

WINSYM RESEARCH · STUDY 1 · RESEARCH DOSSIER 2026

AI AND JOBS IN MALAYSIA: WHO IS EXPOSED, HOW FAST, AND WHAT HAPPENS NEXT

Why near-full employment masks a structural break at the entry level, what the exposure studies do and do not measure, and where the evidence stops.

Reading edition of the research dossier · research status 11 October 2026 · not yet released

AT A GLANCE

LOW UNEMPLOYMENT, THIN ENTRY POINTS

Malaysia creates jobs. It does not create enough of the jobs its graduates trained for, and the junior tasks that used to be the way in are the ones generative AI handles first.

2.9%

unemployment, December 2025 (DOSM)

35.6%

of tertiary-educated workers in semi- or low-skilled jobs, 2.05 million people (2025)

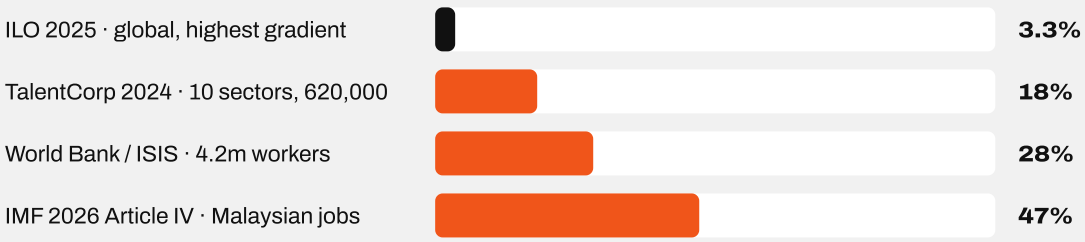
66.0%

of graduates aged 24 and under skill-underemployed (2024)

26%

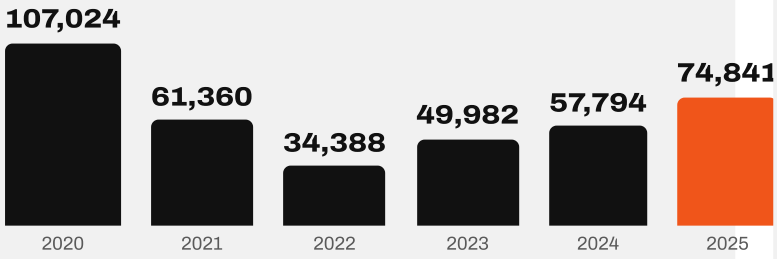
of new positions in 2025 were high-skilled, below the five-year average of 30% (BNM)

FIGURE 1 · FOUR STUDIES, FOUR DEFINITIONS OF EXPOSURE



Exposure is not displacement. None of these studies measures jobs lost. Sources: ILO WP140; TalentCorp impact study; World Bank / ISIS Malaysia working paper (2021 LFS microdata); IMF Staff Country Report 2026/055.

FIGURE 2 · EIS JOBLESS CLAIMS, 2020 TO 2025



The only official Malaysian displacement series. Insured workers only; cause by technology is not recorded. Source: BNM EMR 2025 (SOCSO EIS data).

FIGURE 3 · SINCE 2019

+9%

labour productivity

−1.7%

private-sector real wage per worker

The wage and productivity lines have separated. Labour share of GDP: 33.6% (2024). RMK-13 target: 40% by 2030. Sources: BNM EMR 2025; The Edge citing BNM; RMK-13.

This reading edition sets the complete research dossier of 11 October 2026: more than 250 fact rows from more than 60 sources, about half of them primary. It is the evidence base for the planned flagship study, not the flagship itself. Part I gives the overview, Part II the analysis, Part III the full fact table and source notes.

PART I · THE FRAMEWORK

THE ENTRY-LEVEL CLIFF AND THE COMPETENCY TRAP

State of AI work, talent and enterprise readiness in Malaysia 2026/27, in three panels.

1 TASKS, NOT JOBS: THE AUTOMATION VALUE MAP

Exposure is not displacement. Every role is a portfolio of tasks.

STRATEGIC VALUE OF THE WORK →

AUGMENT, DO NOT AUTOMATE

HUMAN EDGE

High value, hard to automate. Complex judgement, client trust, care, leadership, negotiation. AI helps; it does not replace.

- **Clinicians and care** · judgement and regulation (MMC)
- **Senior consultants, partners** · trust and liability
- **CEO and leadership** · accountability

+15% TO +40% MEASURED OUTPUT (QJE, BCG)

AUGMENT

High value, AI-ready tasks. AI does the scaffolding; skilled people review, decide and own the outcome. The wage-premium zone (PwC Malaysia: 62% average, 66% in finance).

- **Customer-support agents** · novices +30–35%
- **Junior accountants, analysts** · faster, reviewed output
- **Software engineers** · 55.8% faster (Copilot RCT)

FIX THE PROCESS FIRST

NEITHER VALUABLE NOR AUTOMATABLE YET

Messy physical admin, broken handoffs, undocumented process. Fixing these releases more capacity than any licence.

- **Chaotic internal processes** · the SME reality without an ERP

−23.6% AI-DEVELOPER POSTINGS (PWC MALAYSIA, 2025)

AUTOMATE

Low value, AI-ready. Routine, structured, screen-based tasks: the clerical cluster the ILO measures as most exposed. Automate deliberately; retrain the people.

- **Data entry, document processing**
- **Telemarketing, routine verification**
- **Junior drafting and boilerplate**

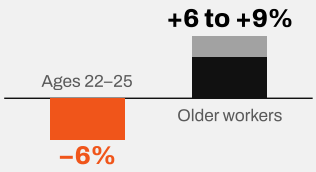
LOW AUTOMATION POTENTIAL

HIGH AUTOMATION POTENTIAL →

2 THE ENTRY-LEVEL CLIFF

Three independent measurements. Malaysia has no official entry-level hiring series, so no line is drawn between them.

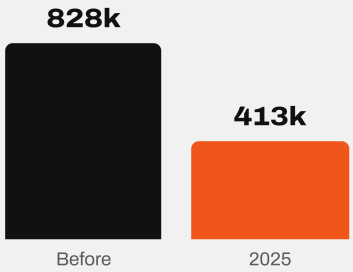
UNITED STATES · LATE 2022 TO SEP 2025



Employment in the most AI-exposed occupations. Relative decline for early-career workers: **16%**. The adjustment runs through hiring, not firing.

Stanford Digital Economy Lab, ADP payroll data

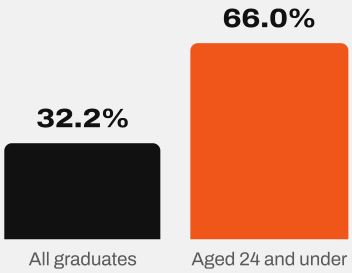
MALAYSIA · JOB POSTINGS 2021 TO 2025



Postings in the most AI-exposed quarter of occupations halved. AI-developer roles **–23.6%**, AI-user roles **+6.9%** in 2025.

PwC AI Jobs Barometer, Malaysia data. Postings, not hires.

MALAYSIA · GRADUATES 2024



Skill-related underemployment: graduates working below their qualification level. Across all tertiary-educated workers in 2025: **35.6%**, 2.05 million people.

DOSM Graduates Statistics 2024; DOSM labour market review 2025

3 THE COMPETENCY TRAP: FOUR STAGES OF ENTERPRISE AI

Malaysia AI Literacy & Execution Index, a winsym Research framework.

01 AD-HOC AND SHADOW AI

Staff use private tools informally. No policy, no training, no measurement. Data exposure risk; capability stays invisible.

The governance gap: the most common starting point

02 TOOL ADOPTION

Licences distributed, guidelines drafted. Processes unchanged, return not measured. This is where most enterprise AI programmes stall.

MIT NANDA: 95% zero measurable return, 5% reach production

03 AUGMENTED WORKFLOW

Staff orchestrate AI inside redesigned workflows. Time savings are tracked at team level. The measured performance zone.

QJE +15% (call centre), BCG 25.1% faster, novices +30–35%

04 STRATEGIC INTEGRATION

Measurable business value, protected data architecture, roles redesigned around AI. New tasks replace automated ones.

The Acemoglu test: do new tasks grow back?

PART I · VERIFICATION

THE TEN NUMBERS CHECKED TWICE

First check: the research agent on the page. Second check: the lead researcher re-opened the page on 11 October 2026.

(First check: research subagent on the page. Second check: lead researcher re-opened the page 11 Oct 2026 — see `notes/verify-*.txt`.)

#	NUMBER	SOURCE (PAGE RE-OPENED BY LEAD RESEARCHER)	SECOND-CHECK RESULT
1	**~620,000 jobs (≈18% of the 3.5m in 10 sectors) "highly impacted" over 3–5 years** — exposure, not displacement	talentcorp.com.my/impact-study/ (18% quote) + theedgemalaysia.com/node/734414 (620,000, 3.5m base)	✅ both re-opened; quote verified: *"Approximately 18% of the workforce within the analysed sectors is projected to be significantly affected"*
2	**4.2m Malaysian workers (28% of labour force) "highly exposed" to generative AI** (World Bank/ISIS task-based study, 2021 LFS microdata)	documents1.worldbank.org/curated/en/099092325013010451	✅ re-opened by subagent with verbatim quote; WB publication page re-opened (2026 projection 4.4%)
3	**Unemployment rate 2.9% (Dec 2025); 3.0% annual 2025**	dosm.gov.my/portal-main/release-content/labour-force-statistics-december-2025	✅ re-opened: *"The unemployment rate in December 2025 was unchanged at 2.9 per cent"*
4	**Skill-related underemployment: 2.05m tertiary graduates in semi-/low-skilled jobs, 35.6% of tertiary employed (2025)**	DOSM annual media statement PDF (file_20260626182921.pdf)	✅ re-opened (childA quote); DOSM Graduates 2024 PDF independently re-opened: underemployment series 2024 = 1.60m / 32.2%
5	**ILO 2025: 1 in 4 workers worldwide in an occupation with some GenAI exposure; 34% of employment in high-income vs 11% in low-income countries; only 3.3% in the highest gradient**	ILO WP140 PDF + Research brief 2025 (both opened; key lines read twice independently)	✅ WP140 re-opened by lead researcher: *"one in four workers are in an occupation with some GenAI exposure"*, *"11% of total employment in LICs vs 34% in HICs"*
6	**IMF: 47% of Malaysian jobs rated high-exposure to AI (2026 Article IV)**	elibrary.imf.org/view/journals/002/2026/055	⚠️ subagent verified on page; lead researcher's second check reached only the metadata page (body paywalled) — treat as single-page verification, cross-checked against IMF's 60/40/26 AE/EM/LIC global figures (verified on imf.org blog)
7	**AI Nation 2030 target: up to 300,000 new jobs attributable to AI by 2030; +1.2 p.p. GDP**	AI Nation 2030 PDF (strapi.naio.okie.my) — official Ministry of Digital	✅ re-opened by lead researcher; quotes verified

#	NUMBER	SOURCE (PAGE RE-OPENED BY LEAD RESEARCHER)	SECOND-CHECK RESULT
8	**HRD Corp approved RM2.62bn in training financial assistance in 2025; AUM RM4.16bn; >2.8m training places**	hrdcorp.gov.my news release	✅ re-opened: *"approved RM2.62 billion in financial assistance"*
9	**US 2025: 1,206,374 announced job cuts (+58%); AI cited for 54,836 of them (4.5%); 71,825 since 2023**	challengergray.com year-end report (published 8 Jan 2026)	✅ re-opened: *"AI has been responsible for 54,836 announced layoff plans"*
10	**Stanford (ADP data): early-career workers 22–25 in most AI-exposed occupations: 16% relative employment decline**	digitaleconomy.stanford.edu Canaries PDF (Nov 2025)	✅ re-opened by lead researcher: *"Early-career workers (ages 22-25) in AI-exposed occupations experienced 16% relative employment declines"*

Other numbers verified 2× along the way: EIS jobless claims 74,841 (2025) and the 2020–25 series (BNM EMR 2025 ch.1, re-opened by subagent; series confirmed in their quote table); Challenger monthly (Dec 35,553; Nov 71,321); TalentCorp contradiction 697,000 jobs (HR Minister, Parliament, June 2026 — lead researcher re-opened The Edge node/808082: *"a TalentCorp study found approximately 697,000 jobs are at risk"*).

PART II · ANALYSIS

TEN MYTHS, CHECKED

Claims that are wrong, exaggerated or untraceable, with the evidence against them.

1. **"620,000 jobs will be lost to AI in Malaysia."** The study says *highly impacted* = "at risk of convergence or displacement" over 3–5 years *within 10 named sectors*, i.e. 18% of 3.5m in those sectors — not national job losses A1-TC3. The Edge's own headline says "at risk of convergence or displacement **if they do not reskill**". Media converts exposure into loss; the study's own medium-impacted bucket (another 1.8m/53%) is almost never reported.
2. **"Nearly 700,000 jobs at risk" (2026 Parliament figure) contradicts the study.** Both are TalentCorp figures at different phases: 620,000 = Phase 1, 10 sectors (2024); 697,000 = later phase, broader scope (MalayMail: 22 sectors, 120 new roles) A1-TC7, G9. Same exposure concept, different denominator — not a correction of the first number.
3. **"AI is causing Malaysia's 2026 retrenchment surge."** Official attribution: 40.85% of the 42,807 losses (Jan–12 Jun 2026) were business closures and downsizing; the HR Minister explicitly rejected AI as the primary cause A1-PS1. Retrenchments are up (+38% EIS applications) but the recorded causes are closures, restructuring and cost-cutting — the closest AI-linked case (Shopee) is a parent-company investor narrative F3-07.
4. **"The ILO says 82% of clerical jobs will be automated" / "27% of jobs at high risk".** The 2023 ILO numbers: 24% of clerical *tasks* highly exposed (+58% medium) and 5.5%/5.1% of HIC employment in high-automation exposure (two different ILO documents disagree; F1-04). Exposure of tasks ≠ loss of jobs; the 2025 update *lowered* the top scores F1-05.
5. **"WEF: 92 million jobs will be destroyed."** The 2025 report projects 92m displaced **and** 170m created → net **+78m (+7%)**; it is a survey of employer expectations, not a forecast F1-09.
6. **"Challenger: AI caused 1.2 million layoffs" (a common 2026 mash-up).** Total announced US cuts were 1,206,374, but AI was cited for **54,836 (4.5%)**; "AI-cited" is the employer's stated reason and has only been tracked since 2023 F2-07.
7. **"Malaysia is losing the AI jobs race — data centres create almost no jobs."** Two true halves, one wrong conclusion: official claims are 7,561 "high-skilled" jobs for RM182.96bn of approved investment (≈RM24m per job — objectively tiny) F3-09, and independent estimates of 50–200 jobs per site imply 2,500–10,000 total E8/E9. But data centres also buy power/water and anchor adjacent digital services; the *jobs* claim is weak, the *economic* claim is broader than jobs. The "few jobs" critique is correct on jobs-per-ringgit; it is not evidence about the wider AI economy.

8. **"AI is already everywhere in Malaysian companies" (from IT-vendor surveys: 81% of MSMEs use AI, 84% of workers use AI…).** All are vendor self-selected surveys (Xero, Microsoft, Red Hat — VENDOR CLAIMS). Independent check: 95% of enterprise GenAI programmes globally get zero measurable return F2-11 and Malaysian SME adoption survey results range from 38% to 81% depending on who asked (F3 [Study 2]). Treat adoption claims as marketing until an official statistic exists.
9. **"Government will create 300,000 (+500,000) AI jobs."** These are aspirational *targets* (AI Nation 2030: "up to 300,000 new jobs **attributable to AI**"; MD2030: 500,000 digital jobs) with no published methodology, overlapping scopes, and no baseline A1-GV1/6. PwC's measured Malaysian reality so far: AI-user roles +6.9% (+~1.8k jobs) in 2025 and AI-developer roles **down** 23.6% F1-12. Targets ≠ forecasts.
10. **"Low unemployment (2.9–3.0%) means the labour market is fine."** BNM explicitly says slack persists A1-BN5; 35.6% of tertiary workers are skill-underemployed A1-DS4; youth 9.6% A1-DS2; the median citizen wage is RM2,793 while the graduate median is RM4,521 — the *quality* of jobs is the Malaysian problem, not the count A1-DS6/7.

PART II · ANALYSIS

SECTOR BY SECTOR

Sources in brackets are the IDs from the fact table.

Shared services / GBS / BPO

- **Size:** >600 GBS firms, >250,000 staff, RM33.1bn exports (TalentCorp GBS volume, 2022 data); GBS industry revenue US$4.95bn (2022) → US$6.7bn expected 2025 A1-MD1. MDEC: GBS cluster 838 companies / RM288.05bn approved / 58,166 jobs within Malaysia Digital (2H2022–2H2025) A1-MD2. Earth's most AI-relevant sector: highest number of skills mapped in the TalentCorp study (200) A1-TC21; GBS among sectors with higher AI adoption A1-TC22.
- **What is exposed:** clerical, data entry, customer service, finance & accounting processing — the canonical ILO-clerical exposure cluster F1-03, F1-04; World Bank/ISIS find clerical workers in the top exposure quartile A1-WB3.
- **What has happened so far:** no Malaysian GBS mass layoff attributed to AI found in this research. GXS Bank's 82 roles were "build-to-run", not AI F3-08. CIMB explicitly avoids manpower cuts via automation F3-04. TalentCorp schools the sector's transition with 200 mapped skills A1-TC21.
- **Plausible by 2030:** the QJE call-centre result (+15% productivity, novices +30–35%) F2-08 implies headcount *growth* is where AI bites — fewer hires per volume, not mass firings; wage growth in FS is already highest-premium (66%) F1-12. Expect role redesign (agent→supervisor-of-AI) rather than elimination; MDEC/MD2030 targets for digital jobs assume GBS growth A1-GV6.

Banking and insurance

- **Size:** employment not broken out by an opened source (GAP). BNM: 71% of banking institutions and 77% of insurance operators already use AI V5 — Child-C note, financial-sector survey.
- **What is exposed:** back-office processing, credit analysis, compliance reporting — PwC gives FS the highest AI wage premium (66%) F1-12.
- **What has happened:** CIMB: cost-to-income −200bp via process simplification + technology, explicitly not headcount F3-04; Maybank IB documents that >50% of retrenched workers 2021–25 were high-skilled A1-PS4 — the sector's automation is visible in recruitment patterns, not public layoffs. GXS Bank 82 roles F3-08.
- **Plausible by 2030:** branch/processing roles shrink via attrition; AI-augmented advisory grows. IMF flags Malaysian AI-exposed workers in low-complementarity roles F1-08 — banks are where complementarity (data-rich, high-skill) is highest, so relative winners.

Retail and wholesale (incl. e-commerce)

- **Size:** largest services employer in Malaysia (Wholesale & retail trade leads services employment growth, A1-DS1 file detail); Cisco model: wholesale/retail is an ASEAN net job *gainer* (+1.8m FTE by 2028, pre-genAI) F1-14 .
- **What is exposed:** cashiers, sales assistants, admin (WEF fastest-declining roles: cashiers, admin assistants — F1-25); DOSM's largest occupation group (sales & services, ~1/4 of employment) at higher automation risk A1-KR1 .
- **What has happened:** Lazada 5% SEA retrenchment (Jun 2026, "business needs") F3-06 ; Shopee developer cuts tied to AI pivot F3-07 ; Grab 1,000 (2023, post-COVID) F3-05 .
- **Plausible by 2030:** WEF sees clerical/secretarial as the largest global decline F1-25 ; PwC shows Malaysian postings already falling in the most-exposed quartile (–50%, 828k→413k) F1-12 — the demand signal is already moving.

Manufacturing and E&E

- **Size:** 16.3% of employment (2025) A1-DS2 ; E&E exports +11% Q4 2025 driven by AI-related demand; global semiconductor sales +25.6% in 2025 A1-BN11, A1-WB file .
- **What is exposed:** routine assembly/clerical-adjacent roles; semi-skilled plant & machine operators are 57% semi-skilled economy context A1-DS3 .
- **What has happened:** Intel Penang US$7bn pause and >2,000 "at risk" — but cause was capex, not AI F3-02 ; PETRONAS (energy) >5,000 — oil price F3-01 . Manufacturing = 20% of 2026 retrenchment cases A1-PS3 .
- **Plausible by 2030:** manufacturing is a *beneficiary* of AI demand (chips/data centres) per BNM and World Bank — more exposed to the boom than to displacement; the risk is role mix (fewer operators per output) rather than sector shrinkage.

ICT

- **Size:** smallest subset of employment but the skill hub; MDEC: Malaysia Digital projects 114,854 jobs, 97% knowledge workers A1-MD2 .
- **What is exposed/actually happening (market signals):** PwC Malaysia: AI-developer roles **–23.6%** in 2025 while AI-user roles +6.9% F1-12 ; Shopee developer cuts F3-07 ; QJE/BCG/Copilot show large task-level productivity gains F2-08/09/10 → fewer junior-coder hires per output; Anthropic: coding = ~34% of Claude usage, falling from 40% F2-03 . Reddit r/malaysia threads (CS graduates' job struggles) match the demand drop (Public Questions §8).

- **Plausible by 2030:** junior entry-point compression (Stanford's 16% entry-level decline pattern — F2-01) most visible in tech-adjacent roles; emerging-role growth (AI engineers etc.) won't absorb 1:1 (TalentCorp: 60 emerging roles vs 949 studied — A1-TC5).

Professional services (legal, accounting, audit)

- **What is exposed:** document review, bookkeeping, junior drafting — the BCG experiment shows +40% quality inside the frontier F2-09; ILO's clerical cluster F1-03. PwC premium 62% avg F1-12.
- **What has happened:** no Malaysian Big-4 layoff attributed to AI was found (GAP); global pattern is "fewer junior hires, same output" (Challenger AI-cited cuts in US tech; F2-07).
- **Plausible by 2030:** the "experience bottleneck" — the QJE result (novices gain most) F2-08 means firms' training pipelines change; entry hiring thins; the BCG "outside-the-frontier is worse" caution F2-09 limits full displacement.

Public sector

- **Size:** ~1.8 million+ civil service (approx; not opened — GAP).
- **Targets:** AI Nation 2030: free 30% of civil-servant capacity from repetitive tasks (35% over ten years) A1-GV2; +45% citizen satisfaction, 20–30% lower delivery costs A1-GV2. Budget 2026/27 fund AI tooling.
- **Reality check:** US government (DOGE) was the largest single reason in Challenger's 2025 data (293,753 cuts) — a caution on how governments implement "efficiency" F2-07. Malaysian civil service has no published AI-displacement figure; "30% capacity freed" is a target, not a plan.
- **Plausible by 2030:** attrition-led shrinkage + task automation; watch for the promised AI Malaysia programme for 100,000 young people A1-GV3.

Education

- **Size:** schooling/training = 40.9% of those outside the labour force (7.23m) A1-DS6 file — the pipeline problem.
- **What is exposed:** not educator jobs — the *value* of credentials: 66.0% of graduates under 24 are skill-underemployed A1-DS5; 32.2% graduate underemployment A1-DS5; CNA: >65% of fresh graduates earn less than RM3,000 G8, secondary; KRI: MBOT/TVET mismatch A1-KR5/6. Education content itself: KPM national AI literacy guide (SPI Bil.2/2026), MQA advisory note 2023 B1/B2 — Study 2 file.
- **What has happened:** HEIs drafting AI-use policies (piecemeal; B3 secondary); DOSM shows graduates flooding semi-skilled work A1-DS22/23.

- **Plausible by 2030:** credential inflation accelerates; course-level return gaps widen (see Study 2 runner-up); teachers/lecturers least-exposed occupationally (WEF: education roles in net-growth list — F1-24 file).

Healthcare

- **What is exposed:** administrative/medical-records roles (clerical cluster, F1-03); clinical roles *least* exposed per occupational exposure literature but subject to MMC guideline V1/2025 D1 — Study 2 file ; PwC health premium 41% F1-12 .
- **What has happened:** MOH diagnostic pilots (lung nodule AI, DR.MATA, AskCPG; D2); no documented AI-driven clinical job losses in Malaysia.
- **Plausible by 2030:** augmentation-first; healthcare is Malaysia's clearest "AI-helps-scarcity" sector (doctor shortage), which changes the displacement calculus (identity of labour scarcity matters — a point the exposure indices ignore).

Logistics

- **Size:** part of services 66.1%; gig/own-account +6.4% A1-BN6 .
- **What is exposed:** dispatch, warehouse clerical; Cisco model: some logistics roles in net-loss zone by 2028 F1-14 file .
- **What has happened:** none documented in Malaysia (GAP). Plausible by 2030: task augmentation (route optimisation, chatbots), gig platform shifts.

Media and creative

- **What happened:** Astro VSS RM52m, ~20% headcount (FY24) — automation named as savings enabler, corporate-services focus F3-03 . Anthropic: creative/production use-cases among top Claude tasks; writer/editor augmentation visible in usage data F2-03 file .
- **Plausible by 2030:** the "mid-level squeeze" — junior writing/design entry roles compress (consistent with Stanford entry-level finding, F2-01).

Gig work and informal

- **Size:** informal employment 19.8% (2025) A1-DS8 ; own-account workers 3.27m and growing +6.4% A1-BN6 ; Gig Workers Bill covers ~1.2m (7%) A1-BN7 .
- **What is exposed/actual:** gig work is the *safety net* absorbing labour market shifts (BNM, A1-BN6) — including, plausibly, workers displaced from formal roles (not directly measured — GAP). KRI: freelancers remain vulnerable (A1-KR file; The Star 2026).
- **Plausible by 2030:** AI raises gig-platform efficiency and precariousness simultaneously; no Malaysian data on AI exposure of gig workers exists (GAP).

PART II · ANALYSIS

ROLE BY ROLE

Most exposed roles (source IDs): clerical & secretarial (ILO top cluster — F1-03/04; WEF largest declines — F1-25); cashiers & sales assistants F1-25 ; admin assistants, data entry & bookkeeping F1-03, A1-WB3 ; customer-service agents (F2-08 shows the productivity jump that suppresses hires); junior coders/entry IT (PwC dev roles –23.6% — F1-12; Stanford 16% entry-level — F2-01); accountancy/audit juniors, legal document review F2-09 ; telemarketing & routine structured jobs A1-WB2: ≥40% substitutable tasks . Typical Malaysian salaries where sources exist: semi-skilled clerical RM2,931 mean A1-DS35 file ; semi-skilled graduate median RM2,550 A1-DS6 ; low-skilled RM1,990 A1-DS6 .

Least exposed roles (source IDs): manual/physical & outdoor work (A1-WB2: structured screen-based tasks; ILO low gradients for physical tasks — F1-02 file); care & health touch roles, teachers (WEF net-growth lists — F1-24/25); agriculture & construction operators (Cisco: agriculture exposed to *other* tech but not genAI substitution — F1-14); roles requiring complex judgement/social-emotional skills A1-WB6 — expected premium . Caveat: least *exposed* ≠ safe from labour-market churn. **Emerging roles (source IDs):** 60 roles from TalentCorp — AI engineers, sustainability specialists, bio-process engineers A1-TC6 ; 43 (72%) AI/digital, 11 green, 6 new-tech A1-TC6 ; WEF fastest-growing: Big Data Specialists, Fintech Engineers, AI & ML Specialists, Software & Application Developers F1-24 ; AI-user roles (+6.9% in Malaysia, F1-12). Salary evidence: AI-skills premium 62% avg, 66% finance F1-12 ; AI-fluent junior RM6,500–9,000 vs general junior RM3,500–6,500 G14 — vendor claim, Sigma School .

PART II · ANALYSIS

TIMELINE 2020 TO 2030

Dated Malaysian events verified in this research.

DATE	EVENT	SOURCE ID
Nov 2020	KRI "Work in an Evolving Malaysia" — sales & services ~1/4 of jobs at higher automation risk	A1-KR1
Nov 2022	ChatGPT launches (global anchor)	F2-12
Jun 2023	Grab cuts 1,000 jobs (~11%) — post-COVID normalisation	F3-05
2023	MQA Advisory Note on generative AI in higher education	B2
c. 2019 (year not stated in source)	KRI discussion paper (Allen Ng): >half of jobs high automation risk over ~20 years (semi-skilled hardest)	A1-KR2
7 Mar 2024	KESUMA mandates TalentCorp as its strategic think tank	A1-TC1
Apr–Sep 2024	TalentCorp Phase 1 study fieldwork	A1-TC file
Q3 2024	Intel pauses US$7bn Penang packaging; >2,000 at risk	F3-02
2024	HRD Corp levy collection RM2.33bn; claim disbursement RM1.99bn	A1-HR2
Nov 2024	TalentCorp study launched (17–19 Nov): 620,000/18% highly impacted; MyMahir	A1-TC2/3
Dec 2024	Microsoft AIForMYFuture: skill 800,000 by end-2025; RM9.6bn commitment	F3-12, A1-TC23
Feb 2025	Minimum wage RM1,500→RM1,700; Intel Penang project on indefinite hold (200 engineers to New Mexico)	A1-BN10; F3-02
Mar 2025	IMF 2025 Article IV: AI-preparedness good, low complementarity warning	F1-08
May 2025	ILO updated GenAI exposure index (WP140) published	F1-01
5 Jun 2025	PETRONAS announces >5,000 cuts (~10%), freeze to Dec 2026	F3-01
Jul–Aug 2025	NVIDIA–YTL RM10bn AI infrastructure (Kulai); DayOne ~1,000 direct/5,000 indirect jobs; Johor 42 DC projects RM164.45bn	F3-09/10/11
Aug 2025	TalentCorp/620,000 presented in Parliament with 60 emerging-role split	A1-TC6
2025	Gig Workers Bill passed (~1.2m covered); EIS claims 74,841; HRD Corp RM2.62bn; BNM: high-skilled = 26% of new jobs	A1-BN7/4; A1-HR1; A1-BN8
3 Dec 2025	GXS Bank cuts 82 roles (not AI-stated)	F3-08
Jan 2026	HRD Corp reports RM2.62bn 2025 approvals; Challenger year-end: AI cited 54,836 of 1.2m US cuts	A1-HR1; F2-07

DATE	EVENT	SOURCE ID
Feb 2026	IMF 2026 Article IV: 47% of Malaysian jobs "high exposure"; DOSM Dec 2025: unemployment 2.9%	F1-07; A1-DS1
1 Jan–12 Jun 2026	42,807 job losses recorded; minister rejects AI as primary cause	A1-PS1
May 2026	Malay Mail: TalentCorp Phase 2 — ~697,000 jobs, 22 sectors, 120 new roles	A1-TC7/G9
23–24 Jun 2026	Lazada retrenches 5% of SEA workforce (incl. MY)	F3-06
29 Jun 2026	Malaysia Digital 2030 launched: 500,000 digital jobs target	A1-GV6
10 Jul 2026	AI Governance Bill public consultation (NAIO)	V1
Aug 2026	AI Malaysia replaces NAIO; "60 months" countdown; CIMB: no manpower cuts, AI-led simplification; Maybank IB: ~39,000 retrenched Jan–May 2026 (+36%)	A1-GV3; F3-04; A1-PS4
Sep 2026	PM: AI drive to create 300,000–500,000 new jobs; GDP +0.8–1.2pp (RM13–20bn/yr)	G15
Oct 2026	Budget 2027: 200,000 AI-skilled individuals; 100,000 free AI subscriptions	A1-GV7
Announced milestones to 2030	AI Nation 2030: 300,000 AI-attributable jobs, +1.2pp GDP, Global AI Index top 10, 30% civil-service capacity freed; RMK-13: COE 40% of GDP, productivity 3.6%/yr, GNI RM77,200; MD2030: 500,000 digital jobs, digital economy 30% of GDP	A1-GV1/2/4/6

PART II · ANALYSIS

THREE SCENARIOS TO 2030

As found in the literature. Not a winsym forecast.

Scenario A — Slow / "no measurable disruption so far" (assumptions: adoption stays shallow where it doesn't pay; enterprise pilots fail at scale; regulation slows deployment). Evidence basis: Yale Budget Lab (no aggregate US disruption 33 months after ChatGPT; F2-04); Danish worker-level "precise zeros" F2-05; MIT NANDA 95% zero-return F2-11; McKinsey >80% no EBIT impact F2-12; BNM's own reading of Malaysia — slack persists, high-skilled jobs only 26% of new hires A1-BN8. In this scenario Malaysia's labour market looks much like 2025: 2.9–3.0% unemployment, structural underemployment 35%+, AI visible in postings and premiums, not in mass displacement.

Scenario B — Medium / "transformation, not displacement" (TalentCorp–WEF middle) (assumptions: 3–5 year adjustment window; reskilling works partially; employers pivot roles rather than cut). Evidence basis: TalentCorp's own framing — 620,000 (18%) highly impacted requiring pivot, 1.8m (53%) affected overall, 60 emerging roles, 84 mapped transitions A1-TC3/4/5; WEF global net +7% with 22% churn F1-09; PwC: productivity growth but *growing* employment in most AI-exposed occupations F1-29/30; Anthropic's flip to augmentation-led usage F2-03; IMF framing of exposure with uplift potential for half of jobs F1-06. Malaysian government plans (RMK-13, AI Nation 2030, Budget 2026 training funds) are all built on this assumption.

Scenario C — Fast / "entry-level squeeze arrives" (assumptions: capability keeps compounding (SWE-bench 4.4%→71.7% in a year — Stanford); employers substitute junior work at scale; US/global patterns transmit to Malaysian GBS/ICT within ~2 years). Evidence basis: Stanford entry-level −16% relative decline F2-01; Amodei's "roughly 50% of entry-level white-collar jobs within five years" (a prediction quoted inside the Stanford paper — F2-05); PwC Malaysia's already-falling top-quartile-exposure postings (−50%, 828k→413k) and −23.6% AI-developer jobs F1-12; Challenger's AI-cited share rising since 2023 F2-07; Clerical concentration of Malaysian employment (57% semi-skilled; A1-DS3) makes Malaysia's exposure profile more front-loaded than the US in clerical-adjacent GBS roles. Counterweight embedded in the same scenario: MIT NANDA F2-11 shows most enterprise attempts fail — fast *capability* doesn't mean fast *deployment*.

PART II · ANALYSIS

KNOWN, CONTESTED, NOT MEASURED

Known (well-evidenced): unemployment 2.9–3.0% with youth 9.6% and massive underemployment (35.6%; graduates under 24: 66.0%) A1-DS1/2/4/5; wage-productivity decoupling since 2019 A1-BN3; exposure estimates: TalentCorp 18% (10 sectors), WB-ISIS 28% high exposure, IMF 47% F1-07, A1-WB1; EIS claims trending up from 2024 (74,841) and 2026 surge (42,807 in 5.5 months) A1-BN4, A1-PS1; government targets (300,000 AI jobs; 500,000 digital jobs; +1.2pp GDP) A1-GV1/6; AI wage premium exists and is large in finance F1-12; international evidence of small-to-date-but-entry-level-concentrated effects F2-01/04/05.

Contested: will exposure translate to displacement — ILO/WB-ISIS say exposure≠loss F1-01, A1-WB1 vs Stanford entry-level decline F2-01 vs Danish firm-level 6–9% below-trend F2-06; how many jobs "620,000 vs 697,000" (A1-TC3/7 — TalentCorp Phase 1 vs Phase 2 scope, never reconciled publicly); whether HRD Corp training converts to jobs (outputs measured in places: 2.8m — A1-HR1); Microsoft/LinkedIn usage claims (vendor) vs MIT zero-return F2-11; whether 2026 retrenchments have an AI component — Minister says no A1-PS1, Shopee/Sea says yes for its case F3-07. **Not measured (no Malaysian data exists — the gaps that matter):**

1. No official Malaysian count of jobs lost *because of AI* — PERKESO/SOCSO does not record cause-of-displacement by technology; the Minister explicitly declined to attribute A1-PS1.
2. No Malaysia-specific genAI exposure index on current (post-2024) labour data — WB-ISIS uses 2021 LFS A1-WB1; ILO/IMF use global occupation mappings F1-01/07.
3. AI adoption rate of Malaysian *firms* from official data — every national number comes from vendor surveys (Xero 81% MSMEs [F1 — Study 2], Red Hat/NAIO 44% expect growth [F2], national 38% 2026 [F3] — all vendor claims).
4. Wage effects of AI at Malaysian firm level — the PwC premium is demand-side (postings).
5. Retraining→employment conversion: HRD Corp publishes places and claims (2.8m; RM2.62bn) not job-outcome rates A1-HR1; PACE/PTPK similar.
6. Graduate outcomes by field of study × AI exposure — DOSM field tables sit behind eStatistik; not published in press releases A1-DS5 note.
7. GBS/BPO headcount change attributable to automation (sector revenue data exists; jobs data is approvals-based and announced — A1-MD1/2).
8. Gig/informal workers' AI exposure — DOSM's informal series A1-DS8 has no AI dimension.
9. Data-centre actual employment (Johor): only state *claims* (7,561 for RM182.96bn) and company projections exist F3-09/10.
10. WEF Malaysia profile does not exist F1-10; ILO has no ASEAN number F1-15 file.

PART II · ANALYSIS

WHAT HELPS

Evidence-based against plausible, for workers, students and parents, employers and government.

Workers

- *Evidence-based:* switching with the AI wave pays — Danish workers who moved into AI-using jobs later earned ~12pp more than stayers F2-05. Augmentation beats automation for your own job: 52% of Claude usage is augmentation F2-03; users inside the AI frontier gain 12–40% productivity F2-09 — learning to delegate to AI demonstrably raises output per hour.
- *Plausible (not yet measured in MY):* MyMahir's 84 transition pathways A1-TC5 and Jelajah AI MyMahir's ~22,000 advertised opportunities A1-PS10; EIS-funded retraining (training fees to RM7,000, JSA 3–6 months — A1-PS5).

Students & parents

- *Evidence-based:* degree value is thinning fastest at entry: 66% of under-24 graduates are skill-underemployed A1-DS5; underemployed graduates' wage penalty 49.3% A1-WB5; yet the degree premium persists in median data (RM5,724 degree vs RM3,390 diploma; A1-DS6). Danish 41% of exposed-occupation workers already use ChatGPT at work F2-20 file. Implication (evidence-traceable): choose courses with data/professional augments; expect a longer ramp.
- *Plausible:* KPM's national AI-literacy guide (SPI Bil.2/2026 — B1) and MQA's 2023 advisory note are the formal anchors but implementation is university-by-university B3, secondary.

Employers

- *Evidence-based:* AI assistance raises output 12–40% for typical tasks (call centre +15%, novices +30–35% — F2-08; BCG +12.2% tasks → 25.1% faster, +40% quality — F2-09; coding +55.8% — F2-10), but 95% of enterprise programmes return zero F2-11 — the difference is deployment discipline (start inside the frontier; 67% success with vendor partnerships vs 33% internal — F2-11). Malaysian tax lever exists: 50% additional deduction for MSME AI & cyber training A1-GV5.
- *Plausible:* HRD Corp levy-funded training is the cheapest vehicle (RM2.62bn approved 2025 — A1-HR1) but outcome data (jobs) is unpublished — demand outcome reporting before scaling.

Government

- *Evidence-based:* the policy architecture is already large: Budget 2026 ~RM5.9bn AI + RM1.828bn HR ministry + RM3bn levy-funded 3m training opportunities + PTPK RM650m (AI/EV/semiconductor) + TVET RM7.9bn A1-GV5 ; RMK-13 productivity 3.6%/yr and COE→40% targets A1-GV4 . What's missing is measurement: no official AI-adoption statistic and no training-to-job conversion metric — both are buildable from existing EIS/SOCSO and HRD Corp data.
- *Plausible:* AI Nation 2030's 30% civil-service capacity target A1-GV2 and Budget 2027's 200,000 AI-skilled target A1-GV7 — credible only if tied to the same measurement regime.

PART II · ANALYSIS

WHAT MALAYSIANS ACTUALLY ASK

The 25 most frequent real questions from Malaysian discussions, verbatim, with the thread they come from.

Collected from r/malaysia, r/malaysiauni, r/malaysians, r/MalaysianPF, r/Bolehland, Lowyat.NET (see `notes/childC-public-questions.md` for the full 34-item bank; `[paraphrased]` marks a comment-level question).

Degrees & courses under AI

1. "3 Uni degrees most at risk due to A I, in 2026." — r/malaysiauni — reddit.com/r/malaysiauni/comments/1oejek7/
2. "Is an AI degree bad?" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1faauxt/
3. "Degree in AI" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1memno0/
4. "software engineering or ai" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1j8soqu/
5. "what degree should i take and avoid" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1jcxf5u/
6. "Courses/Jobs that is highly demand in the coming years" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1jpbr6i/
7. "What degree should I study?" — r/malaysia — reddit.com/r/malaysia/comments/18wi1cg/
8. "To Malaysian who studied Computer Science: how's ur life" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1sjb9y9/
9. "Computer science graduates, did you get the job ?" — r/malaysia — reddit.com/r/malaysia/comments/1vebm4o/
10. "What to study" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1sc4fle/
11. "Parents fav medicine or should I go a bit unconventional to finance?" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1lqnkvm/
12. "Should i go to BAC or stay in STPM" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1mggduj/

Jobs under AI 13. "I Looked Up Which Jobs AI Has Already Started Replacing In Malaysia" (thread) — r/malaysia — reddit.com/r/malaysia/comments/1u1ojoy/ 14. "[paraphrased] Do these AI-jobs reports count subscription-based or token-based AI billing?" (comment) — r/malaysia — reddit.com/r/malaysia/comments/1u1ojoy/ 15. "For Local People Malaysia Anyone with Diploma IT cant get a job due AI and dont have Degree?" — r/malaysians — reddit.com/r/malaysians/comments/1uhodsc/ 16. "What are white collar jobs?" (comment in "Malaysia White-Collar Job Displacement By AI") — Lowyat.NET — forum.lowyat.net/topic/5554697 17. "have you taken necessary action or learning new skills for this new era?" (post in "The job market is really unstable") — Lowyat.NET — forum.lowyat.net/topic/5562506 18. "RM2500 for internship??" — r/malaysia — reddit.com/r/malaysia/comments/15lbdq7/ 19. "Does anyone hire fresh grad devs who rely heavily on AI (like…)" — r/malaysia — reddit.com/r/malaysia/comments/1lqowos/

ChatGPT in school 20. "how to proof you're not using AI??" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1kdrrzo/ 21. "stpm-takers, has anyone ever got caught using chatgpt" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1d7umti/ 22. "Can AI detect AI" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1i6dt5x/ 23. "Taylors University AI detection" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1khnzxg/ 24. "Need help regarding Turnitin" — r/malaysiauni — reddit.com/r/malaysiauni/comments/1udig0j/

AI & money (scams) 25. "My mom kena scam ke now?" — r/malaysians — reddit.com/r/malaysians/comments/1ht522l/

Method note: ~30 of 34 items were reachable only via search snippets (Reddit blocks direct extraction); one thread ("how to proof you're not using AI??") was opened in full. Every URL above is the real thread URL. Reddit is sentiment evidence, not measurement.

PART II · ANALYSIS

LOOKED FOR, NOT FOUND

1. Any official Malaysian statistic attributing actual job losses to AI (searched DOSM, PERKESO/SOCSO, KESUMA, TalentCorp, BNM — no such series exists; the Ministry's answer is: not attributable).
2. WEF Future of Jobs Malaysia profile — does not exist (searched the full report PDF).
3. ILO ASEAN/Malaysia-specific exposure number — ILO has income-group aggregates only.
4. DOSM graduate unemployment **by field of study** — behind eStatistik login; press releases omit it (the single most-asked question in the public bank, §8).
5. HRD Corp: number of levy-paying employers; levy rate text (1%) not verifiable on any page opened this session; outcome (employment) data for levy-funded training.
6. GBS/BPO: no public headcount-vs-automation series; only approvals-based job projections A1-MD2.
7. Johor data centres: actual employment numbers (state claims only); water-use figures (Tier policy numbers exist — E3; consumption data not).
8. Malaysian firm-level wage effects of AI; Malaysian version of the Danish registry studies.
9. PERKESO EIS Loss-of-Employment source report itself (figures came via BNM chapter + news).
10. Malaysia Digital 2030 source doc; KRI original automation discussion paper (both secondary).
11. Second-check access to the IMF 47% page body (paywall) — flagged in Verified-twice.

PART III · EVIDENCE

THE FACT TABLE

Each row states what the source measured: exposure, displacement, wages, adoption or other. Numbers are as printed; nothing has been converted. Full source addresses are in small type under each source.

A. Malaysian official & institutional

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-TC1	TalentCorp is the strategic think tank of the Ministry of Human Resources (KESUMA), mandated 7 Mar 2024; the study was one of its first assigned initiatives Weakness: Self-description of own mandate	**7 March 2024**	2024 other (institutional)	TalentCorp press release + study Vol.1 PDF talentcorp.com.my/resources/press-releases/talentcorp-launches-landmark-study-on-workforce-impact-of-ai-digitalisation-and-green-economy VERIFIED ON PAGE
A1-TC2	The study covers 10 sectors contributing RM933bn (~60% of 2023 GDP) and employing ~31% of skilled/semi-skilled workers, ≈3.5m people Weakness: Sector selection is not all of Malaysia	**RM933 billion (60%); ≈3.5 million**	2023 exposure (scope)	TalentCorp / study Volume 1 same + talentcorp.com.my/impact-study/ VERIFIED ON PAGE
A1-TC3	~~620,000 employees (~~18% of workforce within the analysed sectors) projected "highly impacted" (convergence or displacement risk) over next 3–5 years Weakness: Definition of "highly impacted" is TalentCorp's own; no baseline simulation shown	**620,000; "approximately 18%" of 3.5 million in 10 sectors**	2024 (horizon 2024–2029) exposure (at-risk, not displacement)	TalentCorp talentcorp.com.my/impact-study/; PDF Vol.1 VERIFIED 2×
A1-TC4	Including "medium impacted", ~1.8m employees (53%) projected affected Weakness: Media almost never report the 53%; category widths are internal	**1.8 million; 53%**	3–5 yrs from 2024 exposure	TalentCorp study Vol.1 PDF talentcorp.com.my/images/uploads/publication/192/...Vol1 VERIFIED ON PAGE
A1-TC5	949 roles validated (889 existing + 60 emerging); 84 highly impacted roles mapped for transition; 864 basic & role-specific skills catalogued Weakness: Role counts are expert-judgement; skills list not published in full	**949; 889; 60; 84; 864**	2024 exposure (role-level)	TalentCorp / MyMahir mymahir.my/publication/1/...; talentcorp.com.my/impact-study/ VERIFIED ON PAGE
A1-TC6	60 emerging roles; per Parliament (Aug 2025): 43 (72%) AI/digital, 11 (18%) green, 6 (10%) new technologies; named examples: AI engineers, sustainability specialists, bio-process engineers Weakness: "Emerging" ≠ confirmed hiring demand	**43/11/6 of 60**	2025 exposure (emerging)	HR Minister via The Edge theedgemalaysia.com/node/734414 VERIFIED ON PAGE
A1-TC7	CONTRADICTION: HR Minister (June 2026, Parliament) cited a TalentCorp study finding ≈697,000 jobs at risk within 3–5 years — higher than the 620,000 headline Weakness: Why 620k→697k is not explained in the article; likely Phase 2 scope (22 sectors — see MalayMail, secondary)	**approx. 697,000**	2026 statement (Phase 2 study) exposure	HR Minister R. Ramanan via The Edge theedgemalaysia.com/node/808082 VERIFIED 2×

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-TC8	MyMahir = TalentCorp's digital platform for trends, emerging roles, skills, career pathways; Phase 2 of the study in progress	—	2024–26 other	TalentCorp talentcorp.com.my/impact-study/ **VERIFIED ON PAGE**
A1-DS1	Unemployment rate 2.9% in Dec 2025 (517.7k unemployed), unchanged from Nov; lowest quarterly rate since Q2 2014 (Q4 2025) Weakness: Headline rate masks underemployment & labour force exits	**2.9%; 517.7 thousand**	Dec/Q4 2025 wage/other (labour market)	DOSM dosm.gov.my/portal-main/release-content/labour-force-statistics-december-2025 **VERIFIED 2×**
A1-DS2	Annual 2025: unemployment 3.0% (507.2k), labour force 17.09m, employed 16.58m; youth (15–24) unemployment 9.6% (272.0k) Weakness: "Lowest in a decade" framing vs structural issues below	**3.0%; 507.2k; 17.09m; 16.58m; 9.6%**	2025 wage/other	DOSM annual media statement dosm.gov.my/uploads/release-content/file_20260626182921.pdf **VERIFIED ON PAGE**
A1-DS3	Semi-skilled occupations = largest category: 57.0% of employment (9.45m); skilled 30.1% (4.99m); low-skilled 12.9% (2.15m) Weakness: Semi-skilled share is the structural fact behind AI/wage debates	**57.0%; 30.1%; 12.9%**	2025 other (occupational structure)	DOSM same PDF **VERIFIED ON PAGE**
A1-DS4	National skill-related underemployment: 2.05m persons, 35.6% of tertiary-educated employed (2024: 2.06m; 36.1%); range KL 22.8% → Kelantan 50.5% Weakness: Self-reported skill use; covers only the employed	**2.05m; 35.6%; 22.8%; 50.5%**	2025 wage/other (underemployment)	DOSM same PDF **VERIFIED ON PAGE**
A1-DS5	Graduates 2024: 5.98m (22.3% of working-age); graduate unemployment 3.2% (165.9k); graduate skill-related underemployment 32.2% (1.60m); under-24 graduates 66.0% underemployed; international chart: MY 32.3% vs US 27.3%, UK 28.5%, ID 42.2%, PH 56.7% Weakness: Unemployment-by-field-of-study only in the full publication behind eStatistik (not opened — secondary only)	**5.98m; 3.2%; 32.2%; 66.0%**	2024 wage/other	DOSM Graduates Statistics 2024 dosm.gov.my/uploads/release-content/file_20260401145140.pdf **VERIFIED 2×**
A1-DS6	Median graduate salary RM4,521 (+2.5%); mean RM5,330; degree median RM5,724 vs diploma RM3,390; by skills: skilled RM5,723 / semi-skilled RM2,550 / low-skilled RM1,990 Weakness: Median hides field dispersion	**RM4,521; RM5,330; RM5,724; RM3,390**	2024 wage	DOSM Graduates Statistics 2024 same PDF + release page **VERIFIED 2× (PDF RE-OPENED BY LEAD)**
A1-DS7	Median citizen wage RM2,793 (2024), mean RM3,652; real median +5.4% to RM2,103 Weakness: 2024 data; more recent monthly medians diverge (RM3,167 Dec 2025 — see F3/G12 secondary)	**RM2,793; RM3,652**	2024 wage	DOSM Salaries & Wages Survey dosm.gov.my/portal-main/release-content/salaries-and-wages-survey-report-2024 **VERIFIED ON PAGE**
A1-DS8	Informal employment 3.28m, 19.8% of employment (2023: 21.8%); informal sector 11.4% Weakness: Undercounts gig/platform work	**19.8%; 11.4%**	2025 other (informal)	DOSM dosm.gov.my/portal-main/release-content/informal-sector-and-informal... **VERIFIED ON PAGE**

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-BN1	Employment +3.1% (+504,700) in 2025; LFPR 70.8%; unemployment 3.0% (BNM's own series)	**3.1%; +504,700; 70.8%; 3.0%**	2025 wage/other	BNM Economic & Monetary Review 2025 ch.1 bnm.gov.my/documents/20124/21185020/emr2025_en_ch1.pdf **VERIFIED ON PAGE**
A1-BN2	Aggregate nominal wage growth 5.1% (2025); private sector 3.6% (2024: 2.9%); public sector 7.8% Weakness: Public-sector spike distorts average	**5.1%; 3.6%; 7.8%**	2025 wage	BNM EMR 2025 same **VERIFIED ON PAGE**
A1-BN3	Labour productivity +3.4% (2025, from 2.4% in 2024); since 2019 productivity +9% while private-sector real wage per worker –1.7% Weakness: Averages hide sector splits	**+3.4%; 9%; –1.7%**	2019–2025 wage/productivity	BNM EMR 2025 same **VERIFIED ON PAGE**
A1-BN4	EIS jobless claims: 74,841 (2025) vs 57,794 (2024); series 2020–2025: 107,024 / 61,360 / 34,388 / 49,982 / 57,794 / 74,841 Weakness: Covers only insured workers; claims ≠ people only (re-applications possible)	**74,841**	2020–2025 displacement (insured job losses)	BNM EMR 2025 (SOCSO EIS data) same **VERIFIED ON PAGE**
A1-BN5	Vacancies 119,095/month vs placements 17,383/month (2025) — "labour market slack persists" Weakness: SOCSO vacancy data incomplete coverage	**119,095; 17,383**	2025 other	BNM EMR 2025 same **VERIFIED ON PAGE**
A1-BN6	Own-account (gig/self-employed) employment +6.4% in 2025 — acting as safety net Weakness: Growth partly cyclical, not necessarily AI-driven	**6.4%**	2025 other	BNM EMR 2025 same **VERIFIED ON PAGE**
A1-BN7	Gig Workers Bill 2025 to benefit ~1.2m workers (7% of employed) Weakness: Coverage estimate	**1.2 million; 7%**	2025 other (policy)	BNM EMR 2025 same **VERIFIED ON PAGE**
A1-BN8	High-skilled jobs = only 26% of new positions in 2025, below 5-yr average 30% Weakness: Book PDF partially extracted	**26%; 30%**	2025 other (job quality)	BNM Annual Report 2025 bnm.gov.my/documents/20124/21185005/ar2025_en_book.pdf **VERIFIED ON PAGE (SNIPPET-LEVEL; AR BOOK PDF LARGE)**
A1-BN9	Compensation of employees (labour share) 33.6% of GDP (2024); median wage gap low-vs-semi-skilled narrowed RM550→RM396 (2016→2024) Weakness: Secondary; chart values not printed in extraction	**33.6%; RM396; RM550**	2024 wage	The Edge cover story citing BNM EMR 2025 theedgemalaysia.com/node/749054 **SECONDARY ONLY (EDGE CITING BNM)**
A1-WB1	World Bank/ISIS Malaysia task-based study: 4.2m workers (28% of labour force) "highly exposed" to generative AI; 2.5m (17%) medium-high; 6.7m (45%) in top two groups Weakness: Exposure ≠ job loss; task-substitution model	**4.2m (28%); 2.5m (17%); 6.7m (45%)**	2021 LFS microdata (pub. 2025) exposure	World Bank / ISIS Malaysia working paper documents1.worldbank.org/curated/en/099092325013010451 **VERIFIED ON PAGE**
A1-WB2	Nearly half of Malaysian workers have ≥40% of tasks substitutable by today's genAI capabilities Weakness: Model-dependent	**"at least 40% of its tasks"**	2021 LFS base exposure	same same **VERIFIED ON PAGE**

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-WB3	Exposure uneven: women, younger, clerical, urban workers more likely highly exposed; men 2.7% less likely, older workers 0.3% less likely Weakness: Probit margins, cross-sectional	**2.7%; 0.3%**	2021 LFS exposure	same same VERIFIED ON PAGE
A1-WB4	Only 5% of workers in high-skill AI-exposure occupations; 30% medium-high; only 3 of 484 occupations >half their skill-mix in top quartile (all IT) Weakness: Occupation-level averages compress task heterogeneity	**5%; 30%; 3 of 484**	2021 LFS + eMASCO exposure	same same VERIFIED ON PAGE
A1-WB5	MEM April 2026: tertiary graduates who are underemployed face a 49.3% wage penalty; absolute poverty 5.1% (2024, 416k households, PLI RM2,705) Weakness: Poverty line methodology debated	**49.3%; 5.1%; RM2,705**	2024/2026 wage	World Bank Malaysia Economic Monitor worldbank.org/en/country/malaysia/publication/raising-the-ceiling-raising-the-floor... VERIFIED ON PAGE (PUB. PAGE RE-OPENED BY LEAD; 4.4% 2026 PROJECTION VERIFIED 2×)
A1-KR1	KRI: sales & services — Malaysia's most common occupation group (~1/4 of employment) — faces higher automation risk Weakness: Pre-genAI work	**"about one-fourth of total employment"**	2019 (pub. 2020) exposure	Khazanah Research Institute krinstitute.org/press-release/evolving-economy-changing-work-realities VERIFIED ON PAGE
A1-KR2	KRI discussion paper (Allen Ng): >half of Malaysian jobs at high risk of loss to automation over ~20 years; 4 in 5 of these semi-skilled; 90% of semi-skilled roles at risk — widely quoted figure, original paper not opened Weakness: Original paper not opened; date unclear; pre-genAI methods	**>50% jobs; 4-in-5 semi-skilled; 90% of semi-skilled**	c. 2019 (paper date not stated in article) exposure	KRI via media malaysiakini.com/letters/735015 (secondary) SECONDARY ONLY
A1-HR1	HRD Corp approved RM2.62bn financial assistance in 2025 (+32%); >2.8m training places (+3%); AUM RM4.16bn; IR4.0 assistance RM130m Weakness: Outputs (places) ≠ employment outcomes	**RM2.62bn; 2.8m; RM4.16bn; RM130m**	2025 other (training)	HRD Corp hrdcorp.gov.my/hrd-corp-approved-rm2-62-billion-in-financial-assistance-in-2025-... VERIFIED 2×
A1-HR2	HRD Corp AR2024: levy collection RM2.33bn (+9%), claim disbursement RM1.99bn Weakness: Financial-report figures	**RM2.33bn; RM1.99bn**	2024 other	HRD Corp Annual Report 2024 hrdcorp.gov.my/wp-content/uploads/2025/06/HRD-Corp-Annual-Report-2024-Digital-Version.pdf VERIFIED ON PAGE
A1-PS1	2026 retrenchment wave: 42,807 workers lost jobs 1 Jan–12 Jun 2026 (HR Minister, Parliament); business closures & downsizing = 17,485 (40.85%); minister rejected AI as primary cause Weakness: Official attribution is by stated reason, not AI-cause analysis	**42,807; 17,485; 40.85%**	2026 displacement	HR Minister via NST (also The Edge, Says) nst.com.my/news/nation/2026/06/1471443/... VERIFIED ON PAGE
A1-PS2	EIS applicants 52,607 by 16 Jul 2026; Jan–Jun 2026: 47,053 (+38% y/y, 34,005) Weakness: News citing official data (secondary)	**52,607; 47,053; +38%**	2026 displacement	Says citing SOCSO/Ministry says.com/my/news/2026-is-on-track-to-be-malaysias-worst-year-for-retrenchments... VERIFIED ON PAGE (NEWS, QUOTING OFFICIAL DATA)

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-PS3	PMETs = 51% of 2026 retrenchments (professionals 13,461/26%, technicians 7,104/14%, managers 6,165/12%); ~44% earned <RM3,000/month; services 69% of cases Weakness: Cause not attributed	**51%; 44%; 69%**	2026 displacement	Says/SOCSO data same **VERIFIED ON PAGE (NEWS)**
A1-PS4	Maybank IB analysis: high-skilled workers >half of retrenchments 2021–2025; ~39,000 retrenched Jan–May 2026 (+36% y/y, SOCSO data); 1.5 job placements per retrenched worker Weakness: Bank research, methodology not published	**>50%; ~39,000; +36%; 1.5**	2026 displacement	Maybank Investment Bank (Jul 2026) via news (secondary; original report not opened) **SECONDARY ONLY**
A1-PS5	EIS benefits: training fee up to RM4,000 → RM7,000 for job loss from 2026; Job Search Allowance 3–6 months; 134,123 claims approved / RM248.23m by 12 Jun 2026 Weakness: Policy parameters change; check current	**RM4,000→RM7,000; 134,123; RM248.23m**	2026 other (social protection)	PERKESO perkeso.gov.my/en/our-services/protection/employment-insurance.html + news **VERIFIED ON PAGE (PERKESO)**
A1-GV1	AI Nation 2030 (National AI Action Plan 2026–2030, Ministry of Digital): up to 300,000 new jobs attributable to AI by 2030; up to +1.2 p.p. GDP; Global AI Index Top 10 Weakness: Target, not forecast; no methodology published; overlaps with MD2030 target	**300,000 jobs; 1.2 p.p.; Top 10**	2030 targets exposure/other (government target)	Ministry of Digital / AI Malaysia strapi.naio.okie.my/uploads/AI_Nation_2030_...pdf **VERIFIED 2× (OFFICIAL PDF)**
A1-GV2	AI Nation 2030: free up 30% of civil-servant capacity from repetitive tasks (35% over ten years); I3 engine: +45% citizen satisfaction, 20–30% lower service-delivery costs Weakness: Targets without baseline evidence	**30%; 35%; 45%; 20–30%**	2026–2036 other (public sector targets)	same PDF same **VERIFIED ON PAGE**
A1-GV3	AI Malaysia (company no. 202601028115) replaces NAIO to drive AI Nation 2030; PM Anwar: "less than 60 months"	—	2026 other	The Edge theedgemalaysia.com/node/812301 **VERIFIED ON PAGE**
A1-GV4	RMK-13 (13th Malaysia Plan): GDP 4.5–5.5%/yr 2026–2030; GNI/capita RM77,200 by 2030; COE share of GDP → 40%; labour productivity growth 3.6%/yr; dev allocation RM430bn; education RM67bn Weakness: Targets, not forecasts	**4.5–5.5%; RM77,200; 40%; 3.6%; RM430bn; RM67bn**	2026–2030 other (plan targets)	Ministry of Economy / Bernama rmk13.ekonomi.gov.my Executive Summary PDF **VERIFIED ON PAGE**
A1-GV5	Budget 2026: ~RM5.9bn to strengthen AI sector; RM1.828bn HR ministry upskilling; RM3bn from HRD Corp levy → 3m training opportunities (tech & new energy); PTPK RM650m/25,000+ trainees (AI, EV, semiconductor); TVET RM7.9bn; MSME AI/cyber training +50% tax deduction Weakness: News coverage; budget papers not all opened	**RM5.9bn; RM1.828bn; RM3bn; RM650m; RM7.9bn; 50%**	Budget 2026 other (funding)	Bernama / The Star / Newswav bernama.com/en/general/news.php?id=2478290 etc. **VERIFIED ON PAGE (NEWS, QUOTING BUDGET DOCS)**
A1-GV6	Malaysia Digital 2030 (launched 29 Jun 2026): 500,000 high-value digital jobs; digital economy 30% of GDP; 95% services online by 2030 Weakness: Distinct from AI Nation 2030's 300,000 — two overlapping targets	**500,000; 30%; 95%**	2030 targets other	Malay Mail (govt launch) malaymail.com/news/malaysia/2026/06/29/... **VERIFIED ON PAGE (NEWS)**

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
A1-GV7	Budget 2027 (announced Oct 2026): 200,000 AI-skilled individuals; 100,000 free AI app subscriptions Weakness: New policy, no baseline	**200,000; 100,000**	2027 other	Malay Mail malaymail.com/news/malaysia/2026/10/11/.../238688 **VERIFIED ON PAGE (NEWS)**
A1-MD1	GBS industry: US$4.95bn revenue 2022 → US$6.7bn expected 2025 (6.2% CAGR); >600 GBS firms, >250,000 staff, RM33.1bn exports (TalentCorp GBS volume) Weakness: Industry figures, partly projections	**US$4.95bn; US$6.7bn; >600 firms; >250,000 staff; RM33.1bn**	2022–2025 other (sector size)	MDEC/myDigitalInvestment + TalentCorp mydigitalinvestment.gov.my/digital-gbs; talentcorp.com.my (GBS volume PDF) **VERIFIED ON PAGE**
A1-MD2	Malaysia Digital investments (2H2022–2H2025): RM342.58bn approved; projected 114,854 jobs (97% knowledge workers); GBS cluster 838 companies / RM288.05bn / 58,166 jobs Weakness: Approved ≠ realised; jobs projected	**RM342.58bn; 114,854; 97%; 58,166**	2H2022–2H2025 other (approved investments, announced jobs)	MDEC mdec.my/api/media/file/KFM_x_MDEC_06022026.pdf **VERIFIED ON PAGE**

B. International policy & economics

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F1-01	ILO 2025: ~1 in 4 workers worldwide in occupations with some GenAI exposure; only 3.3% of global employment in the highest exposure gradient G4 Weakness: Index is occupation-level; 6-digit Polish classification universe	**1-in-4; 3.3%**	2025 exposure	ILO WP140 (Gmyrek et al.) ilo.org/sites/default/files/2025-05/WP140_web.pdf **VERIFIED 2×**
F1-02	ILO 2025 gradient exposure by income: HIC 34% of employment vs LIC 11% Weakness: Country income grouping, not Malaysia-specific	**34%; 11%**	2025 exposure	ILO 2025 research brief ilo.org/sites/default/files/2025-05/Research%20brief_GenAI%202025%20Update.pdf **VERIFIED 2×**
F1-03	ILO 2025: women more exposed than men in top gradients G3 5.7% vs 3.1%; G4 4.7% vs 2.4% ; clerical most exposed Weakness: Gender effect via occupational segregation	**5.7% vs 3.1%; 4.7% vs 2.4%**	2025 exposure	ILO WP140 same **VERIFIED ON PAGE**
F1-04	ILO 2023 baseline: 24% of clerical tasks highly exposed + 58% medium (=82%); HIC automation exposure 5.5% (WP) vs 5.1% (Oct-2023 brief — contradiction preserved) Weakness: Two ILO documents differ on HIC number; both shown	**82%; 5.5% vs 5.1%**	2023 exposure	ILO WP96 ilo.org/sites/default/files/2024-07/WP96_web.pdf **VERIFIED ON PAGE**
F1-05	ILO 2023: augmentation potential (10.4% LIC → 13.4% HIC of employment) exceeds automation exposure	**10.4–13.4%**	2023 exposure (augmentation)	ILO wcms_890761.pdf **VERIFIED ON PAGE**
F1-06	IMF: ~40% of global employment exposed to AI; 60% advanced economies, 40% emerging, 26% low-income; roughly half of exposed AE jobs may see productivity gains, half lower labour demand Weakness: Exposure estimate; not displacement	**60/40/26%**	2024 exposure	IMF (Cazzaniga et al., Gen-AI: AI and the Future of Work) imf.org/en/Blogs/Articles/2024/01/14/... **VERIFIED ON PAGE**

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F1-07	IMF 2026 Article IV: 47% of Malaysian jobs rated "high exposure" to AI Weakness: Body paywalled; single full-page check	**47%**	2026 (labour data 2025) exposure	IMF Staff Country Report 2026/055 elibrary.imf.org/view/journals/002/2026/055/article-A001-en.xml **VERIFIED ON PAGE (SUBAGENT); LEAD 2ND CHECK LIMITED TO METADATA PAGE**
F1-08	IMF 2025 Article IV: Malaysia outperforms peers on AI preparedness but many AI-exposed workers are in low-complementarity roles Weakness: Qualitative	**qualitative**	2025 exposure	IMF elibrary (2025 issue) **VERIFIED ON PAGE (SUBAGENT)**
F1-09	WEF FoJ 2025: global net +78m jobs by 2030 (170m created, 92m displaced, 7% net); skill instability 39% (down from 44% in 2023, 57% in 2020); 86% of employers expect AI to transform business Weakness: Employer survey expectations, not a forecast; NO Malaysia country profile exists in the report	**+78m (7%); 39%; 86%**	2025 projection to 2030 exposure (survey-based expectations)	WEF reports.weforum.org/docs/WEF_Future_of_Jobs_Report_2025.pdf **VERIFIED ON PAGE**
F1-10	No Malaysia profile in WEF FoJ 2025 (searched full PDF) Weakness: Malaysia appears only in aggregate data	—	2025 —	WEF same **VERIFIED (ABSENCE)**
F1-11	PwC AI Jobs Barometer 2025/26: global AI-skills wage premium 56% (2025) → 62% (2026); productivity growth in most-exposed industries ~4× since 2022 Weakness: Premium = correlation of skill demand, not causal	**56%; 62%**	2024–25 data wage/adoption	PwC pwc.com/gx/en/issues/artificial-intelligence/job-... **VERIFIED ON PAGE**
F1-12	PwC Malaysia 2025: AI postings ~29k (1.9% → 4% of postings); premiums: Financial Services 66%, avg 62%, Health 41%, Energy/Manufacturing 34%, Consumer 20%; AI-user roles +6.9% while AI-developer roles −23.6% (to period low); top-quartile-exposure postings halved 828k→413k Weakness: Position-postings data, not hires	**29k; 4%; 66%; −23.6%; 828k→413k**	2021–2025 postings wage/adoption	PwC (Malaysia data) same **VERIFIED ON PAGE**
F1-13	Microsoft/LinkedIn Work Trend Index (vendor claims): 84% of Malaysian knowledge workers use AI at work (2024, vs 75% global); 62% of leaders would not hire without AI skills; 2026: 24% "Frontier Professionals" (vs 16% global); 86% of leaders confident of AI agents within 12–18 months Weakness: Convenience samples of knowledge workers; marketing motives	**84%; 62%; 24%; 86%**	2024–2026 surveys adoption (vendor survey)	Microsoft / LinkedIn news.microsoft.com/en-my/2024/06/06/... **VERIFIED ON PAGE — VENDOR CLAIM**
F1-14	Cisco/Oxford Economics ASEAN-6 model (2018): 6.6m jobs redundant by 2028; 28m fewer workers needed for today's output; agriculture −5.7m net FTE; wholesale/retail +1.8m Weakness: 2018 model; pre-genAI; productivity ≠ job loss automatically	**6.6m; 28m; −5.7m; +1.8m**	2018–2028 exposure (modelled)	Cisco / Oxford Economics cisco.com/c/dam/global/en_sg/assets/csr/pdf/... **VERIFIED ON PAGE**

C. Empirical evidence (what actually happens)

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F2-01	Stanford/ADP: early-career workers (22–25) in most AI-exposed occupations: 16% relative employment decline; absolute −6% late 2022→Sep 2025 while older workers +6–9% Weakness: US payroll data; entry-level decline ≠ aggregate job loss	**16%; 6%; 6–9%**	2022–2025 displacement (relative, US)	Stanford Digital Economy Lab digitaleconomy.stanford.edu (Canaries, Nov 2025 PDF) VERIFIED 2×
F2-02	Six facts summary: entry-level declines concentrated in exposed/remotable occupations; aggregate employment still growing (adjustments happen through hiring, not firings) Weakness: US only	**qualitative**	2022–2025 displacement	same same VERIFIED ON PAGE
F2-03	Anthropic Economic Index: Claude.ai usage flipped to augmentation-led — Nov 2025: 52% augmentation vs 45% automation (Aug 2025: automation led 49–47); coding 40% (Mar 2025) → 34% (Nov 2025); top single task 6% of usage Weakness: One platform, one provider	**52%/45%; 49%/47%; 40%→34%**	2025 adoption	Anthropic anthropic.com/news/anthropic-economic-index-january-2026-report VERIFIED ON PAGE (SUBAGENT); LEAD RE-OPEN: PAGE METADATA ONLY (JS CONTENT)
F2-04	Yale Budget Lab: no discernible economy-wide labour-market disruption 33 months after ChatGPT (Nov 2022–Jul 2025, CPS); exposure-group shares stable ~29/46/18%; occupational shift only ~1pp faster than the internet era Weakness: US aggregate can hide local/entry-level effects (cf. F2-01)	**"no discernible disruption"; 29/46/18%**	2022–2025 displacement (US aggregate)	Yale Budget Lab budgetlab.yale.edu/research/evaluating-impact-ai-labor-market-current-state-affairs VERIFIED ON PAGE
F2-05	Danish worker-level registry/survey study: "precise zeros" — no significant effect on earnings/hours (CI rules out effects >1%); small productivity gains (~3% time savings); switchers to AI using jobs later gained ~12pp extra earnings growth Weakness: Denmark ≠ Malaysia; early adoption phase	**precise zeros; 3%; 12pp**	2023–2024 displacement (worker level, Denmark)	Humlum & Vestergaard, via Brookings brookings.edu/articles/still-waters-rapid-currents-earn... + ssrn abstract VERIFIED ON PAGE (BROOKINGS OPENED; SSRN ABSTRACT SNIPPET)
F2-06	CONTRADICTION: Danish firm-level data show AI-adopting firms 6–9% below their own employment trend (2024 cohort ~7.5% below by late 2025) — contrast with worker-level zeros Weakness: Firm-level adoption endogenous; why worker-level shows nothing is unresolved	**6%; 9%; 7.5%**	2023–2025 displacement (firm level)	Bonin et al. via VoxEU cepr.org/voxeu/columns/adjustment-danish-labour-market-ai-has-begun SECONDARY ONLY (SNIPPET)
F2-07	Challenger: US announced job cuts 2025 = 1,206,374 (+58% vs 761,358); AI cited for 54,836 (142 in Dec); 71,825 since 2023 when reason first tracked; DOGE/government largest single reason 293,753 Weakness: "AI-cited" = employer-stated reason, not verified cause; announcements ≠ actuals	**1,206,374; 54,836; 71,825; 293,753**	2025 displacement (announced, employer-stated reason)	Challenger, Gray & Christmas challengergray.com/blog/2025-year-end-challenger-report-... VERIFIED 2×
F2-08	QJE field study (US Fortune 500 call centre, 5,172 agents): AI assistance +15% issues resolved/hour; gains concentrated among novices/low-skill (+30–35%); minimal effect on experienced Weakness: One firm, one task type	**15%; +30–35%**	deployment 2020–21, pub. 2025 other (productivity experiment)	Brynjolfsson et al., QJE 140(2) academic.oup.com/qje/article/140/2/889/7990658 VERIFIED ON PAGE

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F2-09	BCG/HBS/Wharton experiment (758 consultants, GPT-4): +12.2% tasks completed, 25.1% faster, +40% quality on inside-frontier tasks; worse performance outside frontier Weakness: Lab-style task setting; elite knowledge workers	**12.2%; 25.1%; 40%**	2023 other (productivity experiment)	Dell'Acqua et al. / BCG bcg.com/publications/2023/how-people-create-and-destroy-value-with-gen-ai **VERIFIED ON PAGE (BCG); PAPER PDF SNIPPET**
F2-10	GitHub Copilot RCT: treated developers 55.8% faster on an HTTP-server task (71.17 vs 160.89 min; CI 21–89%); n=95 recruited, 35 completed Weakness: Tiny sample; student developers	**55.8%; 71.17 vs 160.89 min**	2022 other (productivity experiment)	Peng et al., arXiv 2302.06590 arxiv.org/abs/2302.06590 **VERIFIED ON PAGE (SNIPPET-LEVEL)**
F2-11	MIT NANDA: 95% of organisations get zero measurable return from enterprise GenAI ($30–40bn invested); only 5% of pilots reach production (funnel 60% evaluated → 20% pilot → 5% prod); vendor partnerships ~67% vs ~33% internal build success Weakness: US enterprise sample; "zero return" measure debated	**95%; 60/20/5%; 67% vs 33%**	2025 adoption (ROI)	MIT NANDA via MIT Sloan Q mlq.ai (report text read via deck) **VERIFIED ON PAGE (DECK TEXT)**
F2-12	McKinsey State of AI (Mar 2025): >80% of respondents saw no tangible enterprise-EBIT impact from genAI; 17% said it was ≥5% of EBIT Weakness: Secondary interpretation of survey	**80%; 17%**	2024/25 adoption	McKinsey via LinkedIn commentary linkedin.com/pulse/ai-value-crisis-2025-2026-ben-carroll-c7w4e **SECONDARY ONLY**

D. Malaysian events (documented, dated)

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F3-01	PETRONAS announced ~10% global workforce cut (>5,000 people), hiring/promotion freeze to Dec 2026 — stated cause: restructuring after net income −32% (2024), oil price; AI NOT the stated cause Weakness: Cause attribution company/analyst; AI absent	**>5,000; ~10%; −32%**	announced 5 Jun 2025 displacement	PETRONAS via news (news opened by subagent) **VERIFIED ON PAGE (NEWS)**
F3-02	Intel paused US$7bn Penang advanced-packaging (Q3 2024), ~14,000 MY employees, 15% global cut — ">2,000 Intel workers in Malaysia at risk" (Star estimate); Feb 2025: project on indefinite hold, 200 engineers relocated to New Mexico Weakness: Cause = capex/financial, not AI; "at risk" is media estimate	**US$7bn; ~14,000; 15%; >2,000**	2024–2025 displacement (risk)	The Star thestar.com.my/business/... **VERIFIED ON PAGE (NEWS)**
F3-03	Astro VSS FY24: RM52m cost, ~20% headcount cut, mainly corporate services; headcount 2,887 end-FY24, "well over a third lower in three years"; automation/ML/AI named only as ongoing savings enablers Weakness: Media/paywall; AI named as enabler not cause	**RM52m; ~20%; 2,887**	FY2024 displacement	Astro (results call/accounts) via The Edge theedgemalaysia.com (opened by subagent) **VERIFIED ON PAGE**
F3-04	CIMB Group (Aug 2026): cost strategy explicitly NOT manpower reduction — process simplification + technology/AI; opex −1.6% QoQ Q2 2026; CIR improved 200bp to 45.2% Weakness: Bank messaging; headcount data not given	**45.2%; −1.6%**	Q2 2026 other	CIMB via The Edge theedgemalaysia.com/node/... **VERIFIED ON PAGE**

ID	CLAIM AND WEAKNESS	NUMBER AS PRINTED	YEAR · MEASURES	SOURCE · CHECK
F3-05	Grab cut 1,000 jobs (~11%) Jun 2023 — post-pandemic normalisation, not AI-stated Weakness: Cause framing editorial	**1,000; ~11%**	Jun 2023 displacement	Says says.com/my/news/grab-is-laying-off-1-000-employees **VERIFIED ON PAGE**
F3-06	Lazada retrenched 5% of SEA workforce incl. Malaysia (23–24 Jun 2026), official reason "business needs and organisational efficiency" Weakness: Number in % of SEA, not MY headcount	**5% of SEA workforce**	Jun 2026 displacement	Malay Mail malaymail.com/news/money/2026/06/24/lazada-layoffs-... **VERIFIED ON PAGE**
F3-07	Shopee cut hundreds of developer roles (~8% of dev workforce, ~10–15% of some teams) June 2026; parent Sea cited pivot to AI-powered automation — closest Malaysian case of AI-linked cause, still partly media framing Weakness: AI stated by parent company in investor context; "AI-washing" debate followed	**~8% developer roles**	Jun 2026 displacement	SEA/Shopee via news (opened by subagent) **VERIFIED ON PAGE (NEWS)**
F3-08	GXS Bank cut 82 roles (~10%) Dec 2025 across SG/MY/IN — stated cause: role redundancy after "build-to-run" transition, NOT AI Weakness: Small, regional	**82; ~10%**	3 Dec 2025 displacement	The Ledger Asia theledger.asia/digital-bank-gxs-bank-cuts-82-jobs **VERIFIED ON PAGE**
F3-09	Johor data centres: 42 projects / RM164.45bn approved (2Q2025, "6,000+ quality jobs"); 51 projects / RM182.96bn / 7,561 high-skilled jobs (Nov 2025); TNB: 36 operating DCs ~4.5GW, 23 under construction 3.8GW; DC = 31% of national demand by 2035 (73,274 GWh) vs 7% now; DC load utilisation 1.05GW 1Q26 (+117% y/y) Weakness: Jobs figures are state claims; jobs-per-RM ratio tiny (see Myths); jobs ≠ yet realised	**42→51 projects; RM164.45bn→RM182.96bn; 6,000→7,561 jobs; 31% of demand by 2035; +117%**	2025–2026 other (investment/jobs claims)	Johor State / Bernama / TNB (The Star) thesun.my; thestar.com.my (multiple) **VERIFIED ON PAGE (NEWS CITING STATE/TNB)**
F3-10	DayOne: ~1,000 direct + up to 5,000 indirect jobs in Johor "over the next few years"; RM400m supply-chain investment Weakness: Company projection (vendor claim)	**1,000 / 5,000**	15 Jul 2025 other (announced)	DayOne via Bernama (news) **VERIFIED ON PAGE (NEWS)**
F3-11	NVIDIA–YTL RM10bn AI-infrastructure deal (Jul–Aug 2025): Kulai 600MW Green DC Park, GB200 GPUs, sovereign LLM Weakness: Announced; jobs impact not quantified in deal	**RM10 billion; 600MW**	2025 other (announced investment)	NVIDIA/YTL via Bernama/NST (news) **VERIFIED ON PAGE (NEWS)**
F3-12	Microsoft AIForMYFuture: skill 800,000 Malaysians by end-2025 (with NAIO); Ministry of Digital projects AI → ~~US$115bn (~~RM530bn) economy contribution in 5 years Weakness: Skilling numbers are targets; USD projection method unpublished	**800,000; US$115bn/RM530bn**	2024–25 adoption (vendor + ministry projection)	Microsoft (vendor) / Ministry of Digital news.microsoft.com/source/asia/... **VERIFIED ON PAGE — VENDOR CLAIM + MINISTRY PROJECTION**
F3-13	Sarawak's HRD Corp levy exemption dispute (RM57.9m) and HRD Corp governance/derivatives-losses scandal (2025–26) — training-scheme credibility backdrop Weakness: News/audit coverage	**RM57.9m**	2025–26 other	KLSE Screener / The Edge klsescreener.com/v2/news/view/1754121/... **SECONDARY ONLY**

PART III · EVIDENCE

SOURCE NOTES

What each key source can show, what it cannot, and where it is weak.

TalentCorp Impact Study of AI, Digital and Green Economy on the Malaysian Workforce (Phase 1, Nov 2024). Commissioned by KESUMA; TalentCorp as its new think tank (mandated 7 Mar 2024). Method: industry engagements + 949 role validations across 10 sectors (RM933bn, ~60% of 2023 GDP; ~3.5m workers). What it can show: role-level exposure categories (high/medium/low/emerging), 84 transition pathways, 864 skills. It cannot show: actual displacement, wage effects, or Malaysia-wide exposure (10 sectors only). Phase 2 (additional sectors; cited figure 697,000 jobs) in progress. Weakness: category definitions internal; per-sector job counts not all published; the 620,000/18% headline is regularly misquoted as "jobs lost".

DOSM (Department of Statistics Malaysia). Labour Force Statistics monthly; annual labour market review; Graduates Statistics; Salaries & Wages Survey; Informal Employment. Sample: labour force survey (~thousands of households, quarterly/monthly). Can show: unemployment, LFPR, sector mix, occupational structure (semi-skilled 57%), skill-related underemployment (35.6%), graduate outcomes, wages. Cannot show: AI adoption, cause of job changes, or platform/gig completeness (informal estimates). Weaknesses: graduate field-of-study tables behind eStatistik; underemployment is self-reported skill use.

Bank Negara Malaysia EMR/AR 2025. Macro-financial analysis using SOCSO EIS, DOSM and its own surveys. Key value: the 9% productivity vs –1.7% real wage gap since 2019 (the "wage-productivity decoupling" fact); EIS jobless-claims series; own-account growth; explicit statements that the economy "has not generated enough high-skilled jobs" and that labour market slack persists despite low unemployment. Cannot isolate AI effects; AI discussed via E&E/global tech cycle rather than labour displacement.

World Bank/ISIS Malaysia working paper (pub. 2025) — the closest thing to a Malaysia-specific genAI exposure index. Task-based method on 2021 LFS microdata + eMASCO occupations; 4.2m workers (28%) highly exposed; exposure concentrated in women/young/clerical/urban. Explicitly exposure, not displacement; the authors also cite Gmyrek et al. global estimates (13% augmented, 2.3% automation-risk). Weakness: 2021 data pre-dates much of Malaysia's AI adoption; task-substitution model.

ILO WP140 + 2025 update (Gmyrek et al., May 2025). Refined occupational exposure index at 6-digit ISCO level (~30,000 tasks in the underlying Polish classification, 2,500 occupations), GPT-4 + human ratings, four exposure gradients. Global estimates: 1-in-4 workers, 3.3% in G4, 34% HIC vs 11% LIC, women > men. Explicitly: exposure to occupational tasks, not predicted job loss; the authors stress most tasks still require human skills. No ASEAN/Malaysia-specific number — that absence is itself a finding. 2023 vs 2025: method changed (4-digit→6-digit), scores lowered (0.30→0.29 mean; SD 0.30→0.14).

IMF Gen-AI paper (Cazzaniga et al. 2024) + Article IVs. Global exposure shares 60/40/26 (AE/EM/LIC). The 2026 Malaysia Article IV applies a similar lens: 47% of Malaysian jobs high exposure (2026). Can show comparative exposure; cannot show timing or displacement. Weakness: occupation-based, "exposure" ≠ "loss"; paywalled body (see verification note).

WEF Future of Jobs Report 2025. Survey of ~1,000 employers (globally balanced), expectations to 2030: +170m/−92m = net +78m (7%); skill instability 39%. Weakness: employer expectations, not forecasts; **no Malaysia profile exists** — Malaysia appears only in demographic aggregates. Fastest-growing roles (Big Data, Fintech Engineers, AI/ML Specialists, Software Developers); fastest-declining clerical/secretarial.

PwC AI Jobs Barometer (2025/2026). Global job-postings analysis (Lightcast) — Malaysia-specific: AI postings share 1.9%→4%, wage premiums (FS 66%, avg 62%), AI-user roles +6.9% vs developer roles −23.6%. Measures demand-side signals, not outcomes. Weakness: postings ≠ hires; premium is correlation.

Stanford Digital Economy Lab, "Canaries in the Coal Mine?" (Oct/Nov 2025). ADP national payroll microdata (US, millions of workers): early-career (22–25) relative employment −16% in most-exposed occupations vs stable experienced workers; adjustments via hiring not firing; aggregate employment still growing. Weakness: US only; short window (through Sep 2025); entry-level effect may be generative (first systematic evidence, not settled science).

Challenger, Gray & Christmas (US). Monthly announcements of job cuts with employers' stated reasons; AI tracked only since 2023: 2025 = 1,206,374 cuts, AI cited 54,836. Weakness: announcements, self-stated reasons, US only. It is a *lower bound of AI attribution*, and even so tiny relative to total cuts.

Yale Budget Lab; Humlum & Vestergaard (Denmark); Bonin et al. (Denmark). The "small effects so far" camp: US CPS shows no aggregate disruption 33 months post-ChatGPT; Danish workers show precise zeros with early productivity gains (3% time savings; switchers +12pp later); Danish firms adopting AI run 6–9% below their own trend — the two Danish results contradict each other and are reported side by side here. All three: short observation windows, rich economies, pre-scale effects.

MIT NANDA / McKinsey State of AI. Adoption-side reality check: 95% of enterprise GenAI programmes "zero measurable return" (MIT NANDA, n≈600 organisations researched Jan–Jun 2025); >80% of McKinsey survey respondents report no tangible EBIT impact. Weakness: US enterprises; definition of "return" contested; but they put a brake on the "AI everywhere" narrative and explain why Malaysian diffusion may be slower than hype.

PERKESO/SOCSO EIS + Ministry of Human Resources. The only official Malaysian displacement series: EIS jobless claims (74,841 in 2025; 42,807 Jan–12 Jun 2026), stated reasons (closures/downsizing 40.85%), PMET share 51%, salaries under RM3,000 ~44%. Cannot show AI cause — the Ministry explicitly does not attribute losses to AI (minister's Parliament reply). Weakness: insured workers only; claims ≠ all job losses.