

The CCaaS Rebalance:

CX Software Spend in the Agentic Era



 **opusresearch**

Derek Top, Research Director & Principal Analyst, Opus Research

Ian Jacobs, VP & Lead Analyst, Opus Research

Amy Stapleton, Senior Analyst, Opus Research

Peter Headrick, Managing Director, Opus Research

May 2026

Opus Research, Inc.
893 Hague Ave.
Saint Paul, MN 55104

www.opusresearch.net

Published May 2026 © Opus Research, Inc. All rights reserved.



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.

Featured Research Reports are available for clients and registered users only.

For more information on becoming an Opus Research client or to purchase the report, please contact:

Peter Headrick, Managing Director, phedrick@opusresearch.net +1-415-505-2511

About Opus Research

Opus Research is a diversified advisory and analysis firm providing critical insight on software and services that support digital transformation. Opus Research is focused on the merging of natural language understanding, machine learning, conversational AI, LLMs, conversational intelligence, intelligent authentication, and digital commerce. www.opusresearch.net

For sales inquiries please e-mail info@opusresearch.net or call +1(415) 904-7666

This report shall be used solely for internal information purposes. Reproduction of this report without prior written permission is forbidden. Access to this report is limited to the license terms agreed to originally and any changes must be agreed upon in writing. The information contained herein has been obtained from sources believed to be reliable. However, Opus Research, Inc. accepts no responsibility whatsoever for the content or legality of the report. Opus Research, Inc. disclaims all warranties as to the accuracy, completeness or adequacy of such information. Further, Opus Research, Inc. shall have no liability for errors, omissions or inadequacies in the information contained herein or interpretations thereof. The opinions expressed herein may not necessarily coincide with the opinions and viewpoints of Opus Research, Inc. and are subject to change without notice.

Published May 2026 © Opus Research, Inc. All rights reserved.