; industrialisation, not experimentation, as this is where most enterprise AI ambition currently founders.

The second component, Lumina academy, is on the face of it a workforce enablement programme. Look closer and it is an answer to one of the most stubborn barriers to adoption we are seeing across the market.

Sopra Steria frames it as industrialising AI capability across the workforce — beyond incremental upskilling — through role-based pathways spanning AI literacy, practitioner skills, service design and governance, and building the confidence, judgement and accountability needed for responsible AI use across frontline delivery, transformation teams and leadership.

The underlying principle, that people, process and governance must scale in line with the technology, is exactly right. In recent conversations with end users, the recurring theme has not been technology but people — a "fear of becoming obsolete" or FOBO that turns staff teams into the single biggest brake on change. A platform disconnected from the rest of the organisation cannot address that. By aligning its own workforce behind the vision first and then taking that know-how out to clients as a consulting offer, Sopra Steria is treating change management as a core part of the proposition rather than an afterthought.

Given that the company is navigating this transition while running large operations populated by exactly the people most exposed to that fear, it will inevitably carry the scars. That is hard-won and difficult to replicate.

The third component, Lumina Exchange, is an experience centre — but one the company is at pains to insist must be more than a room in London where clients do the same analogue things they have always done.

It is positioned as a semi-autonomous collaborative environment in which clients, partners and Sopra Steria teams work side by side, accelerating the journey from idea to prototype to industrialised service.

Crucially, it grounds innovation in real operational contexts rather than lab-based experimentation, builds on global expertise to design, test and scale faster, and aims to reduce delivery risk by aligning innovation directly to platform, people and operations.

Spanning physical sites in London, India and Paris and connecting tens of thousands of colleagues across the group, it is designed to ingest a client's problem ahead of any visit and arrive with proofs of concept and an emerging business case already shaped, with every engagement making the underlying models more capable.

The ambition here is large, and execution will be everything; co-creation environments are easy to announce and hard to make truly intelligent or effective. But the design intent — AI at its heart rather than bolted on — is the right one.

Productised, outcome-led, and aimed at a wider market

The go-to-market thinking is where Lumina looks particularly interesting. Sopra Steria envisages a productised, modular family of industry- and problem-specific offers — Lumina mortgages, Lumina banking, Lumina collections, Lumina employability, Lumina recruitment, Lumina HR etc.— each with a defined problem statement, generic performance outcomes and, ultimately, proven outcomes once live.

This is a deliberately different motion from traditional lift-and-shift outsourcing, and it should open the door to a broader buyer set: data-rich organisations in areas such as insurance or mortgage processing that would never have considered conventional BPO but are entirely comfortable consuming a platform that can take on part of their finance, HR or processing estate, for example.

It also gives Sopra Steria a challenger story in European markets where it is a strong digital player but a less established BPS name. Underpinning all of this are outcome-based commercial models — pricing tied to things like efficiency savings, additional sales or customer satisfaction improvements.

We would offer one note of caution: outcome-led contracting has been talked about for twenty years and, particularly on the IT services side, too often disappointed. The difference here is that BPS, with its end-to-end control of process, has always been the more mature ground for true outcome-based pricing. This plays squarely to Sopra Steria's strengths, as does its ability to deploy agentic AI inside regulated environments — the company made the deliberate, incremental investment of becoming FCA-regulated to run its debt management operations, the very business that will become Lumina collections.

In a market where many platform and hyperscaler players have little appetite for regulatory nitty-gritty, domain credibility in public sector and financial services is a real selling point. A customer in a regulated sector does not want a cookie-cutter engagement; they want a partner that has done this at scale, under scrutiny, and lived to tell the tale.

Lumina is not, on its own, going to reorder the UK BPS rankings overnight, and Sopra Steria still sits behind the market's very largest players. The company is realistic about this, and frames a two-pronged approach: pursuing the new, broader opportunity opened up by the technology while also using Lumina to disrupt incumbents under the same margin pressures it faces. Traditional BPO may grow only modestly — low single digits on most forecasts — but the spend, and the opportunity, is shifting into adjacent lines.

The combination of installed-base proof points, an answer to the human barriers to adoption, productised industry offers and commercial models that suit its heritage shows how a scaled BPS business can evolve into a more industrialised, next-generation service model — making this one of the more credible transformation stories we have seen in the sector.

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Marc Hardwick joined TechMarketView in October 2017 as a Senior Research Director for TechSectorViews, focusing on User Experiences and the Business Process Services market.

With over twenty years' experience in research and analysis, Marc spent eight years as Director of Business Intelligence at BPS market leader Capita plc. There, he led corporate research and intelligence activities across all markets, helping to place insight at the heart of Capita's sales and delivery process. His work also supported Capita's business development and acquisition activities.

Before joining TechMarketView, Marc was Commercial Director at specialist research consultancy ComRes, where he directed sales and marketing, oversaw new product development, and identified market diversification opportunities.

Earlier in his career, Marc worked as an Analyst at Datamonitor focused on industrial and process control technologies, and as Head of Strategy at the Inward Investment Agency Think London. He holds a Combined Honours in Business Administration and Social Studies from Aston University.

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