2026 BPO, AI & CX Intelliview:

From Labor Arbitrage to Managed AI Operations

opusresearch

November 2026

Ian Jacobs, VP & Lead Analyst, Opus Research

Derek Top, Research Director & Principal Analyst, Opus Research

Amy Stapleton, Senior Analyst, Opus Research

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

www.opusresearch.net

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

opusresearch | Report »

2026 BPO, AI & CX Intelliview:

From Labor Arbitrage to Managed AI Operations

Generative and agentic AI are rewriting the economics of customer experience outsourcing. Opus Research's 2026 BPO, AI & CX Intelliview evaluates how six CX BPOs (Concentrix, Firstsource, Foundever, iQor, TELUS Digital, and TP) apply AI inside their own delivery operations and in the services they sell to clients. Using a two-axis BPO AI Maturity Model, a six-dimension AI operating model profile, and the Intelliview Map, the report finds that no provider has yet reached AI-native delivery, that BPOs sell AI better than they run it autonomously, and that proof of value and accountability for failure remain the weak points.

November 2026

Ian Jacobs, VP & Lead Analyst, Opus Research

Derek Top, Research Director & Principal Analyst, Opus Research

Amy Stapleton, Senior Analyst, Opus Research

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

www.opusresearch.net

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

2026 BPO, AI & CX Intelliview:
From Labor Arbitrage to Managed AI Operations

Table of Contents

Key Highlights 4
Introduction: The BPO Dilemma 4
The BPO AI Maturity Model 6
The AI Operating Model Profile 8
- Six Dimensions of the AI Operating Model 9
- Reading the Results 10

The 2026 BPO, AI & CX Intelliview Map 11
- Leaders 12
- Standouts 12
- Sidebar: Crescendo 12

The Proof Problem 13
Where Does BPO AI Differentiation Come From? 13
Who Owns the AI, and Who Owns the Failure? 14
How the Frontline Job Is Changing 15
Questions to Ask Your BPO 16
Methodology 16
Appendix A: Company Dossiers 18
- **Concentrix** 19
- **Firstsource** 22
- **Foundever** 25
- **iQor** 28
- **TELUS Digital** 31
- **TP** 34
- Reference Profile: **Crescendo** 37

Table of Figures

Figure 1: Primary Strategies by Provider 6
Figure 2: The BPO AI Maturity Model 7
Figure 3: Maturity-Stage Definitions by Axis 8
Figure 4: AI Operating Model Profile Scores 10
Figure 5: 2026 BPO, AI & CX Intelliview Map 11
Figure 6: Dividing AI Control Plane Responsibilities 15

Key Highlights

- **Leaders and Standouts.** TP, iQor, Foundever, TELUS Digital, Firstsource, and Concentrix* are leading solution providers highlighted in the 2026 BPO, AI & CX Intelliview Map, each with distinctive strengths buyers should weigh against specific needs.

- **BPOs sell AI better than they run it autonomously.** Client-facing AI services is the cohort's strongest dimension, with autonomous customer service the weakest.

- **Proof is the market's weak point.** Among the RFI respondents, reported containment ranged from roughly 35% to 75%, two reported no containment figure at all, and definitions differ from provider to provider. Buyers should insist on baselines, attribution, and evidence that results repeat across accounts.

- **Workforce change trails the rhetoric.** Every provider says frontline work is shifting toward exceptions and judgment calls, but transforming the workforce to maximize AI value is still in progress.

- **Accountability for AI failure has to be designed in.** When the client, the BPO, and the technology vendor each control part of the AI system, ownership of errors, handoffs, and remediation must be assigned before launch, not after the first failure.

Introduction: The BPO Dilemma

Over the past few decades, CX BPOs built an enormous business around a straightforward proposition. They could recruit, train, and manage people to handle customer interactions more efficiently than their clients could. Labor arbitrage supplied much of the economic engine. Operational discipline and excellence kept it running.

Modern AI puts pressure on both parts of that equation. Agent assistance can reduce the time and expertise required to complete work. Meanwhile, autonomous agents can take over portions of the work itself. For a provider paid by the hour or the seat, helping a client need fewer people creates an awkward sales conversation. Success can shrink the customer invoice.

The remaining human work also gets harder. As automation absorbs routine requests, agents inherit more exceptions, emotionally charged conversations, and problems that cross systems or departments. Those interactions demand different skills, more support, and performance measures that recognize complexity. Yesterday's staffing assumptions won't necessarily survive tomorrow's contact mix.

Clients also have more options. Software vendors, implementation partners, and AI specialists can compete for pieces of the customer service budget. A BPO's ability to supply thousands of trained agents becomes less persuasive when the buyer wants to know how many interactions can be resolved without one.

Yet deploying AI creates substantial new work. Someone has to connect systems, maintain knowledge, define authority, test behavior, manage escalations, and establish whether the results justify the cost. BPOs already understand many of the operational problems involved. However, turning that familiarity into a service clients will pay for takes investment and demonstrable expertise.

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

Peter Headrick
Managing Director, Opus Research
e | pheadrick@opusresearch.net
p | +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) 505-2511

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 November 2026 © Opus Research, Inc. All rights reserved.