

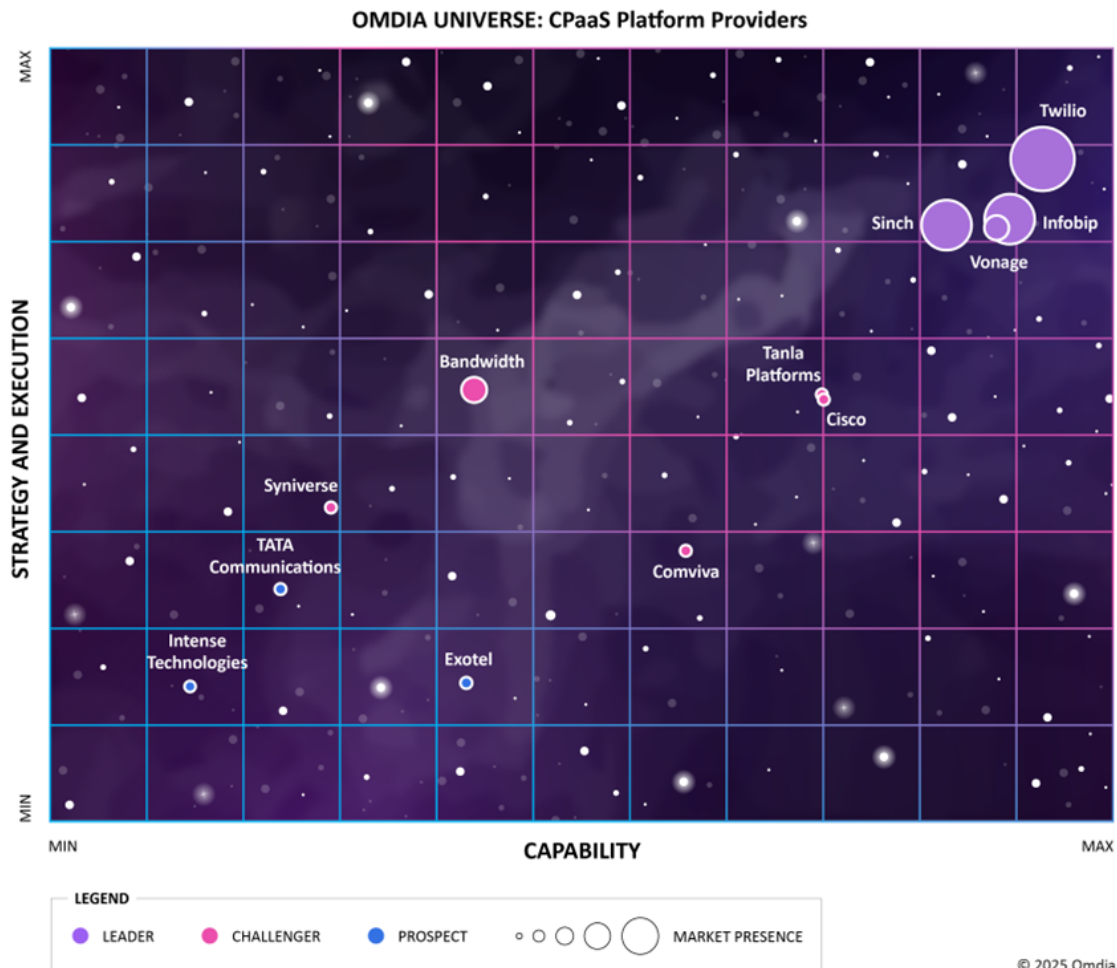
# Omdia Universe: CPaaS Platform Providers, 2025

# Summary

## Catalyst

The focus of communications platform as a service (CPaaS) vendors has shifted significantly over the last 12–24 months. CPaaS is now about much more than enabling enterprises to communicate with their customers using traditional channels such as SMS, voice, or email. This report explores how CPaaS vendors are helping enterprises engage and interact with their customers via multiple communications channels, with a high degree of personalization underpinned by AI/generative AI (GenAI) and utilizing AI-based automation to drive efficiencies and enhance the customer experience. It is aimed at C-level executives, telco and IT managers, and line-of-business managers.

**Figure 1: The Omdia Universe for CPaaS Platform Providers**



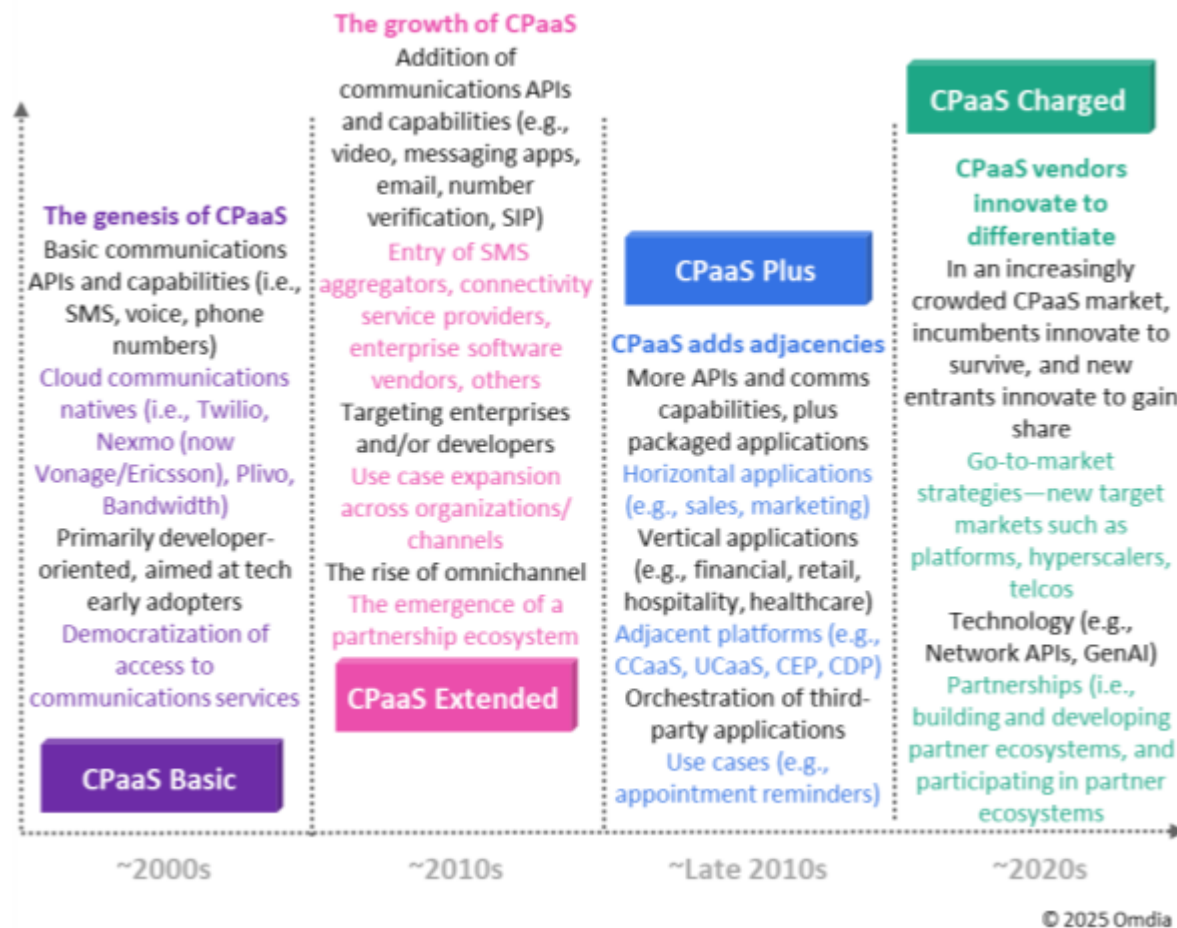
Source: Omdia

## Omdia view

The CPaaS market has evolved significantly since the native cloud communications providers Twilio, Nexmo (now Vonage/Ericsson), Bandwidth, and Plivo first pioneered the market in the late 2000s, with a suite of basic CPaaS capabilities, which were primarily aimed at developers and tech early adopters (CPaaS Basic—see **Figure 2**). In the early 2010s, the CPaaS market saw the addition of more communication Application Programming Interfaces (APIs) and capabilities (CPaaS Extended), the entry of vendors from adjacent markets (SMS aggregators, enterprise software vendors), use case expansion, the rise of omnichannel communications, and the emergence of a partnership ecosystem. By the late 2010s, CPaaS vendors were adding packaged applications (horizontal and vertical), moving into adjacent platforms such as contact center as a service (CCaaS), unified communications as a service (UCaaS), and customer engagement platforms (CEP), templating use cases, integrating with third-party applications, and enabling orchestration (CPaaS Plus). There was also significant M&A as CPaaS vendors filled gaps in their portfolios in terms of products, technology, reach, and network capabilities.

Now, in the early-to-mid 2020s, the focus for CPaaS vendors has moved from adding adjacencies to innovating to differentiate (CPaaS charged) in the areas of omnichannel communications, contextual communications, AI/GenAI-based automation, security/authentication and compliance, the development of CEP, and integration with third-party enterprise applications. Consequently, CPaaS vendors are no longer just enablers of cloud-based communications—they are also becoming the enablers of cloud-based consumer engagement.

Figure 2: The evolution of CPaaS: From APIs to adjacent platforms and GenAI



Source: Omdia

However, the provision of communications and connectivity services still generates the majority of most CPaaS vendors' revenue. They continue to invest in building out their communications networks, including data centers, cloud partnerships, and direct and indirect connections with mobile operators. This investment strengthens CPaaS vendors' ability to provide the high quality, resilient, low-latency communications capabilities that their enterprise customers require in the regional and local markets in which they operate, facilitating compliance with relevant telecoms and data privacy regulation—making them a trusted delivery partner. In addition, CPaaS vendors are offering firewalls and anti-fraud platforms that help enterprises guard against exploits such as the artificial inflation of traffic (AIT) and spam/scam attacks perpetrated on popular messaging channels such as SMS and WhatsApp. These exploits damage consumer trust in enterprise use of these channels, and CPaaS vendors are well-positioned to provide technology to mitigate against such threats.

CPaaS vendors are adding new communications channels, with WhatsApp and Rich Communication Services (RCS) currently representing the more significant opportunity. However, adding new communications channels opens up another opportunity for CPaaS vendors—the ability to help enterprises orchestrate their interactions with customers across the multiple channels via which they wish to be contacted, including falling back between channels based on individual preferences.

Meanwhile, several CPaaS vendors are also offering CAMARA-based Network APIs, complementing their existing API portfolio and positioning them to broaden their market reach into telecoms—specifically, the enterprise customer bases of their telco partners. The CAMARA/GSMA Open Gateway initiative has significant telco and vendor support, including CPaaS vendors Vonage, Infobip, and Sinch, who are all members of Aduna Global, the recently announced Ericsson-led Network API consortium.

CPaaS vendors have also recognized that they are well-positioned to add value to the customer engagement ecosystem. So, in addition to their communications capabilities, almost all vendors in this Universe offer some kind of customer engagement or customer experience capability, whether through acquisition or their own development—and some more extensively than others. This capability includes CEP, customer data platforms (CDPs), CCaaS, UCaaS, and horizontal solutions (e.g., to enable sales and marketing campaigns).

More than that, CPaaS vendors are enhancing their CEP offerings by infusing AI/GenAI throughout to enable functionality such as chatbots and agents, data analytics, content summaries, content generation (e.g., for marketing campaigns), sentiment/intent analysis, and more. They are also enabling integrations with third-party CEP applications, recognizing that their enterprise customers have legacy platforms that they may not wish to replace but that they wish to enhance with functionality that a CPaaS vendor can provide. The ability to integrate with multiple applications also enables those CPaaS vendors that offer a CDP to draw together data from those disparate systems, which they can use to create a single profile of the customer, facilitating customer interactions that can be hyper-personalized and contextual.

## Analyzing the CPaaS Universe

### Market definition

CPaaS is a suite of services that allows developers and organizations to integrate communication capabilities into their customer-facing applications easily to improve their interactions with customers, employees, and partners. CPaaS enables various use cases depending on the communication channel used. These use cases vary across vertical industries, and can be tailored to an organization's requirements. The benefits of using CPaaS include increased customer satisfaction, faster response times, an improved customer experience, and the automation of backend processes or "workflow." CPaaS providers operate at scale, offering a comprehensive range of services or, in selected markets, with more focused offerings.

To qualify as a CPaaS provider, vendors must offer fundamental capabilities such as programmable APIs, phone numbers, cloud-based access to communication networks, developer resources, and flexible pricing models. However, leading CPaaS providers offer additional technologies and services such as security and authentication features, and pre-packaged solutions such as CCaaS, UCaaS, CEPs, CDPs, and AI features. In our ranking of CPaaS vendors, Omdia considers this enhanced level of solution breadth to be a key differentiator among market leaders.

Omdia has scored participants in the CPaaS Omdia Universe on the following criteria:

## Strategy & innovation

- **Innovation:** Innovation is the engine room of differentiation, and in the increasingly competitive CPaaS market, differentiation is critical not only in terms of the products and services a CPaaS vendor offers, but also in how they take them to market.
- **Go-to-market strategy:** Includes developer outreach, technical support, and professional services. Developers remain a core market for CPaaS vendors, whether full-time employees or contractors. Developers/organizations rely on CPaaS vendors for assistance when issues arise. Professional services teams within CPaaS vendors support developers/organizations through supplementary skills for projects or turnkey services.
- **Pricing & licensing:** How a CPaaS vendor prices its services and generates revenue, including business models.

## Market momentum

- **Geographic coverage:** Where a CPaaS provider has a local presence. A CPaaS provider with wide coverage can offer services, such as phone numbers, that customers can use to terminate traffic on telco networks.
- **Number of customers:** Refers not only to how many customers a CPaaS vendor has, but also assesses the market segments and penetration of its customer base, plus metrics such as SMS traffic volumes and voice minutes.

## Vendor execution

- **Implementation services:** How developers access and integrate a vendor's APIs and connectivity services. For larger enterprises, a CPaaS vendor may have dedicated teams working directly with enterprises, or may partner with companies such as systems integrators, value-added resellers (VARs), or independent software vendors.
- **Partners & ecosystem:** Partnerships with other technology vendors, systems integrators, and consultants are essential for CPaaS vendors to broaden their service portfolio, reach into new market segments and/or geographies, and deliver CPaaS capabilities into vertical industries.
- **Non-functional requirements:** How a CPaaS vendor enables quality of service across its infrastructure; for example, how it ensures reliable and timely delivery of real-time communication, the service level agreements it offers, and how it complies with local regulations.

## Core capabilities

- **Connectivity services:** A provider's telecommunications network that offers services such as phone numbers, voice, and messaging. A vendor may provide these services directly and/or indirectly through third-party aggregators.
- **APIs, value-added services, and packaged solutions:** The vendor's APIs for communications services (including SMS, MMS, voice, video, and other messaging apps), plus additional value-added services, such as number masking, two-factor authentication, and 10DLC.

## Advanced capabilities

- **AI capabilities:** Enterprises can use AI-powered technologies to enhance customer interactions, overtly through chatbots and sentiment analysis of social channels, or in the background with intelligent call routing services. Moving forward, GenAI—enabled by CPaaS vendors—is expected to play a key role in how enterprises engage with their customers.
- **Customer engagement capabilities:** Many CPaaS vendors are adding CEPs to their service as an extension to omnichannel communications. Other CPaaS vendors offer integrations into enterprise customers’ existing CEPs, recognizing that their customers may wish to leverage existing investments.

## Market dynamics

In this Universe, Omdia profiles twelve vendors, including four “new” entrants—the India-headquartered companies Comviva, Exotel, Intense Technologies, and Tanla Platforms—two of which Omdia has ranked as Challengers. In addition, Tata Communications now includes its combination with Kaleyra. The twelve vendors in this Universe do not reflect the totality of CPaaS vendors in the market—Omdia calculates that there are at least 30 vendors (including these 12) offering CPaaS capabilities (see **Table 1**). The “native” CPaaS vendors include Twilio, Vonage (via Nexmo), Bandwidth, and Plivo. Other CPaaS vendors have originated their CPaaS offering from various parts of the value chain; for example, SMS aggregators such as Infobip, Sinch, Syniverse, and Tata Communications have pivoted to become CPaaS vendors, enterprise software vendors such as Cisco Webex Connect have acquired a CPaaS platform to complement their existing products, and telcos/telco alliances such as Telin and Bridge are seeking to provide their own CPaaS platforms to engage with their enterprise customers directly—or to allow their members to do so. As outlined above, most CPaaS vendors are moving towards the “CPaaS Charged” end of the CPaaS evolutionary timeline.

**Table 1: Industry origins of selected CPaaS vendors**

<b>“Native” CPaaS vendors</b>	<b>SMS aggregators, connectivity service providers</b>	<b>Enterprise software vendors, network equipment providers</b>	<b>Telcos, telco alliances/hyperscalers</b>
Bandwidth	BICS (Proximus)	8x8	AWS Communication Developer Services
Plivo	Bird	Avaya	Azure Communications Services (Microsoft)
Twilio	Cequens	Cisco Webex Connect	Bridge Alliance
Vonage (Nexmo)	Comviva	Exotel	Proximus (BICS, Telesign)
	Infobip	IntelePeer	Telin
	Route Mobile (Proximus)	Intense Technologies	Tencent Cloud
	Sinch	Mavenir	
	Syniverse	Ribbon	
	Tanla Platforms	RingCentral	
	Tata Communications (Kaleyra)	Soprano Design	

Source: Omdia

Much of what is driving the development of the CPaaS market is related to CPaaS vendors’ current imperative to help enterprises interact more effectively with their customers. Omdia’s survey *The State of Digital CX 2024* (see Further Reading) reveals that organizations face significant challenges in leveraging their data to enhance customer engagement and improve operational efficiency. Key issues include the inability to personalize interactions in near real-time, the lengthy process of querying omnichannel data and running AI/ML models, and difficulties in integrating various data sources.

Organizations must address these complex challenges through strategic planning, technological investments, and organizational change to achieve an integrated view of customer data and streamline systems. By breaking down silos, upgrading technology, improving data quality and governance, ensuring compliance, and fostering a culture of collaboration and innovation, large enterprises can attain a comprehensive view of their customers. This enables them to fully leverage customer data, enhancing the customer experience through personalization, proactive support, and improved product offerings.

Over the past year, customer interaction channels have changed significantly, with text-based chatbots now leading the way. A total of 55% of respondents said their use of these chatbots has either "significantly

increased" or "increased." The growing popularity of chatbots in customer service can be attributed to their round-the-clock availability, cost-effectiveness, instant responses, and consistent service quality. These chatbots effectively and efficiently handle routine questions, collect valuable data, and integrate seamlessly with other systems. Plus, their ability to support multiple languages and continually learn and adapt makes them vital tools for modern customer service.

Email and mobile apps have also experienced substantial growth, with 52% of respondents indicating significant or moderate increases in these channels. The persistent preference for email highlights customers' desire for non-intrusive, documented communication. Social media platforms ranked fourth as a preferred customer interaction channel, with 50% of respondents reporting increased usage, closely followed by live web chat and digital self-service, which both saw a 48% increase.

The *State of Digital CX 2024* survey posed a vital question to organizations: "What do you envision to be the top priorities in how you will evolve the customer experience over the next one to three years?" Half of the respondents identified using advanced analytics and AI as their top priority to understand evolving customer needs and preferences. This emphasis on leveraging sophisticated technologies reflects a broader trend towards data-driven decision-making, aiming to enhance customer insights and foster more meaningful engagements. In addition to analytics and AI, creating a seamless experience across the customer journey is important to 46% of respondents, highlighting the critical need for consistency and cohesion across all touchpoints.

Furthermore, 45% of respondents plan to adopt a proactive approach to customer engagement to anticipate and address customer needs before issues arise. Such a forward-looking strategy can significantly enhance customer satisfaction by providing timely and relevant interactions. Enhancing personalization remains a priority for 44% of respondents, underscoring the growing demand for tailored experiences that resonate with individual customers.

As the CPaaS industry continues to evolve to offer higher-value, customer-focused, and automated platforms, organizations are empowered to orchestrate the customer journey in low-code/no-code environments, deliver better services, and provide a consistent customer experience across all touchpoints. In light of these market developments, our Universe evaluation has aligned with key priorities for enhancing customer experience, as reflected in the scoring for the Advanced CPaaS category.

Figure 3: Vendor rankings in the CPaaS Platform Providers Universe

Vendor	Products evaluated
<b>Leaders</b>	
Twilio	Twilio CPaaS
Sinch	Customer Communications Cloud
Infobip	Infobip CPaaS
Vonage	Vonage Communications Platform
<b>Challengers</b>	
Bandwidth	Maestro
Cisco	Webex Connect
Comviva	NGage
Syniverse	Concierge
Tanla Platforms	Wisely
TATA Communications	Customer Interaction Suite
<b>Prospects</b>	
Exotel	Enterprise Customer Communication Ecosystem
Intense Technologies	UniServe

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Source: Omdia

## Market leaders

Based on Omdia's criteria and analysis, Infobip, Sinch, Twilio, and Vonage are identified as leaders in this report (see **Figures 1 and 3**). Each of these vendors has significant capability across all criteria scored. Their reach is global: Leaders have enterprise customers for their platforms and services in many countries and in most regions, which is supported by a localized presence delivered either on the ground or, in the case of Twilio, remotely. This reach is underpinned by thousands of direct and indirect connections with telcos in many countries, Leaders' own communications infrastructure (e.g., voice networks, email platforms) and data centers, and partnerships with public cloud providers. Leaders have comprehensive offerings across a

number of services (e.g., phone numbers, short codes, long codes), APIs, value-added services, and packaged solutions. They have a well-defined, multi-level go-to-market strategy that acts as an accelerator for growth and innovation and which variously includes direct sales, an extensive partner ecosystem, and developers. Leaders are using their CPaaS capabilities as the foundation to extend into customer engagement, offering their own products and services in this area and complementing them with third-party integrations. Leaders are also heavily investing in adding AI/GenAI-based functionality and features across their technology stack.

## Market challengers

Bandwidth, Cisco Webex Connect, Comviva, Syniverse, Tanla Platforms, and Tata Communications are identified as Challengers in this report, meaning that they score lower than the Leaders for both Strategy & Execution and Solution Capability. Challenger CPaaS vendors have less capability than Leaders in one or more areas, even though their offerings may be comparable in others. For example, most of the Challenger vendors score lower than the Leaders on connectivity services and geographic coverage, typically because they are focused on providing services in only a few countries or one or two regions. Three of the six also score much lower on the Advanced CPaaS summary category (AI capabilities and CEPs) than the Leaders. This applies to the Challenger vendors that are partnering with third parties for CEP, rather than offering their own, since the integration of AI capabilities is primarily happening in technology that enables or supports CEP. However, some Challengers have reasonably high scores (though not as high as the Leaders) in areas such as innovation, go-to-market strategy, partners and ecosystem, and non-functional requirements. This suggests that the CPaaS offerings of the Challengers, their approach towards strategy and innovation, and the way in which they offer and support services are somewhat competitive with the Leaders.

## Market prospects

Intense Technologies and Exotel are identified as Prospects in this report. Prospect CPaaS vendors score lower across the board than Leaders and Challengers on Strategy & Execution, though Exotel scores higher than some of the Challengers on Solution Capability. Lower scores for Strategy & Execution relate mainly to lower scores for vendor execution (i.e., implementation services and non-functional requirements) and for market momentum (i.e., geographic coverage and customer metrics). The two Prospect vendors are Indian-headquartered companies, and while they have a significant number of enterprise customers in India, including banks, utilities, and government departments, they have a limited presence/customer footprint in other countries and regions. Meanwhile, in Solution Capability, Exotel outperformed some of the Challengers in AI capabilities and some in CEPs.

## Opportunities

CPaaS vendors occupy a unique position in the customer engagement value chain. They are enablers of the communications services that enterprises use to interact with their customers (e.g., SMS, voice, email, messaging apps, and so on). Most CPaaS vendors also offer products and services that facilitate and/or automate engagement between enterprises and their customers, ranging from use case templates for notifications and alerts all the way up to verticalized solutions, CEPs, and customer data platforms. The proliferation of capabilities within the CPaaS vendor product portfolio allows them to tap into a range of opportunities:

- **Multichannel/omnichannel communications:** CPaaS vendors can facilitate the addition of emerging business messaging channels to enterprises' customer engagement, such as WhatsApp and RCS. They can also help enterprises orchestrate interactions across multiple communications channels, enabling customers to self-serve or to have two-way conversations

using their preferred channel, whether that be SMS, voice, email, messaging apps, video, or a combination of any of the above.

- **Contextual communications:** In addition to multichannel or omnichannel communications, CPaaS vendors can assist enterprises in enabling seamless, contextual communications with their customers (i.e., combining customer data, automation, and workflows with communications channels to enable personalized and highly relevant interactions).
- **AI/GenAI-based automation:** CPaaS vendors have been using AI for some years, for example, machine learning (ML) algorithms often underpin their messaging traffic optimization. They are now playing a key role in “democratizing” the use of AI/GenAI in their CX applications, helping enterprises identify relevant use cases in customer engagement, and providing AI/GenAI-based capabilities such as chatbots and agents, data analytics, content summaries, content generation (e.g., marketing campaigns), sentiment/intent analysis, and more, to help enterprises drive efficiencies, enhance customer interactions, and personalize experiences. They also educate enterprises about the safe and ethical use of AI/GenAI.
- **Verticalized solutions:** CPaaS vendors often have domain-specific expertise across industries, either because of their heritage as SMS aggregators or developed in line with their growth (e.g., Twilio). They can leverage this expertise to provide solutions that cater to the unique needs of different verticals, including banking, financial services, and insurance (BFSI), retail/e-commerce, telecommunications, government, healthcare, and transportation.
- **Security and compliance:** As communications enablers, CPaaS vendors also have a key role to play in helping enterprises to comply with regulatory and legislative requirements at local and regional levels, to safeguard their businesses from exploits such as the artificial inflation of traffic, and to protect their customers from exploits such as spam, fraud, and robocalling. Meanwhile, enterprises are also looking for lower-cost, more secure forms of verification and authentication, beyond SMS-based one-time passcodes, which represents a further opportunity for CPaaS vendors.
- **Integration with enterprise applications:** Providing APIs that more easily allow enterprises and developers to add communications capabilities into existing enterprise applications and services has long been a key differentiator for CPaaS vendors. As CPaaS vendors started providing packaged solutions, they’ve also developed a modular and systematic approach towards integrating elements of these solutions with enterprise applications. This approach means that CPaaS vendors, especially the Leaders in this Universe, have a substantial number of integrations with enterprise applications. This increases the accessibility of their offerings, helps them address their enterprise customers’ constraints on costs, and provides enterprises with a platform that allows them to centrally manage their communications with consumers.

## Threats

At the time of writing, the state of the global economy remains uncertain. A significant and potentially globally destabilizing macroeconomic factor is the trade policy uncertainty resulting from the US introducing global tariffs on all imported goods in April 2025, including a universal minimum tariff of 10%. China, Japan, South Korea, and emerging economies in Asia & Oceania have had high tariffs imposed, ranging from 24–49%. The US’ new trade policy has raised the prospect of a global recession, with trading partners, including trade blocks such as the EU, considering reciprocal tariffs, which may further exacerbate global economic instability. In addition, geopolitical tensions continue, especially in Eastern Europe and the Middle East; the conflict in the Middle East may potentially result in higher oil prices and reduced global growth. Other

macroeconomic factors impacting the global economy include inflation, supply chain disruptions, and monetary supply shifts. This instability could result in decreased budgets, postponed sales cycles, and delayed customer payments, negatively impacting the CPaaS market.

Selling CPaaS also remains challenging due to the need for CPaaS vendors to identify and engage with multiple buying centers within an enterprise, a lack of awareness about what CPaaS vendors offer, inertia within organizations around moving from an existing supplier, increasing pressure on enterprises to consolidate vendors, and a concurrent need for any vendor to rapidly demonstrate ROI. As an example, Twilio, a Leader in this Universe, stated at its Investor Day in January 2025 that almost two-thirds of its customers (63%) purchase one product only, which underlines the challenges involved in selling into enterprises. However, Twilio also revealed that the remaining 37%, who are multi-product customers, generate 90% of its revenue, suggesting that there is significant extra value to be unlocked, and prompting the vendor to revamp its go-to-market accordingly (see Twilio profile, below). Other CPaaS vendors are almost certainly experiencing similar challenges.

## Market outlook

In our CPaaS Universe, a strategic cluster of market-leading vendors—Infobip, Sinch, Twilio and Vonage—will continue to retain their position as vendors that have the most comprehensive solution capability combined with proven ability to evolve their strategy and go-to-market to meet the ever-changing communications requirements of enterprise customers, globally. These vendors have moved from offering a basic set of cloud-based communications APIs (e.g., SMS, voice) and supporting services such as telephone numbers, to providing a vastly expanded set of communications APIs and supporting services, comprehensive CEPs that enable orchestrated, omnichannel communications, and pre-packaged solutions that are tailored to industry verticals and horizontal market segments (e.g., marketing, sales). In addition, they are infusing AI/GenAI across their products and services at all layers, enabling efficiencies within their own networks, more robust security features (e.g., spam and fraud detection); and data-driven, hyper-personalized, contextual customer engagement capabilities, which include automation where appropriate. CPaaS vendors will retain a key role as an enabler in the CX value chain, either as providers of their own platforms or as partners to others.

Challengers and Prospects in this Universe have similarly invested in building out CEP capabilities—alongside their investment in communications infrastructure and connectivity services. There are varying factors (listed above) governing why Challengers and Prospects fall where they do in this Universe, and Omdia by and large expects these factors to persist in the coming years. For example, achieving global reach or tapping into the long tail of citizen developers has not been a priority for some vendors; others have chosen not to develop or acquire their own CEP capabilities, preferring instead to partner with existing providers.

Omdia expects that communications services (i.e., connectivity services such as SMS and voice) will continue to generate the most significant revenue for CPaaS vendors over the next 2–4 years. As an example, the largest vendor in this Universe by revenue, Twilio, generated 93% of its \$4.46bn revenue in 2024 from its Communications business. Within the communications services offering, Omdia expects that enterprise demand for WhatsApp and RCS Business Messaging (RBM) will grow, and CPaaS vendors will see their revenue from these services increase in-line. Meanwhile, several CPaaS vendors in this Universe have added Network APIs to their portfolio, and Sinch and Infobip both joined the recently announced Aduna consortium of telcos led by Ericsson (owner of Vonage, also a member of Aduna). Omdia's *Telco Network API Revenue Forecast – 2023–29* (see Further reading) estimates telco revenue from five Network API

categories (subscriber identity, location, network quality, edge computing, payments) will total \$1.6bn by 2026, rising to \$8.7bn by 2028.

# Vendor analysis

## Vendor accolades

Within the vendor analysis section, there are two types of accolades that can be awarded to vendors:

- The **best-in-class** accolade is awarded to the vendor(s) with the highest score (highest outright, tied highest, or within <1% of the highest score) for each of the scoring categories that make up this Universe topic:
  - Core CPaaS Capability
  - Advanced CPaaS Capability
  - Solution Breadth
  - Strategy & Innovation
  - Market Momentum
  - Vendor Execution

The Top-tier accolade is given to vendors falling within the upper tercile (top third) of the scores within the comparison group, for each of these same scoring categories.

## Bandwidth (Omdia recommendation: Challenger)

Bandwidth should appear on your shortlist if:

- You need a global, scalable, and reliable IP voice and messaging network built on a low-latency, high-quality, carrier-grade infrastructure.
- You need flexible integration capabilities that can utilize an enterprise's preferred applications and platforms, such as unified communications, CCaaS, and voice AI agent solutions.
- You want a platform that integrates voice, messaging, emergency, and phone number management for global communications and that features automation and developer-friendly REST APIs, enabling businesses to scale while ensuring local compliance.

## Overview

Bandwidth is a notable provider in the CPaaS market, recognized for its global IP voice network and core CPaaS capabilities. The company offers scalable and reliable communication services, including voice, messaging, and emergency management. Bandwidth's CPaaS platform stands out in the industry due to its open, vendor-agnostic approach. This allows organizations to support crucial communications while also having the flexibility to integrate their preferred applications, leading to a more tailored user experience. By focusing on an open integration framework, Bandwidth enables businesses to choose the tools that best suit their needs without being tied to a single vendor, encouraging innovation and adaptability.

Bandwidth's go-to-market strategy features a dual approach that enables the company to effectively serve diverse clients. The first route involves collaborating with hyperscalers and resellers, integrating Bandwidth's comprehensive communication solutions into their CPaaS, UCaaS, and CCaaS platforms. This strategy is particularly advantageous for small and mid-sized customers, providing them with scalable and reliable communication solutions bundled within the platforms they already use. By partnering with resellers, Bandwidth ensures its services remain accessible to a broader market, facilitating seamless communication and enhancing the overall user experience for smaller enterprises.

The second route focuses on large enterprises with whom Bandwidth engages directly to offer customized communication services. This approach often involves partnerships with leading platforms, allowing Bandwidth to tailor its offerings to meet the specific needs of various industry verticals. By providing personalized solutions, Bandwidth addresses the unique challenges and requirements of large organizations, ensuring their communication strategies align with their business goals. This direct engagement strengthens client relationships and positions Bandwidth as a key player in delivering advanced, mission-critical communication capabilities at the enterprise level.

Bandwidth offers three primary market solutions tailored for business-critical communication. Firstly, Global Communication Plans provide PSTN calling options that enable employees to communicate with each other and their customers through unified communication and contact center platforms. By integrating with resellers, Bandwidth ensures that businesses can maintain effective communication, regardless of size or geographical location.

Bandwidth is a leading Tier 1 carrier operating in 38 countries. It has built strong partnerships with global carriers and mobile operators, enabling the company to provide reliable and high-quality communication services. Additionally, Bandwidth can connect indirectly in all 67+ countries it serves, ensuring comprehensive and flexible communication solutions for its clients. This extensive network connectivity allows Bandwidth to provide robust and high-quality communication capabilities to businesses of all sizes, fostering a more connected and efficient global offering.

Secondly, Bandwidth's Programmable Services include A2P messaging and programmable voice services designed for hyperscalers and large senders like conversational commerce platforms. These services offer scalability and flexibility, enabling large-scale operations to customize and enhance their communication capabilities to meet specific business needs. Programmable messaging allows businesses to automate and personalize customer interactions through SMS, MMS, and other messaging channels. This enables efficient handling of high volumes of messages, ensuring timely and relevant communication.

Programmable voice services provide robust solutions for adding voice capabilities to applications. This includes call routing, conferencing, and interactive voice response (IVR) systems. By leveraging these services, businesses can create seamless voice communication experiences for their users while integrating with existing workflows and systems. The programmability aspect allows for high customization, enabling enterprises to tailor their communication strategies to align with their business goals and customer expectations.

As a further example of its messaging vision, Bandwidth recently announced its status as a Directly Connected Aggregator (DCA), having fully implemented a direct connection with a Tier-1 global mobile network operator. This strategic move is a key part of the continued buildout of the Bandwidth Communications Cloud, enhancing its ability to deliver high-volume text messaging.

Lastly, Bandwidth's Enterprise Solutions focuses on customer experience for Global 2000 companies, offering composable solutions via its Maestro platform that integrate with best-in-class CX and AI platforms. These solutions are designed to enhance customer engagement and provide users with a seamless,

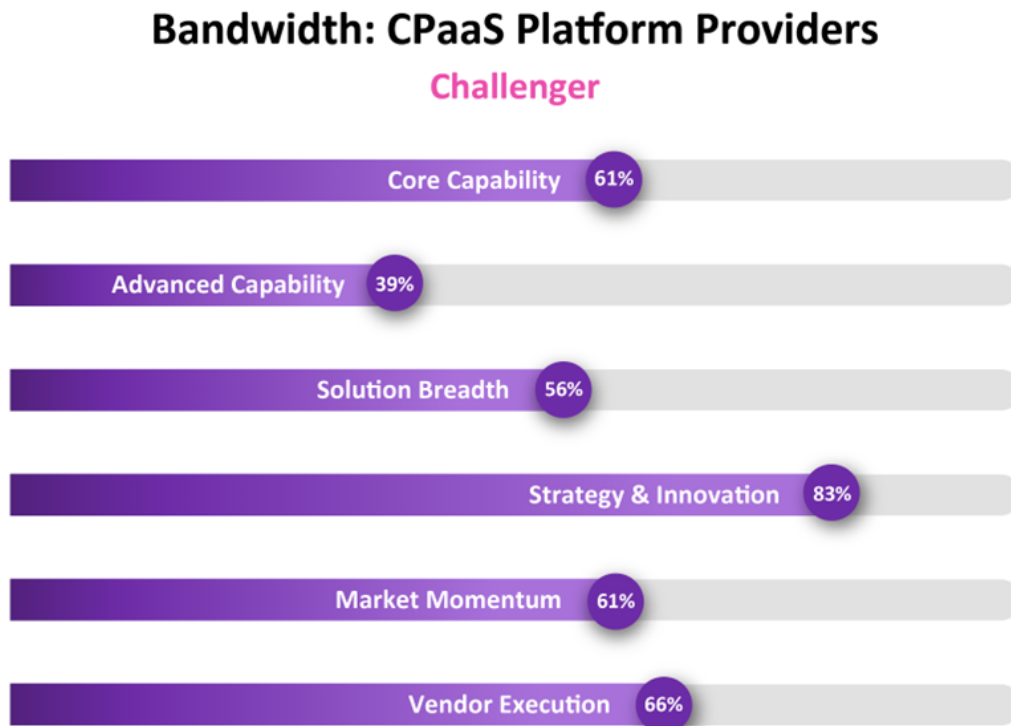
personalized experience. As enterprises move to the cloud or between cloud vendors, Bandwidth's strong relationships with top CCaaS providers is a key strength. Going forward, Bandwidth is extending its vendor-agnostic strategy to enable enterprises to choose from the vast ecosystem of conversational AI providers to integrate voice AI agents in many use cases, including IVR replacement.

Bandwidth's 24/7/365 support is a key differentiator. By leveraging advanced technologies such as ML algorithms, predictive analytics, and real-time data processing, Bandwidth anticipates customer needs to resolve issues promptly.

Looking ahead, Bandwidth plans to expand its messaging services worldwide, introduce Rich Business Messaging (RBM) capabilities, and enhance conversational messaging. These efforts aim to boost customer engagement and create new opportunities for businesses, reinforcing Bandwidth's status as a challenger in the CPaaS industry.

In addition, Bandwidth is focused on improving its back-office customer experience, emphasizing automation, reliability, and redundancy. The company is also integrating AI to enhance its functionality.

Figure 4: Omdia Universe ratings—Bandwidth



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Source: Omdia

## Strengths

- **Global owned-and-operated network:** As Bandwidth owns and manages its own cloud-native network with global reach, it delivers ultimate control in terms of flexibility, reliability, scalability, and support. Furthermore, this allows the vendor to reinvest any cost savings into strategies that promote innovation and new capabilities.

- **Platform-agnostic approach:** Bandwidth offers a flexible, open environment that enables enterprise CIOs to build their technology stack according to their own preferences. With Bandwidth’s Maestro platform, enterprises can integrate their preferred UCaaS, CCaaS, and conversational AI and ML solutions.
- **Regulatory expertise:** Bandwidth is a network owner and operator with extensive global regulatory knowledge. This expertise allows the vendor to provide essential consulting support and insights on regulatory developments, helping customers navigate and comply with complex international regulations specific to each country.

## Limitations

- Unlike many other CPaaS vendors that focus more on a unified customer experience approach to CPaaS, Bandwidth’s vendor-agnostic “freedom of choice” strategy does not offer out-of-the-box omnichannel orchestration, making it challenging for enterprises who want prebuilt solutions.
- Bandwidth’s AIBridge enhances communication workflows with conversational AI. While beneficial, other vendors offer co-pilot and embedded solutions within an “all-in-one” AI solution rather than la carte integrations—which, to some customers, might be preferred for its simplicity. Enterprises should carefully assess which option aligns best with their strategies.
- Bandwidth Maestro integrates various UCaaS, CCaaS, AI, and ML platforms, but it is currently limited only to voice, AI, and emergency integrations. The vendor enables messaging through simple-to-integrate APIs outside the Maestro platform.

## Cisco Webex Connect (Omdia recommendation: Challenger)

### Cisco Webex Connect should appear on your shortlist if:

- You are seeking a platform with robust core functionalities, including communication channel management, integration setup and management, security, scalability, and a centralized cloud communication platform to handle customer interactions.
- You are an enterprise where Cisco is a key strategic vendor, and you wish to gain additional value from integrating existing solutions, such as Webex Contact Center, with various third-party applications and services.
- You need a variety of pre-packaged applications to effectively manage and automate marketing campaigns, customer notification services, customer self-service using NLP, NLU, GenAI, and omnichannel contact center capabilities.

## Overview

Cisco Webex has a well-known heritage that was founded in the contact center market, and it has vastly broadened its capabilities through the acquisition of IMI Mobile in 2020. This strategic move enabled Cisco Webex to integrate advanced messaging, voice, and automation features into its portfolio, providing businesses with enhanced customer capabilities. Cisco Webex Connect employs a strategic go-to-market approach by collaborating with an extensive partner ecosystem consisting of resellers, system integrators (SIs), VARs, and independent software vendors (ISVs). These partnerships expand Cisco’s market reach into enterprise environments, allowing for tailored solutions, enhanced support, and innovative customer engagement across numerous industries.

Central to Cisco Webex Connect's approach are six pillars: Channels, Integrations, Flow Orchestration, NLP/NLU and AI, Enterprise Controls and Security, and Service Assurance. These pillars focus on broad connectivity, interoperability, simplified customer interaction management, stringent security, and reliable performance. Cisco is actively investing in AI advancements, localization, accessibility, and achieving FedRAMP certification to expand its market reach and strengthen partnerships. These efforts seek to enhance productivity, reduce costs, and improve customer experiences across new markets.

The Webex Connect CPaaS platform boasts a robust set of features aimed at enhancing customer engagement. Key functionalities include the Customer Profile Module, which allows users to create multichannel customer profiles, and the Contact Policy Module, which captures customer communication preferences. These tools deliver contextual customer experiences based on preferences, channel availability, and other profile information. The platform's ability to programmatically access and update customer profiles adds flexibility, ensuring customer data remains current and relevant.

In addition to its customer profile capabilities, Webex Connect offers native integration with Cisco's Journey Data Service (JDS) module. JDS is an open platform that collects data to enhance customer profiling, ensuring that profiles are consistently updated with every interaction and engagement. Furthermore, Webex Connect can integrate with other CDPs through data streams and integration nodes, or by creating custom logbooks for asynchronous extract, transform, and load (ETL) processes. These features collectively position Webex Connect as a powerful challenger in the CPaaS market.

Webex Connect's sophisticated natural language processing (NLP) and natural language understanding (NLU) capabilities enhance conversational customer interactions. The Flow Builder feature simplifies the creation of complex conversational flows using drag-and-drop components. Webex AI Agents offer low-code tools for crafting both autonomous and scripted virtual agents across digital and voice channels, leveraging GenAI. Additionally, built-in NLP and NLU libraries include spell check, unit recognition, numbers recognition, date and time recognition, sentiment analysis, language translation, and a profanity filter. Utilizing modules from providers like Azure and Google API, Webex Connect ensures robust AI-driven solutions.

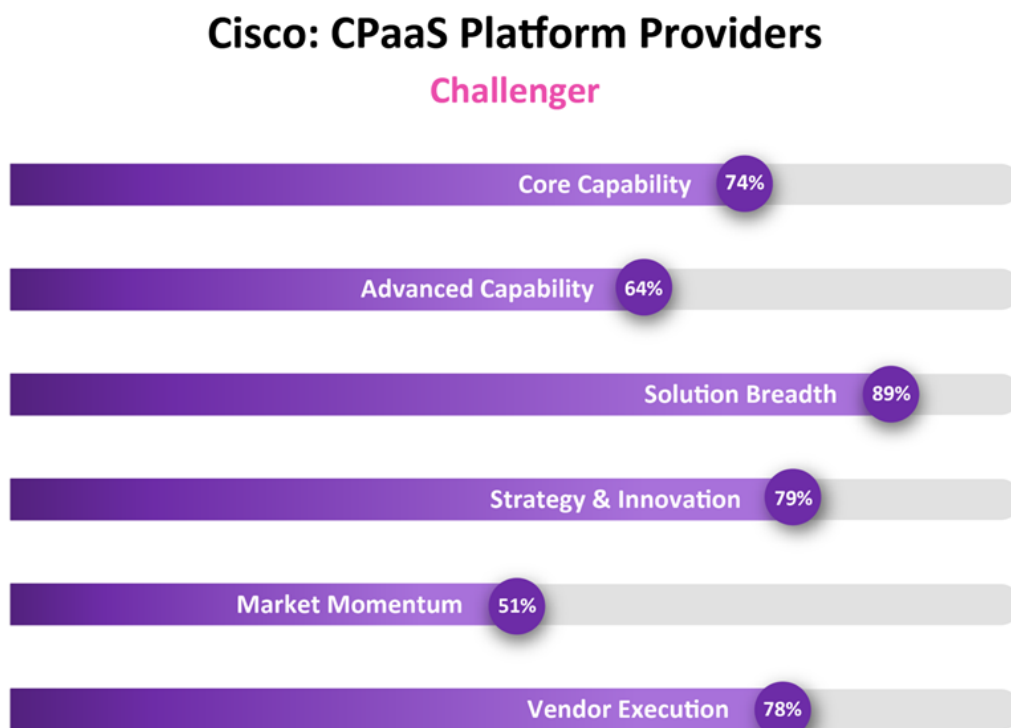
Cisco Webex Connect enhances its native connectivity by integrating various communication channels through comprehensive messaging APIs. These include SMS, MMS, RCS, voice, push notifications, in-app messaging, web chat, email, Apple's Messages for Business, WhatsApp, Instagram, Facebook Messenger, and others. Additionally, Cisco Webex Connect offers various APIs to access message and call statuses, call recordings, customer profiles, and event API and webhooks. These features allow for real-time triggers and updates from integrated systems, facilitating relevant customer interactions and journeys.

Cisco Webex Connect integrates with leading third-party AI solutions from Google, Microsoft, Amazon Web Services (AWS), IBM, and Kore.ai, allowing enterprises to leverage their existing investments. This capability is enhanced by Webex Connect's AI Agents feature, which supports conversational automation. By incorporating Cisco's AI investment in MindMeld, Webex Connect ensures clients can choose the AI engine that suits their needs. This adaptability allows enterprises to improve their customer experience at any stage of AI adoption, from conversational AI to support functions. The platform also offers integrations with various customer relationship management (CRM), helpdesk, contact center, and vertical systems. Examples include Salesforce, Zendesk, and EPIC in the healthcare space. Additionally, businesses can leverage a custom integration node to configure reusable integrations with desired systems. At the same time, partners benefit from an integration studio for adding newer integrations and reducing time-to-value for enterprise clients.

Webex Connect also offers essential network APIs, such as number verification, SIM swap checks, and OTP SMS, which are primarily used for security in the financial industry. These APIs, supported by operator partnerships, enhance fraud prevention and real-time customer identity decisions, balancing privacy with valuable data use.

Although Cisco's established heritage is in the contact center market, and it has higher-than-average scores in the customer engagement category, it did not emerge as the highest-scoring vendor in our assessment. This outcome illustrates the competitive nature of customer engagement solutions, where even well-established companies must continually innovate to maintain their edge. Nonetheless, Cisco's dedication to improving its offerings is evident in the extensive features of the Webex Connect platform, which distinguishes it as a strong challenger in the CPaaS market.

**Figure 5: Omdia Universe ratings—Cisco Webex Connect**



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Source: Omdia

## Strengths

- **Comprehensive communication channels:** Cisco Webex Connect integrates various communication channels through comprehensive messaging APIs, allowing businesses to provide a seamless and unified customer experience across multiple platforms.
- **Advanced AI and NLP capabilities:** Webex Connect offers AI agents and sophisticated NLP and NLU capabilities, which enhance conversational customer interactions.
- **Integration with leading AI solutions:** Cisco Webex Connect integrates with leading third-party AI solutions from Google, Microsoft, AWS, IBM, and Kore.ai. This allows enterprises to leverage

their existing investments in these technologies and ensures adaptability to ongoing channel updates.

## Limitations

- Unlike some CPaaS vendors operating their own networks or maintaining extensive global partnerships with carriers, Cisco Webex Connect has limited geographical coverage for SIP trunking, collaborating with North American and UK partners to offer voice services for enterprise clients.
- While the Cisco Webex brand is well-known and trusted by global enterprises, Cisco Webex Connect remains a somewhat lesser-known entity in the CPaaS market. Indeed, Cisco does not publicly disclose information regarding the number of customers it has, the amount of traffic it processes, or other metrics that can help organizations gauge the success of its platform.
- Although Webex Connect's go-to-market strategy leverages Cisco's strong contact center brand and customer base, its lack of broader marketing for standalone CPaaS capabilities limits its visibility and competitiveness in the CPaaS market.

## Comviva (Omdia recommendation: Challenger)

### Comviva should appear on your shortlist if:

- You are a CSP wishing to offer a customizable, white-labeled, multi-channel solution for enterprises, leveraging your existing mobile infrastructure to maximize the potential of your value-added CPaaS solution.
- You do not wish to depend on a CPaaS aggregator to manage the complexities of integrating your own network infrastructure, such as network-based authentication and multiple business support systems (BSS) interactions.
- You require a flexible business model that includes options for revenue sharing, opex, and capex from a vendor focused on monetization and helping operators maximize their profits.

## Overview

Comviva's NGAGE Omnichannel CPaaS platform is a comprehensive service designed to help mobile communication service providers (CSPs) maximize their investments in existing infrastructure. By offering universal, simplified, and standardized APIs along with pre-packaged solutions, NGAGE opens up new service opportunities and revenue streams for CSPs to sell to enterprise customers.

Comviva's go-to-market strategy empowers CSPs to monetize their network assets. This is achieved through the availability of both CAMARA-compliant and non-standard APIs. The platform supports private and public cloud deployments, giving companies the flexibility and scalability they need to meet various operational demands. Network APIs are bundled with Communication APIs and accessible through the Comviva API Marketplace, which features flexible pricing options like CAPEX, ARR, and Revenue Sharing. This ensures that CSPs can tailor their services to fit their business goals, fostering innovation and growth in their markets.

From a standardized API perspective, Comviva embraces GSMA's Open Gateway CAMARA APIs, which create a universal framework for common network APIs. This makes it easier for developers to access operator networks and turn them into programmable platforms. With these APIs, developers can add

functionalities like identity management, cybersecurity, billing, signaling, quality of service, and geolocation to their applications. Mobile telecom operators can leverage these capabilities to introduce new revenue streams, enhance customer experiences, and engage users through more personalized services.

Comviva's Network API offerings are further strengthened through partnerships with Application Service Providers (ASPs) across diverse sectors, including healthcare, autonomous vehicles, IoT platforms, digital twins, and AR/VR. These collaborations help ensure that Comviva's omnichannel CPaaS integrates well with a variety of application ecosystems. This means telecom companies can provide tailored solutions that meet the specific needs of enterprise customers, leading to greater utility from Comviva's APIs and faster adoption of innovative technologies across different industries.

Additionally, Comviva works with 5G Network Exposure Function (NEF) and Service Capability Exposure Function (SCEF) providers to unlock advanced network capabilities. These partnerships are vital in the age of 5G, allowing the integration of features like ultra-low latency, massive connectivity, and high reliability into Comviva's API solutions. This collaboration enables telecom operators to harness the latest network advancements, providing superior customer experiences and new revenue opportunities through next-generation services.

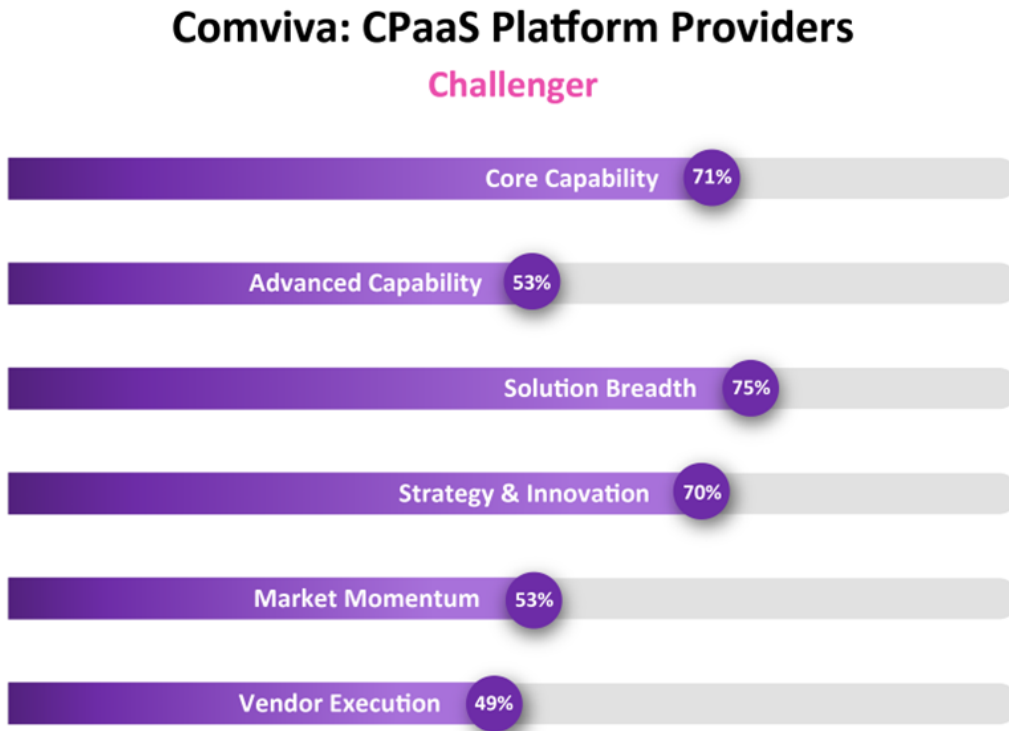
Beyond the NGAGE platform, Comviva also offers a range of pre-built solutions designed to meet various enterprise needs. These include areas like marketing automation, customer engagement, and omnichannel communication. By using Comviva's ready-made applications, telecom operators can deliver value-added solutions to businesses, helping them manage campaigns, automate customer notifications, launch surveys, gather feedback, and improve customer care.

The NGAGE platform is equipped with a native conversational AI solution. Developed from the ground up, it features a user-friendly low-code interface allowing easy customization and rapid deployment. This solution enables the integration of virtual agents into chatbots, enhancing automated interactions. Additionally, the platform supports the assignment of live human agents based on teams and departments, ensuring that users are directed to the appropriate agent through advanced routing capabilities.

The NGAGE Platform effectively leverages GenAI in several key areas. Firstly, it allows businesses to enhance customer engagement through personalized messaging. It also includes a built-in low-code/no-code journey builder, which enables users to upload necessary documents to train their customized journeys. This functionality facilitates AI-driven conversations, allowing for prompt responses to inquiries. Finally, the conversational AI Solution supports the integration of third-party applications—such as OpenAI—to develop intelligent chatbots. This feature significantly improves automated interactions and provides a robust solution for engaging effectively with customers.

NGAGE's omnichannel platform is competitive with other vendors in areas such as APIs, value-added services, packaged solutions, AI, and a user-friendly drag-and-drop interface allowing users to create and automate journeys without coding. However, there is potential for improvement in customer engagement capabilities. Other vendors have received higher functional ratings; Comviva's lower rating is mainly due to the lack of features such as a native CDP and more enhanced integration with broader cross-functional business workflows.

Figure 6: Omdia Universe ratings—Comviva



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Source: Omdia

## Strengths

- **AI capabilities:** Comviva leverages advanced AI/ML to enhance customer interactions, enabling intelligent automation, sentiment analysis, and personalized messaging across multiple channels.
- **API marketplace integration:** Comviva offers a robust API marketplace that allows enterprises to integrate communication APIs with ease, enabling faster deployment of voice, messaging, and digital engagement solutions.
- **Conversational AI & chatbots:** Comviva's platform supports AI-powered chatbots and virtual assistants, helping businesses automate customer support and improve engagement through NLP.
- **Focus on telcos:** Comviva's focus on communications service providers (CSPs) means it can provide tailored solutions for telcos which are optimized to help them grow their enterprise customer base and revenue.

## Limitations

- Comviva has only in the last two years started to focus on expanding its reach into Western markets such as North America and Europe, meaning its brand awareness in these regions to date has been limited by comparison to other CPaaS vendors. However, it is now securing telco

customers in these regions, which will boost the recognition of Comviva as a global CPaaS provider.

- Comviva has its own API marketplace, but its connections with enterprise tools, like CRM, ERP, and customer service platforms, might not be as comprehensive as those of its competitors. This lack of pre-built integrations could mean enterprises need more custom development.

## Exotel (Omdia recommendation: Prospect)

### Exotel should appear on your shortlist if:

- You are a company in the Asia & Oceania/Middle East regions, with a strong CPaaS requirement for an extensive, customizable, and scalable solution to enhance customer engagement through an omnichannel, AI-enhanced platform.
- You require advanced AI-driven features (e.g., intelligent call summaries, sentiment analysis, call transcripts, and call quality analysis) to help enhance both customer and agent experiences.
- You need a platform to analyze customer interaction data across channels to enable personalized responses and enhance customer engagement.

## Overview

Exotel is a notable prospect in the CPaaS market. It offers a customizable and scalable solution to enhance customer engagement and experience through its omnichannel, AI-enhanced platform. As a strong virtual telecom operator, Exotel particularly serves regions such as India, Southeast Asia, the Middle East, and Africa. The company's platform delivers reliable communication solutions for over 7,000 businesses, facilitating more than 70 million daily conversations.

In recent years, Exotel has undertaken several acquisitions to expand its capabilities and market reach. Notable acquisitions include Ameyo, which offers contact center software, and Cogno AI, a conversational AI platform. The integration of Ameyo's solutions has enhanced Exotel's customer engagement tools, allowing businesses to efficiently manage customer interactions across various channels. Additionally, the acquisition of Cogno AI has introduced advanced AI-driven conversational features to Exotel's offerings. These strategic moves have enabled Exotel to develop a more comprehensive suite for customer engagement.

Exotel provides mission-critical connectivity through its robust voice and messaging APIs, which are designed to ensure reliability and seamless business communication. While Exotel's chat and messaging APIs are not as extensive as some competitors offer, it primarily focuses on popular messaging channels (WhatsApp, SMS, and RCS), with Rakuten Viber support added within Exotel's contact center offering.

A key element of Exotel's customer engagement capability is its Conversational Context Data Platform. This platform collects and analyzes data from customer interactions across different channels, providing a complete view of each customer's journey. Businesses can deliver personalized and relevant responses by integrating conversation histories, sentiment analysis, and real-time engagement metrics. This approach not only enhances customer satisfaction by promptly addressing their needs, but also equips customer service representatives with valuable insights, enabling them to engage more effectively and resolve issues efficiently. The platform's ability to unify data from various touchpoints ensures a consistent and enhanced customer experience, which can foster stronger customer relationships and build loyalty.

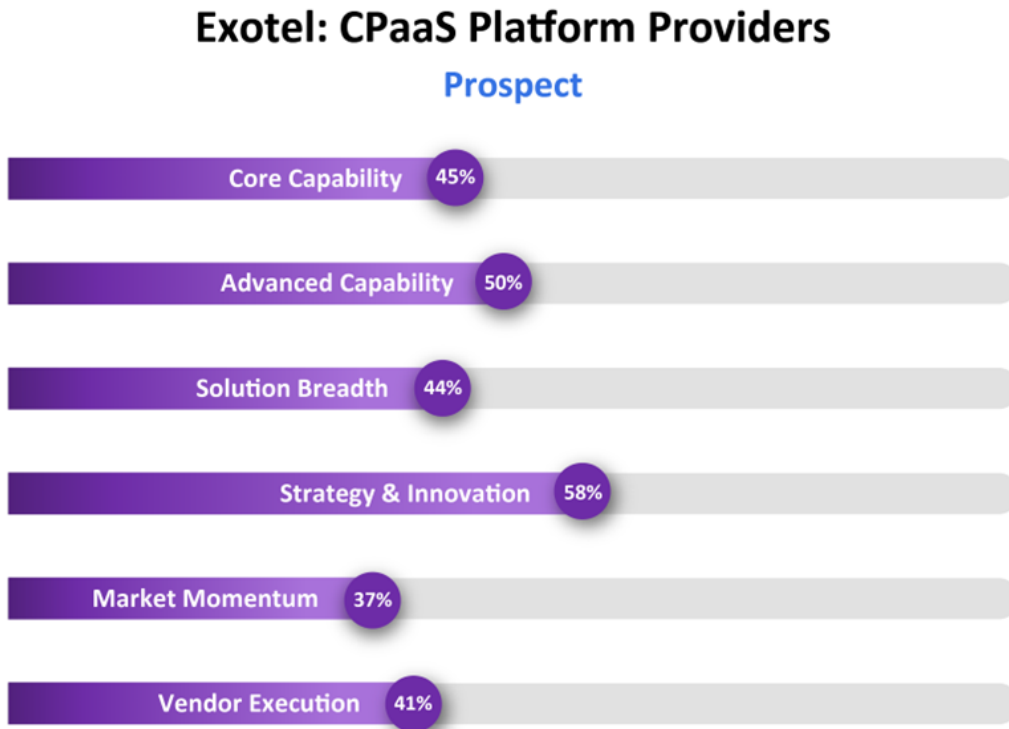
Exotel's Exomind capability enhances its Conversational Context Data Platform by seamlessly integrating with a customer's existing knowledge base, making important information readily accessible. The bot is specifically trained on customer data using advanced large language models (LLMs) and includes APIs for flexible implementation. This ensures that virtual assistants are well-versed in the customer's products, services, and FAQs, enabling them to provide accurate and relevant answers. With Exomind, businesses can create personalized interactions and enhance the overall efficiency and effectiveness of their customer service operations.

Indeed, AI capabilities are a significant aspect of Exotel's platform, offering tools such as intelligent call summaries, sentiment analysis, call transcripts, and call quality analysis. These features provide businesses with valuable insights into customer interactions, enhancing customer and agent experiences throughout the pre-, during, and post-conversation stages of customer engagement.

For instance, intelligent call summaries provide brief overviews of conversations, enabling customer service representatives to understand prior interactions quickly. Sentiment analysis helps identify the emotional tone of calls, allowing businesses to respond with greater empathy. Call transcripts offer detailed records of all conversations, which are beneficial for training and maintaining quality standards. Furthermore, the call quality analysis feature helps companies uphold high communication standards by monitoring and addressing issues as they arise.

Finally, Exotel offers a variety of chatbot and voicebot solutions, including both rule-based systems and advanced GenAI models. These virtual assistants can handle a range of customer queries with instant responses, allowing human agents to focus on more complex issues. Rule-based chatbots are particularly useful for answering simple, repetitive questions, while GenAI-powered bots can engage with more nuanced inquiries, providing a personalized customer experience.

Figure 7: Omdia Universe ratings—Exotel



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Source: Omdia

## Strengths

- **Customer insights and data utilization:** Exotel uses conversational context data to provide insights into customer interactions, allowing brands to better understand their customer base and tailor their marketing strategies accordingly.
- **Customer engagement:** Exotel's AI-enhanced contact center features agent assistance, real-time translation, and voicebots/chatbots, designed to enhance customer engagement and support.
- **Use-case based functionality:** Exotel supports specific use-cases such as marketing campaigns, sales automation, collections, customer support, and service delivery through its robust suite of APIs.

## Limitations

- Despite operating in 60 countries, Exotel's primary regions are Southeast Asia, Australia, the Middle East, and India. This may be restrictive for larger enterprise customers with broad global requirements.
- Exotel has fewer connections to mobile operators than some competitors, which may limit its ability to support global businesses and reduce its appeal to customers seeking extensive

international reach. In other regions, where Exotel adopts a “telco-agnostic” approach, customers would need to establish a separate relationship with an operator of their choice.

- Exotel supports several major messaging platforms, but its range is not as extensive as that of some of its competitors, which natively support more regional services like LINE, Zalo, and Xiaomi Messaging. Additionally, the absence of support for Apple Messages for Business may be limiting for global customers.

## Infobip (Omdia recommendation: Leader)

### Infobip should appear on your shortlist if:

- You are looking for a CPaaS provider that has robust credentials as a global provider of high-quality communications services to enterprises, developers, hyperscalers, partners, and telcos.
- You are looking for a CPaaS provider that offers an AI-infused, modular approach towards helping enterprises engage with their customers, with a platform that enables the gamut of customer experience, from basic messaging and voice connectivity through two-way rich engagement via multiple communications channels, to automated and more intelligent conversations.
- You wish to engage with your customers using RBM and are seeking a partner with RBM campaign experience in multiple countries.
- You would like to learn more about how Network APIs can help you achieve business outcomes by working with a vendor that is well-connected to the emerging Network API ecosystem.

## Overview

Founded in 2006, the Croatian-headquartered Infobip’s heritage as a global SMS aggregator and connectivity services provider laid the foundation for its transformation to become the third-largest CPaaS vendor in the world by revenue. Organic growth, R&D, and acquisitions have each played a role in Infobip’s ability to now offer a comprehensive CPaaS stack comprising infrastructure, connectivity services, communications APIs, software applications, an applications marketplace, security and authentication, anti-fraud, and verticalized solutions. AI and GenAI are infused across the stack and integrated into many use cases.

Infobip segments its product portfolio and platform into four key areas: infrastructure and connectivity, communications channels and APIs, software and applications, and verticalized solutions.

### Using infrastructure and connectivity to create global scale and resilience

Infobip probably boasts the highest number of direct and indirect connections to telcos of all the vendors in this Universe, with 800+ direct connections and 9,700+ connections in total, including SMPP, SS7, and HUB connections. This allows it to provide SMS and voice connectivity, multiple types of phone numbers, and other telco-related services in 190 countries, including SMS short codes in 80+ countries, SIP trunking in 150+ countries, and local numbers in 50+ countries. In addition, Infobip is an MVNO in 30 countries, which means it offers its own number ranges in these markets. Infobip’s messaging infrastructure and voice networks enable it to support 43bn+ interactions per month. A global network of 40+ data centers in 20+ countries underpins the platform’s resilience, redundancy, and ability to scale while also meeting customer requirements for data privacy. In addition, Infobip offers telcos and enterprises tools to identify and prevent exploits; these include the Anam Protect SMS firewall, and the Signals anti-fraud tool; the latter aims to

detect and prevent the AIT relating to two-factor authentication/one-time passwords (2FA/OTPs). The company has 70+ offices on six continents, giving it global reach and local presence.

### Tapping into emerging communications channels and APIs to drive growth

Infobip offers a comprehensive suite of communications channels and APIs (see **Figure 8**), but one of its key differentiators from other vendors in this Universe is that it is also at the forefront of adding emerging channels for business messaging and communications, believing these to be growth vectors for the industry as well as the company. This includes early-stage engagement with Google and its own enterprise customers to run business messaging campaigns on Android devices based on RCS, the telco-based rich messaging service positioned as the upgrade to SMS. Apple's recent addition of support for RCS in iOS 18 provides further impetus to the RCS Rich Business Messaging (RBM) ecosystem. Infobip also partners with Meta, Apple, and Rakuten Viber to facilitate the addition of WhatsApp Business, Apple Messages for Business, and Rakuten Viber for Business into its enterprise customers' omnichannel customer engagement strategies. Supporting both channels and engaging with early adopters among its customer base gives Infobip valuable deployment experience and market awareness, which positions it strongly for when more enterprises seek to add RCS and/or messaging apps into their omni-channel strategies.

**Figure 8: Infobip product stack**



Source: Infobip

Network APIs is another nascent channel with which Infobip has engaged, viewing it as a logical extension to its existing CPaaS API portfolio, and as a growth driver. Infobip actively participates in the GSMA-led Open Gateway initiative, which seeks to create standardized interoperable APIs under the CAMARA framework, via which enterprises can more easily access and integrate telco-based network functions into their platforms. Infobip offers the following Network APIs: Number Verify, SIM Swap, Device Location, Know Your Customer, and Quality on Demand. It has launched CAMARA-compliant Network APIs with telcos in Brazil and Spain, and with Vodafone Group and DT Group. In addition, Infobip partnered with equipment

manufacturer Nokia, and recently joined Aduna, the Ericsson-led consortium of telcos and other CPaaS vendors. The vendor will leverage its existing partner ecosystem and developer community, and its global network reach, to grow market awareness and facilitate the adoption of Network APIs among enterprises.

In the API space, an additional competitive differentiator for Infobip is its CPaaS X APIs. CPaaS X is a bundle of existing and new resources and APIs—grouped under Numbers, Messages API, Sending Strategies, Subscription, and Reporting. CPaaS X aims to help Infobip’s B2B enterprise and platform customers to onboard CPaaS services more quickly and easily, by reducing operational complexity and simplifying workflows. It also allows Infobip’s enterprise customers to bring-your-own-connection (BYOC) to ensure business continuity.

### **AI-infused applications help Infobip add value to customer experience**

Infobip offers a set of composable, embeddable, headless SaaS applications that can be deployed standalone or embedded into an enterprise instance of ~70 external platforms from key vendors in marketing technology, contact center, CRM, e-commerce and payments, and communications. It does not intend to compete with these vendors but rather to augment their deployed platforms and to orchestrate the platforms from multiple vendors that an enterprise customer has. Infobip’s SaaS applications include the Moments CEP, Conversations contact center, Experiences suite of conversational templates and use cases, Answers chatbot building platform, People customer data platform, and Infobip AI hub.

Moments is a low-code/no-code platform that enables enterprises to build omnichannel customer journeys, with use cases including customer onboarding, lead generation, marketing and promotional campaigns, and alerts and notifications. Conversations facilitates personalized, multichannel communication between an enterprise and its customers. It uses AI to automate the routing of customer inquiries to the most appropriate agent and/or via their preferred communications channel, to enhance contact center operations by automating tasks for agents and reducing the need for customers to repeatedly provide information, and to create a joined-up experience (e.g., not sending a marketing message to a customer who has just made a complaint). Answers complements agent-based customer engagement by enabling enterprises to create chatbots and AI assistants for answering routine inquiries; it uses natural NLP and GenAI. Experiences is a library of customizable templates and use cases that enterprises can draw on to build and orchestrate their own customer journeys. Examples include setting up a chatbot to receive table bookings via WhatsApp or setting up automated messages to customers via SMS or WhatsApp to remind them of an abandoned cart or to celebrate an anniversary.

Like other CDPs, the People CDP enables an enterprise to import customer data from multiple sources (e.g., CRM platforms, data warehouses) and to create what it calls a Persistent ID or profile for the customer, which includes information such as contact details, preferred communications channels for interaction, and activity feed. Enterprises can then use that holistic view of the customer to create highly targeted and relevant interactions across various journeys, channels, and levels of automation through Infobip’s own platforms (as above) or those of its integration partners.

Finally, Infobip’s AI Hub is its collection of AI and GenAI tools, which enterprises can use to integrate conversational AI into their CEPs. Infobip has partnerships with Microsoft Azure Open AI, Google, Meta, HumanFirst, and Splx.ai; it will orchestrate the use of the most appropriate LLM according to its customers’ needs. In addition to infusing AI and GenAI into the applications listed above (Conversations, Answers, Experiences), Infobip’s other AI- and GenAI-capable offerings include AI Orchestrator, AI Assistant, and Vocalize.

- **AI Orchestrator** is a tool that uses sentiment, language, and intent analysis to enable enterprises that have deployed chatbots to route customers to the most appropriate chatbot or AI-based assistant depending on their inquiry (e.g., product, sales, general information).
- **AI Assistant** provides automated answers to customer inquiries across multiple communications channels using LLMs trained on the organization's data.
- **Vocalize** is a lead generation tool that uses GenAI-powered gamification on WhatsApp to collect relevant information, which is then fed into the People CDP.

### Focused investment in vertical industries

While Infobip provides products and services to ~30 industry verticals, it has identified five key areas for investment and growth: retail, telco-as-a-customer, BFSI, healthcare, government, and travel and transportation. These are the verticals in which the vendor expects to generate the most traffic and revenue over the coming years. Infobip acknowledges that most of its enterprise customers in the BFSI vertical, in particular, but in other verticals as well, still only use one or two of the communications channels Infobip enables to engage with their customers (typically SMS, voice). The vendor wants to expand the number of services its customers use, and is engaging with them via direct sales, using squads (see below) to target leads and to map their characteristics (e.g., digital maturity, CX maturity, level of automation). Squad members then engage with stakeholders within the enterprise, consulting with them to identify pain points and to build a framework of use cases that can help achieve a required business outcome. That framework is then used to tailor a solution for the enterprise.

## Infobip is a Leader in the CPaaS Omdia Universe

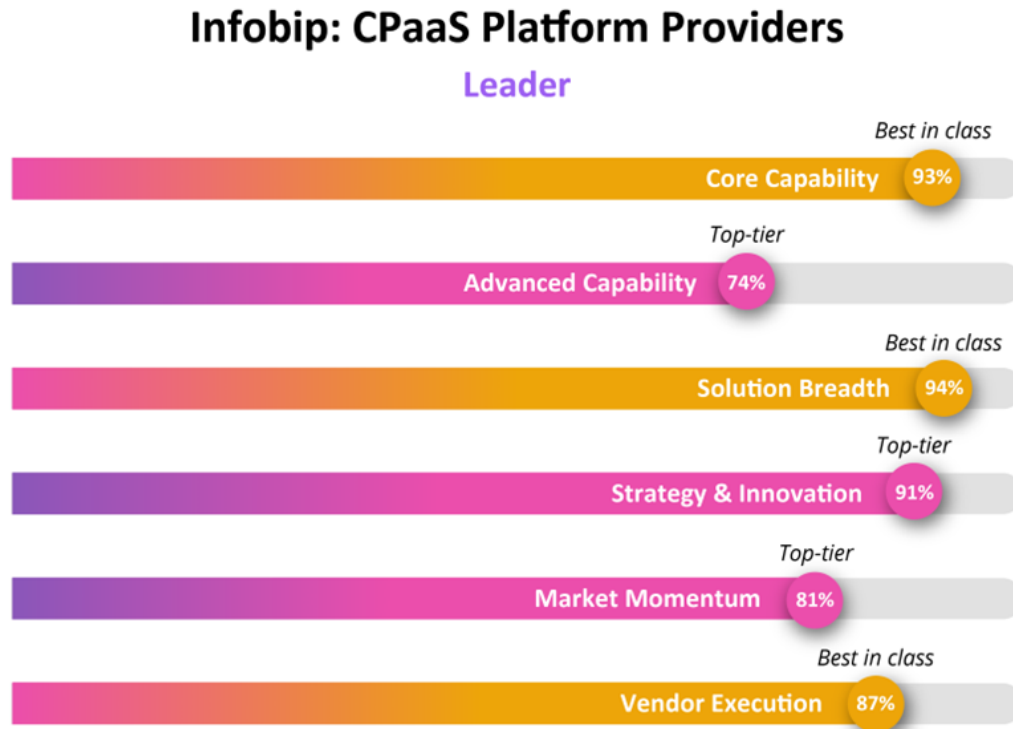
Infobip is classified as a leader in this Omdia Universe. It is a leader or equal leader on the leaderboard for three of the 12 categories scored in the CPaaS Omdia Universe, with a minimum of 10 points above average scores for 11 of those categories. Its highest scores are in AI capabilities, innovation, connectivity services, APIs, value-added services and solutions, and partners and ecosystems—for all but innovation Infobip scores a minimum of 20 points above average scores.

When the solution capability scores are combined with scores for solution breadth, Infobip comes out a clear second on the solution capability leaderboard, with a score of 83%.

In addition, Infobip is rated “best in class” for two of the six summary categories and “top-tier” for the remaining four (see **Figure 9**). “Best in class” means that Infobip has the highest score in the relevant categories, while “top-tier” means that it falls within the top third of the scores for the relevant categories. Infobip's highest overall score in these categories is 94% for Solution Breadth.

Infobip's 2023 CPaaS-only revenue of \$1.8bn makes it the third-largest CPaaS vendor by revenue in this edition of the Omdia Universe.

Figure 9: Omdia Universe ratings—Infobip



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Source: Omdia

## Infobip restructures go-to-market to optimize customer acquisition

Infobip's CPaaS stack underpins its go-to-market approach towards providing tiers of communications and customer engagement capabilities to four key market segments: SMB, enterprise, digital natives, and platforms and wholesalers. It defines these tiers as:

- **CPaaS 1.0:** Core channels: primarily messaging and voice; this is how Infobip primarily acquires customers.
- **CPaaS 2.0:** Conversational engagement: omnichannel, two-way communications, rich engagement through digital channels and conversational software; Infobip uses this approach to expand its footprint into existing customers.
- **CPaaS 3.0:** Conversational transformation: automated conversational experiences, integrations with enterprises' own IT systems; this is how Infobip builds customer stickiness.

Customer size also determines Infobip's go-to market. The vendor has historically engaged in direct sales with its customers, typically large enterprises, but also with and via partners such as systems integrators, consultants, marketing agencies, and telcos. At this level, Infobip offers managed services and verticalized solutions, including templates for predefined use cases, and it deploys a cross-functional team, or squad, to win new business and then deliver a tailored experience. The vendor has about 60 squads operating globally, comprising a core team that includes an account executive/business leader, business development manager, partnership manager, and a CPaaS solutions team; the team also has access to shared resources

such as sales, product, and customer success. Each squad is tasked with meeting a specific business objective or set of objectives for Infobip—for example, securing 2–5 new logos in the retail vertical in a certain country or region, and within a certain timeframe. Infobip says the approach is delivering value to Infobip in terms of customer acquisition, reduced churn, and more

Infobip still engages a proportion of its enterprise customers via direct sales and managed services, but it has also switched just under 10,000 of its lower-revenue accounts to an optimized online self-service capability via its website. The move has freed up internal resources for Infobip to provide direct sales and managed services to higher-value customers. Infobip also uses online self-service as a customer acquisition tool (i.e., to convert an enterprise that uses the vendor’s self-service capability to discover and try its services) into a higher-value customer by then engaging them via direct sales and managed services. The vendor offers a “try for free” call-to-action on its website, which takes customers to an interface through which they can explore Infobip products and pricing options, make purchases, and use Infobip’s software applications. They can also access Infobip APIs and SDKs on its developer website.

Following its 2021 and 2022 acquisitions of Shift Conference and Netokracija, respectively, Infobip is actively working to bolster its presence in the developer community. While Infobip hasn’t revealed the size of that community, its Infobip Shift developer events in Europe and the US have attracted 5,000+ developers; it runs local developer community gatherings, hosts on-site technical meet-ups, and attends external developer conferences as a speaker and/or exhibitor. In addition, its ShiftMag has 40,000+ monthly subscribers; Infobip also offers comprehensive online developer resources.

Partnerships play a key role in Infobip’s go-to market; it has 1,000+ partners across technology, product, consulting, services and systems integration, telco, and marketing agencies. These include 70+ integration partners such as Microsoft, Salesforce, Oracle, Adobe, Meta, and Google, which span applications such as CRM, marketing, CCaaS, and e-commerce. The vendor exposes its integration partners to developers and enterprises via its Exchange marketplace, in turn, it is listed on its integration partners’ marketplaces. Exchange enables developers, systems integrators, ISVs, and customers to publish and consume applications built on the Infobip CPaaS platform. To further add value for its enterprise customers, Infobip embeds its partners into other go-to-market motions, such as organizing joint events, workshops, and demos, including them in its sales collateral, and working with them to scope, design, build, and deliver joint solutions for its customers.

Probably one of the key areas of differentiation for Infobip from other vendors in this Universe is its focus on telco partnerships. In addition to partnering with telcos for the supply of connectivity services to Infobip, the vendor has partnerships with telcos in 70+ countries to provide CPaaS capabilities, that the telcos white-label into their enterprise customers; it is also an active participant in the GSMA-led Open Gateway initiative (see above). As a strategic technical provider of CPaaS to telcos, Infobip bundles its products and services with marketing and sales support, enablement, and incentives. In addition to enhancing their enterprise propositions with the CPaaS capabilities that Infobip offers, telcos work with the vendor to educate, incentivize, and enable their internal stakeholders to then effectively market, sell, and deliver solutions to enterprise customers. For Infobip, the benefits are clear: it broadens its reach through the market presence of its telco partners and into its telcos’ enterprise customer bases.

## Strengths

- **Network and global coverage:** As mentioned previously, Infobip’s global communications network and market reach, which includes almost 10,000+ direct and indirect connections to telcos, its own US VoIP network, and a global network of 40+ data centers in 20+ countries, means it can provide services at scale, with high levels of redundancy.

- **Engaging early with emerging channels:** Supporting RCS, messaging apps, and Network APIs, and engaging with early adopters of these services among its customer base gives Infobip valuable deployment experience and market awareness. It also positions it strongly for when more enterprises seek to add RCS, messaging apps, or Network API-based services into their omnichannel strategies.
- **Focus on AI:** Infobip doesn't regard the use of AI/GenAI in CPaaS as innovative on its own, instead regarding AI capabilities as an emerging hygiene factor (i.e., it is necessary for Infobip (and others) to integrate AI where appropriate across the CPaaS technology stack). The integration of AI and GenAI capabilities can then be used to drive innovation, for example, using AI and GenAI to enable new use cases and enhance existing ones; using automation to speed time-to-market, or to enhance the customer experience; using ML to improve network performance, or build/re-build trust in channels such as SMS or voice.

## Limitations

- **CEP:** Infobip's lowest score is in the CEP category, but it should be noted that it still ranks among the top five vendors for CEP in this Universe, with four (including Infobip) scoring at around the same level. Infobip scores highly for having its own CDP, the availability of a visual builder (low-code/no-code), the automation of customer queries (using chatbots, for example), and the integration of video, voice, chat, and messaging into existing customer engagement/contact center systems. However, it scores lower on criteria such as the number of integrations with third-party platforms—though Infobip has stated that it prioritizes quality over quantity, that is, deeper and higher-quality integrations with fewer third-party platforms—customer self-service capabilities, and the integration of text-, call- and video-based help within the same application.

## Intense (Omdia recommendation: Prospect)

### Intense should appear on your shortlist if:

- You need a CPaaS vendor experienced in providing high-volume, mission-critical communications capabilities for large banks, telcos, insurance companies, government departments, and utilities.
- You are an enterprise with multiple back-end systems to which you wish to add a centralized omnichannel communications capability.
- You are seeking a company that is experienced in working with Meta, Google, and enterprises to enable marketing campaigns and customer engagement use cases that include WhatsApp and RBM.

## Overview

Intense Technologies is an India-headquartered provider of software and services that operates in the US, the UK, and the Middle East. Its enterprise customers are primarily in the telecoms and BFSI industry verticals, but also in government and utilities. Enterprise customers include telcos Jio, Vodafone, BSNL, Ooredoo, and Etisalat; banks Axis Bank and HDFC Bank; insurance company TATA AIG; India's Income Tax Department; and India-headquartered utility Adani Electricity. The company has 70+ implementations of its platforms, which, between them, enable 1 billion+ notifications and 500 million statements a day.

The vendor's products comprise:

- **UniServe NXT Communication Hub:** UniServe Connect (customer communications platform), UniServe Reach Marketing Automation Platform, Connect Transmission Hub.
- **AI-enabled data management platform:** IDM data management hub, 1Vu identity management platform.
- **Reasy low-code/no-code platform:** Enables the automation of processes and forms, and low-code custom application development.

Intense Technologies views the UniServe Connect and the UniServe Reach Marketing Automation Platform as its key CPaaS offerings. However, each of the other capabilities listed above can also be used as part of an enterprise customer's CPaaS implementation as needed.

The vendor is aligned with other vendors in this Universe in that it has recognized the growing enterprise demand for personalized, data-driven customer engagement, the move towards customer-centric business models, and the need to provide a seamless customer engagement experience across multiple touchpoints. Further, Intense acknowledges that AI, data analytics, and automation represent a significant opportunity for enterprises to optimize their communications strategies, reduce costs, and enhance customer loyalty. The vendor is also well-positioned to tap into the increasing adoption of cloud-based communications solutions, and the need to address localized compliance requirements, data privacy, and security regulations.

Intense Technologies offers a limited range of connectivity services compared to other vendors. It directly offers a small range of communications channels in India only, including SMS, local numbers, and SMS short codes; it does not offer SIP trunking. Intense has direct and indirect connections with an undisclosed number of mobile operators in India and markets outside India, with which it partners to provide local numbers and phone numbers to enterprise customers. Meanwhile, its APIs, value-added services, and product solutions are available globally.

Intense Technologies also offers a more limited range of communications APIs; they comprise SMS, RCS, voice, email, WebRTC, and chat/messaging apps; the latter supports WhatsApp and Facebook Messenger. WhatsApp and RCS are key communications channels in India, making it imperative for any CPaaS platform provider operating in this market to support them; they are also significant (or becoming more significant, in the case of RCS) on a global scale. India is WhatsApp's single largest market globally with an estimated 565 million monthly active users (MAUs) at end-2024, representing ~11% of total global MAUs according to Omdia's *Messaging Apps Tracker* and *Messaging Apps Users, Traffic, and Revenue Forecast 2024–29* (see Further reading). India is also leading the way in the adoption of RBM, thanks to an active ecosystem that includes Google, telcos, CPaaS vendors, and enterprises. Consequently, RBM traffic in India will reach an estimated 2.7 billion messages in 2025, according to Omdia's *RCS Users, Traffic, and Revenue Forecast 2024–29*; this will grow further following Apple's support of RCS in iOS 18. At the time of writing, Apple was reportedly in talks with Google to enable cross-platform RBM campaigns in India.

The fact that Intense Technologies' customer base is heavily weighted to the telecoms and BFSI industries is testament to the strength of the capabilities that it provides in its Customer Communications platform to support the key use cases of notifications and statements. These use cases include transactional communications for banks (e.g., notifications of deposits, debit card use), policy issuance, and automated claims processing. The platform also enables the broader use cases that apply across industries, which include appointment reminders and scheduling, emergency notifications and alerts, customer service and support, and marketing and sales.

The Customer Communications capabilities referred to above include job validation, suppression, metering, billing heads, performance analytics, message view, event-triggered messaging, DLR repush, retry, short URLs, templates, load management, and auto allocation to gateways. Each of these features helps enable Intense Technologies' customers to reach their business objectives for message delivery, compliance, managing communications costs, and improving the customer experience.

The UniServe Reach Marketing Automation Platform features a drag-and-drop visual journey orchestration designer, which is a module that enables citizen developers to more easily create customer journeys across multiple communications channels (SMS, voice, IVR, messaging apps). It also provides campaign analytics, which enterprises can use to measure outcomes. UniServe Reach can integrate with third-party gateways, analytics platforms, chatbots, and CRM platforms, but not with other CEPs or contact centers at this time.

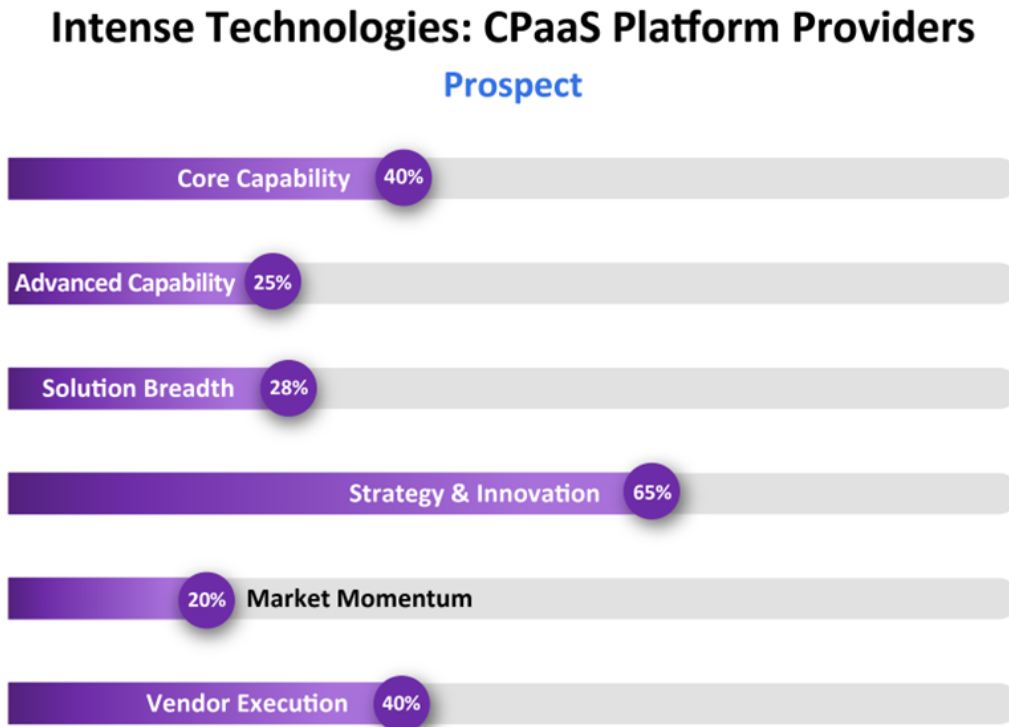
While Intense Technologies does not have a CDP per se, enterprises can import customer data into the UniServe Reach Segmentation module, which can then be used to create unified customer profiles. Enterprises can use these profiles to send hyper-personalized marketing campaigns to their customers. They can also use UniServe Reach to provide omnichannel customer support via a unified interface that combines SMS, voice, and video, and that leverages the contextual information held within the unified customer profile. Features that will add value for enterprises include Send Time Optimization and Communication Suppression, which ensure that messages reach customers through their preferred communications channel and at a time that is most suitable to them.

Intense Technologies' use of AI is also limited by comparison to other vendors in this Universe, though it is exploring adding capabilities such as conversational AI and virtual agents to its CPaaS platform—specifically UniServe Reach; GenAI is also a key component of its future roadmap. Meanwhile, like other CPaaS vendors, it already uses AI-based load orchestration algorithms to optimize the distribution of communications traffic, reducing latency and enhancing performance.

Intense Technologies' go-to-market approach combines digital marketing, direct sales, and partnerships, respectively aimed at building brand awareness of the company and its products, cultivating and converting leads, and expanding its reach into new customer bases while also being able to access and integrate complementary capabilities with its own platforms. Market research informs its GTM, allowing it to tailor its marketing and customer acquisition strategies. The vendor has around 25 partners, which include telcos and systems integrators. Its partnerships with telcos primarily center around the provision of communications services to Intense, but Intense also collaborates with some telcos to integrate its CPaaS capabilities with their networks, so that telcos can offer CPaaS to their own enterprise customers. Key systems integrator partners include IBM, HCL, Infosys, and TCS.

Looking forward, Intense Technologies is actively exploring opportunities to expand its presence in other regions and countries, particularly in Asia & Oceania and the Middle East. The integration of additional AI and ML into UniServe Reach is also on the roadmap, with a view to delivering enhanced personalized and predictive capabilities, including automated content recommendations and more advanced analytics. It will also implement a duplicate message check feature, which is aimed at preventing the sending of duplicate messages and consequently reducing redundancy and improving the overall quality of its message delivery.

Figure 10: Omdia Universe ratings—Intense Technologies



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Source: Omdia

## Strengths

- Strong presence in India and in high-value industry verticals:** Intense Technologies has a sizeable slate of enterprise customers in India, including some of the largest companies in telecoms and BFSI, as well as in utilities and government. Not all these customers are using Intense Technologies' CPaaS, but the vendor is well-positioned to upsell or cross-sell as the need arises. In addition, these references also position Intense Technologies well for its plans to expand into other countries.
- Ability to integrate with enterprises' multiple backend systems to provide a centralized platform for omnichannel communications:** Intense Technologies has demonstrated for enterprise customers like Axis Bank, Reliance Jio, Adani Electricity Mumbai, and TATA AIG Insurance, that UniServe's ability to integrate with an enterprise's multiple back-end systems to enable omnichannel communications (e.g., SMS, WhatsApp, email) from a centralized platform delivers results such as lower opex and maintenance costs, reduced onboarding times, increased cross-selling and upselling opportunities, enhanced brand image, and improved delivery rates.

## Limitations

- Despite its strong market position in India, Intense Technologies is a smaller player in this Universe in terms of revenue, number of customers, and global geographic coverage. Its

roadmap includes expansion into additional countries and regions, but its efforts to do so may be hampered by the presence of the global CPaaS vendors in these markets.

- There are multiple areas in which Intense Technologies does not have as broad a capability as other CPaaS vendors, likely because it has focused its investment on the products and services where revenue and profit are more certain. If Intense Technologies is to parlay its strong market position in India to compete with the global CPaaS vendors on the world stage, its offerings will need to at least reach parity with them. There are some indications that it is working to achieve this parity, for example, its 2025 roadmap suggests it plans to add more third-party integrations to popular CRMs, ERPs and marketing automation platforms, to introduce ML-based fraud detection, to add compliances for relevant regional- and country-level data security and privacy regulation (e.g., GDPR), and to expand its partner program to include more carriers, resellers, and solutions providers, among others.

## Sinch (Omdia recommendation: Leader)

### Sinch should appear on your shortlist if:

- You are looking for a CPaaS provider with a solid heritage in providing global, high-quality, high-volume telco messaging services to enterprises and telcos, which has broadened to include other channels such as voice, email, messaging apps, and RCS.
- You are seeking a CPaaS provider with enterprise-grade infrastructure that can handle massive scale, offers comprehensive channel coverage with direct carrier connections for reliability, and provides global reach (60+ countries) combined with local expertise—all enhanced by intentional AI capabilities across the platform.
- You are an enterprise looking for a unified, omnichannel CEP that combines multiple communications channels with capabilities such as workflows, automations and performance analytics, and 500+ pre-built connections into underlying ecosystems (e.g., partners).
- You wish to engage with your customers using RBM and are seeking a partner with long-term RBM campaign experience.

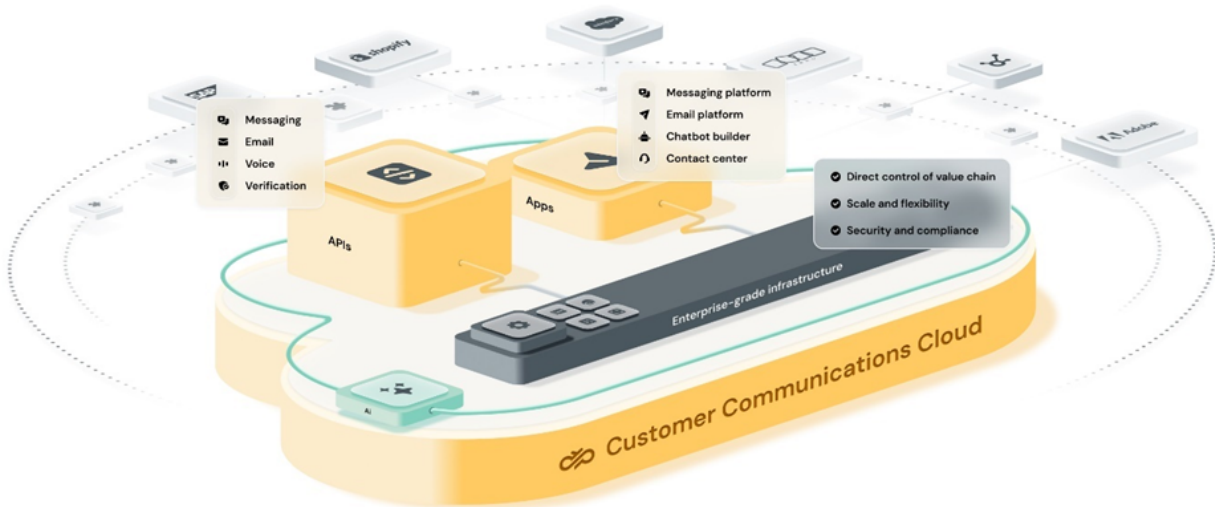
## Overview

Founded in 2008, the Sweden-headquartered Sinch has a long history as an SMS aggregator, providing high-quality A2P SMS to enterprises around the world. Through internal development and strategic M&A over the past decade, Sinch has successfully transitioned to becoming a CPaaS provider and is now one of the top three CPaaS vendors globally. As the focus for CPaaS moves beyond enabling simple one-way, single channel connectivity between enterprises and their customers, towards enabling two-way, omnichannel engagement, Sinch has aligned its product development and go-to-market motions accordingly.

At a high level, Sinch's CPaaS platform, the Customer Communications Cloud, comprises its enterprise-grade infrastructure with hundreds of direct carrier connections, Messaging Super Network, an omnichannel API platform, and turn-key applications such as the Sinch Engage unified CEP (see **Figure 11**). Sinch targets discrete but also overlapping target markets with each layer of its CPaaS product suite—operators and wholesale, technical users, and business users, respectively. Wrapped around the whole is the Sinch partner ecosystem, segmented into platform ecosystems (ISVs) and value-added partnerships (technology services distributors, VARs, systems integrators, and affiliate partners). It also has channel partnerships with application/CSPs, and service aggregators, which broadens its reach into selected markets and industry

verticals. AI is infused across the Customer Communications Cloud, providing GenAI capabilities across messaging channels, intent/sentiment detection, and fraud prevention.

**Figure 11: Sinch Customer Communications Cloud**



Source: Sinch

The Sinch Super Network annually delivers close to 1 trillion interactions, comprising 250 billion SMS, 470 billion emails, 4.6 billion email verifications, and 250 billion voice minutes. Around 100,000+ developers access its APIs and SDKs each month—Sinch has ~3 million developers in its developer program in total—for messaging, chat, email, voice, verification, omnichannel, and fax. It has more than 175,000 enterprise customers for Sinch Engage, many of whom use the platform for one- and two-way messaging use cases and marketing campaigns, email marketing campaigns, omnichannel customer communications, CCaaS, UCaaS, and conversational AI.

## Sinch is a Leader in the CPaaS Omdia Universe

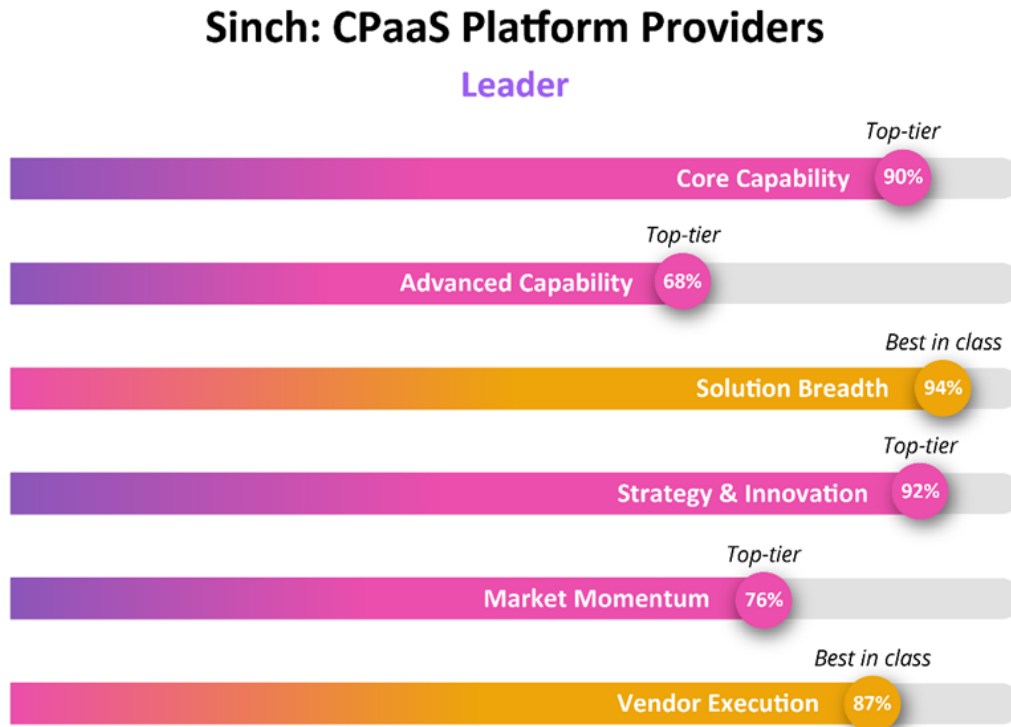
Sinch is classified as a leader in this Omdia Universe. It scores well above average for 11 of the 12 categories, with its highest scores in innovation (95%), go-to-market strategy (91%), and non-functional requirements (91%).

Sinch also performs strongly across strategy and innovation, market momentum, and vendor execution, with an average score of 85%. These scores underline that the vendor has a clear roadmap for continuing to develop its CPaaS platform in line with emerging market trends, that it has a significant global presence in terms of both reach and customer base, and that it is effectively supporting its enterprise customers to achieve their business goals.

In addition, Sinch is rated “best in class” for two of the six summary categories and “top-tier” for the remaining four (see **Figure 12**). “Best in class” means that Sinch has the highest score in the relevant category, while “top-tier” means that it falls within the top third of the scores for the relevant categories. Sinch’s highest overall score in these categories is 94% for Solution Breadth.

Sinch's 2023 CPaaS-only revenue of \$2.19bn makes it the second-largest CPaaS vendor by revenue in this edition of the Omdia Universe and puts it into the second-highest revenue band in terms of market presence.

Figure 12: Omdia Universe ratings—Sinch



© 2025 Omdia

Source: Omdia

Sinch scores highly for its connectivity services (90%) and global reach (86%) in this Universe. It has direct connections with 600+ telcos, and indirect connections with 500+. It operates its own voice network in the US (via the Inteliquent acquisition), which gives it 95% on-net coverage. Full PSTN connectivity in the US enables Sinch to also provide Microsoft Operator Connect and Direct Routing, meaning enterprises can use Teams as their primary business phone system; it also means that Sinch can offer 911 emergency calls in North America via Teams.

The vendor operates a hybrid public–private cloud network, using partners including AWS, Google, GlobalConnect, MongoDB, InfoBank, Extrinsic, and Equinix, as well as deploying its own regional data centers. In this way, Sinch maximizes scalability, uptime, and deliverability while ensuring compliance with relevant local regulations, including telecommunications, data privacy and security, and emerging regulations around AI.

As a cloud-based communications provider, Sinch’s APIs and applications are accessible in any country. Sinch also has enterprise customers in 100+ countries and a local presence in 67 countries (including 53 physical offices). It offers local and toll-free numbers in 70+ countries provides SMS short codes in 42 countries, and SIP trunking in 27. In addition, its programmable voice text-to-speech is supported in 70+ languages, and NLP in 120+ languages. All of the above demonstrates Sinch’s commitment to being a global company that operates locally.

Sinch’s 2021 acquisition of email platform Pathwire means it provides its own email capabilities to its enterprise customers and to other CPaaS vendors—another important differentiator. Email remains a key

customer communications channel; Omdia's *Digital Consumer Insights 2024* survey of ~20,000 online consumers in 20 countries found that email and SMS are still the top two ways in which consumers interact with the customer care teams of their service providers across a variety of use cases. This is the case even in countries where WhatsApp has high penetration, including Brazil, India, Indonesia, Malaysia, Mexico, and South Africa.

RCS is another key differentiator for Sinch. The vendor was early to market with RCS in comparison to some of the other Leaders in this Universe. It released its RCS API with SMS Fallback in 2018 and now offers enterprises three ways to engage with the capability: as a Basic RCS upgrade to SMS, as part of its Conversation API (a single API for 13 channels, including RCS Basic, Single, and Conversational), and integrated into Sinch's SaaS applications and those of its partners, including Hubspot, Zapier, and Salesforce. The vendor works closely with Google to enable RBM, and states it is already sending millions of RCS messages every month for enterprise customers globally—this would primarily be on Android phones since Apple only started enabling RCS on iOS in late 2024. Sinch expects RCS traffic to scale up significantly with Apple's support of RCS, increasing the addressable market for RBM and enabling enterprises to send RBM campaigns to iPhones too—pending telco support of RBM in their networks.

Sinch's Engage multichannel CEP comprises a modular architecture that brings together the vendor's own multiple software applications (see above) into a single platform, exposing all its capabilities to enterprise customers. It is, in turn, integrated with more than 500 other third-party applications supplied by ISVs within its partnership ecosystem. The modular architecture means Sinch can more easily add new products and services—its own and those of its ecosystem partners. Engage allows Sinch's enterprise customers to select the applications and capabilities that they need, the communications channels that they wish to use, and the use cases they wish to deploy, and integrate as required with their existing applications and platforms. Strategically, Engage aims to support enterprises as they move to conversational (two-way) customer engagement experiences, with an initial focus on conversational marketing and customer care.

Alongside other CPaaS providers, Sinch has used AI technologies such as ML and NLP for some time, for use cases such as preventing SMS exploits like AIT, and for text-to-speech/speech-to-text within the customer engagement context. Its 2020 acquisition of Chatlayer paved the way for it to offer its conversational AI platform, which provides a no-code architecture and use case templates that enable enterprises to build chatbots and voice bots. The chatbots and voice bots can be deployed across multiple communications channels and integrated into enterprises' existing CEP as well as Sinch's own Engage. Sinch also offers Smart Conversations building blocks as part of its Conversation API; these enable AI capabilities such as sentiment analysis, message intent, and image recognition, as well as text-to-speech/speech-to-text.

The vendor is also integrating GenAI into its platform; to do so, it has partnered with LLM providers such as OpenAI, Google Gemini, and Azure AI, data intelligence platforms such as Databricks and Azure AI, and guardrail provider Chatterbox Labs. Sinch's GenAI tools include the AI Copy Generator, which enables marketers to generate copy for personalized marketing campaigns for email, WhatsApp, and SMS. Sinch is also enabling the usual set of GenAI capabilities around content summaries and answer generation for human agents, as well as FAQ-based chatbot support. Like other CPaaS vendors, Sinch seeks to demonstrate the utility of AI and GenAI in use cases for customer engagement and to build trust. It wants to help its customers use AI to solve meaningful problems, for example, preventing AIT, and automatically masking sensitive or offensive content to protect human agents. The company also has an AI Center of Excellence at the executive level, a GenAI team that focuses on helping internal and external teams to build effectively and safely with LLMs, and it uses Chatterbox to audit its own internal models.

In February 2025, Sinch partnered with Aduna, an Ericsson-led venture with major global telcos. This collaboration expands Sinch's network API ecosystem, enhancing enterprise access to secure mobile

network capabilities for authentication, identity verification, and fraud prevention. As a contributor to the CAMARA standardization initiative, Sinch is expanding its Number Verification API offerings while streamlining developer integration. This positions Sinch to broaden its global network API portfolio in 2025, enabling businesses to embed secure communications into digital services with carrier-grade reliability.

Like other CPaaS vendors, Sinch has a multi-tiered go-to-market approach, which it tailors to customer type and geography. It utilizes direct sales, self-service, and a partnership ecosystem to target enterprise customers, developers, non-technical users, and telcos. Land-and-expand is a key element of its direct sales GTM motion, while Sinch expects that its new unified, one-stop-shop platform approach for Engage will further help unlock cross-selling opportunities. Sinch customers typically fall into the BFSI, telco, healthcare, and retail industry verticals. More than half of Sinch's revenue in 2023 (58%) came from North America, 23% from Europe, the Middle East and Africa (EMEA), and the remaining 20% split between Asia & Oceania and Latin America. Segment-wise, over half of Sinch's revenue (53%) still comes from its messaging products, with another 40% coming from voice and advanced voice services; email represents just 7% of revenue.

Sinch has a partnership ecosystem of almost 1,500 companies. In particular, it has forged strong partnerships with global ISVs, providing its connectivity services to these vendors as well as collaborating with them. The vendor's Tier 1 partners include Microsoft, Salesforce, SAP, and Adobe. Key elements of Sinch's Customer Communications Cloud are natively integrated into their platforms, complementing their applications, and allowing them to build their own large-scale communications capabilities. For example, Sinch partners with Salesforce and Adobe to natively integrate omnichannel messaging into their platforms, its Contact Pro contact center is SAP-approved, and it integrates its email with Microsoft's Azure. In addition, Sinch works with Salesforce and Adobe on co-product and service development, and with SAP on combined go-to-market efforts. Its MessageMedia and Clicksend applications, among others, are available on Salesforce's App Exchange marketplace, and can be integrated into an enterprise's Salesforce instance.

Looking ahead, Sinch is focusing on six key areas of development:

- **Unified platform experience:** For example, creating a universal Sinch ID and SSO, consolidating its voice products into a common SIP and media platform, and Sinch Engage (as above).
- **Rich conversational experiences:** Enabling richer two-way communications by, for example, leveraging richer communications channels such as WhatsApp and RCS via the Conversation API, using AI to complement contact center capabilities, providing workflow/journey builders, and a rich editor composer.
- **Frictionless product:** Investing in product-led experiences to provide a more seamless approach for enterprises towards building out their customer engagement capabilities.
- **Actionable intelligence:** Creating enhanced data-based insights for enterprises to help them optimize their communications with customers. For example, advanced email analytics, ML-based automated routing, next-generation analytics and fraud reporting, personalization, and email deliverability recommendation engine.
- **AI-enhanced communications:** Integrating AI capabilities across the Sinch platform for Sinch's internal use as well as in the applications and services it offers its customers. For example, Sinch is using AI to help its own customer support team detect customer-facing incidents more quickly and troubleshoot more effectively. It also plans to roll out capabilities such as an AI automation generator, an email template generator, an AI segmentation generator, and AI-based alarms for high-impact operational scenarios.

- **CPaaS leadership and innovation:** Centers around Sinch taking the lead in technologies such as ML-based AIT detection and prevention, RCS scalability and geo-redundancy, email automation, SIP trunking, and automated number handling and porting.

## Strengths

- **Infrastructure and network:** Sinch's Tier 1 Super Network for messaging and largest independent network of phone numbers enables it to offer global reach, high deliverability, and scalability for its enterprise customers, which include eight of the top 10 technology companies globally; Sinch also supplies services to other CPaaS vendors. Sinch has direct connections with 600+ telcos, including via SS7 connections, and indirect connections with 500+ telcos. It operates its own voice network in the US with 95% on-net coverage. It also operates a global hybrid public-private cloud network, via partners such as AWS, Google, and Equinix, as well as its own regional data centers. The network supports almost 1 trillion interactions annually.
- **Global reach:** Sinch has a local presence in 67 countries and serves enterprise customers in 100+ markets. Local presence means Sinch can localize its products, comply with relevant regulations around telecommunications, data privacy and security, and AI, and provide country-level guidance on regulations to enterprise customers. Via its 2020 acquisition of ACL Mobile, Sinch is present in India, which it states is the fastest-growing CPaaS market globally.
- **Innovation:** Sinch scores highly for innovation in this Universe, demonstrating its ability to identify key market trends, to develop and integrate technologies into its own network (such as AI/GenAI, advanced analytics, fraud protection), and to deliver products and services accordingly to early adopters (e.g., RCS, new communications channels, AI/GenAI-based applications), before iterating them as they mature into mainstream use.
- **Go-to-market strategy:** Sinch also scores highly for go-to-market, demonstrating advanced capability in developer engagement, professional services, and technical support.

## Limitations

- **CEP:** Alongside most of the other vendors in this Universe, Sinch scored lowest in this category, although its score was second highest overall. Limitations in this category include the fact that Sinch doesn't have its own CDP, having made the conscious decision to partner with leading CDP providers rather than create its own. However, partnering does allow its customers to receive CDP capabilities, including native customer journey visualization, customer journey analytics, and metrics, which allow employees to respond in real time.

## Syniverse (Omdia recommendation: Challenger)

### Syniverse should appear on your shortlist if:

- You are a financial institution that requires enhanced security, global connectivity, and reliable communication capabilities from your CPaaS vendor.
- You prefer a high-touch support model from a vendor with a dedicated team focused on providing personalized assistance, understanding a customer's individual challenges, and delivering tailored solutions.

## Overview

Syniverse is a challenger in the CPaaS market. Its platform enables businesses to interact with customers across multiple channels, including SMS, MMS, RCS, WhatsApp, voice, and push notifications. The platform is designed for flexibility and scalability, allowing organizations to incorporate communication functionalities into their existing applications and workflows without requiring significant infrastructure or development efforts.

Syniverse's IPX network provides a comprehensive interconnect solution for carriers worldwide, enabling secure and efficient global communication. Its foundation is built on robust interoperability and signaling infrastructure, consisting of 800+ direct and indirect connections to operators. Supporting the transmission of over one trillion messages annually, it delivers reliable and scalable connectivity across more than 190 destinations. This extensive reach ensures that mobile operators and enterprises can maintain seamless communication while meeting the growing demands of digital interactions.

Designed to support omnichannel engagement, Syniverse's network enables carriers to offer A2P messaging and other communication services that enhance customer relationships. A key component of this offering is Syniverse's HCP (hyper-scale communications platform) messaging platform, a next-generation solution that empowers enterprises to automate interactions and drive engagement through cloud-based APIs. Integrated with the IPX network, the platform ensures high levels of security and compliance while providing businesses with the flexibility to scale their messaging strategies. With its reliability and global reach, Syniverse's network serves as a critical asset for companies looking to enhance connectivity, build customer trust, and adapt to evolving communication needs.

Syniverse employs a dual approach in its go-to-market strategy, catering to both digital adopters and digital-native businesses. For enterprises seeking high-touch service and tailored solutions, Syniverse offers hands-on support, helping them integrate communication capabilities into their existing systems with minimal disruption. At the same time, for digital-native companies that prefer a more autonomous approach, Syniverse provides self-service APIs and SDKs, enabling seamless integration and customization. To extend its market reach beyond the Forbes 2000, Syniverse collaborates with strategic go-to-market partners, leveraging their networks and expertise to connect with a broader range of businesses. This approach allows Syniverse to serve organizations of all sizes, offering flexible solutions that adapt to different levels of digital maturity and operational needs.

Syniverse offers a suite of communication APIs that enable businesses to integrate messaging, voice, and identity solutions into their applications and workflows. These APIs support SMS, MMS, RCS, push notifications, messaging apps, chatbots, voice, and flash calls, allowing organizations to engage customers through multiple channels. In addition to messaging, Syniverse provides identity verification solutions, such as Phone Number Verification, Right Party Verification, and Account Takeover Protection, helping businesses enhance security and reduce fraud. By leveraging Syniverse's APIs, companies can automate customer interactions, streamline authentication processes, and improve overall engagement while ensuring compliance with global security standards.

While Syniverse's platform provides messaging support across key channels, its capabilities remain somewhat limited. The platform supports WhatsApp messaging and integrations with Salesforce Messaging and Oracle applications, but additional features and channels are still being developed. While the platform does not yet support network APIs such as CAMARA, which are designed to provide deeper network-level integrations. Despite these limitations, Syniverse's APIs offer a reliable foundation for businesses looking to enhance their communication strategies with scalable, cloud-based solutions.

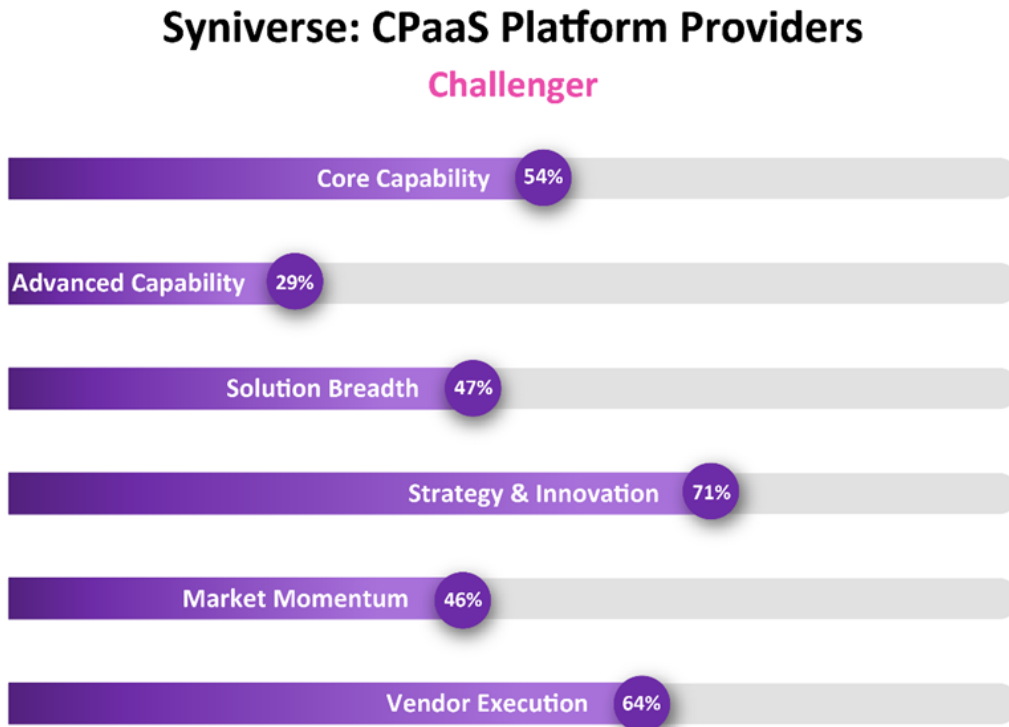
Syniverse offers a range of packaged solutions designed to enhance customer engagement and streamline contact center operations. By integrating messaging, voice, and digital communication tools, these solutions help businesses connect with customers more efficiently across multiple channels. Syniverse takes a partnership approach, working closely with enterprises to support seamless connectivity into leading CRM, ERP, and other upstream systems such as Salesforce, Oracle, and Adobe.

In addition to these capabilities, Syniverse provides a flexible reporting platform powered by a robust and comprehensive data lake. This analytics-based infrastructure allows businesses to gain deep insights into customer interactions, measure engagement effectiveness, and refine their customer engagement strategies. Furthermore, Syniverse's reporting tools can be leveraged to identify potential fraud, helping enterprises protect their brand and customers from malicious activity.

Syniverse applies AI to targeted business use cases, focusing primarily on areas that deliver tangible customer benefits, such as fraud prevention and anti-spam protections. Syniverse helps businesses detect and mitigate fraudulent activities by leveraging AI-driven analytics, ensuring secure and reliable communication channels. These capabilities enhance trust and security in messaging, voice, and digital interactions, reducing risks for enterprises and their customers. However, while Syniverse has made strides in AI for security and fraud detection, its capabilities in other AI-driven areas, such as conversational AI and virtual agents, remain limited.

Rather than offering native conversational AI or virtual agent solutions, Syniverse takes a partnership-driven approach to this market. The company enables connectivity into top AI providers, chatbot platforms, and enterprise AI solutions, including Microsoft, Google, Amazon, Salesforce, Kore.ai, and Boost.ai. This integration allows businesses to leverage best-in-class AI technologies using Syniverse's secure and scalable communication infrastructure. However, AI remains a work in progress for Syniverse, and continued investment in this area will be critical to staying competitive with industry peers advancing their AI capabilities more aggressively.

Figure 13: Omdia Universe ratings—Syniverse



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Source: Omdia

## Strengths

- Global network reach and carrier relationships:** Syniverse has well-established relationships with mobile network operators worldwide, providing direct connectivity to hundreds of carriers. This ensures high message deliverability, low latency, and strong security, making it a reliable choice for enterprises with global communication needs.
- Expertise in security and fraud prevention:** Syniverse has a strong track record in securing messaging and mobile communications. Its fraud prevention tools, anti-spam solutions, and authentication capabilities, such as phone number verification and account takeover protection, help businesses safeguard customer interactions while maintaining compliance with global regulations.
- Co-creation model and professional services:** Syniverse Professional Services enables businesses to tailor and optimize communication solutions to their specific needs, powered by Syniverse's solutions engineering and customer success teams. By working closely with clients, Syniverse ensures the development of customized, innovative use cases and solutions that drive business growth and enhance customer experiences.

## Limitations

- Unlike more prominent CPaaS providers that offer native AI-driven chatbots and virtual assistants, Syniverse depends on third-party integrations with AI platforms such as Microsoft, Google, and Amazon. This lack of substantial in-house AI capabilities may restrict its ability to compete effectively in the expanding conversational AI and customer engagement market.
- While Syniverse provides core messaging services across SMS, MMS, and WhatsApp, its support for other messaging apps is still developing. Competitors with more comprehensive omnichannel messaging capabilities have an advantage in addressing diverse global markets.
- As network APIs gain traction in enabling advanced telecom capabilities (e.g., quality-of-service controls, number verification, and location-based services), Syniverse has yet to adopt CAMARA or similar standards. This puts it behind competitors in integrating deeper network-based services into their CPaaS offerings.

## Tanla Platforms (Omdia recommendation: Challenger)

### Tanla Platforms should appear on your shortlist if:

- You need a CPaaS vendor with a proven track record in providing high quality mobile messaging services to large enterprise customers in multiple industry verticals—mostly in India, but with a presence in other regions and with plans to expand its geographic reach in EMEA, and Asia & Oceania.
- You want a platform that provides advanced security capabilities, utilizing AI/GenAI and blockchain to optimize the detection and prevention of SMS spam and fraud.
- You are seeking to work with a vendor that is intentionally integrating AI/GenAI across its CPaaS technology stack, internalizing it in relevant applications, solutions, and use cases.
- You wish to add WhatsApp and RBM to the channels with which you communicate with your customers and are seeking to work with a vendor that has significant expertise with both.

## Overview

The India-headquartered CPaaS vendor Tanla Platforms was founded in 1999, initially operating as a provider of mobile messaging services and primarily focused on enabling communications between businesses and consumers. The acquisitions of Karix Mobile (formerly mGage India) in 2018 and ValueFirst Group in 2023 facilitated Tanla's transition to becoming a full-fledged CPaaS provider. The vendor has 2,500+ customers in 12 countries across Europe, the Middle East and Africa, and Asia & Oceania, with 81% of these being large enterprises. In India, Tanla's customers include nine of the top 10 banks, seven of the top 10 insurance companies, and eight of the top 10 financial services providers—although its remit spans other key industry verticals, including retail, healthcare, telecoms, media, travel and hospitality, and payment gateways. Around 60% of its revenue come from 50 of its top 100 customers, which it says it has also retained as customers for 5+ years.

Domestic SMS still represents 50%+ of Tanla's revenue—which totaled 3,928 crore in FY24 (\$471.1m; to end-March 2024)—and international SMS ~25%, with the vendor claiming 45% share of the SMS market in India. However, Tanla has diversified into providing app-based messaging and voice services, from which it is generating ~20% of its revenue and which is seeing 150% growth year-on-year. It says its strategic partnerships with Google, Meta, and Truecaller are key to this growth. RCS (Google) and WhatsApp (Meta)

are already key business messaging channels in India and are becoming so globally. Omdia expects that enterprise use of WhatsApp for business messaging will continue to grow and that Apple's support of RCS in iOS 18 will be a key growth driver for RBM in the coming years. Meanwhile, Truecaller has built a monthly active user base of 433 million globally by being able to identify and block SMS spam and robocalls, which represent a significant challenge for the telecoms industry.

Tanla has connectivity with all the telcos in India and with Tier 1 operators internationally, including Vodafone, Orange, China Mobile, Telekom Malaysia, Etisalat, and MTN. The vendor does not have as many direct and indirect connections with operators as other vendors in this Universe. However, this connectivity enables it to provide A2P SMS services domestically and internationally, as well as local and national phone numbers, toll-free numbers, short and long codes, and SIP trunking. In addition, it operates a hybrid public-private cloud network, using Azure and AWS, supported by its own data centers in Hyderabad and Mumbai.

The vendor supports a wide range of communications APIs, including telco messaging (SMS/MMS, RCS), voice, email, push notifications, and messaging and communications apps; the latter include the three Meta apps (WhatsApp, Facebook Messenger, Instagram), as well as Viber, Weixin/WeChat, Line, Apple Messages for Business, Microsoft Teams, Telegram, and Truecaller Business Messaging.

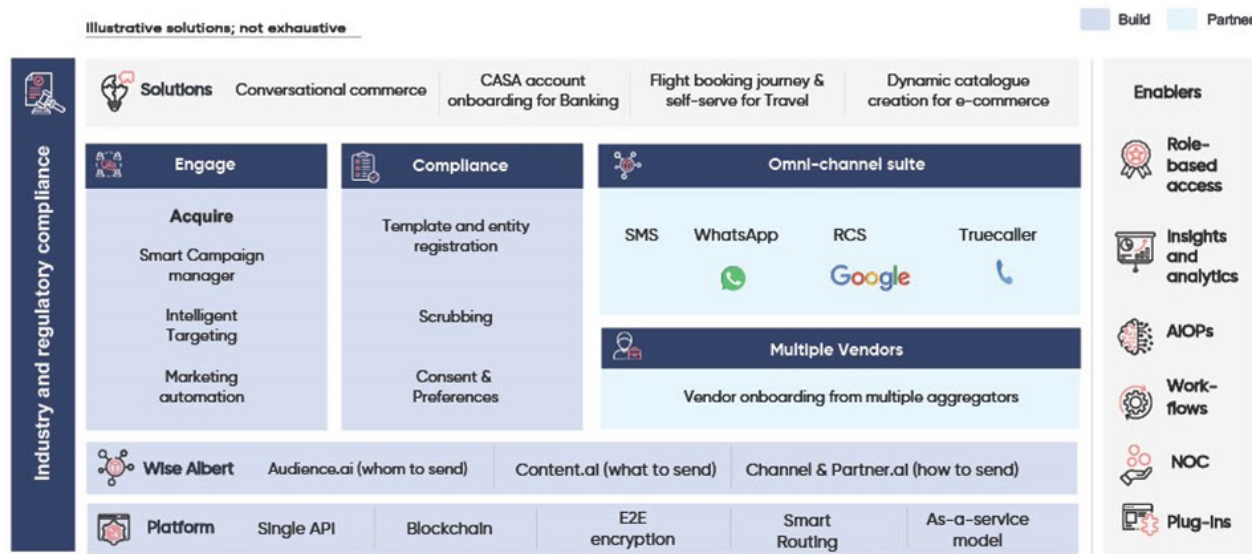
Tanla has a comprehensive CPaaS technology stack, which is grouped into four key offerings, each of which bears the suffix ".ai" to emphasize the extent to which the vendor is integrating AI and GenAI across the stack. The four offerings are:

- **User.ai:** Trubloq blockchain-based anti-spam platform, Wisely ATP anti-scams solution, Wisely Consent consent management platform.
- **Enterprise.ai:** Wisely API-led digital enablement platform, RCS messaging as a platform (MaaP) server, Surbo Conversational AI platform.
- **Intelligence.ai:** Wise Albert AI-based data intelligence platform.
- **Channel.ai:** Omnichannel messaging platform, unifying customer communications across SMS, voice, email, Google RCS, WhatsApp, and Truecaller Business Messaging.

The vendor describes its Wisely API-led platform as a "platform of platforms" because it is essentially the engine that combines and/or enables all the above capabilities (see **Figure 13**). With Wisely, Tanla seeks to help its enterprise customers achieve four key objectives: protect consumers against exploits such as spam and scams, comply with relevant local regulations (including adapting to the regulatory requirements of new markets that Tanla enters), connect enterprises with their customers, and enable enterprises to more effectively engage with their customers. Each element of the vendor's CPaaS stack plays a role in helping enterprises achieve one or more of these objectives.

Figure 14: Tanla Platforms Wisely

## Wisely: Single API-Led Platform Powering All OTT Communications



Source: Tanla Platforms

Tanla is not the only CPaaS vendor to provide SMS firewall and fraud detection, but the ability to provide user consent platforms and technologies is a differentiator (i.e., Wisely Consent). SMS phishing (smishing) is a significant problem in India (and globally)—Tanla estimates that ~140 million phishing messages are sent monthly, with around 200,000 Indians falling victim to these attacks, but only 40,000 reporting it. Its deployment of Wisely ATP with a flagship customer identified and blocked more than 6 million smishing attacks in one month, resulting in the reporting of 71,000+ malicious sender IDs, and the elimination of ~25,000 CTAs (calls to action) across multiple communications channels, including WhatsApp and email.

Meanwhile, the vendor's Trubloq.ai blockchain-based anti-spam platform is a differentiator for the company. Trubloq.ai enables distributed ledger technology (DLT) registration of sending entities (i.e., businesses), their sender IDs, and their content templates as an additional mechanism to help prevent SMS spam and fraud. DLT registration is mandated in India by the country's regulator, the Telecom Regulatory Authority of India (TRAI). But if DLT registration proves effective in India to combat SMS spam and fraud, other national regulators may follow, meaning Tanla is well-positioned to use its blockchain expertise to expand into other markets.

Trubloq.ai includes the Registration.ai module, which simplifies the DLT registration process and provides GenAI-based recommendations for creating effective content. It also includes the DigiAssets.ai tool, which uses GenAI to check the content templates (campaigns) created by enterprises and provide an approval score; a high score indicates that the template is more likely to receive DLT registration approval without needing any modification. If the score is low, DigiAssets.ai suggests corrections to improve the template, which can be applied using a one-click cleanup capability. Tanla says that enterprise customers using Registration.ai experience 90% faster DLT registration and a 60–80% reduction in phishing attacks.

Wise Albert is Tanla's data intelligence platform, which uses GenAI and ML to provide insights and recommendations that can be used to help optimize the customer journey. It has three key use cases: Audience.ai, for identifying key customer segments; Content.ai, for automating the creation of campaign

content (also includes the BotGPT chatbot builder); and Channel&Partner.ai, for determining which communications channel to use (e.g., SMS, voice, WhatsApp) and which delivery partner.

The Surbo Conversational AI suite of products builds on the Wise Albert capabilities to add more customer-facing functionality. It is pre-configured with 100 conversational flow templates, which are tailored to six industries, enabling enterprises in these industries to quickly go live with common customer engagement use cases. However, the platform is customizable, so enterprises can create their own conversational flows. It also offers a live chat agent module, which enables handoffs between automated systems and human agents, and which supports text, voice, and video communications. In addition, Surbo supports speech-to-text transcription, sentiment analysis, emotion detection, keyword/phrase detection, and call categorization and tagging.

Surbo also includes an LLM-agnostic GenAI chatbot builder, Surbo Intelligent Agent. Tanla says it designed this platform to be human-centric (i.e., to develop chatbots that engage in natural, human-like conversations using technologies such as NLP). Surbo-built chatbots can also integrate with external APIs and data sources, which, via GenAI, can add further context and personalization to an enterprise's conversation with a customer. Meaningful data can also be extracted from these conversations and analyzed to further refine the customer experience.

The vendor is developing a partnership ecosystem around GenAI, with the aim of harnessing the power of LLMs and data analytics, while also upholding ethical principles. The ecosystem currently includes core partner OpenAI, but Tanla aims to add Meta and Anthropic (LLMs) in line with its LLM-agnostic approach, as well as data intelligence platform providers for NLP, sentiment analysis, data visualization; and vendors that specialize in guardrail technologies such as bias detection and mitigation, privacy and security, and explainable AI.

Tanla offers a range of value-added services, segmented as follows: security and authentication, omnichannel messaging, and marketing and customer engagement. Security and authentication capabilities include silent network authentication, one-time passwords, anti-phishing, and blockchain-based search reports. Omnichannel messaging value-added services (VAS) include number insights and verification, multi-channel messaging, promotional messages, secure transaction alerts, and customer support automation. Finally, Tanla's marketing and customer engagement capabilities include the Gamooga Customer Data Platform, marketing automation, campaign manager, and loyalty management.

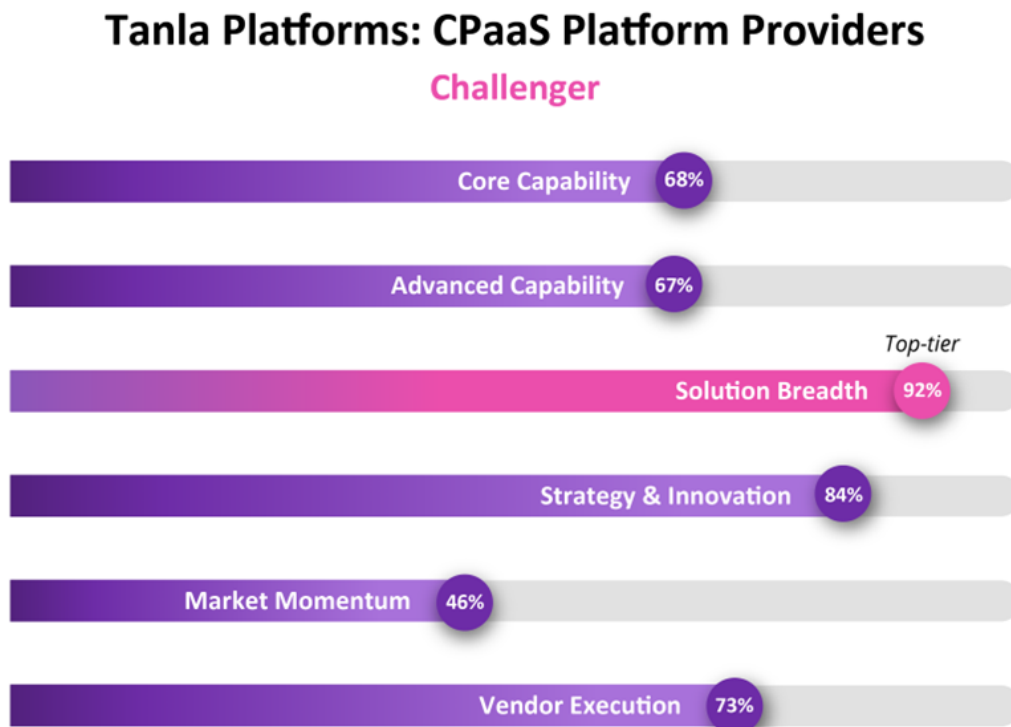
The vendor also packages solutions by numerous industry sectors and use cases. For example, in the education vertical, Tanla provides solutions for student engagement and administration; in government, it enables secure communications for public services, citizen engagement, and information dissemination; in healthcare, it enables use cases in patient engagement, appointment management, and secure communication; and in hospitality it provides solutions for guest engagement, booking management, and marketing and promotions. Similar use cases are enabled for BFSI, energy and utilities, media, retail and e-commerce, telecoms, and transportation and logistics, among others.

Another key differentiator for Tanla is its expertise in RBM. The vendor is Google's preferred partner for RCS in India, stating that it is Google's largest partner globally for RCS, with 60% market share. India is one of the most active RCS markets globally, due in part to the high penetration of Android devices—90.9% in 4Q24, according to Omdia's *Smartphone OS, Active Installed Base – 4Q24*. Google Messages is natively available on Android devices and enables RCS messaging by default. Omdia's *Digital Consumer Insights 2024* survey also found that while WhatsApp remains the most-used app for messaging in India, preferred by 58% of respondents, 11% of respondents preferred to use Google Messages—this is equal-highest with the US, which is emerging as another key RCS market.

Tanla offers its own RCS MaaP, which Vodafone Idea is using to process RBM traffic for enterprises; it claims that 1.5 billion RBM messages per month are being sent in India. The vendor's RCS capabilities include APIs, a visual designer aimed at helping "citizen developers" to manage and deploy one and two-way RBM campaigns, a low-code workflow builder, a campaign manager, a conversation manager, and AI/ML-based recommendations. It also provides tailored RCS/RBM solutions for verticals, including travel, hospitality, BFSI, and retail.

Looking forward, Tanla will focus on scaling its digital platform business, building leadership in the messaging app market, and expanding its global footprint. It will work to commercialize its new and existing platforms, especially Wisely ATP and Trubloq.ai. It plans to deepen its partnerships with Google, Meta, and Truecaller to increase the reach of RBM, WhatsApp, and Truecaller; it also expects that its collaboration with Vodafone Idea in India will unlock further value in RBM. Finally, Tanla is seeking to capitalize on its acquisition of ValueFirst to expand into new markets in Asia & Oceania and the Middle East.

Figure 15: Omdia Universe ratings—Tanla Platforms



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Source: Omdia

## Strengths

- **Strong presence in India:** Tanla does not have a comparable geographic reach to the Leaders in this Omdia Universe, though it has 2,500+ enterprise customers in 12 countries. However, its proven ability to supply high-quality messaging services at scale to marquee customers in the world's most populous nation, with half of its top 100 customers having remained loyal to Tanla Platforms for 5+ years, gives it a solid foundation on which to expand.

- **Focus on WhatsApp and RCS:** Meta's WhatsApp enjoys high penetration in India, making it an attractive channel for businesses to communicate with consumers. Meanwhile, India is also a key market for RBM, with an estimated 1.5 billion RBM messages per month. As a strategic partner for Meta and Google, Tanla has developed strong capabilities for enabling enterprises to add WhatsApp and RBM to their omnichannel customer engagement strategies.
- **AI/GenAI propagated throughout CPaaS stack:** Tanla may not have an as extensive AI/GenAI partner ecosystem as the Leaders in this Universe, but like them, it is integrating AI/GenAI into functionality and applications across its CPaaS technology stack and doing so with intent (i.e., using AI/GenAI where it is feasible and more likely to deliver good business outcomes).

## Limitations

- **Partnership ecosystem:** The company has a smallish partnership ecosystem of 100+, segmented into ISVs, telcos, systems integrators and distributors. As Tanla seeks to expand globally, and potentially compete with the Leaders in this Universe, it should aim to build out a more fulsome partnership ecosystem to help it reach into new countries, expand into new market segments, and complement its products. This could include integrations with the third-party providers of business software that prospective enterprise customers are already using, as well as the AI/GenAI partnerships it is already pursuing (see above).
- **Geographic reach:** As with other India-headquartered companies included in this Universe, Tanla has a relatively small geographic reach, which limits the addressable market for its CPaaS platform—though it is seeking to expand further globally over the next 12–18 months.

## Tata Communications (Omdia recommendation: Challenger)

### Tata Communications should appear on your shortlist if:

- You need a CPaaS provider with global experience of providing high-quality messaging and communications services to large enterprise customers, with demonstrated longevity within its customer base, especially in the BFSI vertical.
- You wish to work with a CPaaS vendor that has direct or indirect connections to more than 2,000 telcos which, combined with a hybrid public–private cloud network, enables it to provide a high level of availability, scalability and compliance, and low latency, across its global footprint.
- You are a telco seeking a CPaaS provider with which you can partner to sell CPaaS services into your own enterprise customer base.

## Overview

At the time of writing the previous *Omdia Universe: CPaaS Platform Providers 2023–24* (see Further reading) the India-headquartered Tata Communications was completing its acquisition of the US-headquartered Kaleyra Communications. The two vendors have since completed their integration, creating a global CPaaS vendor which has 35 global offices and close to 5,000 enterprise customers across the US, Europe, Asia & Oceania, and the Middle East.

The combined company has identified five strategies by which it aims to drive growth and innovation in CPaaS and customer engagement:

- Retain and expand SMS-based messaging revenue, while developing new revenue streams from RCS, WhatsApp, and other messaging apps.
- Grow revenue from non-messaging products (voice, email, video, contact center), and build partnership ecosystems around them.
- Accelerate monetization of AI-enabled products, focusing on conversational AI and live agent capabilities.
- Provide a unified platform experience for enterprises that enables them to create smooth customer journeys across multiple channels, campaigns, workflows, billing, and reporting.
- Develop platform convergence, including deeper integration between its CPaaS and CCaaS platforms.

Tata Communications' go-to-market strategy is primarily direct sales to large enterprise customers, with which it typically co-creates services. The vendor states that it has very high customer retention rates, with an average engagement tenure of 10+ years for international clients, and 15+ years for banking customers. Tata Communications credits this high retention to its responsiveness, providing 24x7 customer support, and proactively helping customers detect and resolve problems.

Tata Communications has delivered impactful business outcomes for customers such as Indian-headquartered e-commerce enablement platform Shiprocket, which provides brands such as Samsung, Levi's, Kellogg's, and Decathlon with shipping services. Shiprocket integrated Tata Communications' WhatsApp into its platform, with 3,500 of its sellers now using this capability to communicate with their customers, resulting in a 45% reduction in return to origin (RTO), an increase in customer response rates from 30% to 70%, and reduced contact center costs due to fewer customers needing to contact sellers. Another customer example is a large Italian bank, to which Tata Communications (via Kaleyra) has been providing high-quality messaging services for 25 years (since 2000), including security notifications, authentication (via OTPs), and marketing campaigns. Tata Communications says it achieves a 99% delivery rate for critical messages within two seconds for the bank and has continuously evolved the services it provides to comply with local and regional regulations for banking services, data privacy and security, and telecoms.

Tata Communications also goes to market via its partnership ecosystem, which includes product partners (e.g., with Meta for WhatsApp, Google for RCS), ISVs, co-marketing, commercial partners (e.g., systems integrators), telcos, and marketplaces. Developers are not the primary route to market for Tata Communications, but it does provide developer resources, including a dedicated website and developer portal through which APIs, documentation, and design support are available.

The vendor's access to connectivity services is substantial—it has more than 2,000 direct and indirect connections to mobile operators, and can offer voice services in 240+ countries, and SIP trunking in 50+ countries. It can also provide its enterprise customers with local and national numbers, toll-free services, and short codes and long codes in an undisclosed number of countries, while its APIs, value-added services, and solutions are also widely available, but dependent on the country. Tata Communications partners with public cloud providers to offer services at a high level of availability, redundancy, and scalability, and with minimal latency, across its global footprint; it also enables Tata Communications to comply with local regulations, including those around data privacy and security.

The combination of Tata Communications and Kaleyra has resulted in a platform called the Customer Interaction Suite (CIS). CIS comprises four key offerings: communications platform (i.e., CPaaS), Kaleyra AI, conversational AI, and contact center (i.e., InstaCC) with live agent UI. The vendor's focus for CIS is to enable

omnichannel capabilities for its enterprise customers, infuse AI into an enterprise's interactions with customers, and deliver a total experience (TX) CEP that supports hyper-personalized interactions at scale.

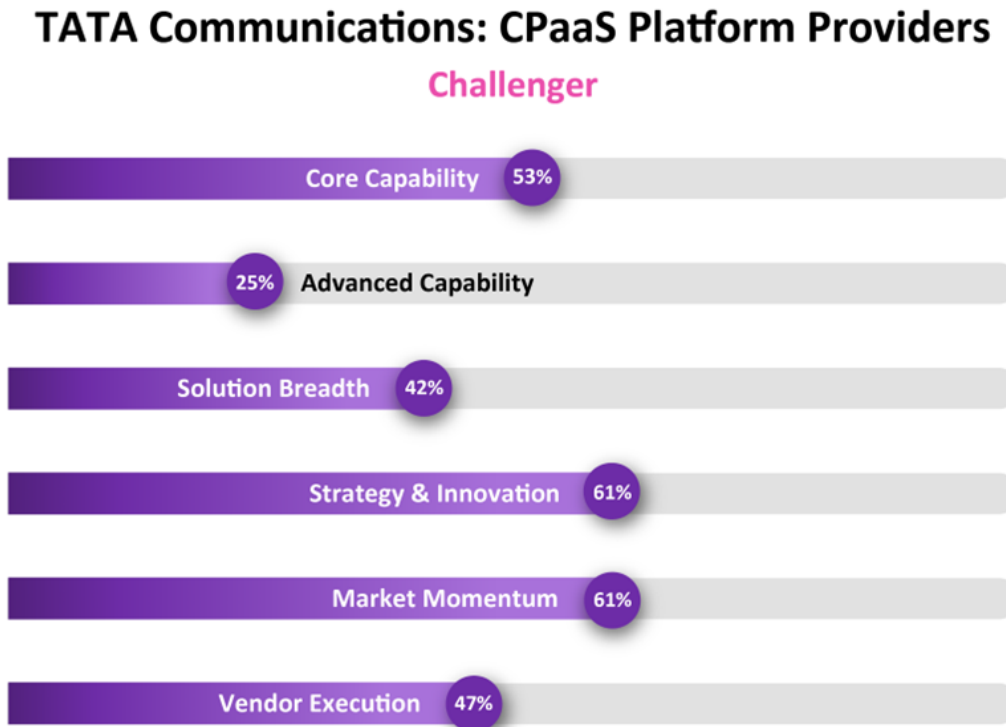
Tata Communications' communications platform includes a wide range of communications APIs—SMS, MMS, RCS, voice, video, email, WhatsApp, Conversations, and push notifications—as well as APIs that enable complementary services, such as Campaigns, Verify, Numbers, Lookup, Failover, Flowbuilder, and Directory. The company has partnered with Google to enable RCS in some countries, dependent on device reach (i.e., Android penetration) and carrier preparedness, with the goal of offering it globally by end-2025. It is also working with Meta on the beta of the WhatsApp Business Calling API, which Tata Communications has soft-launched. In addition, Tata Communications also offers Programmable Voice, which is a suite of APIs and other capabilities that includes virtual numbers, Smart IVR, call masking, click-to-call, Verify, and Flowbuilder. Like most other vendors in this Universe, Tata Communications has not (yet) engaged with Network APIs via GSMA Open Gateway/the CAMARA project.

As with other vendors in this Universe, Tata Communications is integrating AI into its products with the aim of helping enterprises enhance their customer engagement experience. It says that AI-based automation will enable enterprises to send their customers the right message via the right channel at the right time (i.e., delivering hyper-personalized and contextual communications) and doing so proactively so that the customer feels their needs are anticipated and/or quickly fulfilled.

The vendor's GenAI-based Kaleyra AI platform consists of an AI template generator for creating campaigns over WhatsApp, SMS, and other messaging channels and a conversational AI analytics tool for creating conversationally impactful visualizations when analyzing metrics such as campaign performance. Kaleyra AI also includes a conversational AI no-code assistant builder for creating virtual agents. Other new additions to Tata Communications' Conversational AI capabilities include workflows, which combine chatbots with live agents to optimize the customer support experience. The vendor intends to add AI Agent Assistants for human agents, which will enable content/conversation summaries to support contextual communications and sentiment analysis. Automated/AI-based tools will also be introduced to further support the customer experience, including the AI-based routing of customer inquiries, context-based personalization and segmentation, and the selection of the next-best channel. It's clear that Tata Communications is infusing AI/GenAI across its CPaaS and its CCaaS platforms, as is the case with the other vendors in this Universe.

Meanwhile, Tata Communications is also evolving its InstaCC beyond the contact center, integrating CPaaS capabilities and Kaleyra AI into it to create a full-fledged CEP. InstaCC TX will be an agent experience solution powered by Kaleyra AI, which aims to simplify operational efficiencies for agents and boost employee productivity. Underpinning Tata Communications' customer engagement capabilities are the large number of integrations that it has with third-party CDPs, CRM, ERP, and others, enabling its channels and products to be integrated into the business workflows created on these platforms.

Figure 16: Omdia Universe ratings—Tata Communications



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Source: Omdia

## Strengths

- **Connectivity services and geographic reach:** Tata Communications performs extremely well in this Universe on geographic reach, with 2,000+ direct and indirect connections to mobile operators, 35 global offices, and the ability to offer voice and messaging services in 240+ countries and SIP trunking in 50+ countries.
- **Market momentum:** Tata Communications has close to 5,000 enterprise customers across the US, Europe, Asia & Oceania, and the Middle East, including in the BFSI and e-commerce verticals, which require large volumes of customer communications—especially messaging notifications, alerts and campaigns—to be delivered with high quality and at scale. Testament to Tata Communications’ ability to do so is its retention of a proportion of its enterprise customers for 10+ years.

## Limitations

- **AI and GenAI:** Tata Communications does have capabilities in AI and GenAI, but it is limited in comparison to other vendors in this Universe. However, the vendor’s Kaleyra AI platform provides a solid foundation on which to build, and Tata Communications is rolling out AI/GenAI capabilities across its portfolio.
- **Customer engagement capabilities:** The vendor has strength in integrating its products and services into the existing customer-facing platforms that its enterprise clients are using,

including third-party customer data platforms, contact centers, CRMs, and ERPs, and in so doing helping its customers achieve enhanced KPIs (see examples above). But again, its own CEP capabilities are limited by comparison to other vendors, especially the Leaders in this Universe, who view CEP as not only complementary to their core CPaaS offerings, but integral to being able to provide all the technology that an enterprise needs to not only communicate but also engage with their customers. It is possible that Tata Communications' forthcoming InstaCC TX platform will boost its CEP capabilities.

## Twilio (Omdia recommendation: Leader)

### Twilio should appear on your shortlist if:

- You want to work with a vendor that has maintained its industry-defining position in providing cloud-based communications services to enterprises by iterating its capabilities and making targeted investments in line with emerging technologies.
- Your organization seeks tailored customization and supports a developer-oriented approach toward adding communications capabilities to its existing platforms.
- You are a company operating in the retail, financial services, healthcare & life sciences, or technology verticals, and you are looking for an industry-specific CPaaS solution.
- You would like to explore how your organization can use AI and GenAI to more effectively communicate and engage with your customers.
- You wish to deploy a CEP that allows you to more effectively use your customer data, including combining it with AI and GenAI capabilities, and with communications channels, to deliver an enhanced, contextual, personalized customer experience.

## Overview

Twilio, a US-based company, continues to push the boundaries of what it means to be a CPaaS vendor. Founded in 2008, Twilio began as a developer-oriented cloud communications provider with a small set of core communications APIs and a pay-as-you-go self-service model. It had the relatively "simple" goal of enabling enterprises to more easily access SMS and voice services for customer communications.

Fast forward to 2025, and Twilio is still highly engaged with its community of developers, which has now swelled to more than 10 million, but is also laser-focused on helping enterprises move beyond simply communicating with their customers to more effectively engaging with their customers.

Twilio is the largest CPaaS provider globally by revenue, generating \$4.46bn in 2024, with its communications portfolio comprising \$4.16bn. Its segment revenue in 2024 was \$297.7m. 2024 was a transformative year for the vendor, with Twilio's co-founder and former CEO Jeff Lawson stepping aside in January, and Khozema Shipchandler, formerly president of the Twilio Communications business, taking the reins, with the mandate to significantly improve the company's financial standing—specifically, to drive towards profitability.

Meanwhile, a 1Q24 operational review of the segment business concluded with the decision to keep it, from the perspective of the value it brings to its vision of a CEP that combines contextual data, communications, and AI as an enabler of personalization at scale. For context, the annual CPaaS-only revenue for some of Twilio's competitors is in the ballpark of Twilio's segment revenue.

Communications is where most of the value currently lies in Twilio's business. The vendor operates a Super Network, which combines physical and cloud-based connections to more than 4,800 carrier partners, enabling communications in more than 180 countries, and global number availability and SIP connectivity in more than 180 countries and regions—including 65,000+ phone prefixes and 200+ number types. Eight Edge locations, with multiple Availability Zones (data centers) per Edge, enable Twilio to operate a network that is highly resilient, as well as being fast and secure; it also means that enterprises can scale globally without needing to manage their own data centers and connectivity. Twilio uses patented ML algorithms to optimize traffic routing around the Super Network (see below for more detail); additionally, enterprises can use Twilio's Traffic Optimization Engine to further optimize their own traffic flows.

Twilio offers reporting and analytics tools that give its customers deep visibility into their communications traffic flows, enabling troubleshooting and improving the quality of service. These include Messaging Insights and Voice Insights. Twilio has added two AI-based tools for messaging and voice, which deliver further actionable insight: Customer Deliverability Engine and Voice Intelligence. Customer Deliverability Engine is aimed at helping enterprises improve message deliverability, proactively monitor messaging traffic, and provide AI-based Intelligent Alerts in real-time when anomalies are detected. Other features include the Intelligent Discovery AI Assistant for enhanced troubleshooting, and the Deliverability Score to track campaign effectiveness. Meanwhile, Voice Intelligence uses speech recognition tools to enable enterprises to, among other things, analyze calls, recognize keywords and entities, and create transcriptions from which enterprises can extract AI-based call summaries, measure customer sentiment, and gain insights that they can use to further improve the customer experience.

Twilio offers a rich suite of APIs, including communications (telco messaging, voice, app messaging, email, video), security and authentication (Verify, Lookup), and regulatory compliance. It also offers an extensive range of informational resources for developers and enterprises. It does not yet offer Network APIs (i.e., such as those offered under the GSMA Open Gateway Initiative), stating that it continues to evaluate the opportunity as a comprehensive commercialization and distribution strategy is still being established. It does, however, offer network-level functionality through its Lookup API. Meanwhile, enterprises can also access communications solutions that are packaged around use cases (e.g., marketing and promotions, verification and identity, alerts, and notifications) and vertical industries (e.g., finance, healthcare, retail, public sector, hospitality).

Segment is core to Twilio's current messaging around "building personalization at scale." Building personalization at scale means making it easier and quicker for enterprises to gather customer data from multiple sources (in addition to the channel data from its communications channels), contextualize that data to provide personalized engagement experiences for their customers on the communications channels they prefer, and harnessing AI and GenAI to do so—all in a way that engenders consumer trust. (See *Omdia Universe: Customer Data Platforms 2025* in Further reading for more details on segment.)

Supporting both the communications and segment businesses is a sizable partner ecosystem, including 3,000+ tech partners and ISVs, comprehensive professional services and technical support, and pricing tailored to meet the varying needs of its self-service and enterprise customers.

## Twilio is a Leader in the CPaaS Omdia Universe

Twilio is classified as a leader in the Omdia Universe. It is a leader or equal leader on the leaderboard for seven out of 12 scored categories, with a minimum of 10 points above average for all but one of the 12. Its highest scores are in connectivity services, AI capabilities, innovation, go-to-market strategy, geographic coverage, and non-functional requirements, for all of which, except innovation, Twilio scores more than 20 points above the average. Its highest delta is in geographic coverage, where it scores 34 points above the

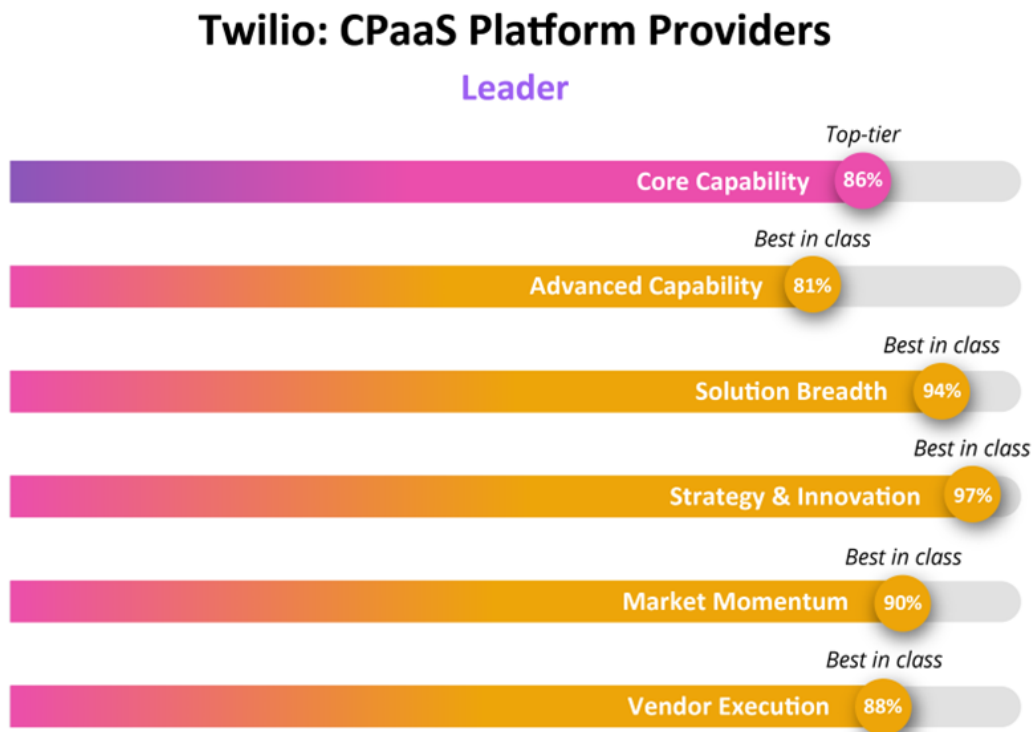
average score. Twilio is more consistently a leader or joint leader across categories than other CPaaS vendors in this Universe, signaling its continued market dominance.

When the solution capability scores are combined with the category score for solution breadth, Twilio's overall solution capability score is 85%, making it the leader in this category.

In addition, Twilio is rated "best in class" for four of the six summary categories (see **Figure 16**), and top tier in the remaining two, with its highest overall score, 97%, in Strategy & Innovation. Best in class means that Twilio achieved the highest overall rankings for each of these categories, and top tier means that it is among the leading vendors for each of these categories.

Twilio is also the leading CPaaS vendor in terms of market presence, with CPaaS-only revenue of \$3.86bn in 2023.

**Figure 17: Omdia Universe ratings—Twilio**



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Source: Omdia

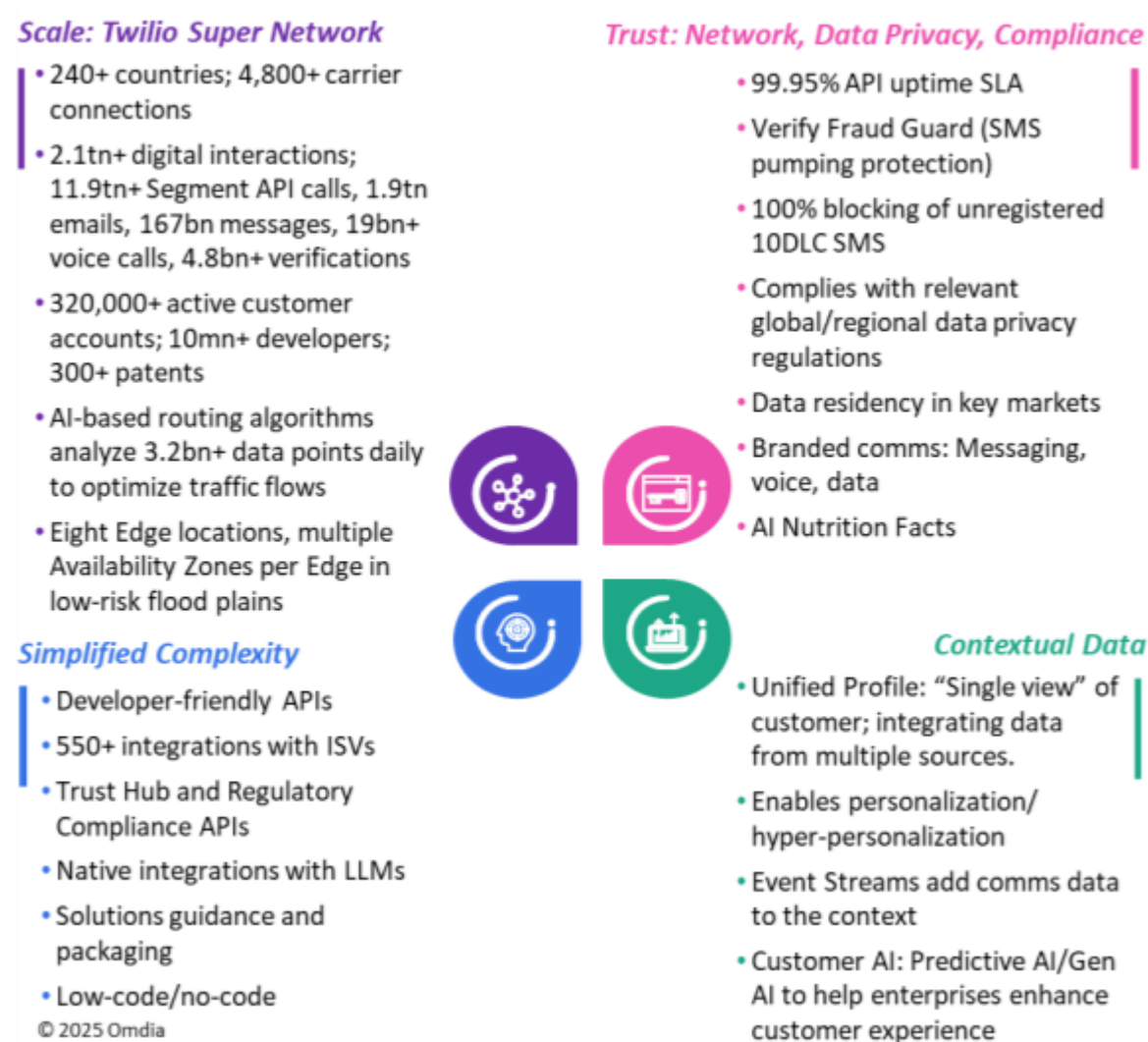
## The four pillars of building personalization at scale

Twilio views delivering on its "building personalization at scale" messaging from a technical perspective as somewhat of a quad-play: scale, trust, simplified complexity, and contextual data.

Twilio's Super Network plays a key role in delivering significant volumes of communications traffic across different channels and at a high level of redundancy, which is one indicator of its ability to scale (see **Figure 18**). Another indicator of Twilio's scale is the size of its user base, spanning developers, enterprise customers, and partners. In addition to its 10 million+ developers, it has more than 320,000 customer accounts (including 84% of the Fortune 500 and 54% of the Global 2000) and a partnership ecosystem of

3,000+ independent software vendors, VARs, systems integrators, platforms, tech providers, and outsourcers that are using Twilio's APIs to build products and services for enterprises. A third indicator is innovation—Twilio has more than 300 patents—and the ability to iterate, with over 250 product improvements, new capabilities, and features delivered in 2024 alone. It's the Twilio Alpha project, run by the vendor's Emerging Technology and Innovation team, that contributes to this fast pace of innovation by exposing its ideas and prototypes to customers and then using the customer feedback in the development process.

Figure 18: Twilio quad-play to build personalization at scale



Source:

Twilio, Omdia

Twilio has heavily invested in building trust. This is evident in its Super Network, engineered with the objective of ensuring its enterprise customers can trust that they can use it to effectively reach their customers, at a high quality of service; it offers a 99.95% API uptime SLA. Route optimization plays a significant role in offering this SLA. Twilio uses patented ML algorithms to analyze 3.2 billion+ data points daily, optimizing routes to balance traffic and reroute it around latency and outages. It says the algorithms detect 95% of incidents before carriers do, and 99% of incidents before customers see an impact on deliverability. Its vast number of connections to carriers means that, on average, it can use up to four different paths to route traffic to end-customers.

Another way in which Twilio builds trust among its enterprise customers, and in the SMS channel in particular (which is still essentially the vendor's bread-and-butter in terms of revenue), is to offer capabilities aimed at preventing exploitation of the channel by bad actors. For example, in August 2023, Twilio added Fraud Guard to its Verify API for multi-channel authentication and verification; Fraud Guard aims to help keep the A2P SMS channel clean by preventing SMS pumping (aka artificial inflation of traffic,

or AIT) and other exploits. Twilio claimed that by the end of 2024, Fraud Guard had saved its enterprise customers a total of \$62.7m by blocking 569 million fraud attempts. Another example of Twilio's efforts to restore trust in A2P SMS is being the first CPaaS vendor in the US in September 2023 to completely block unregistered 10-digit long-code traffic (10DLC).

Being a trusted CPaaS vendor means complying with relevant regulations, particularly around data privacy and security, in the jurisdictions in which Twilio provides services; in addition, the vendor has data residency in key markets. It also helps its enterprise customers keep up to date and comply with regulatory requirements in their markets via its Regulatory Compliance REST APIs. Meanwhile, Twilio's branded messaging and calling capabilities enable enterprises to build—or rebuild—trust with their customers, which has largely been eroded due to the rising incidence of robocalls and spam. By adding their logo or a verification mark to the message header or calling interface, organizations can verify their identity with the consumer, which should help boost call completion rates and messaging engagement. In addition, Twilio's AI Nutrition Facts are an example of where the vendor is trying to facilitate enterprise trust in using and/or building on Twilio products and services that integrate AI or GenAI. AI Nutrition Facts is a “product label” that aims to help enterprises make informed decisions about their use of an AI-based capability.

Twilio also continues to build on its original mission of “democratizing” enterprise access to voice and SMS, with its continuing commitment to simplifying complexity across its portfolio and making it “faster and easier” for its customers to achieve their business outcomes. This manifests in the development of capabilities across three key areas:

- **Builder experience:** Includes offering developer-friendly APIs, tailored use-case onboarding flow guides, expanded low-code/no-code solutions, and AI-based support.
- **Marketplace and partners:** For non-builders, providing easier access to Twilio partners/ISVs that are providing services built using the Twilio platform or that are integrated with the Twilio platform (including LLMs, cloud-based data storage, CRM, and so on).
- **Solutions guidance:** Packaging products and services around use cases, for example, the Twilio Engagement Suite for marketing or notifications campaigns, or Communications Add-ons to more easily enable use cases such as throughput shaping for high-volume messaging.

Finally, contextual data is how Twilio is adding the “personalization” component to customer engagement. What Twilio is aiming for is the holy grail of consumer engagement—enabling enterprises to provide their customers with an experience that is personal and relevant to them, at a time that is optimal for them, using the communications channel(s) that they prefer. Achieving this goal relies firstly on being able to access and combine all the information a company might hold about its customers, which is often in disparate platforms. This is where the Segment CDP comes in, with its ability to ingest customer and communications data from multiple sources. Twilio's Unified Profile then acts as a “front-end” to the customer data, which is combined in the Segment CDP, and which can be combined with a range of other AI- and GenAI-based tools for use cases such as improving customer service or creating sales or marketing campaigns. These tools include Voice Intelligence, Agent Copilot, AI Predictions, Predictive Audiences, Generative Audiences, and Linked Audiences.

## Evolving go-to-market and tapping into AI/GenAI to drive revenue growth

Twilio's go-to-market approach has evolved significantly over the years. In addition to retaining a comprehensive self-service capability for developers, Twilio now addresses the needs of large enterprises and multinational companies via dedicated account executives, which are aligned to key vertical

industries—technology, regulated verticals such as healthcare and financial services; retail, and non-profits—and to its partner ecosystem.

However, Twilio is also doubling down on its “land and expand” approach towards cross-selling additional capabilities to existing and new customers. The company revealed at its Investor Day in January 2025 that almost two-thirds of its customers (63%) only purchase one product, but that the remaining 37%, who are multi-product customers, generate 90% of its revenue. Clearly, there is significant extra value to be unlocked in shifting its single-purchase customers to multi-purchase.

To that end, Twilio is taking a three-pronged approach:

- Training its sales teams to become strategic, trusted advisors, who understand the landscape within which an enterprise operates, and its pain points, and who can identify the relevant buying personas within the organization and offer appropriate solutions.
- Communicating the “One Twilio” narrative around how enterprises can generate higher value through combining customer data, communications capabilities, and AI/GenAI.
- Investing in the development of industry-specific solutions for the retail, financial services, healthcare & life sciences, and technology verticals.

As outlined in [Omdia Universe: CPaaS Platform Providers 2023–24](#) and above, Twilio is already well advanced in using and infusing AI and GenAI in its platforms to drive network efficiencies, counteract bad actors, and enable hyper-personalized customer engagement. It has been using ML for tasks such as traffic balancing and route optimization for some years, and more recently added AI-based analytics and fraud prevention (see above). It partnered with companies such as OpenAI, Google, and Frame AI to integrate LLMs into API functionality as well as Flex, Segment CDP, and Engage. It is offering AI-based virtual agents and agent copilots, which, when combined with unified profiles, enable enterprises to more effectively automate customer engagement (for example, answering routine inquiries) and to provide a more personalized, less frustrating customer experience with a human in the loop. It developed predictive AI and GenAI tools such as Predictions, Recommendations, and Generative Audiences; these can help enterprises to more effectively market relevant products and services to their customers. Its efforts seem to be paying off; at its recent investor day, Twilio announced that 90% of Forbes 50 AI startups are building on Twilio, 9,000+ companies are using Twilio’s AI capabilities to build products and services, and that these companies have generated \$260m in revenue as a result, at an average of ~\$29,000 per company.

## Strengths

- **Innovation:** Twilio’s capacity to innovate manifests in the number of patents that it owns (300+), and its ability to add new products, features, and improvements on almost a daily basis (250+ in 2024). Innovation is key to ensuring that Twilio’s product and service development keeps pace with emerging technologies (such as AI/GenAI), allowing it to meet the diverse and evolving needs of its developer community and enterprise customers and to differentiate itself in a competitive market.
- **Go-to-market strategy:** Twilio has become the largest CPaaS vendor by revenue by effectively transitioning its go-to-market approach from being solely a self-service mechanism aimed at builders (i.e., developers) to also addressing the enterprise market (i.e., non-builders) with dedicated account executives, verticalized solutions, an extensive partner ecosystem, tiered professional services and technical support, and expanded pricing structures. Recognizing that most of its enterprise customers still only take one service, the next stage of development in

Twilio's go-to-market is to execute on its three-pronged strategy aimed at selling more services to its existing customers.

- **Connectivity services and geographic coverage:** Twilio does not own its own network, but it is one of the best-connected CPaaS vendors in this Universe, with 4,800+ carrier partners globally; this means it can offer a wide range of services in 180+ countries. The Twilio Super Network also has eight Edge locations, with multiple Availability Zones per Edge; this, in conjunction with tools such as ML-based routing optimization, means that it can offer its customers a 99.95% API uptime SLA.
- **AI capabilities:** Twilio has infused AI and GenAI is throughout its Communications and Segment platforms, ranging from the AI capabilities that it has used for years to optimize traffic routing, to the newer AI- and GenAI-based capabilities being used within the Segment products, which will play a key role in helping enterprises to “build personalization at scale.”

## Limitations

- **Measured approach with RCS:** Twilio has typically taken a pragmatic approach to rolling out new communications APIs, preferring to provide capabilities based on market demand and maturity of channel and onboarding—and this has been the case for RCS (and Apple Messages for Business). Apple's support of RCS in iOS 18 now makes cross-platform RBM possible, and the US is emerging as one of the key global markets for RCS. Twilio has onboarded Verizon and T-Mobile (beta) in the US and has customers sending RCS messages at scale in full coverage markets, including Spain, Germany, Sweden, and Singapore, among others. However, other CPaaS vendors have been working with enterprises to deliver RCS campaigns for some years, giving them valuable experience and market awareness, which is something that Twilio has to build.
- **Taking a wait-and-see approach with Network APIs:** Similarly, Twilio has held off from adding Network APIs, stating that it continues to evaluate the opportunity while a comprehensive commercialization and distribution strategy is established. Again, other CPaaS providers have taken a different view, partnering with the GSM Association, telcos, and telecommunication vendors to offer Network APIs to their enterprise customers. The market for Network APIs is still relatively nascent, and similar operator initiatives have failed before (e.g., OneAPI) so it remains to be seen whether Twilio's reticence to enter this market is well-founded.
- **Building revenue internationally:** Twilio has a global Super Network, and the capacity to offer products and services in 180+ countries, but 65% of its revenue is still generated within the US. It is working to increase its revenue from international markets (which are growing faster than the company average), with part of that effort coming from holding its SIGNAL event in key regions (Brazil, Singapore, London), to raise awareness of itself as a company and its products and services.

## Vonage (Omdia recommendation: Leader)

### Vonage should appear on your shortlist if:

- You need a robust global network connectivity solution for reliable communication across regions.

- You want to work with a vendor that offers a robust and versatile CPaaS platform that integrates unified communications as a service (UCaaS), CCaaS, and a wide range of APIs for voice, messaging, video, email, fraud protection, network APIs (for fraud, location and quality), and AI.
- You are a communications service provider looking to leverage your partnership with Ericsson by exposing network APIs to enterprises, to improve app security, enhance customer engagement, and streamline business operations.

## Overview

Vonage is a leader in the CPaaS market, offering a platform that combines UCaaS and CCaaS with strong network API support within the same platform. These integrations provide developers with a comprehensive suite of APIs for secure, trusted, and branded communications. By enabling personalized digital, high-quality experiences, Vonage helps businesses strengthen customer relationships and enhance brand loyalty.

Vonage's go-to-market strategy focuses on key industries, regions, and a strong partner network. The company tailors its solutions to sectors like healthcare, financial services, retail/e-commerce, transportation, and logistics, addressing their specific communication, security, and operational needs. Vonage is expanding its presence in North America, Europe, and Asia & Oceania, adapting to local market demands and regulatory requirements. It also partners with system integrators, independent software vendors, hyperscalers, cloud providers, and telecom providers to extend its reach and improve service delivery.

Vonage's extensive API portfolio supports communication, security, and customer engagement across multiple channels. Businesses can manage global phone numbers through the Numbers API, which supports both SMS and voice services. The SMS API enables global messaging with features like HIPAA compliance, fraud alerts, and sender ID registration management. The Messages API consolidates messaging channels like RCS, SMS/MMS, WhatsApp, Viber, and Facebook Messenger into a unified interface. The Dispatch API automates workflows across channels, and the Verify API offers a low-code two-factor authentication workflow solution.

Security-focused APIs such as Number Insight and SIM Swap help businesses verify phone numbers, prevent fraud, and enhance authentication. Vonage also provides tools for in-app voice and messaging integration, account management, and access to insights through the Reports and Advanced Insights APIs. The Redact API supports data privacy, while the Audit API monitors account activity.

Vonage's Voice API allows businesses to personalize interactions with WebRTC and PSTN calling, featuring cost-effective global calling, programmable SIP trunking, and IVR capabilities. AI-powered tools, like NLP-based voice bots in Vonage AI Studio, integrate with major AI providers such as Google, Amazon, and Microsoft. The Video API supports interactive video calls with multiparty sessions and integrates with medical and AR/VR devices. Vonage also offers an email API for transactional messaging and marketing campaigns and a broad range of SDKs for embedding communications into mobile and web applications across common programming languages and frameworks.

Security is integral to Vonage's API offerings, which include encryption, firewall controls, and advanced security features tailored to business needs. In addition to security and compliance, the Vonage Protection Suite directly targets fraud prevention and AIT attacks, leveraging Network APIs like Number Verification and SIM Swap. Forthcoming Network APIs will also include Location Retrieval and Verification, Device Reachability and Roaming, and Quality on Demand APIs, which will further help businesses expand and adapt their customer engagement strategies.

Vonage maintains strong connectivity with global telecommunications providers, with 170 direct and over 2,000 indirect connections. Its partnership with Ericsson further enhances its direct connections, supporting services such as Network APIs and RCS to deliver improved network capabilities, and secure, branded, verified messaging, respectively. Vonage's SIP Dashboard simplifies voice connectivity, allowing businesses to deploy SIP trunks, access pre-built voice applications, and transition to AI-powered interactions. The dashboard includes robust security features and intelligent SIP applications for call recording, transcription, and sentiment analysis.

Vonage provides a complete technology stack for customer engagement, combining network and carrier interfaces, a broad CPaaS API portfolio, and packaged applications for contact centers and unified communications. Its solutions are designed to enhance customer interactions across multiple channels and integrate with existing workflows. Vonage Conversational Marketing (powered by Jumper.ai) is an omnichannel platform for brands to engage customers across social media, messaging, and web platforms. It includes tools like Broadcast Manager, Chatbot Automation, Unified Inbox, and built-in commerce features.

Vonage offers several pre-packaged solutions aimed at improving communication and customer engagement for businesses of all sizes. Vonage Business Communications (VBC) is a comprehensive UCaaS solution offering voice, messaging, fax, social media, and video conferencing capabilities. It includes AI features designed to streamline communication and enhance workflows. Additionally, Vonage Contact Center (VCC) is a cloud-based platform offering features such as advanced call routing, real-time reporting, and analytics.

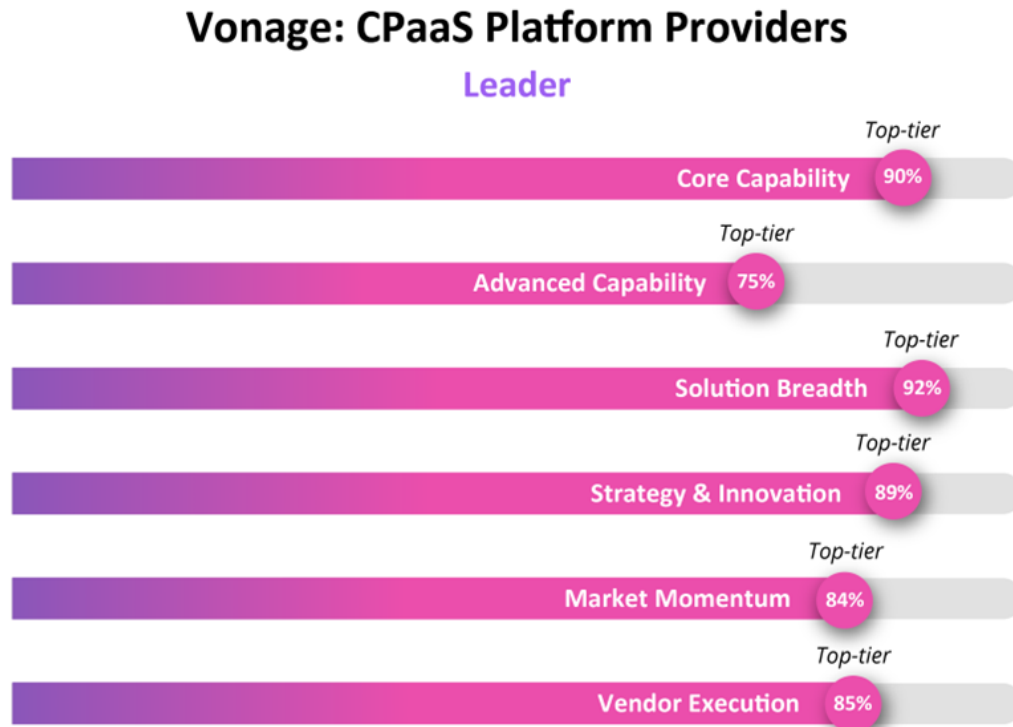
Vonage's AI integration within its CPaaS platform enables customers to access advanced AI capabilities without needing separate AI solutions. AI Studio, powered by Vonage's NLU engine, allows businesses to create virtual assistants that integrate with Vonage's voice, RCS, SMS, and social messaging APIs. AI Studio can be accessed through the developer dashboard and offers a visual flow builder for easy deployment. Businesses can also opt for Vonage-built and managed AI virtual assistants, with support from Vonage's conversational designers and professional services.

Vonage's AI tools extend across communication channels. The Voice API includes premium text-to-speech (TTS) technology, replicating live speech nuances in over 30 languages and dialects. Automatic speech recognition (ASR) supports voice applications like IVR, two-factor authentication, and order submissions in 120 languages. AI connectors enable real-time integration with third-party AI engines for customized interactions.

The video API features AI-powered capabilities such as audio connectors for live captioning, transcription, and translation, and media processor functionalities that apply ML to analyze and optimize video streams. Vonage Conversational Marketing & Commerce integrates GenAI for automated responses, live chat assistance, and content generation for marketing, enhancing customer engagement across various touchpoints.

With its comprehensive AI-powered tools, Vonage helps businesses create smarter, more efficient customer experiences, enhancing communication across multiple channels and ensuring scalable, secure, and intelligent solutions for most modern-day business requirements.

Figure 19: Omdia Universe ratings—Vonage



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Source: Omdia

## Strengths

- **Comprehensive API Portfolio:** Vonage provides a wide range of APIs, including voice, RCS, SMS/MMS, video, social messaging, fraud protection, network APIs, and email, allowing businesses to build extensive customized communication solutions.
- **Advanced AI capabilities:** The integration of AI within Vonage's CPaaS platform, including AI Studio and premium text-to-speech (TTS) technology, enhances the functionality and user experience of communication applications.
- **Omnichannel engagement:** Vonage Conversational Marketing & Commerce, powered by Jumper.ai, enables brands to interact with customers across multiple platforms, including social media, messaging, and the web, with tools like Chatbot Automation and a Unified Inbox for live agents.

## Limitations

- Although Vonage offers a comprehensive developer portal and extensive resources, the wide variety of APIs may be a challenging learning process for enterprises and require development support.
- There is a perception that Vonage relies exclusively on its parent company, Ericsson. Vonage should further highlight its broader partnerships with major technology and AI providers.

Additionally, Ericsson's recent joint venture, Aduna (which includes 15 leading communications service providers and network operators), promotes an open ecosystem that enhances the availability of network APIs for all providers.

# Appendix

## Methodology

### Omdia Universe

Omdia's rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer-reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

### Inclusion criteria

- The platform enables cloud-based communications services via programmable APIs that include, but are not limited to, telco messaging (SMS, MMS, RCS), messaging apps (such as WhatsApp, Facebook Messenger, Viber, Weixin/WeChat, Google Messages, Apple Messages for Business), voice calling, video calling, and email.
- The platform enables access to communications products and services, such as telephone numbers, SMS short codes, number verification and authentication, customer authentication and verification, telco messaging termination directly or indirectly onto telco networks, voice interconnection (SIP trunking, programmable SIP), email, and IoT.
- The platform enables access to global communications networks for messaging, voice, and data, with either direct connections to mobile operators (your own communications network) or indirect connections via messaging aggregators and voice/data interconnection providers.
- The platform offers developer resources and/or has a substantial network of integration partners.
- The platform has a significant level of recognition—among enterprises, that is, it must have at least five publicly referenceable enterprise case studies of businesses over 1,000 employees

## Further reading

[\*Messaging Apps Tracker – 1H24\*](#) (January 2025)

[\*Mobile Messaging Traffic and Revenue Forecast: 2024–29\*](#) (November 2024)

[\*Telco Network API Revenue Forecast \(2023–29\)\*](#) (November 2024)

[\*Consumer Mobile Messaging 2030\*](#) (October 2024)

[\*Messaging Apps User, Traffic, and Revenue Forecast: 2024–29\*](#) (October 2024)

[\*2024 Digital Consumer Insights: Advanced Communications & Messaging\*](#) (September 2024)

[\*The State of Digital CX 2024: Survey Analysis\*](#) (August 2024)

[\*Omdia Universe: CPaaS Platform Providers, 2023–24\*](#) (November 2023)

[\*RCS User, Traffic, and Revenue Forecast: 2024–29\*](#) (September 2024)

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