The CCaaS Rebalance:

CX Software Spend in the Agentic Era

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CCaaS Spend Shift: Before and After the CXO Control Plane

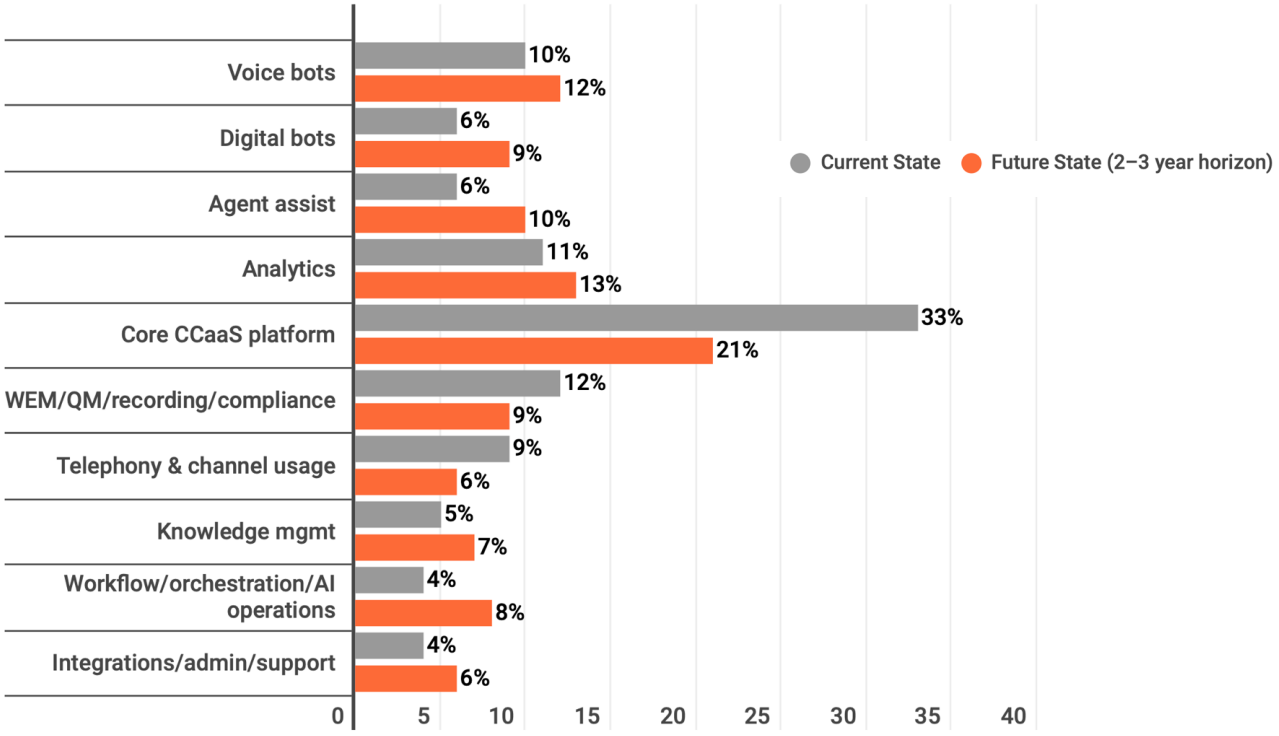
How AI is redistributing customer service software spend over the next 2-3 years.

Sizing the Pool

Opus Research estimates that enterprises currently spend approximately $15 billion globally on the customer service software categories covered in this report, with North America accounting for roughly $5-6 billion, or about 40% of the total. The Core CCaaS platform layer — the single largest category today at 33% of spend — represents roughly $4-5 billion of that globally, consistent with publicly reported CCaaS platform revenue from leading industry analysts. The remaining two-thirds is distributed across the nine surrounding categories that make up the broader customer service software stack, from analytics and WEM to bots, agent assist, knowledge, and orchestration. These figures are directional and exclude professional services, telecommunications carrier fees beyond platform-embedded channel usage, and BPO labor. Over the 2–3 year horizon covered in this report, the overall pool is expected to continue expanding, but the mix within it shifts meaningfully as AI moves from overlay to operating layer.

Bottom line: The base contact center stack still anchors customer service software spend today, but the value pool is moving above it. Opus Research projects that over the next two to three years, Core CCaaS platform spend will compress from roughly 33% to 21% of the software mix as orchestration, agent assist, analytics, and AI-native automation capture a larger share of enterprise budgets. The money does not disappear. It migrates to the layer where brands design journeys, govern AI behavior, route work across human and machine agents, and prove business outcomes

Figure 1: Estimated share of customer service software spend by category (Current vs. Future)



Key Shifts

- **Core CCaaS platform (down 12 points):** Core platform spend remains foundational, but it becomes less differentiated as orchestration and AI layers move above the system of record. The platform still matters, but its share of incremental budget shrinks as buyers invest in layers that directly shape outcomes.
- **Workflow / orchestration / automation (+4 points):** This is the emerging power center in the stack. Enterprises will increasingly pay for the layer that designs, governs, evaluates, and optimizes AI-driven flows, copilots, agent handoffs, and policy enforcement across channels.
- **Agent assist (+4 points):** Agent assist is moving from pilot to default. Copilot-style assistance grounded in enterprise knowledge and real-time conversation context is becoming expected operating spend rather than innovation spend.
- **Voice bots and digital bots (+2 points, +3 points):** Both categories gain share as agentic AI contains a larger portion of interactions end to end. Voice automation benefits especially from stronger speech recognition and reasoning stacks.
- **Analytics (+2 points):** Analytics becomes the learning loop for the operation, not just a reporting layer. Conversation intelligence increasingly tunes workflows, surfaces proof of value, and creates defensible operating advantage.
- **WEM / QM / recording / compliance (down 3 points):** AI-driven auto-QA reduces the cost of manual sampling. The category remains operationally important, but less spend stays trapped in labor-intensive legacy processes.
- **Telephony and channel usage (down 3 points):** Share compresses as containment rises and interaction volume shifts from live channels to automated and assisted tiers.
- **Knowledge and case development (+2 points):** Knowledge becomes governed operational infrastructure for retrieval-grounded generation and next-best action, rather than a passive repository of answers.
- **Integrations, admin, and support (+1 point):** These layers expand modestly as MCP-style connectivity, agent-to-agent interoperability, and implementation support become monetized requirements rather than embedded afterthoughts.

Professional services note: For every $1 brands spend on customer service software today, they likely spend about $0.40 on professional services. Over the next two to three years, that figure likely rises by roughly 20% to about $0.50 as services tied to orchestration, analytics, integrations, knowledge, and agentic AI grow faster than services tied to core CCaaS infrastructure. That shift is already visible in higher-touch enterprise AI deployment models and rising demand for workflow-specific implementation and tuning.

Implications for Buyers and Vendors

- **Enterprise buyers:** If orchestration is still treated as a free add-on inside a CCaaS contract by 2028, the enterprise has likely ceded control of the layer where customer experience differentiation now lives. Budgeting for orchestration as its own line item is becoming a strategic requirement.
- **CCaaS vendors:** The era when platform incumbency guaranteed share of wallet is ending. Vendors that cannot compete credibly in orchestration, assist, and analytics risk becoming the infrastructure beneath someone else's intelligence layer.

- **AI and orchestration vendors:** The CXO control plane is the fastest-growing category that many enterprises still do not formally own. This is the opening to establish category leadership before procurement frameworks and vendor hierarchies harden.

Methodology

These percentages are a directional model, not audited revenue segmentation. The current-state baseline triangulates vendor packaging, public pricing mechanics from Genesys, NiCE, Amazon Connect, and the like. This is a subjective judgment about how broadly each category is deployed. The future-state projection applies Opus Research's CXO framework to estimate directional share shifts over a two- to three-year horizon while holding the category taxonomy constant so the before-and-after view remains comparable. Totals sum to 100% in both views, and the model is designed to show how spend mix shifts across categories rather than to forecast whether aggregate software spending grows or contracts.

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