

Building Together: AI and People, One Coherent Approach for Malaysia

Findings from the Malaysian Contact Centre Industry Research 2026

A RESEARCH COLLABORATION



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A research collaboration between COPC Inc. and the Contact Centre Association of Malaysia (CCAM)

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FOREWORD

From the President of CCAM

"Building Together: AI and People, One Coherent Approach for Malaysia."

These words are more than the title of this report—they represent what we believe will define the future of Malaysia's contact centre industry.

Artificial Intelligence (AI) is transforming customer operations at an unprecedented pace. Yet while technology continues to evolve, one principle remains constant which is that sustainable success will never be built on AI alone. It will be built by thoughtfully bringing together people, processes, technology, and purpose to create better outcomes for customers, employees, and businesses alike.

This report reflects that conviction.

A defining strength of this research is the enduring partnership between CCAM and COPC Inc. Since becoming CCAM's Knowledge Partner in 2019, COPC has consistently helped elevate Malaysia's contact centre industry through internationally recognised certifications, capability development, operational excellence, process standards, and thought leadership. Together, we have worked to raise professional standards and strengthen the capabilities of our industry.

This report is therefore not simply a reflection of where our industry stands today. It is intended to serve as a practical guide for where we go next.

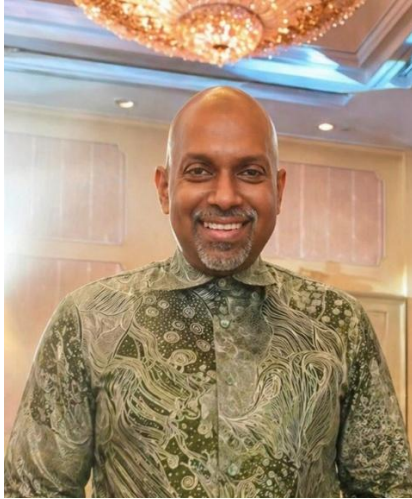
Into 2026, we believed it was time to build on that partnership by undertaking meaningful industry research that could help organisations navigate one of the most significant transformations our profession has ever experienced. The result is this report—a collective effort designed to equip leaders with insights, benchmarks, and practical perspectives as AI reshapes customer operations.

The findings are encouraging. Organisations across Malaysia are embracing AI with growing confidence and purpose. At the same time, the research reminds us that governance, trust, workforce readiness, and responsible adoption will ultimately determine long-term success. Technology may accelerate transformation, but leadership, culture, and people will determine its impact.

On behalf of CCAM, I extend my sincere appreciation to Dr. Shreekant Vijaykar and the entire COPC team for their expertise, professionalism, and unwavering commitment in delivering this important study. I also wish to thank the Industry Leaders across Malaysia who generously shared their insights, experiences, and perspectives. Additionally, my heartfelt gratitude goes to the CCAM team for their time and dedication in bringing this industry initiative to fruition.

As you read these pages, I encourage you to look beyond the data. See the opportunities. Challenge conventional thinking. Build new capabilities. Lead with courage and responsibility. Together, let us

continue **Building Together**—creating a Malaysian contact centre industry that is globally respected, future-ready, and always **Built with Purpose**.



Vigneswaran Sivalingam

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FOREWORD

From the President of South Asia and ASEAN at COPC

Two years ago, at the National Contact Centre Conference (NCCC 2024) organized by CCAM, the message I carried to the stage was that AI capabilities had arrived and the industry needed to harness them. At NCCC 2025, it was that the tools were here and the industry needed to begin using them. This year, at NCCC 2026, the message has shifted again. The capabilities are not just present; they are integrated. The tools are not just being used; they are being AI-native. The question is no longer adoption; the question is how to design well, with a purpose, and for the future.

The stakes for Malaysian Contact Centre industry are there for all to see. With over 400 sites and 300,000 people employed in the country's contact centre and BPO industry, projected to grow at 11% CAGR through 2030, this is not a small, niche marketplace (data from Contact Centre Association of Malaysia, with whom COPC Inc. has a 6-year long close relationship for the industry). These Malaysian BPOs have over time morphed into strategic business hubs.

Malaysia's progress on AI adoption between 2024 and 2026 is most striking. The proportion of contact centres actively using AI in customer care has risen from 38 percent in 2024 to 55 percent in 2026. Once you add those planning to deploy within the next eighteen months, the figure reaches 90 percent. Equally telling, only about one in five organisations expect to continue with their existing AI solutions unchanged. Three-quarters are either implementing new solutions or refreshing what they already have.

The most encouraging signals are in consumer sentiment. When Malaysian consumers were asked whether the AI application understood their issue, 87 percent said yes, compared with 76 percent globally and 81 percent for the broader Southeast Asian region. Also, the top-two-box satisfaction with AI interactions in Malaysia stood at 83 percent, ahead of other regions. These numbers tell us that Malaysian AI deployments, on average, are working. Customers are not just tolerating AI. They are recognising its competence. That said, three patterns in this year's data deserve particular attention from every contact centre leader who reads this report.

The build-together imperative. There is no separate operating model for the AI-native business. Roles are being redesigned: fifty-seven percent of respondents have upskilled existing roles, forty-eight percent have created new specialist roles. The window to design the People-AI operating model intentionally is open right now.

The governance paradox. Almost every organisation we surveyed agreed that AI governance matters. Yet fewer than half have a formal AI governance policy in place. Fourteen percent said that they have no safeguards at all, and that is markedly higher than the global benchmark of four percent. Malaysia seems to be ahead in deployment but will need to push the governance further.

The local opportunity. Earlier, the local AI ecosystem in Malaysia was nascent. Today, there are industry forums for AI and agentic AI, increased agency support for locally built solutions, and the National AI Action Plan 2026-2030 to provide direction. Malaysia can build for its own context rather than simply import what was designed elsewhere. The multilingual reality, the regional service mandate, and the insourced business models, reward local design.

At COPC Inc., we have spent thirty years building and refining a framework that helps contact centres ground their improvement work in measurable, repeatable practice. The most recent release of the COPC CX Standard, Release 8.0, published in January 2026, is the first edition built specifically to address an environment where the performer of work might be a human, a system, or both. The report you are about to read uses that frame to interpret the Malaysian findings. We hope it is useful.

Finally, a word of thanks. The CCAM secretariat, under the leadership of President Vigneswaran Sivalingam, has been a generous and rigorous partner throughout this project. Sonam Sangani, who led the research, along with her team, brought the discipline that turns survey data into something worth publishing. And the sixty-five Malaysian organisations who responded gave us the foundation to write anything at all. There is much in this report that should make Malaysian contact centre leaders proud. There is also work that lies ahead. Both are worth reading carefully.



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WHAT THIS REPORT SAYS

EXECUTIVE SUMMARY

The Malaysian Contact Centre industry in 2026 is ahead in deployment of AI and has moved away from pilots and strategy to execution. The work now is to do AI well: with governance, with measurable returns, and with people designed into the AI-native operating model. Eight themes summarise the year's findings.

1. AI Adoption is settled

Ninety percent of Malaysian contact centres surveyed are either currently using AI in customer care or plan to introduce it within the next eighteen months. The share of those already deploying AI rose from 38 percent in 2024 to 55 percent in 2026. Only five percent have no plans for AI, a number that is significantly down from thirteen percent two years ago.

2. The technology mix is broadening

Generative AI is the dominant family, present in 83 percent of Malaysian deployments, ahead of the 72 percent global benchmark. Predictive AI is in roughly half (48 percent), multimodal AI in 41 percent, and agentic AI in 31 percent. Rule-based automation is only about 27 percent. Investment is flowing toward predictive and agentic capabilities.

3. Consumers are giving AI room to operate

Asked whether the AI application understood their issue, 87 percent of Malaysian consumers said yes, compared with 76 percent globally and 81 percent for the broader Southeast Asian region. Top-two-box satisfaction with AI interactions in Malaysia reached 83 percent, also higher compared to other countries.

4. AI is now an operational lever

Sixty percent of organisations report that AI handles between 20 and 60 percent of customer interactions autonomously, out of which forty-five percent report 20 to 40 percent autonomous handling. Only five percent report that all AI cases require human oversight. What this means is that AI has stopped being a side experiment and is now part of daily customer service operations.

5. Speed is the realised benefit; quality is the next test for AI

The most widely reported benefit of AI deployment is faster resolution (56 percent), ahead of better first-contact resolution (52 percent), increased capacity (48 percent), and cost reduction (44 percent). Sixteen percent report no benefits. The realised value sits on the throughput side. Whether quality and trust keep pace will define the next eighteen months.

6. The governance paradox for AI is real

Almost every leader agreed that AI governance matters, but only 45 percent have a formal AI policy. Fourteen percent of Malaysian centres have no safeguards for AI, against four percent in other countries. Real-time monitoring (38 percent) and AI audits (31 percent) lag the numbers from other countries as well.

7. The workforce is being redesigned and reskilled

Ninety-one percent of practitioners report a noticeable impact on workforce skills in the past twelve months. Fifty-seven percent have upskilled existing roles, 48 percent have created new specialist roles, and 39 percent have reduced entry-level positions. Looking forward, 63 percent expect headcount to fall but only 21 percent expect cuts of ten percent or more. In contrast and very interestingly, the supporting roles in contact centres, like reporting and WFM, are also undergoing a change, with shorter spans than what were seen in 2022.

8. ROI for AI takes about a year and a half

For organisations less than a year into AI deployment, on average 30 percent of use cases are showing ROI. At one to two years, that average rises to 41 percent. Beyond two years, this goes to 54 percent. It shows that patience and dedicated capability help in AI deployment; organisations with dedicated AI teams or an AI centre of excellence report 14 percentage points higher perceived ROI than those without.

Based on these themes, the four areas of guidance that run throughout this report serve as a working agenda for reinvention for any Malaysian contact centre in 2026 and beyond:

Design Together. There is no separate operating model for AI-native business. People and AI need to be designed into the same workflow, the same governance, and the same performance frame.

Design with Purpose. Resolution remains the Northstar. The purpose of any AI build, as well as other actions being taken in the Contact Centres, is to resolve the customer's issue, end to end, across the customers' service journeys.

Design for the Present and the Future. Agility in practice, with deliberate investment in Malaysia's own ecosystem strengths, i.e., multi-lingual capabilities, regional reach, management capacity, and a supportive policy environment, should help in building with a purpose.

Measure the Impact. There should be measures of performance improvement and ROI, which translate thought leadership into practice.

PART I

The Malaysian Context

Before turning to the findings from 2026, especially on the state of AI deployment in Malaysian Contact Centres, it is worth grounding the report in the realities of Malaysian Contact Centre industry and what Malaysian contact centre leaders themselves say is on their plates, in terms of the strategic priorities they identified for the next twenty-four months.

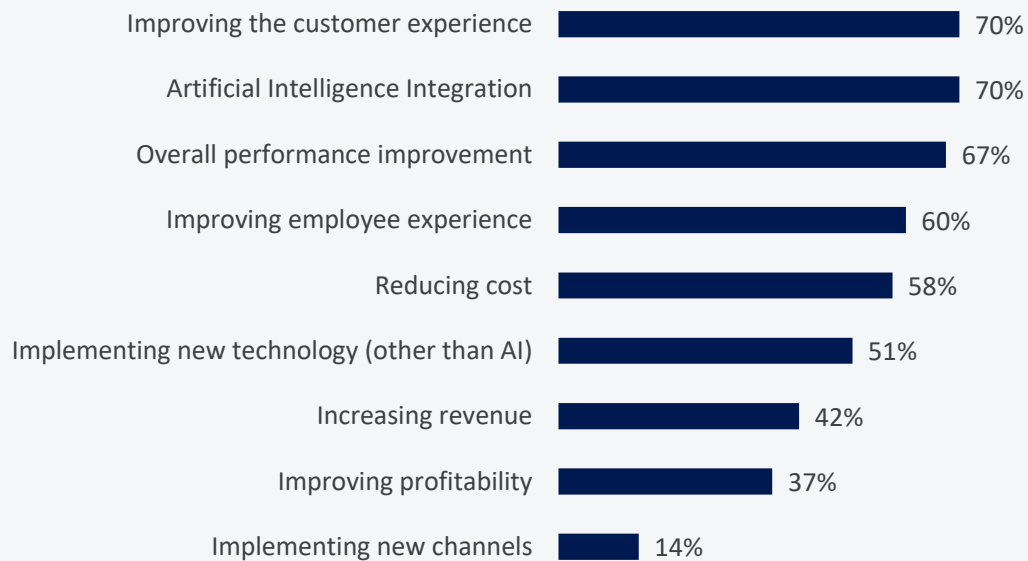
A few years ago, the conversation around this industry was about moving up the value chain, leaving the typical "cost arbitrage" route of some of the Asian economies behind, and repositioning toward work and tasks that have higher complexity and therefore higher value (Vijaykar & Aitchison, 2022). Today, these decisions have become key inflection points for the industry. Agentic voice AI can now detect customer sentiment mid-conversation, adjust tone and pacing, and navigate complex resolution workflows, and even handle multiple languages, to a reasonable extent.

Strategic Priorities Over the Next 24 Months

Respondents were asked which strategic objectives they were focused on for the coming twenty-four months. The pattern that emerged is the headline finding of this section: customer experience, AI integration, and overall performance improvement sit at top priority, with close to seventy percent respondents quoting these. Sixty percent identified employee experience as priority, with reducing cost running close to it (58 percent). Adopting new non-AI technology (51 percent), increasing revenue (42 percent) and improving profitability (37 percent), as well as implementing new channels (14 percent), complete the set.

“CX, EX, AI, and Performance sit at priority. These are the four lenses Malaysian contact centre leaders are looking through today”.

Findings from this data indicate that customer experience, employee experience, AI and performance are four priorities for Malaysian contact centres. However, treating them as separate workstreams is the most common mistake. Organisations that are quietly winning are the ones who treat them as a single integrated agenda. The implication for any organisation reading this report is that AI cannot be governed in isolation, employee experience cannot be planned in isolation, and customer experience cannot be improved in isolation. They are converging on the same operational design and management approach.

Fig. 1.1: Strategic Priorities

Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

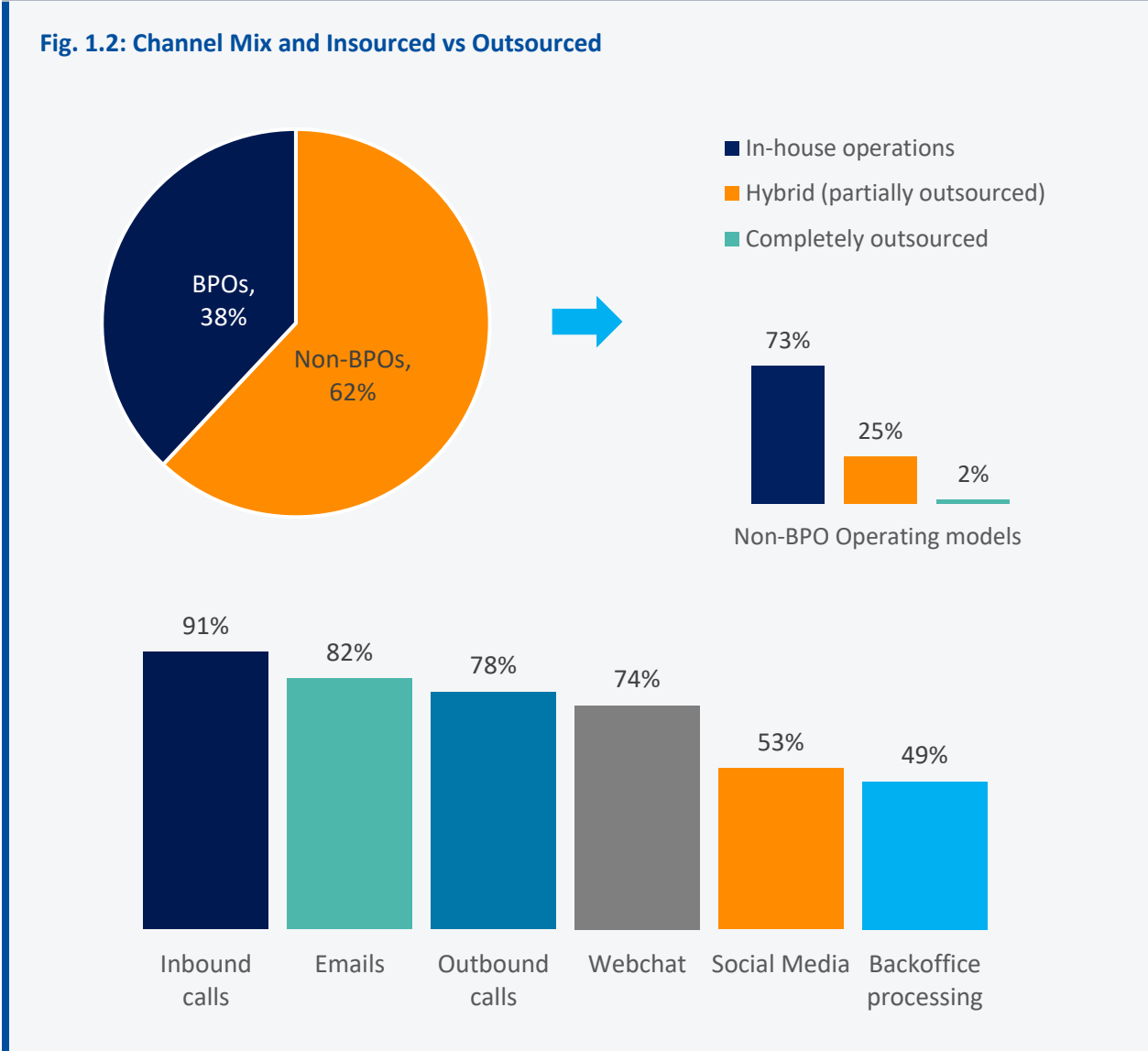
Insourcing vs Outsourcing and Channel Mix

As the world moves into a more AI-native business environment, it is also worthwhile documenting the status of the Malaysian Contact Centre industry today, represented by the participants in our study.

Broadly speaking, the industry continues to have a spread of operating models, as represented by the respondents to our survey, where 38 percent are BPOs and 62 percent are in-house operations, captive shared services, or hybrid arrangements. As expected, BPOs represent for a much larger share of the frontline staff headcount, reflecting the structural reality of the Malaysian market.

The four largest sectors by response count in the study are BPO, Government and Public Service, Financial Services and Banking, and Insurance, which also reflect the industry status. Other represented sectors include Telecommunications, Retail and eCommerce, Technology, Transportation and Logistics, and Automotive. This distribution represents the diversity of operational settings in the Malaysian industry.

By channel mix, the industry has moved into a stable, omnichannel mode, with voice calls and emails leading as expected, but a sizable lead from web chats, and a good amount of work being done with social media channels for customer service, complaint handling, technical support, billing service, as well as sales & presales.



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

Top Operational Challenges

Respondents identified their top five operational challenges from a list of thirteen. The leading three were: reducing costs, improving customer experience, and budget constraints at close to fifty percent. Improving efficiency followed these, at 40 percent, along with recruiting staff (38 percent). Training and agent development (33 percent) and getting the required headcount to meet business requirements (31 percent) were the next cluster.

The combination of cost pressure with talent constraints points directly toward the operational case for AI deployment, while also explaining why governance and ROI measurement (covered in Part III) are coming under sharper scrutiny than in previous editions of this research.

Fig. 1.3: Top Operational Challenges for Malaysian Contact Centres

Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

AI Adoption in Malaysia: From Pilot to Production

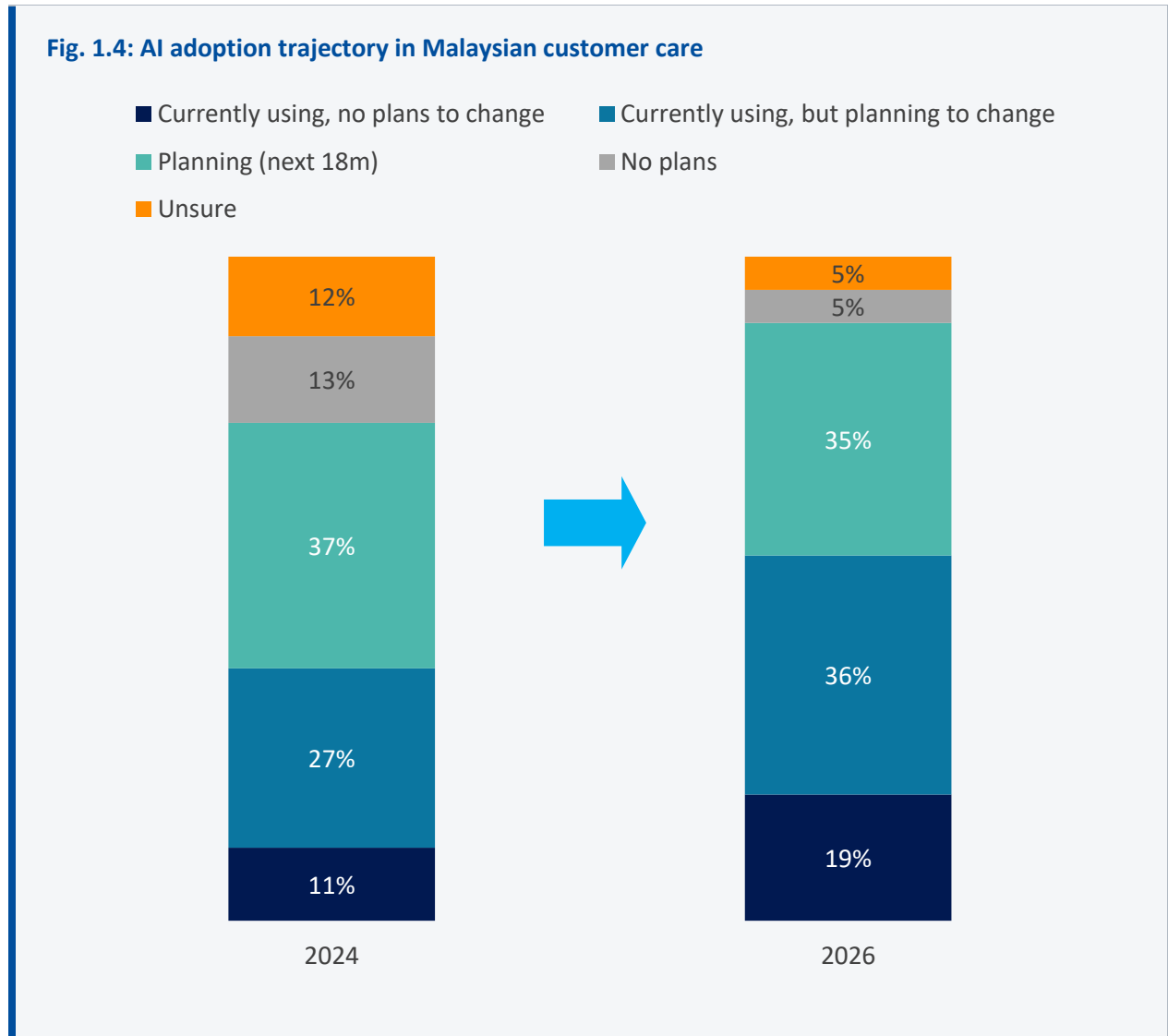
An important data point in this report, and the one that most clearly captures the change between 2024 and 2026, is the trajectory of AI adoption in customer care.

What has changed?

What can be seen is that the share of organisations actively using AI in customer care has risen by 17 percentage points in two years, a rate of change that is among the highest COPC has observed in any of the markets it tracks. What is also good to see that the share of organisations with no plans for AI has reduced from 13 percent to 5 percent. Also, the gap to the global benchmark has narrowed considerably, and Malaysian organisations are clearly committed to closing it.

“The main message coming out from the studies is that Malaysia has come along in AI adoption, and we need to build together, build locally, and build for the next level”.

Among organisations currently using AI, only about one in five plans to continue with their existing AI solutions unchanged. About three-quarters are either implementing new AI solutions in customer experience or refreshing the solutions already in place. The implication for industry leaders and practitioners is that 3 out of 4 of them will have some change related to AI coming their way in the next 18 months.



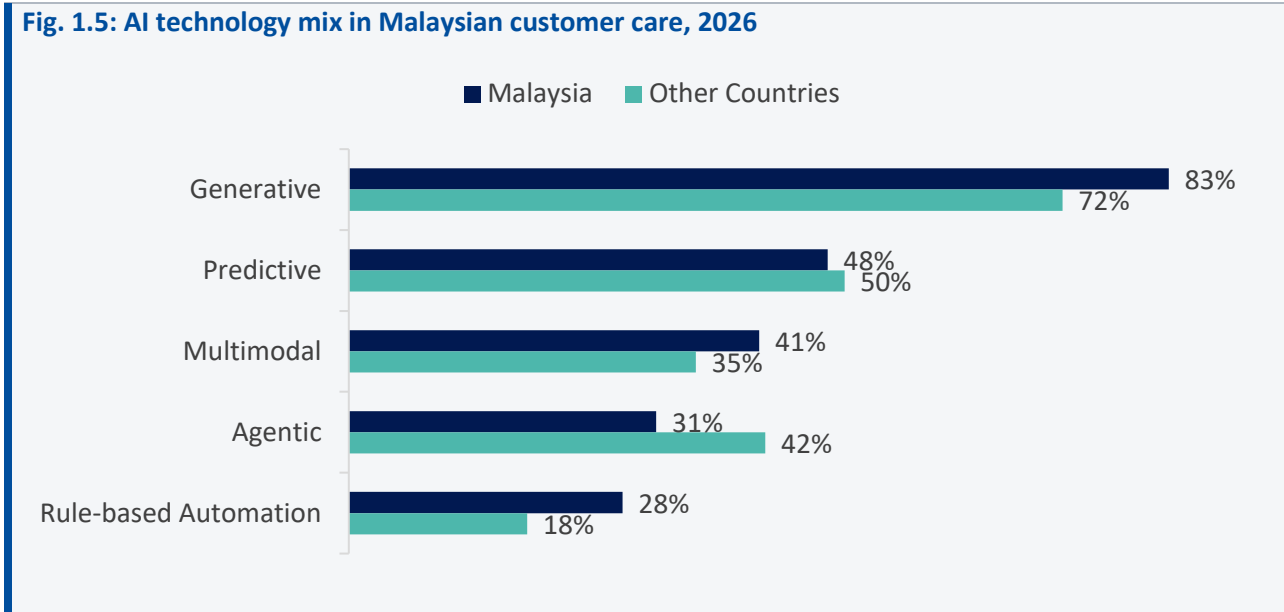
Sources: CCAM-COPC Malaysian Industry Research 2024 and 2026.

What type of AI are people deploying?

In terms of the specific AI solutions being deployed, Generative AI leads in Malaysia, more so than in comparisons with other countries, reflecting the practical accessibility of GenAI tools and the speed at which they have been integrated into customer-facing and agent-facing workflows, as is done globally

(Natta, 2025). Predictive AI sits close to the global benchmark, suggesting that the underlying analytics maturity in Malaysian operations is solid. However, Agentic AI is behind the global mark (31 percent in Malaysia versus 42 percent globally), but this could simply be a result of the applicability of Agentic solutions in the workflows carried out in Malaysian Contact Centres. Rule-based workflows are trailing in this data, but they have not disappeared; and in many cases, they continue to do the work they were designed for.

Fig. 1.5: AI technology mix in Malaysian customer care, 2026



Source: CCAM-COPC Malaysian Industry Research 2026; COPC Global AI Deployment Research 2026. Multi-select question.

How does this relate to customer expectations?

For more insights, this data set of the use of AI by Malaysian companies was mapped alongside the way Malaysian consumers perceive the relative intelligence of AI in customer service, that shows an interesting pattern. The COPC Global Benchmarking Research 2025-26, which surveyed consumers across multiple markets about their actual experience with AI in customer care, showed that 87 percent Malaysian consumers quoted that they feel that the AI application understood their issue. That compares with 81 percent for the broader Southeast Asian region and 76 percent globally. Top-two-box satisfaction with AI interactions in Malaysia stood at 83 percent, against 77 percent for Southeast Asia and 74 percent globally.

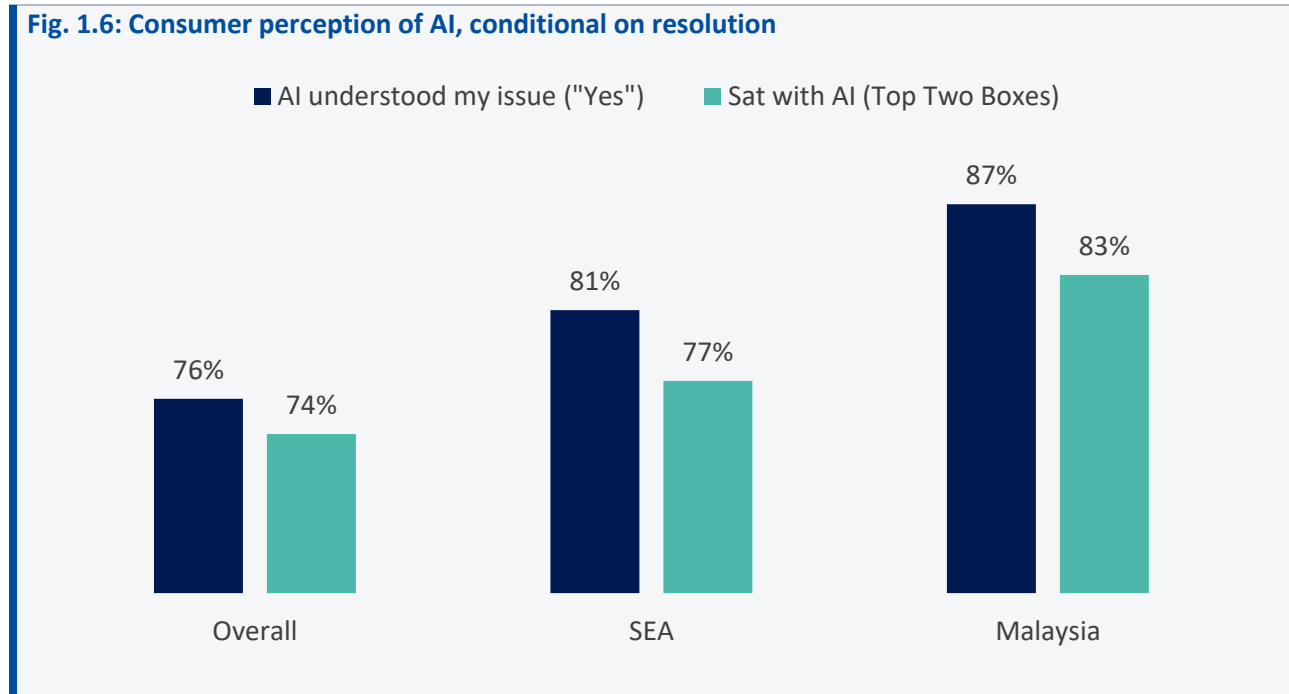
The COPC Global Benchmarking Research also produced four practical findings that are worth surfacing here:

Resolution is critical: when the company fails to resolve, the NPS impact is severe, moving from plus 33 for resolved interactions to minus 72 for unresolved.

Transparency builds trust: hiding that a channel is AI-powered produced a 34-point drop in satisfaction in COPC's wider sample.

Experience drives adoption: positive AI interactions raised willingness to use AI in the future from 25 percent to 76 percent.

Training matters: employees trained in AI tools were 25 percent more satisfied than those who were not.



Source: COPC CCAM Consumer Research 2025-26; COPC Global Benchmarking Research 2025-26.

"Malaysian consumers quote a higher confidence and satisfaction in the AI applications used for customer care"

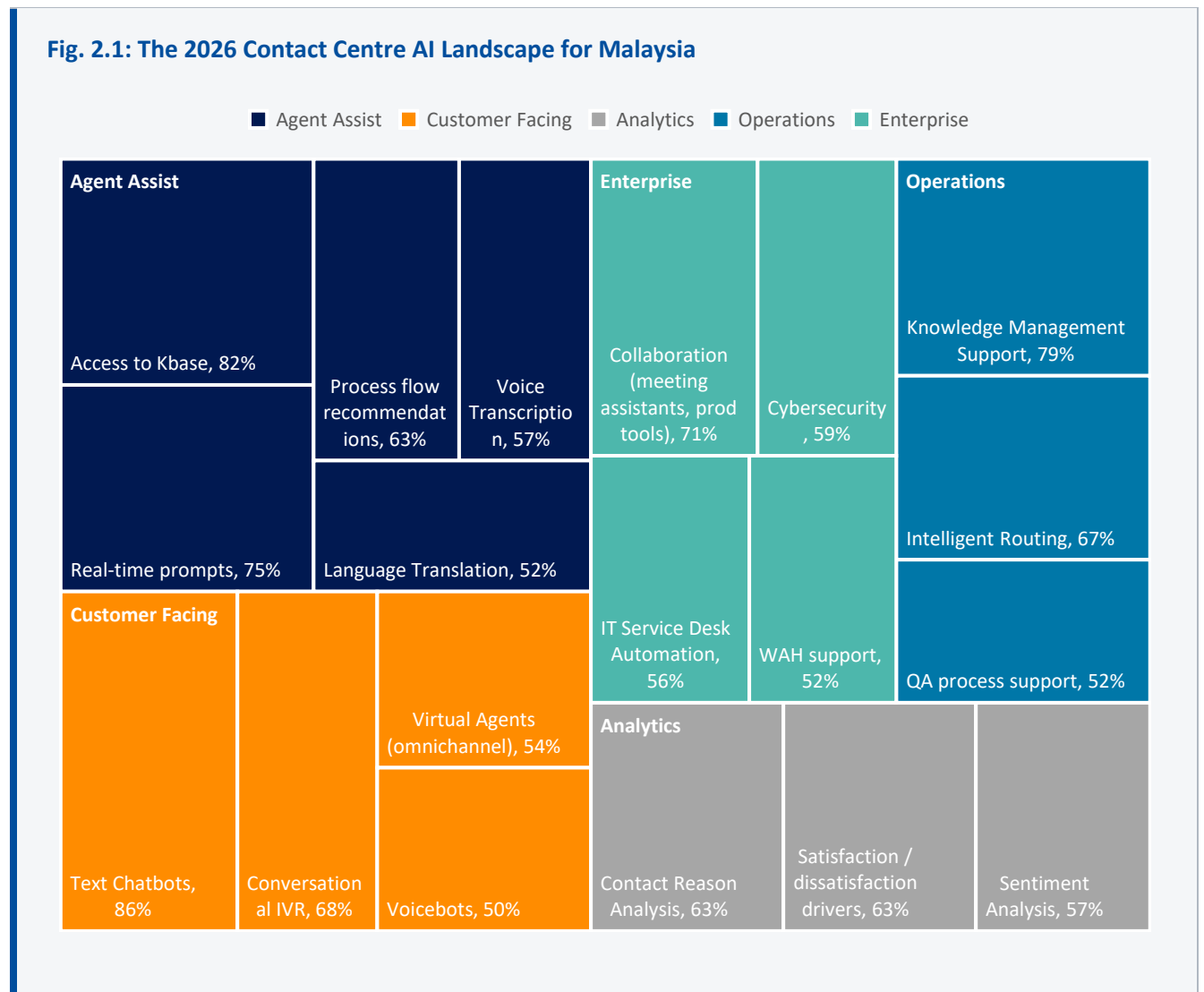
These consumer signals, read together with the data from the Malaysian Contact Centre Industry Research of 2026, tell a coherent story. Malaysian consumers are pro-resolution, and willing to use AI-native channels for their queries and issues. Malaysian Contact Centres are deploying AI in ways that strengthen this bond between the consumers and the providers. AI deployments that resolve quickly, disclose themselves openly, and are supported by trained staff outperform on every consumer-facing measure.

PART II

The 2026 AI Use-Case Landscape

The COPC study shows that there are several use cases of AI in Contact Centres that have taken root and knowing where AI is being used, and how, gives a useful set of pointers to the reader. The 2026 survey asked respondents to identify, across five functional groupings, the specific use cases in which their organisations were deploying AI.

The AI Landscape



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

Agent Assist: the most concentrated area of AI deployment

Agent Assist is where AI is most deeply embedded in Malaysian contact centres, as well as in other regions. In this, providing agents real-time access to the knowledge base is the most common deployment, in 82 percent of organisations. Real-time prompts to agents come in at 75 percent. Process flow recommendations (63 percent), voice transcription (57 percent), and language translation (52 percent) round out the category. These five use cases together describe a contact centre floor where the agent is no longer working alone, but the AI is sitting alongside supplying knowledge. Thus, Agent Assist has effectively become standard kit in the Malaysian market.

Customer-Facing Technologies: where the customer meets AI

Customer-facing AI use cases are nearly as deep. Text chatbots are present in as high as 86 percent of organisations. Conversational IVR is in 68 percent, virtual omnichannel agents in 54 percent, and voicebots in 50 percent. Half of Malaysian contact centres now use AI-driven voicebots for at least some customer-facing interaction, which is a strong indication of how rapidly voice channel AI has matured.

Operations: knowledge management, routing, and quality

Operational AI is concentrated in three areas: knowledge management support (79 percent), intelligent routing (67 percent), and QA process support (52 percent). The knowledge management number says that the foundational data infrastructure for AI, the curated, current, accessible knowledge base, is recognised as central by four out of five organisations.

Interestingly, Workforce Management (WFM) and Talent-related AI applications sit at only 35 to 45 percent adoption across most use cases. This is markedly behind the other categories, and behind global benchmarks. The implication of this is that WFM and Talent are the next frontier. The organisations that move first in these categories will compound efficiency gains across scheduling, forecasting, recruitment, learning, and performance management.

Enterprise: the broader use case and productivity dividend

Beyond the contact centre operations, AI is showing up in the enterprise tools and support processes that contact centre staff use to do their jobs. This includes collaboration tools and productivity assistants (meeting summaries, document drafting, knowledge synthesis), which are in 71 percent of organisations. AI is used in Cybersecurity in 59 percent of cases, IT service desk automation using AI is done in 56 percent, and AI to support work-at-home (WAH) operations is quoted in 52 percent cases.

Analytics: where AI is making its mark on business insight

Finally, Analytical AI sits at strong levels across the board: contact reason analysis (63 percent), satisfaction and dissatisfaction driver analysis (63 percent), and sentiment analysis (57 percent). This is one of the categories where Malaysian operations are arguably best positioned, because the analytical use cases tend to have clearer ROI, less customer-facing risk, and easier integration with existing systems.

AI in Recruitment, Training, and Performance Management

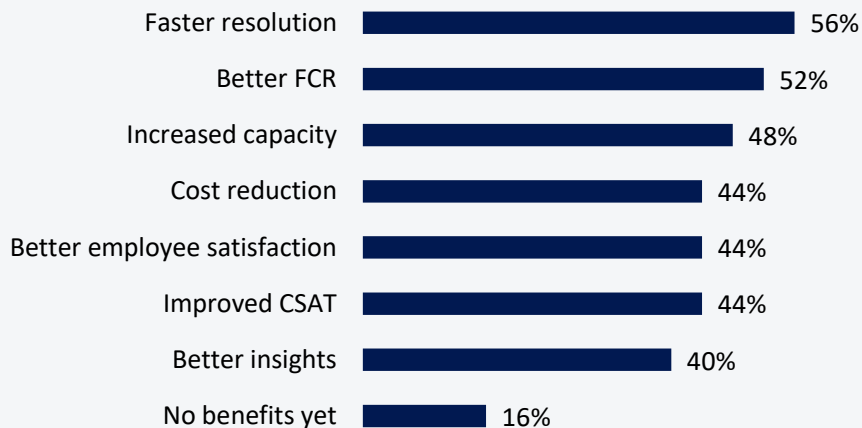
Within the broader category of Workforce Management and Talent, the survey asked specifically about AI applications in recruitment, training, and performance management. The pattern is one of cautious experimentation: AI is being trialled in HR and talent functions, but more sparingly than in customer-facing or agent-assist contexts. Use cases that show meaningful traction include AI-assisted CV screening, AI-driven training content generation, automated quality monitoring, and behavioural analytics applied to performance management.

Organisations that have moved on these use cases report material gains in time-to-hire, training completion rates, and consistency of coaching, but the broad adoption curve still lags the customer-care use cases by twelve to eighteen months. The implication of this is that for an organisation looking to extend its AI footprint in 2026, the WFM and Talent territories have a potential for quick and strategic wins.

Benefits of AI Realized to Date

Respondents were asked which benefits their organisation has experienced from AI deployment. The pattern shows that speed wins and quality is the next test.

Fig. 2.2: Benefits experienced from AI deployment, Malaysia 2026



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

What can be seen is that faster resolution beats cost reduction as the number one realised benefit of AI deployment in Malaysian operators, providing a meaningful shift from the typical early-stage AI ROI story,

which tends to emphasise headcount savings. Also, only 16 percent of respondents report no benefits at all, a striking number given how recent many of these deployments are. The implication is that even in the early stages, AI is producing some amount of visible value for the operators who deployed it.

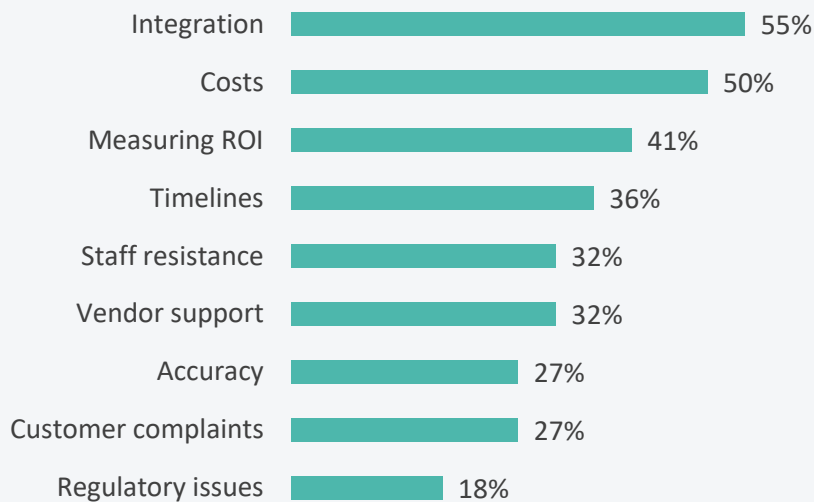
CSAT improvement with AI deployment, at 44 percent, is real but trails throughput gains by some margin. It is implicit in the current deployment patterns that these throughput gains will eventually pull quality along with them. But organisations that consciously design for quality alongside speed are the ones whose ROI will hold up over the next eighteen months.

"Faster resolution wins over cost reduction as the primary realized benefit of AI deployment in Malaysian Contact Centres, changing the ROI narrative for AI".

AI Implementation Challenges

When asked about the challenges they have experienced while implementing AI in customer care or support, respondents flagged a clear hierarchy. The leading challenges are not about the technology itself. They are about the work around the technology.

Fig. 2.3: Top AI implementation challenges, Malaysia 2026



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

The two leading items, integration (55 percent) and cost (50 percent), are operational and financial. Demonstrating ROI at 41 percent reflects the difficulty of attribution of ROI to AI deployment in environments where multiple change programmes overlap. Staff resistance at 32 percent shows that the human change-management work is real and ongoing and needs attention.

Notably, accuracy of AI outputs, the issue that dominated AI conversation in 2023 and 2024, has fallen to seventh on the list, reflecting the improvements in the technology in the last few years. Regulatory and compliance issues sit at the bottom, which is consistent with Malaysia's relatively settled regulatory posture at the time of writing.

These findings from the study align with global studies and findings elsewhere. For example, McKinsey quotes that complexity of integration with existing systems, concerns over security, reliability and hallucinations of AI tools, as well as lack of modern data foundations are among the top barriers to AI adoption globally (McKinsey Global Tech Agenda, 2026).

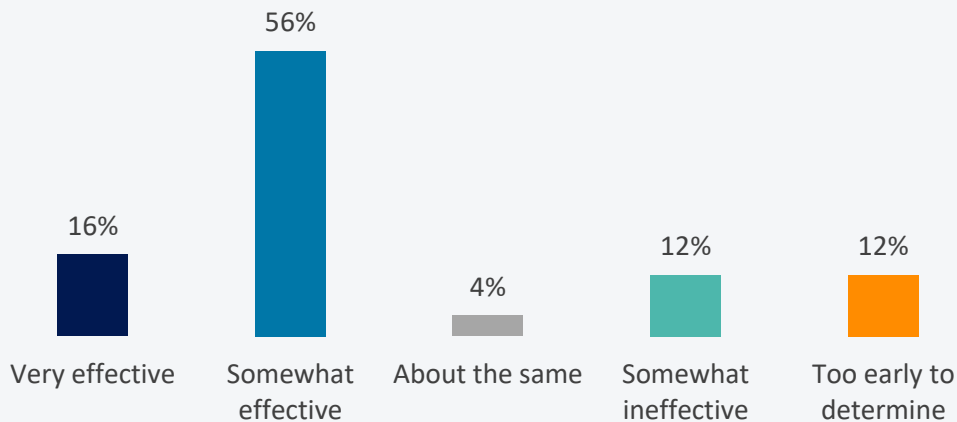
Why a Global Best Practices Standard matters.

The top blockers, integration, costs, and ROI proof, are exactly the gaps that a well-designed standard closes. Standards provide common definitions for AI capabilities and outputs, frameworks for cost-benefit analysis, and reproducible measurement methods for ROI. This is where COPC Inc.'s thirty years of experience in building a global benchmark comes as a strength for Malaysian Contact Centre industry.

Autonomous Resolution: AI as an Operational Lever

The survey asked operators to compare AI effectiveness with human agents handling the same interaction types. The results are instructive both for what they say and for how they have changed since our earlier studies.

Fig. 2.4: AI effectiveness compared to human agents, Malaysia 2026



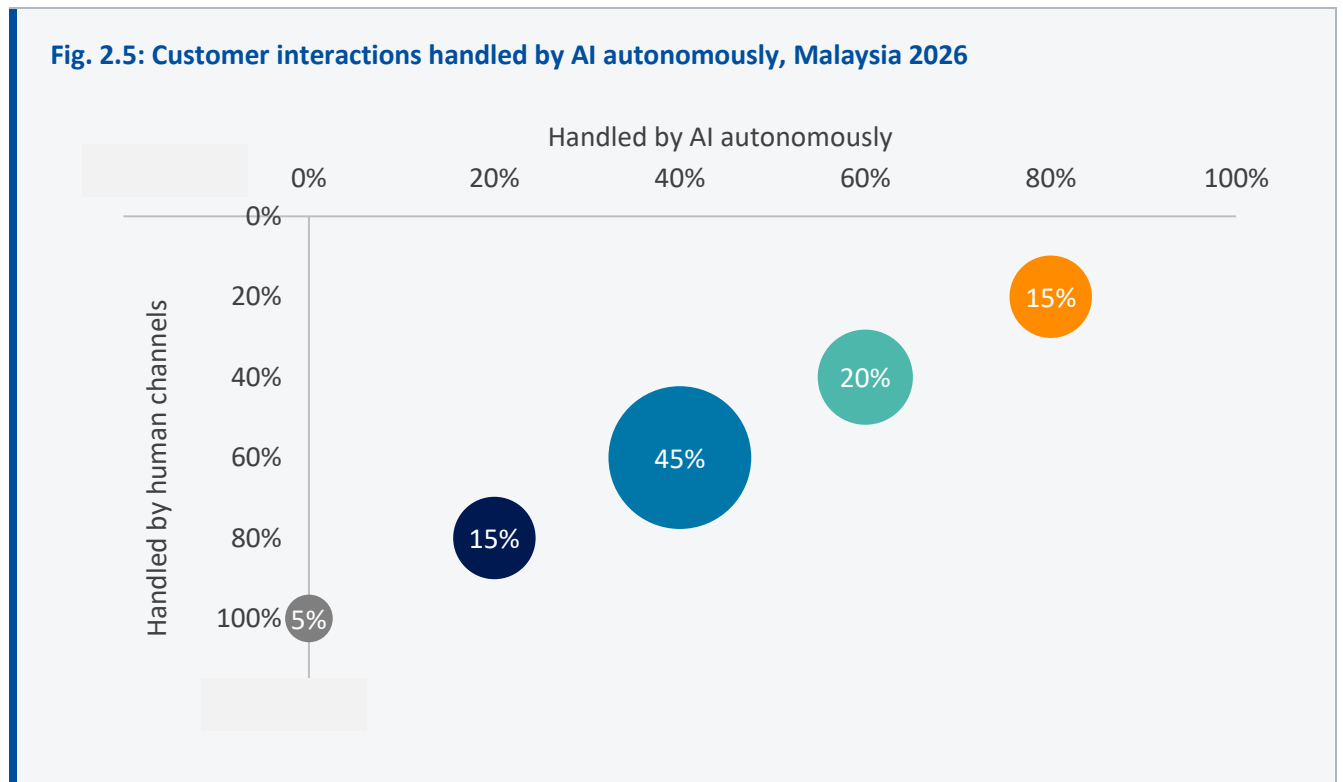
Source: CCAM-COPC Malaysian Industry Research 2026.

Adding 'very effective' and 'somewhat effective' yields 72 percent of organisations rating their AI as effective relative to human agents. This has reduced from the higher positive sentiments recorded in other earlier studies by COPC Inc. The drop should be read as a maturing of judgment, as organisations have moved more workload onto AI, and as they have seen what AI can and cannot do.

The 12 percent saying 'too early to determine' is itself a useful signal, suggesting that meaningful evaluation is still ahead for a meaningful subset of operators.

An important measure of how seriously AI has been integrated into Malaysian operations is the share of customer interactions it now resolves autonomously, with no human involvement during or after the interaction. Sixty-eight percent of organisations report AI handling between 20 and 60 percent of interactions autonomously, indicating that AI is no longer a side experiment, but a sizeable share of daily operational volume.

"Roughly one in three interactions are resolved end-to-end with AI, while the remaining ones are either co-handled or escalated to human agents"



Source: CCAM-COPC Malaysian Industry Research 2026.

The modal range, 20 to 40 percent, suggests that for most organisations the practical sweet spot of AI autonomy in 2026 is roughly one in three interactions resolved end-to-end without human involvement, with the remainder either escalated or co-handled.

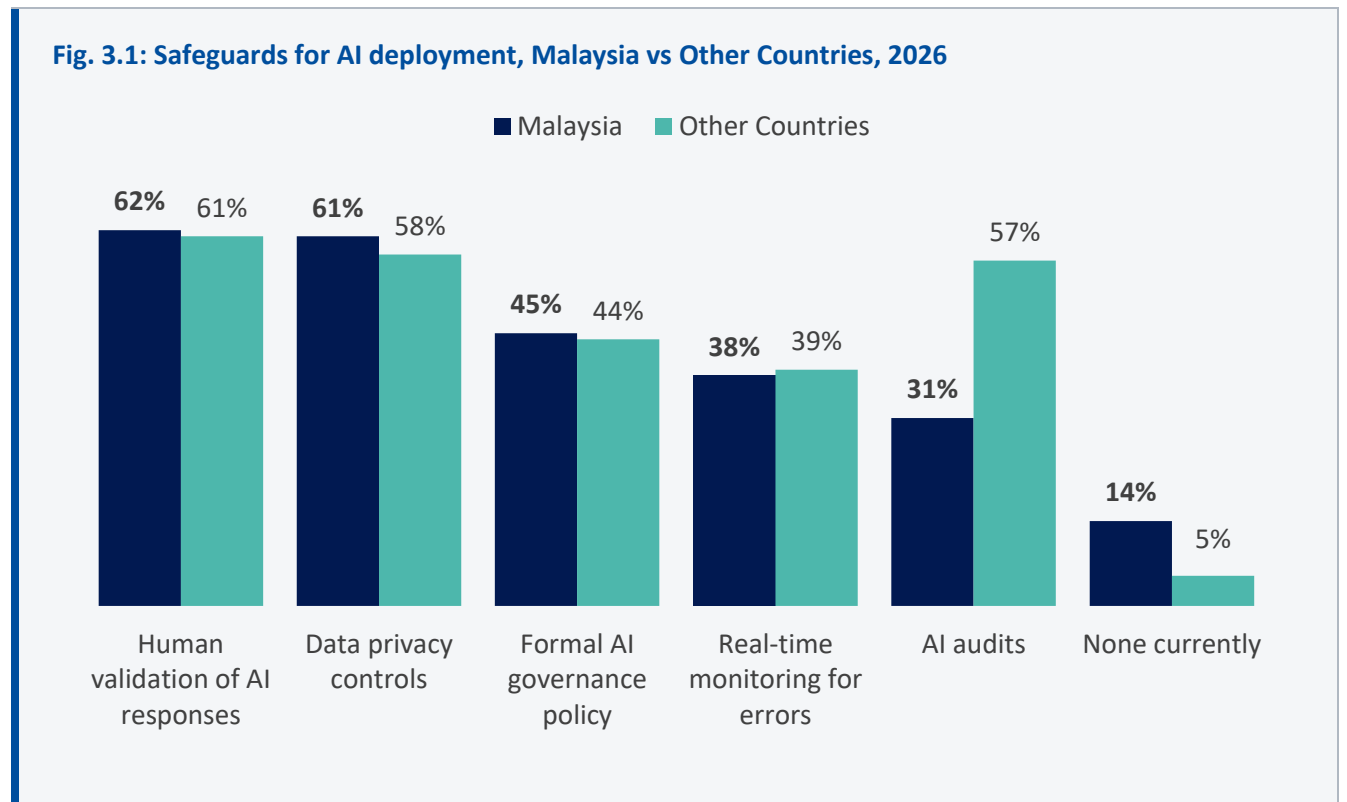
A ten percent of organisations report more than 80 percent autonomous handling. These are the leading edge of the market, and they typically combine three things: a narrow, well-defined transaction mix; a mature knowledge base; and an explicit design for human-in-the-loop oversight rather than human-by-default handling. The patterns underlying their success are explored in Part V.

PART III

The Governance Paradox

This section of the report clearly identifies gaps in the deployment. While Malaysian contact centres have moved fast on AI adoption, and there is a good amount of thought leadership in this area, the adoption of AI governance on ground seems lagging, which is explored further here as an opportunity for Malaysian industry to lead globally.

Safeguards in Place for AI



Source: CCAM-COPC Malaysian Industry Research 2026; COPC Global AI Deployment Research 2026. Multi-select question.

About 14 percent of the data, or roughly one in seven Malaysian organisations deploying AI in customer interactions, reports having no safeguards in place for AI deployment. The global comparison for this is five percent. The second number that comes across is the AI audits, at 31 percent in Malaysia versus 57 percent globally. In both if these, there is a palpable gap that warrants direct attention. Malaysian operators are matching the global mark on the basics of human validation and data privacy, but these are resource-heavy approaches. The lag is noticeably on the disciplines that turn safeguards from one-off controls into systematic governance: regular auditing, real-time monitoring infrastructure, and formal policy.

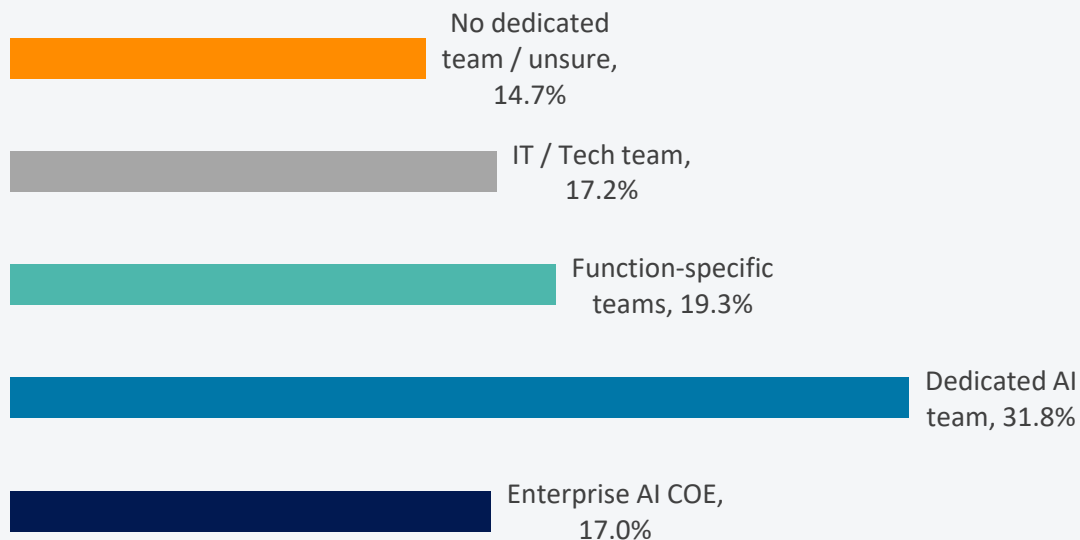
Why AI Governance matters.

AI governance is fast becoming a precondition for enterprise procurement, particularly in regulated sectors such as banking, insurance, and government. Malaysian contact centres serving these sectors will increasingly find that AI deployments will need to demonstrate auditability and policy compliance to win or retain business. The gap on AI audits, governance, and policy, is the most immediately actionable item in this report. The roadblock is the bottleneck and if Malaysia leads the way, there is a real opportunity towards gaining advantage.

Who is Deploying AI in the organization?

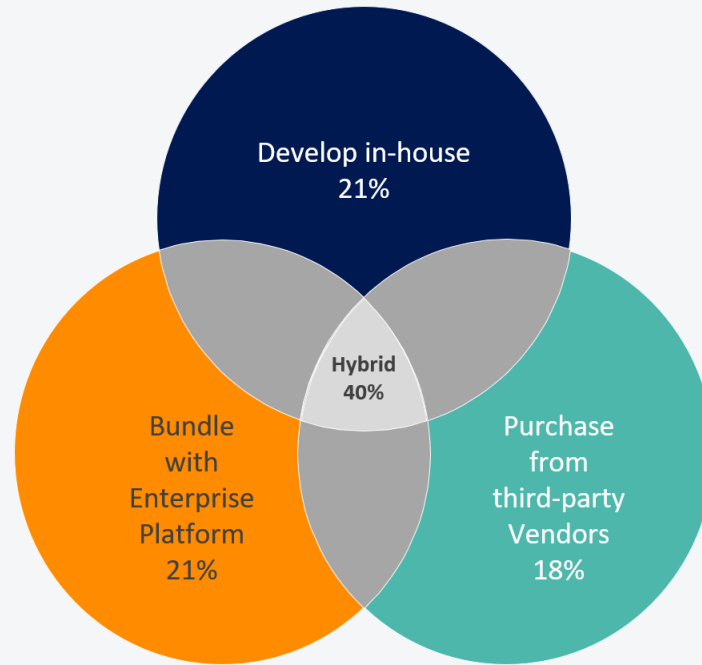
Part of the reason behind this gap is the roles and responsibilities in the organizations in terms of AI governance, and who, organisationally, owns AI deployment. The pattern points to a capability gap that closely tracks the governance gap globally.

Fig. 3.2: Organisational ownership of AI deployment globally



Source: COPC Global AI Deployment Research 2026.

As can be seen, only about one-third of organisations have a dedicated AI team. Less than one-fifth have an enterprise AI Centre of Excellence. Almost 15 percent have no clearly defined owner for AI deployment at all. Why this matters is that our data from the COPC Global AI Deployment Research shows a meaningful ROI advantage for organisations with structured ownership: there is a 14 percentage-point increase in perceived ROI for AI when deployed by dedicated teams or with an AI Centre of Excellence, compared to less structured arrangements (59 percent positive ROI perception versus 45 percent).

Fig. 3.3: Approaches to AI capability building

Source: COPC Global AI Deployment Research 2026, figure not to scale, for representation only.

Another statistic that might be useful, from the Global AI deployment study is about the approaches taken by companies to develop and deploy AI. About a fifth develop AI solutions inhouse. This could be due to regulatory or compliance reasons, or due to business strategy. A fifth deploy AI bundled with enterprise platform, while another fifth purchase point solutions from third-party vendors. However, forty percent continue to have a hybrid approach, with all three of these methods deployed across their organizations for different purposes and use cases.

The implication is important for the industry at its current stage of maturity. The economics of contact centre operations are being rewritten in real time. One needs to understand that pricing pressures faced by Contact Centres in Malaysia currently are symptomatic. The deeper issue is the value proposition that contact centres and BPOs bring to the table.

When it comes to AI, some providers seem to pass third-party AI and automation tools through to clients under the garb of transformation. The results follow as expected: lower headcount requirements, but also lower revenue per seat, and no meaningful differentiation from the next provider. Companies that build skills and proprietary operating IP, and bring these as part of their value proposition, are the ones gaining traction.

The “build-or-buy” decision for AI.

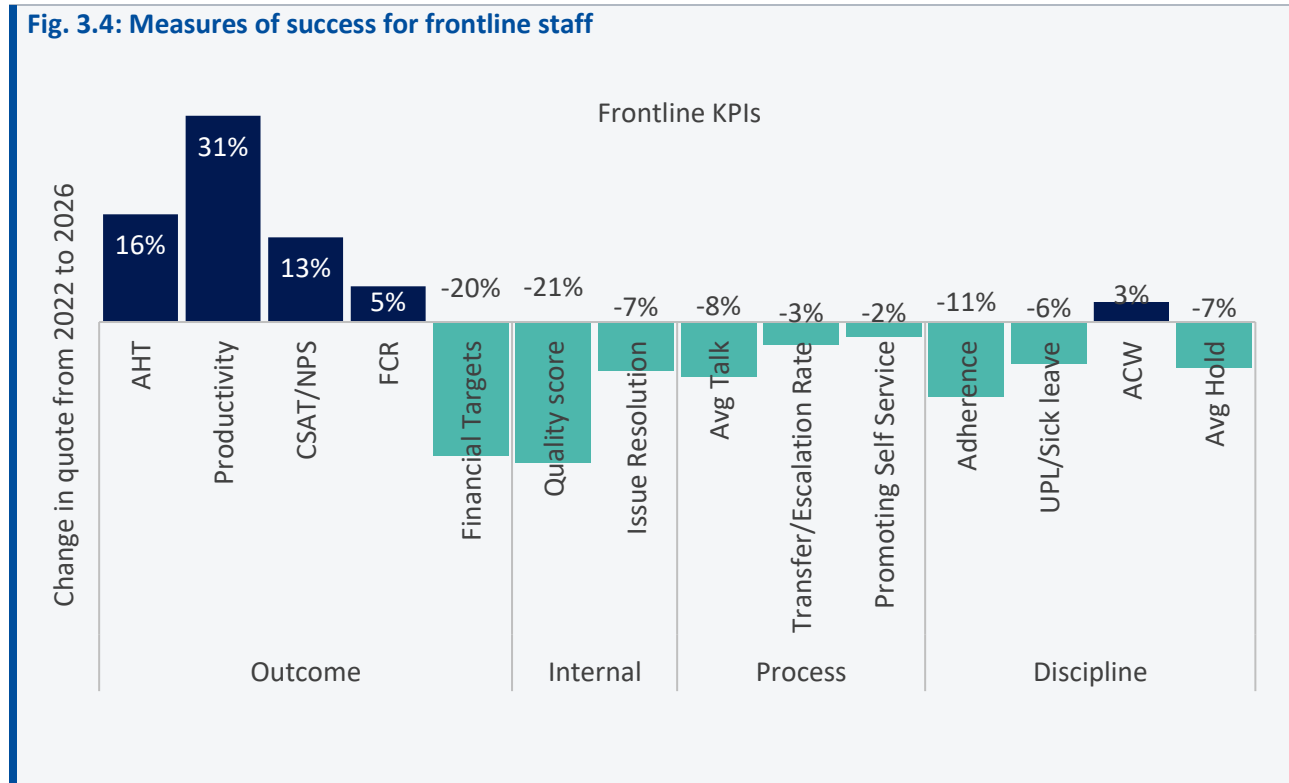
The implication is consistent with the findings in this study that governance and capability are linked. The same organisations that report formal AI policies tend to report dedicated teams, regular audits, and stronger ROI outcomes. The discipline of governing AI well and the discipline of building AI well are the same, just at different stages of the workflow.

The latest release of COPC CX Standard, Release 8.0, introduces a management cycle in the form of Plan -> Design -> Manage -> Measure. This aligns with the actionable workflow in AI deployment, just as it does for any other organizational approach.

Measuring Success in an Organization

A part of governance and management cycle is about what to measure and how to measure it. In a related question asked to Malaysian Contact Centre operators in the study, an interesting pattern is seen emerging, when one compares the numbers from a similar study done four years ago, in 2022. The numbers given here are specific to what goes into the scorecards of frontline staff, but the message broadly speaks about the way success gets measured in the organizations.

Fig. 3.4: Measures of success for frontline staff



Source: CCAM-COPC Malaysian Industry Research 2026 and 2022. Multi-select question.

Respondents were asked to choose the metrics that constitute a frontline agent's scorecard in their contact centre and were given a list of metrics to select. These included the typical performance metrics like Average Handle Time (AHT), productivity, CSAT or NPS, first contact resolution (FCR), as well as internally tracked metrics like quality scores and issue resolution. There were also discipline metrics and process metrics adherence, amount of time in after-call work (ACW), hold time, talk time, escalation rates, and providing self-service options to the customers.

"There is an increase of outcome metrics in frontline performance, indicating a shift to more value-based role designs".

Throughout the outcome metrics, there is a palpable increase in the focus in 2026 compared to the numbers from 2022, as more respondents have included these in their quotes this time. There is a larger focus on resolving the issues in the first contact itself, rather than the generic issue resolution across the customer journey.

On the contrary, the internally measured and inward-looking metrics seem to have reduced focus. Quality score, which is often tracked internally, and lacks the customer calibration, seems to be giving way to the more direct, customer-facing measures like CSAT and NPS. This is true also for behaviour and discipline metrics. AHT, which is the overall outcome, seems to have more focus, rather than the activity metrics like talk time, hold time, and after-call wrap time.

Metrics related to operational hygiene, like adherence and unplanned leaves seem to have moved to a "qualifier", rather than performance criteria. The reduction in the focus on financial targets suggests a reassessment of the agent's role to identify what is in control of the frontline staff and adjusting the governance structure to more effective and relevant measures.

Growth in maturity in roles and responsibilities for frontline.

These findings, where the frontline performance criteria have evolved from activity measures to outcome measures, show a growth in the level of maturity in the Malaysian contact centre industry in the last four years and allows the industry to pivot to more value-driven and outcome-oriented outlook, instead of being internal-driven and activity-oriented.

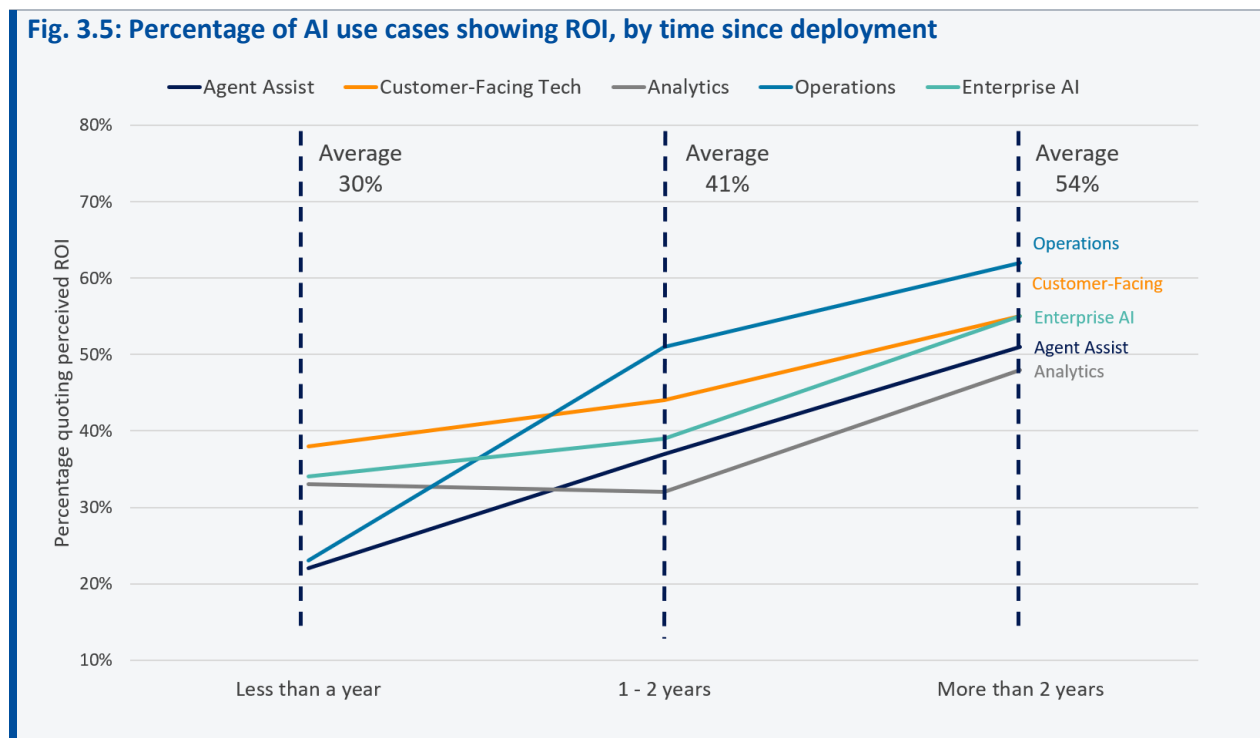
Time for ROI for AI Deployment

A separate question, drawn from the COPC Global AI Deployment Research 2026, addresses the timing of ROI. The pattern is clear and worth holding onto as a planning benchmark. Across all the use cases of AI deployment seen in the Contact Centre industry worldwide, which were described in Part II earlier, i.e., Operations, Customer-Facing, Agent-Assist, Enterprise AI, and Analytics, there is a meaningful increase in

the perceived ROI when the maturation goes beyond two years. This indicates a gestation period for AI deployment before real benefits start manifesting in the business.

"It takes over a year and a half to perceive meaningful ROI from AI deployment in contact centre operations".

What this means is that expecting ROI in the first six to twelve months of an AI deployment is being optimistic. On average, organisations are seeing only about 30 percent of their use cases show positive ROI in year one. It is also seen that more time produces more ROI, broadly speaking, although the gains taper across different use cases. The absolute level even after two-plus years is about 54 percent, which is to say that nearly half of AI use cases are still not delivering ROI even at the two-year mark.



Source: COPC Global AI Deployment Research 2026. Averages across five AI categories.

This finding is in line with other global studies and reinforces the need for moving beyond the ROI debate. PwC quotes that 56 percent of CEOs have not yet seen a measurable financial benefit from AI, only 12 percent have achieved both cost and revenue gains, and 17 percent of companies cite difficulty measuring ROI or value as a leading adoption challenge (PwC, 2026).

The practical advice that follows is to set ROI horizons realistically, instrument early so that ROI is observable rather than inferred, and treat the AI portfolio with deliberation, with some bets that will succeed quickly, some that will succeed slowly, and some that will not succeed at all. The 14-point ROI advantage for organisations with dedicated AI teams suggests that the portfolio management discipline pays for itself.

PART IV

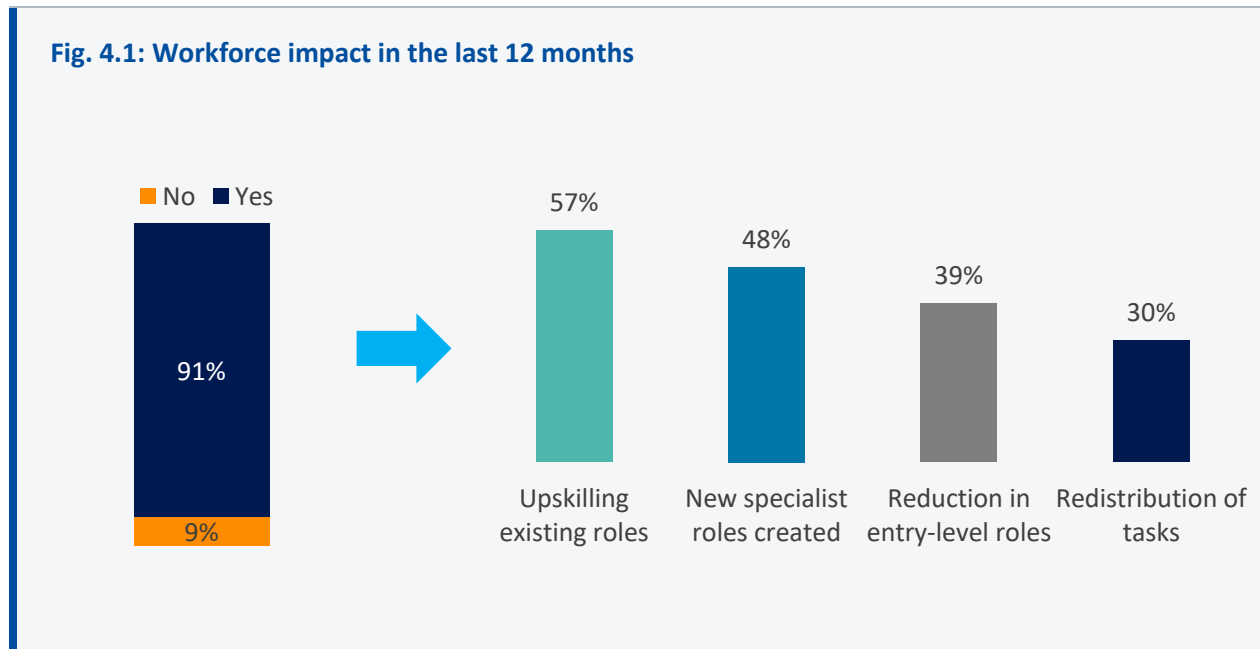
People in an AI World

Of all the questions in the 2026 survey, the ones touching on workforce impact produced the most consistent picture. AI is reshaping the Malaysian contact centre workforce gradually, and it is doing so visibly. The leaders who responded to the survey are clear-eyed about both what has already happened and what they expect next. There are specific indicators in terms of role changes and spans of control that are worth noting as harbingers of change.

The Story So Far with AI

Respondents were asked whether there had been a noticeable impact of AI on workforce skills in the past twelve months. Ninety-one percent said yes. Nine percent said no. That is one of the largest single-direction responses anywhere in the survey. Also, more than half the respondents quoted that frontline staff now require more advanced skills than before.

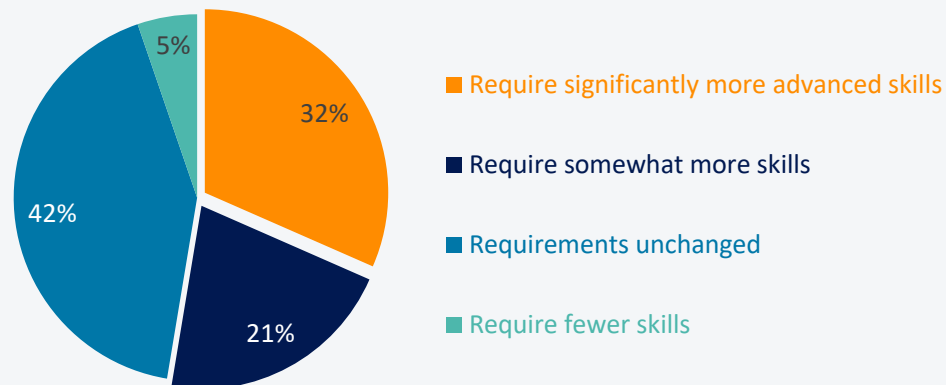
Forty-eight percent of respondents quoted that new specialist roles are getting created due to the deployment of AI. This aligns with COPC Inc.’s observations across the industry. Agents are using various AI tools to address customer queries better. Team leaders are using AI to document progress reports, coaching plans, and to analyse operational data. Quality auditors are training AI to monitor large parts of the transaction autonomously.



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

This trend is expected to continue, as is seen in this chart below, which is based on the question to respondents on how they perceive AI's impact to frontline agent skills has been so far. Read together, these two questions tell us that the roles are being redesigned and reskilled. The dominant response is upskilling existing roles (57 percent), followed by creating new specialist roles (48 percent). The skill-requirements question reinforces this. Fifty-three percent of organisations report that frontline roles now require somewhat or significantly more skills than they did before AI was introduced. Only five percent report fewer required skills due to the use of technology.

Fig. 4.2: Impact on frontline agent skill requirements



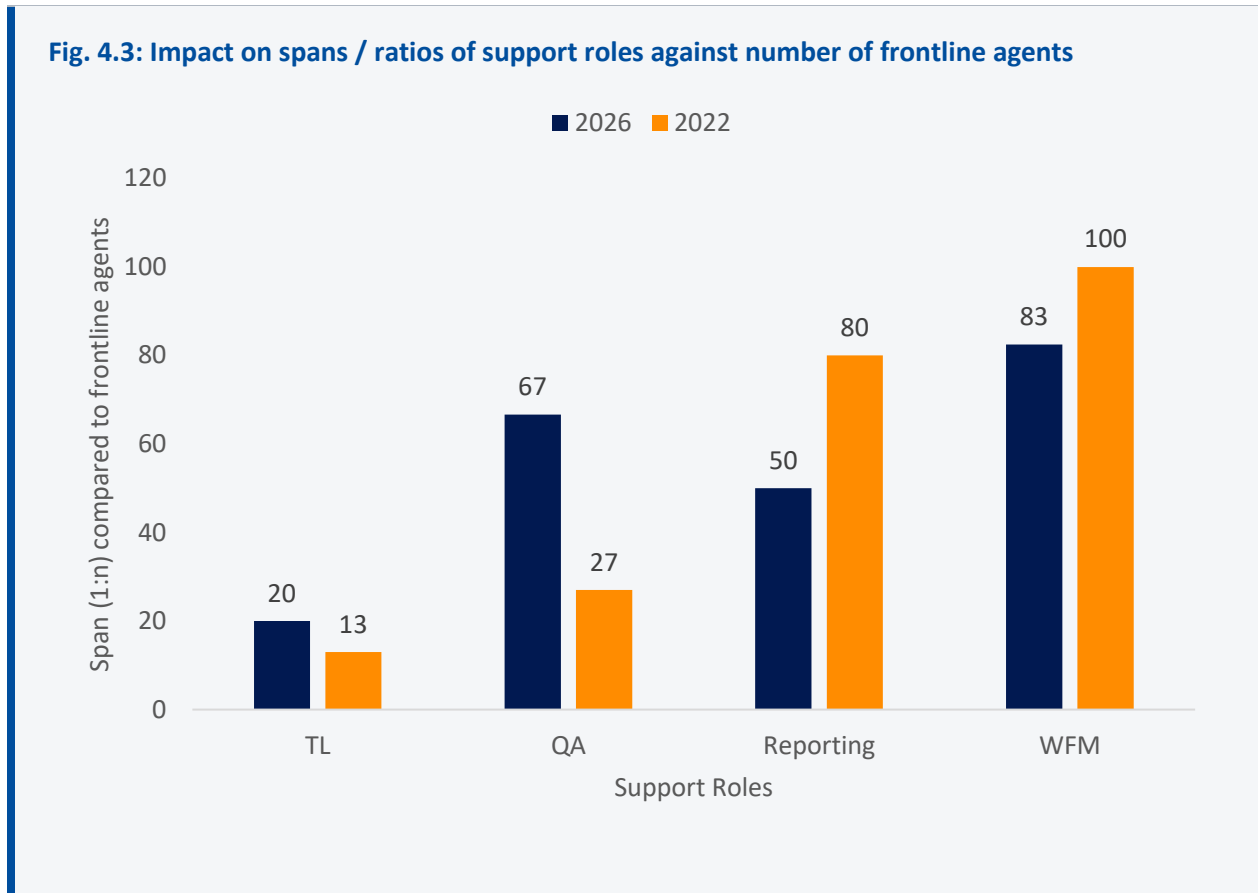
Source: CCAM-COPC Malaysian Industry Research 2026.

"Upskilling of existing roles is the dominant figure, followed by quotes on increased skills in the existing roles".

Where reductions are happening, they are at entry level (39 percent), and the typical context is that AI is absorbing the more routine work that entry-level agents used to do, which then frees the operation to invest in more skilled tier-two and tier-three capabilities, AI prompt engineers, conversation designers, AI quality assurance specialists, and so on. Along with changes in the roles, there is also an expectation that the existing roles will be rewritten for the new environment.

Impact On Team Structures and Support Roles

While the earlier charts showed the impact on agents and frontline staff, the picture with supporting roles and leadership roles tells yet another, compelling story. And the most striking of these findings is the changes in the spans of control for several support roles, including team leaders (TLs), quality analysts (QAs), reporting analysts, and workforce management (WFM) executives that are in the organization. For this, the responses from 2026 were compared with the data from the study conducted four years ago, in 2022.



Source: CCAM-COPC Malaysian Industry Research 2026.

There is a striking pattern in the chart above. The spans of TLs and QAs have shot up. While four years ago, there was one Team Leader for 13 people, the current quotes are one for 20 people, indicating a shift in the team sizes as well as the role of frontline TLs in these team. The numbers are more pronounced in BPOs (TL ratios of 1:25) compared to non-BPOs (1:17). Part of this could be due to the maturity of the industry, or simply increasing cost pressures in these competitive markets, while some of it could be due to the hybrid nature of work (in-office and work-from-home), allowing larger teams to be formed and managed at frontline level.

The use of automated quality monitoring allows QAs to change their role from simply auditing transaction to focus on training the AI tools and then have a much larger coverage. While earlier, a QA was perhaps handling two teams, it now seems that they can handle about three teams concurrently, since a large part of the actual audit and evaluation is automated.

It is interesting to note that the spans for reporting analysts and WFM executives have shrunk, signalling a much larger role change in these supporting functions. There is much reliance on reporting analysts for analysis of customer data, transaction data, and operational data, that can drive better business outcomes. The WFM roles have changed as well, especially in the BPOs, where the ratio is 1:103 compared to non-BPOs where the ratio is 1:70, with more real-time and functional duties being added due to multi-

channel support (as mentioned in the Part I), as well as higher integration with operational processes of scheduling, work allocation, reactive management, queue management, and agent adherence management, requiring tighter spans.

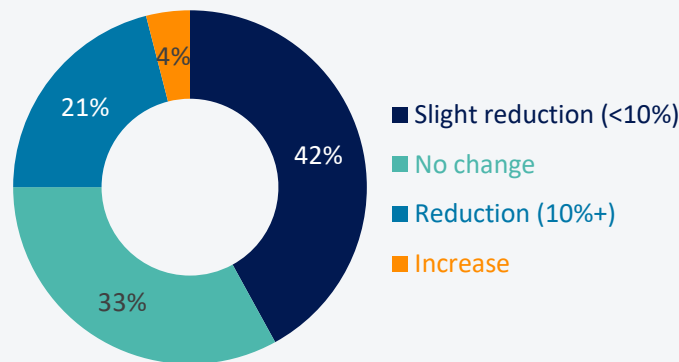
The People-AI redesign opportunity.

There is a window, currently open, to design the People-AI operating model intentionally. The organisations that act in this window will lock in differentiated capability for the next several years, and this includes not only the frontline staff, but also supporting and leadership roles within the contact centres.

What Comes Next

Looking forward, the survey asked what impact respondents expected AI and automation to have on headcount over the next twelve months.

Fig. 4.4: Future impact to headcount expected over the next 12 months



Source: CCAM-COPC Malaysian Industry Research 2026.

Two-thirds of respondents expect some reduction in headcount, but only one in five organisations expects cuts of ten percent or more. The picture is one of gradual contraction and change. About four percent expect growth. This gives leaders room to redesign roles deliberately rather than respond to attrition reactively.

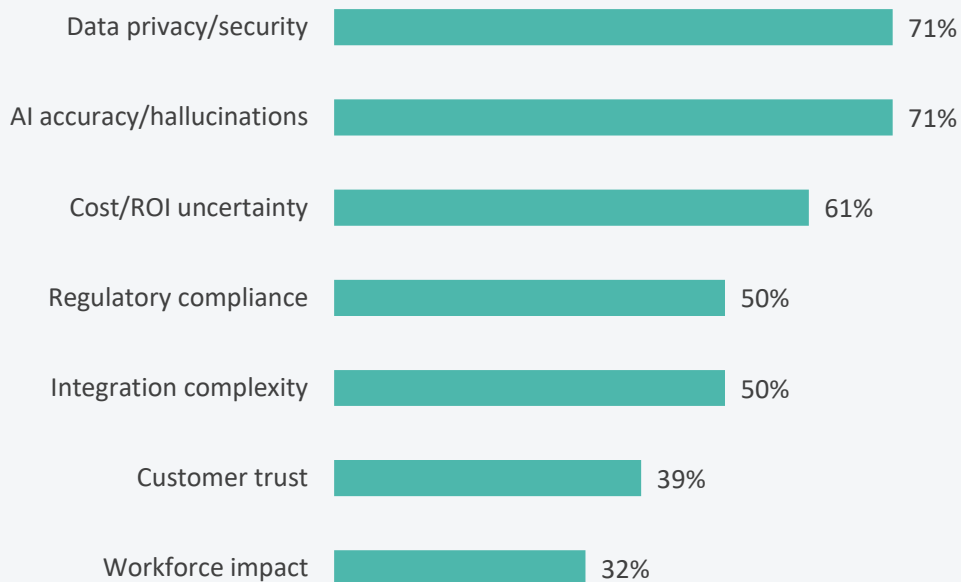
There is a real difference between the BPO and non-BPO segments here, in that BPO respondents tend to anticipate sharper headcount adjustments, reflecting the more direct exposure of BPO commercial models to volume-based pricing. Non-BPO respondents tend to anticipate gentler adjustments, reflecting the broader range of operational and policy considerations that shape in-house staffing decisions. The

pattern across both segments, however, is the same: more contraction than growth, but mostly gradual, and offset by the upskilling and specialist-role creation captured in the preceding section.

Concerns with AI Deployment in Contact Centres

Respondents were also asked about their concerns regarding AI implementation. The pattern that emerged sits at the People-AI boundary rather than at the technology itself.

Fig. 4.5: Top concerns about AI implementation



Source: CCAM-COPC Malaysian Industry Research 2026. Multi-select question.

Trust, accuracy, customer experience, and workforce impact dominate the concern list about AI implementation in Malaysian Contact Centres in this study, which aligns with findings globally from elsewhere as well. For example, Deloitte’s “State of AI in the Enterprise” report quotes that data privacy is at the top of AI risks, closely followed by governance and oversight issues (Deloitte, 2026). It is worth noting that all of these are at the confluence of AI and people, either staff or customers. Thus, it requires a governance-plus-capability approach, rather than a mere technology approach.

PART V

Build With a Purpose: A Blueprint

Malaysian operators support clients across ASEAN, ANZ, the Middle East, and beyond, and the RFPs landing in their inboxes are getting sharper on AI governance and journey-level outcomes. This is a significant moment in the growth and maturity of the industry and requires a concerted effort to push the boundaries of possibilities.

The findings in Parts I through IV describe the Malaysian Contact Centre industry as an industry that is moving fast on AI but is taking its time to put the organisational, governance, and people-side disciplines in place. Of course, this is not a Malaysian-specific pattern but is seen globally in 2026 across about 20 countries that were surveyed by COPC Inc., and it is precisely the pattern the COPC CX Standard Release 8.0 was designed to address.

The COPC CX Standard has been published continuously since 1996. Over those thirty years it has evolved through eight major releases, beginning as a call-centre quality framework, broadening to encompass digital channels and the broader service journey, and arriving in January 2026 at Release 8.0, which is the first edition of the Standard built specifically for an environment in which the performer of any given task might be a human, a system (like a bot), or both. The following concepts from the Standard Release 8.0 are useful in general, as a response to most of the findings from this report, and give a set of actions as a blueprint for the industry to build with a purpose.

Unified management across channels. In COPC CX Standard Release 8.0, one consistent set of standards governs the entire operation. Bots and live agents are no longer managed under separate logics; design, implementation, and performance measurement work the same way across every touchpoint.

AI governance built in. Explicit requirements for AI ethics, technology planning, and performance verification mean automated systems are governed with the same rigour applied to people, not as a side-track.

Service journey focus. New requirements in Release 8.0 push operators to design and optimise end-to-end service journeys rather than individual transactions, reflecting the fact that customers care about the problem they are solving, not the channel they are in.

Flexibility in metrics. A new exhibit structure lets operators choose metrics that fit their business, provided the intent of each measure is met. Measurement becomes about what matters to the operation, not what is mechanically prescribed.

Operational depth. The COPC CX Standard R8.0 provides process-level guidance that executives can direct, and operations teams can implement, narrowing the gap between strategy and execution with practical, actionable requirements.

Returning to the gaps identified earlier in this report, the AI governance gap (14 percent of Malaysian operators with no safeguards), the audit gap (31 percent in Malaysia versus 57 percent globally), the dedicated-team gap (only 32 percent of organisations with a dedicated AI team), and the ROI-measurement gap (41 percent citing ROI proof as a challenge), the COPC CX Standard Release 8.0 is purpose-built to close each of them (COPC Inc., 2026).

Safeguards become a defined requirement, mapped to performer types. Audits become a defined cadence, with documented evidence. Dedicated AI capability becomes a clearly described function. ROI measurement becomes a structured practice tied to specific task-performance metrics. None of this is a substitute for the local judgement that each Malaysian organisation will need to bring. But all of it provides the scaffolding within which that judgement can be exercised consistently, defended internally and externally, and improved over time, using best practices from the COPC CX Standard.

Work as Tasks: The Conceptual Shift

The single most important change in Release 8.0 relevant to AI-native businesses is the way work is defined. This redefinition matters because it eliminates the artificial separation between 'AI work' and 'people work' that has plagued operating model design in many organisations.

Work, as defined in COPC CX Standard R8.0

Work = a Task. A task is a single action with a clear input, a defined performer, a measurable output, and an intended outcome.

Performer types: Person (a human), System (a bot, a workflow, an AI), or Person + System (human-in-the-loop arrangements).

Performance is measured against the task and the intended outcome, regardless of who or what performed it.

Under the “work = task + performer” framing, both are simply work, with different performer types. Governance, measurement, and quality assurance apply to all performers uniformly. Training applies to all performers uniformly, in the sense that humans are trained and systems are configured and tuned. Performance management applies to all performers uniformly, in the sense that what matters is whether the task was performed correctly and whether the intended outcome was achieved. AI deployments fail most often not because the AI does not work, but because the boundary between AI and human responsibility was never properly designed. The task-and-performer framework makes that design problem explicit and repeatable.

One of the important operational disciplines that come out of this research is the design of human-in-the-loop (HITL) arrangements for AI deployment. In practice, this means deciding in advance, on a task-by-task basis, where AI runs autonomously, where AI runs with human review, and where AI is excluded entirely. COPC's work with clients in the region has produced a repeatable pattern for this decision.

Five practical consequences follow from the task-and-performer framing:

- **Workflow accuracy:** every step is owned by a defined performer with a defined output, eliminating the gaps where AI and human responsibilities blur.
- **Automation and AI readiness:** the framing makes it explicit which tasks are candidates for AI handling, which are candidates for human-in-the-loop (HITL), and which should remain fully human.
- **Training clarity for RLHF strategies:** Reinforced Learning from Human Feedback (RLHF) is not a vague aspiration; it is a defined performer type with a defined contribution to the task.
- **Performance measurement:** the same task can be measured for a human performer and a system performer using comparable metrics.
- **Easier tracking:** performance data can be aggregated and reported across performer types, giving leadership a coherent view of total task performance.

Implications to the Malaysian Contact Centre Industry

The Malaysian Contact Centre and BPO industry has over 400 sites and employs 300,000 people and is projected to grow at 11% CAGR through 2030. But beneath these numbers, however, there is an important structural question for the upcoming future: how much of that growth will be real and will be captured by BPOs who genuinely transform their model, versus those riding the wave without changing what they fundamentally deliver.

The structural tension in the market is getting apparent by the day: the established BPOs understand operations deeply but continue to treat AI as a cost-reduction lever rather than a signal to rethink the entire operating model. Whereas AI-native players understand the technology but are still learning to operate at contact centre scale: managing attrition, compliance, and client SLAs simultaneously.

There is still work to do, and it is heartening to see sprouts of acknowledgement as well as actions in sustainable advantage for Malaysian Contact Centre industry. This includes a revised focus on design, greater drive for skill building, and a fundamental review of the strategic plans by companies in this field. There is a larger awareness that procurement of AI tools is not a strategy. Redesigning the operating model around those tools to drive high performance is.

The winners will close that gap deliberately, through structured integration of AI agents, human agents, and performance management into a single measurable system. This is precisely where frameworks like the COPC CX Standard 8.0 create competitive advantage: not as a governance checkbox, but as an

architecture for running AI and people as a unified, accountable workforce. The question is not whether AI will reshape CX delivery in Malaysia; it already is doing so across various business processes. The question is whether Malaysia's contact centre operators will lead that reinvention, and how.

Call to Action: Connected by Design

The findings in this report point to four practical priorities for Malaysian contact centre leaders in 2026 and beyond, even to 2030, and lead to a 9-point list of actionable items given later in a table. Taken together, they form a working agenda for any Malaysian operation that wants to translate the maturity of the market into durable advantage.

Design Together (Human + AI)

There is no separate operating model for the AI-native business. People and AI need to be designed into the same workflow, the same governance, and the same performance frame.

The data showing that customer experience, employee experience, AI integration, and overall performance sit at near-identical strategic priority is not coincidence, since these are four lenses on the same operational design problem. Organisations that treat them as separate workstreams underinvest in the most valuable coordination, while those that treat them as one design problem capture the upside of AI without the typical penalty to staff engagement or customer trust.

Design with Purpose

Resolution remains the Northstar. The purpose of any AI build, or any other deployment for that matter, is to resolve the customer's issue, end to end.

When AI resolves, NPS climbs. When AI fails to resolve, NPS falls dramatically. Speed gains, throughput gains, and cost gains will only hold if resolution holds. The organisations that are quietly outperforming are the ones that have not lost sight of this. They treat AI as a way of resolving more issues more reliably, not as a way of moving more interactions through the system.

Design for the Present and the Future

Agility in practice, with deliberate investment in Malaysia's own ecosystem strengths: going beyond multi-lingual capability, regional reach, and a supportive policy environment.

Malaysia's position in the regional AI ecosystem has strengthened materially in the last two years. The National AI Action Plan 2026-2030 provides a policy direction. Industry forums on agentic AI and locally built solutions are rising in the activity. Agency-level support for locally tuned AI is increasing. The multilingual reality across regional markets served from Malaysia, and the cultural literacy required for service journeys in Southeast Asia are competitive advantages that imported AI solutions, designed elsewhere, cannot easily replicate.

Measure the Impact

Translate thought leadership into practice with confidence. Drive measurable ROI and impact of AI deployment to business and society.

The 41 percent of organisations citing ROI measurement as an implementation challenge is not a problem of intent, but of method. The data this report has surfaced makes a strong case that ROI follows a predictable curve, around 30 percent of use cases showing positive ROI in year one, rising toward 54 percent beyond year two. The organisations that perform best on this curve are the ones with dedicated AI capability, structured measurement, and the patience to let the curve play out.

Table 1: Connected by Design – A 9-point Blueprint with Actionable Areas for Malaysian Contact Centre Stakeholders

Themes	Actionable Areas
Design Together	<ol style="list-style-type: none"> 1. Review AI roadmaps alongside workforce plans 2. Include CX leadership and Operations leadership in AI governance committees 3. Treat the redesign of the operating model, the deliberate articulation of which tasks are performed by people, by systems, or by both, as a board-level priority
Design with Purpose	<ol style="list-style-type: none"> 4. Evaluate every AI deployment against a resolution or a purpose metric, not just a containment or deflection metric
Design for the Present and the Future	<ol style="list-style-type: none"> 5. Re-examine the make-or-buy decision for AI capability within Malaysia 6. Build on the regionally tuned models, locally built agent-assist solutions, and contextually aware AI service journeys as competitive advantage
Measure the Impact	<ol style="list-style-type: none"> 7. Define every AI use case from day one with a clear ROI hypothesis and a defined measurement method, even if the early numbers are modest 8. Review the AI portfolios quarterly, with explicit decisions to scale, hold, or retire each use case 9. Triangulate the perceived ROI of an AI use case across operational metrics (throughput, AHT, FCR), customer outcomes (CSAT, NPS, resolution), and staff outcomes (workload, engagement, attrition)

Closing Note

A year from now, when the next edition of this research is published, the Malaysian contact centre industry will look meaningfully different from how it looks today. The adoption curve will have flattened. The governance gap will, with effort, have closed. The People-AI operating model will be more deliberately designed. The local AI ecosystem will have matured further. And the question the industry asks itself at NCCC 2027 will, in turn, be different from the question it is asking now. The data in this report is a snapshot of an industry in motion, captured at a moment of unusual and exciting transition. The decisions that move it forward will be made by the leaders who read it.

FURTHER RESOURCES

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Some of the organizations that contributed to the study:

Aeon Credit Service, Bank Rakyat, Brandt International, IKEA, Lenovo, Manulife, MAS, Prasarana, Shangri-La Hotels, Telecontinent, Transcosmos, and others.

METHODOLOGY

About This Research

This report draws on a survey of contact centre leaders in Malaysia conducted between April and May 2026 by COPC Inc. in collaboration with the Contact Centre Association of Malaysia (CCAM). The survey ran online via SurveyMonkey, was distributed through the CCAM membership network and partner channels and remained open for about thirty-five days. Sixty-five usable responses were received after data cleaning and deduplication.

Sample composition

The 65 respondent organisations between them represent approximately 16,500 frontline contact centre agents based in Malaysia. About 11 of them are listed in the Contributors section at the end of this report. The sample is split between in-house contact centres and outsource service providers, with BPOs accounting for 38 percent of respondents (but a larger share, about 70 percent, of total frontline headcount). This reflects the structural reality of the Malaysian market, where a small number of large BPO operations operate alongside a much wider group of in-house centres.

The Study Sample, at a Glance

65 responding organisations, drawn from CCAM membership and partner networks

Approximately 16,500 frontline staff represented across the sample

Mix of operating models: in-house, captive, outsourced, and hybrid arrangements

Coverage across BPO, Banking and Financial Services, Insurance, Government and Public Service, Telecommunications, Retail and eCommerce, Travel and Hospitality, Technology, Transportation and Logistics, and Automotive sectors

Industry coverage

By response count, the largest industry segments are: BPO / Business Process Services (38 percent of responses), Government and Public Service (12 percent), Financial Services and Banking (9 percent), and Insurance (7 percent). Other sectors with meaningful representation include Travel, Retail, Telecommunications, Technology, and Automotive. By frontline headcount, the BPO segment dominates at 70 percent, followed by Travel and Hospitality, and Government and Public Service. Where useful, the report distinguishes BPO and non-BPO patterns. In general, the findings are applicable to contact centres for both BPOs and non-BPOs, including in-house centres and business services.

Survey design

The questionnaire covered eight broad themes: organisational profile and operating model, channels and transaction types, languages and onshore/offshore mix, technology stack and platform satisfaction, AI adoption and use cases, AI governance and safeguards, workforce impact and skill shifts, and strategic priorities over the next twenty-four months. Most questions were multi-select with mutually exclusive options; the survey also included a small number of open-text fields for AI use cases and qualitative feedback.

Where this report compares 2026 results to 2022 or 2024, the prior data points are drawn from the 2022 and 2024 COPC CCAM Industry Research Reports (also conducted by COPC Inc.). Where this report compares Malaysian results to a global benchmark, the comparison set is drawn from the COPC Global AI Deployment Research 2026, which surveyed contact centre operations across multiple regions, covering about 20 countries. Comparisons to Southeast Asia (SEA) and to consumer perspectives are drawn from the COPC-CCAM Consumer Research 2025-26, which is referenced inline at the relevant findings.

A note on interpretation

The sixty-five individuals and their organisations who participated in this study, in the context of the Malaysian contact centre industry, represent a substantial share of the operational footprint. Yet, these findings should be read as directional. Where percentage differences are within a few points, no conclusion is claimed. Where larger gaps appear, those are highlighted and interpreted. All percentages are computed on the full sample of valid respondents to a given question unless otherwise stated. Multi-select questions sum to more than 100 percent and are flagged where they appear.



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About CCAM

The Contact Centre Association of Malaysia (CCAM) was inaugurated in September 1999. Since then, it has been at the forefront of developing the local customer relationship management and contact centre industry in Malaysia. CCAM operates as a strategic think-tank, an educational platform, and a progressive establishment geared toward constantly improving the calibre of industry professionals.

The Association's main aim is to bring about multiple benefits for its members across professional development, research and development, statistical studies, and Malaysia-specific growth resources. CCAM membership spans organisations that own contact centres, organisations that use contact centres, and organisations that serve the contact centre industry from a broad range of vertical industries, including BPO, banking and financial services, insurance, telecommunications, government and public service, retail, technology, travel, transportation and logistics, and many others.

CCAM is an alliance member of the Contact Center Associations of Asia Pacific (CC-APAC), and chaired CC-APAC in 2010. Through its CX Malaysia chapter, the Association extends its work into the broader customer experience community, encompassing strategy, marketing, IT, HR, business transformation, sales, and customer service leadership.

CCAM's flagship programmes include the National Contact Centre Conference (NCCC), the CX Summit, the Industry Excellence Awards, the CC-APAC Regional Awards, and a range of training and development partnerships, most notably with COPC Inc. The Association is a registered non-profit organisation and operates from Plaza Kelana Jaya, Petaling Jaya, Selangor.

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About COPC Inc.

COPC Inc. is a global consulting firm that helps the world's largest customer-facing organisations improve operational performance, customer experience, and the effectiveness of their CX investments. Founded in 1996 by leadership from Microsoft, Dell, American Express, and other founding partners who came together to address the lack of objective standards in outsourced customer service, COPC has spent thirty years building, publishing, and refining the COPC CX Standard, now in its eighth release.

The COPC CX Standard provides a comprehensive framework for managing and improving customer experience operations, covering leadership, process management, people, performance, and continuous improvement. Release 8.0, published in January 2026, is the first edition of the Standard built specifically for environments in which the performer of customer-facing work may be a human, a system, or both. It is the most significant update to the Standard in thirty years.

COPC operates across six pillars of CX operational support:

- **CX Improvement Consulting:** implementing and executing CX plans, improving customer journeys, improving contact centre performance, interdisciplinary knowledge and operational expertise applied to technology solutions that deliver measurable value.
- **Strategic Sourcing Consulting:** building partnerships between clients and their vendors that are beneficial to both parties.
- **Training:** comprehensive, globally recognised, training courses based on COPC research, benchmarks, and the COPC CX Standard.
- **Research:** employee experience, customer experience, and competitive research to equip leaders with insights to guide decisions and strategies.
- **Certification:** rigorous certification programmes for organisations that demonstrate excellence in their operations.

COPC has worked with leading organisations in over seventy countries, and maintains regional operations across North America, EMEA, Latin America, and Asia-Pacific. The South Asia and ASEAN operations lead COPC's engagement with the Malaysian contact centre industry, including the long-standing partnership with CCAM that produced this report.

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Building Together

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