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Omdia Universe: Customer Engagement Platforms, 2026

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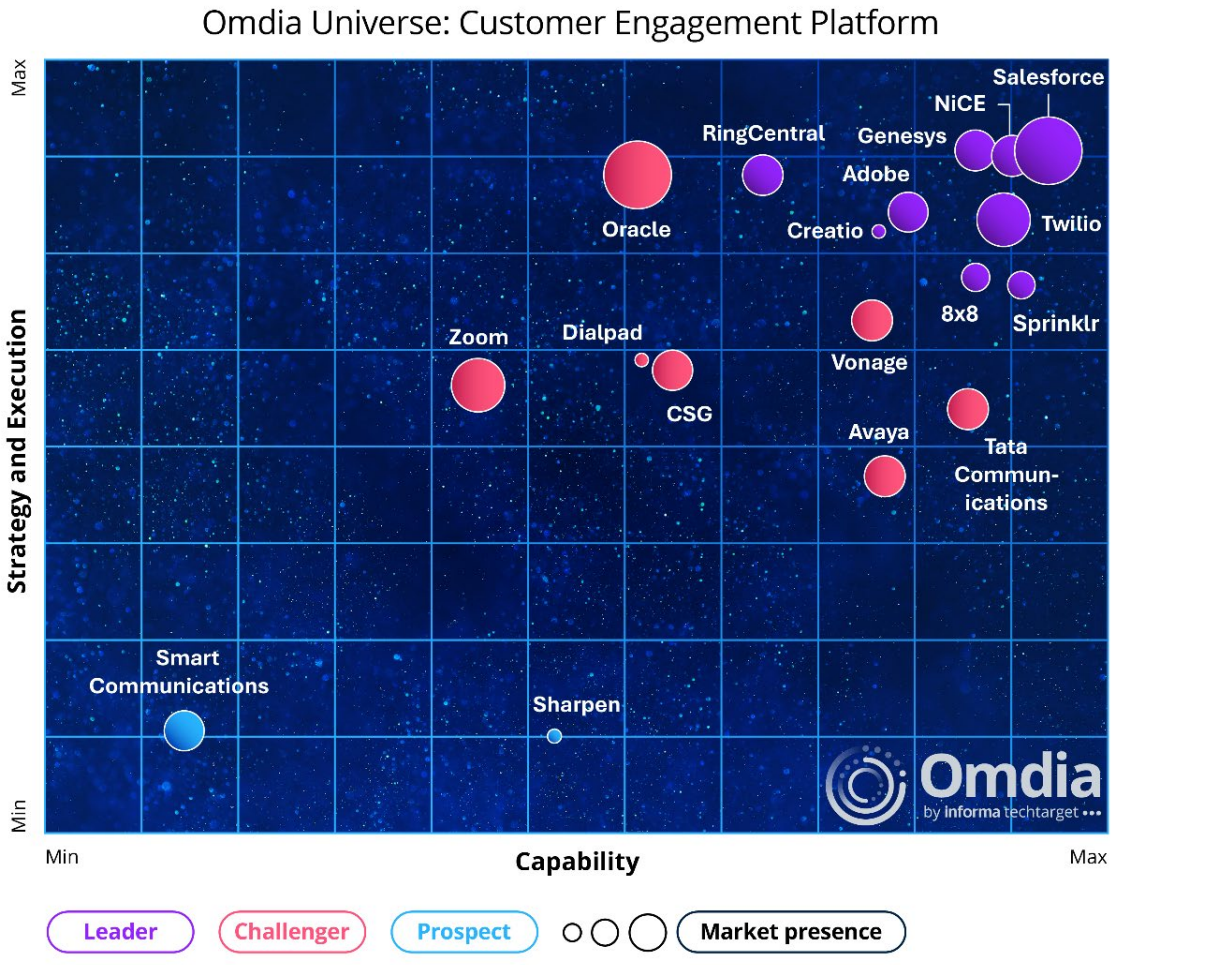
Summary

Catalyst

The *Omdia Universe: Customer Engagement Platforms, 2026* provides invaluable insights into a rapidly evolving market where the urgency to adapt to dynamic customer expectations is higher than ever. With intense competition driving innovation, this Universe is critical for understanding how vendors are reshaping their offerings to deliver greater value and customer-centric solutions in the digital transformation era. This intelligence is essential for businesses to stay competitive and capitalize on emerging opportunities. Understanding these shifts helps technology leaders choose platforms that lower complexity while delivering meaningful customer outcomes.

Figure 1: The Omdia Universe for customer engagement platforms



Source: Omdia

Omdia view

The customer engagement platform (CEP) market is entering one of the most transformative periods we have seen in more than a decade. What used to be a fairly predictable space—dominated by contact center upgrades, incremental digital channel adoption, and traditional workforce tools—has become a fast-moving battleground shaped by artificial intelligence (AI), data unification, architectural convergence, and rising pressure on enterprises to simplify their customer experience (CX) ecosystems. When we talk with technology buyers today, the theme is almost universal: they know customer engagement is evolving faster than their tech stack, and they want to know which engagement platforms can actually take them into the future rather than bolting new features onto old foundations. The purpose of this research is to answer exactly that.

One of the defining trends reshaping this market is platform convergence. Enterprises are actively rejecting the multi-vendor, multi-interface, multi-database approach that has historically defined customer engagement. Instead of running separate systems for UCaaS, CCaaS, digital engagement, workforce management, marketing automation, and analytics, organizations are gravitating toward platforms that unify as many of these functions as possible—or at least orchestrate them in real time. Vendors such as Genesys, NiCE, Sprinklr, 8x8, Dialpad, RingCentral, Vonage, and Sharpen are leaning into convergence from the communications and contact center side, while Salesforce, Oracle, Adobe, and Creatio approach it from the CRM and data orchestration angle. The trend is clear: the winning platforms will be those that reduce complexity, cost, and integration overhead while delivering richer context and more consistent experiences.

The second major trend reshaping the market is the shift from AI-assisted engagement to AI-orchestrated engagement. Only a year ago, AI in CX largely focused on summarization, transcription, sentiment, and maybe a chatbot or two. Today, organizations are evaluating AI agents capable of performing multi-step tasks, making decisions based on customer history and intent, and autonomously optimizing journeys. CSG, Sprinklr, Genesys, and NiCE are pushing aggressively into this space, while Avaya, Salesforce, and Adobe emphasize AI governance and flexibility—critical for regulated industries. What makes this trend so important is that buyers are asking whether it can scale accurately, safely, and predictably across the enterprise. That means the real differentiators now include governance, explainability, data quality, data privacy, model choice, and integration with existing business logic.

Third, the market is being shaped by a renewed focus on unified, real-time customer data. Nearly every vendor claims to offer some version of a unified profile, but the depth, latency, and completeness of these profiles vary widely. Platforms such as Adobe Experience Platform, Oracle Unity CDP, Salesforce Customer 360, NiCE CXone Mpower, CSG Xponent, Sprinklr Unified-CX, and Genesys Event Data Platform are redefining what “real time” actually means—shifting from nightly batch updates to live streaming data that continuously syncs across touchpoints. This trend matters because real-time, identity-resolved profiles power AI-driven next-best-action, personalized service, proactive outreach, and omnichannel continuity. Without this foundation, platforms cannot deliver on the promise of modern engagement.

Finally, the CEP market is being reshaped by industry-specific needs and deployment flexibility. Highly regulated sectors—financial services, healthcare, insurance, government—are accelerating modernization efforts but cannot compromise on data sovereignty, uptime, auditability, or governance. Vendors such as Avaya, Smart Communications, NiCE, Oracle, and CSG are thriving here because they offer hybrid deployment, sovereign cloud options, strict data controls, and domain-

specific compliance frameworks. This matters because regulation is no longer a barrier to cloud adoption—it is a manageable hurdle that requires enterprises to choose platforms built with compliance at the core and, if needed, consider hybrid environments.

Together, these trends signal a market shifting from channel-centric tools to intelligent, orchestrated, AI-first engagement platforms. Understanding these dynamics is essential for buyers to select technology that will not only meet today's needs but remain relevant—and competitive—through the next decade of CX transformation.

Analyzing the CEP Universe

Market definition

The CEP market includes unified, data-driven systems that help organizations manage, orchestrate, and optimize every customer interaction across channels, from voice and chat to social, email, web, and in-app experiences. Unlike traditional contact center tools or standalone marketing systems, CEPs bring together communications, real-time customer data, AI, analytics, and workflow automation into a single platform that understands who the customer is, what they are trying to do, and what should happen next. It acts as the connective tissue across the customer journey, coordinating both human and AI-driven interactions, personalizing engagement in real time, and ensuring continuity as customers move between channels or devices. In practical terms, the CEP market serves organizations looking to replace siloed point solutions with an integrated platform that can improve service efficiency, increase personalization, reduce operational complexity, and proactively deliver better customer outcomes at scale. Omdia considered several functionalities when analyzing vendors' CEP capabilities.

CEP functionality

- **UCaaS/CpaaS:** In today's rapidly evolving CEP market, two important segments—UCaaS and CPaaS—play distinct but complementary roles. Unified communications as a service (UCaaS) bundles core communication tools such as voice, video meetings, messaging, and collaboration into a single cloud-based solution, giving businesses an all-in-one workspace for internal and external communication. Communications platform as a service (CPaaS), on the other hand, provides developers with APIs to embed communication capabilities (e.g., SMS, voice, WhatsApp, or video) directly into customer-facing applications and workflows. Together, UCaaS and CPaaS play a critical role in the modern customer engagement ecosystem: UCaaS supports seamless team and customer interactions out of the box, while CPaaS enables companies to build tailored, automated, and scalable engagement experiences wherever their customers are.
- **Unified data:** Unified customer data brings together every interaction, preference, and profile detail from across channels into one consistent, accessible view. Instead of customer information living in disconnected systems—like CRM, support tools, marketing platforms, and commerce apps—a unified data layer stitches it all together so teams and automated systems can understand who customers are and what they need in real time. This capability becomes the foundation for personalized journeys, smarter routing, and more meaningful conversations, because every message or action is informed by the same complete, up-to-date customer information.

- **Campaign orchestration:** Campaign orchestration is all about navigating systems across the enterprise to find the right information to coordinate the right messages, at the right time, across the right channels—automatically and intelligently. Instead of running isolated email blasts, text campaigns, or app notifications, orchestration brings everything together into a single, connected workflow that adapts to each customer's behavior and preferences. It lets teams design journeys that react in real time, sending a follow-up when someone opens a message, switching channels if they do not respond, or personalizing content based on their profile or past actions. In short, campaign orchestration turns scattered outreach into cohesive, personalized experiences that feel seamless to customers and scalable to the business.
- **Workforce engagement management (WEM):** This refers to the tools and intelligence that help companies optimize, support, and empower the teams that deliver customer experiences within the CEPs. It brings together capabilities such as forecasting and scheduling, quality and performance management, coaching, and employee feedback into one integrated system. Instead of juggling disconnected tools to staff contact centers, monitor interactions, or develop agents, WEM unifies these processes so leaders can match resources to demand, improve service quality, and boost employee satisfaction. In essence, it ensures the people behind the customer experience are present, equipped, motivated, and aligned, making the entire engagement ecosystem more effective.
- **Customer journey orchestration:** Customer journey orchestration capabilities enable brands to understand and actively shape customers' end-to-end experiences across channels. Instead of treating each interaction as a one-off touchpoint, journey orchestration connects signals from every step of the customer lifecycle and uses real-time data to decide what should happen next. Whether it is triggering a personalized message, guiding a customer to the right support resource, or adjusting an offer based on behavior, the system continuously adapts to create smoother, more relevant experiences. At its core, customer journey orchestration helps businesses move from reactive communication to proactive, context-aware engagement that feels natural to customers and drives better outcomes.

AI and automation

- **AI-powered CCaaS and engagement:** AI and automation in CCaaS platforms and the broader contact center market have become core capabilities within modern CEPs, and their role has expanded far beyond the old idea of chatbots or basic IVR. Today, AI and automation in this context are a set of intelligent systems that help organizations handle interactions more efficiently, personalize service at scale, and free human agents to focus on the moments that require empathy.

At a practical level, AI in the contact center includes capabilities such as real-time transcription, automated summaries, sentiment analysis, predictive routing, and knowledge surfacing. These features make every interaction smarter by giving agents the context they need at the exact moment they need it. Automation adds another layer by streamlining repetitive tasks, such as updating records, scheduling follow-ups, or pulling data from multiple systems, saving valuable time and reducing tedious work for customer-facing employees.

But as part of a CEP, AI and automation go even further. They become orchestration tools that can anticipate customer needs, trigger proactive outreach, or even complete multi-step workflows without

human intervention. This is where concepts like AI agents and agentic automation come into play—they do not just assist agents but rather take on work traditionally handled by humans, such as processing refunds, verifying identity, or guiding customers through structured, multi-channel journeys.

The reason this capability is so important is that it connects the dots between channels, data, and business logic. Companies can respond instantly, reacting to customer problems and, in some cases, prevent the issue altogether. Because these AI capabilities sit within a broader engagement platform, they benefit from shared data and profiles and consistent governance. In other words, AI becomes smarter, safer, and more impactful because it operates within a unified ecosystem rather than in isolation. Together, AI and automation serve as the engine powering modern customer engagement, helping companies scale great experiences while reducing cost and complexity.

Market dynamics

Three forces reshaping the CEP market

The CEP market is being reshaped by three big forces: convergence of stacks, AI moving from add-on to infrastructure, and unified, real-time data becoming the real battleground. The vendors included in this Omdia Universe sit at different points on that spectrum, but they are all reacting to the same underlying enterprise pressures to simplify the CX estate, modernize away from legacy systems, and make AI safe and economically viable at scale.

First, convergence and simplification are driving a lot of buying decisions. 8x8, Dialpad, RingCentral, Vonage, Zoom, Genesys, NiCE, Sharpen, and Tata Communications all lean into the UCaaS+CCaaS or CCaaS+WEM story, promising a single platform instead of a patchwork of telephony, routing, workforce, and analytics tools. Zoom's expansion from meetings into telephony, contact center, and AI-powered CX reflects this convergence trend, while Vonage positions its API-first communications platform as a way to embed voice, messaging, and video directly into customer journeys. Tata Communications, meanwhile, brings a global communications and network fabric that unifies voice, messaging, contact center, and connectivity for large, distributed enterprises.

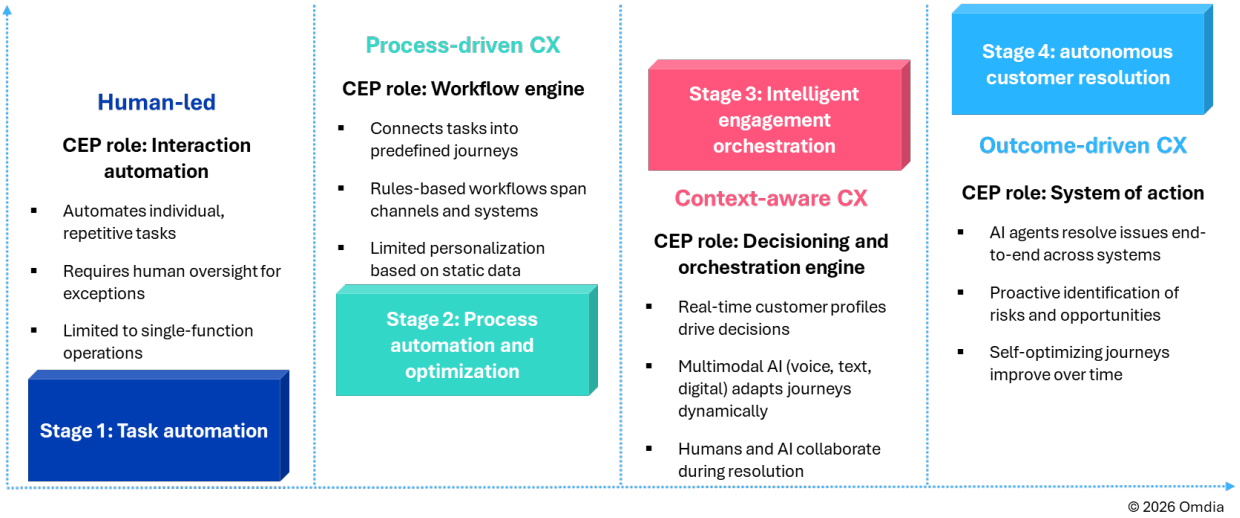
At the other end of the spectrum, Adobe, Salesforce, Oracle, Sprinklr, and CSG act more as experience and data "brains" that sit above CRM, billing, service, and marketing systems, orchestrating journeys rather than just handling contacts. Creatio, Smart Communications, and Avaya position themselves as flexible engagement platforms that can live alongside existing investments rather than forcing rip-and-replace efforts.

AI is the second structural driver, and it is no longer credible to show up with AI as a bolt-on. Dialpad's real-time transcription and coaching, NiCE's Enlighten models for CX, Genesys' experience orchestration, Sprinklr's native AI agents, Zoom's AI Companion, Vonage's AI-accelerated communications APIs, and Sharpen's pragmatic summaries and sentiment exemplify how AI is being embedded directly into live operations. At the same time, players such as Avaya, Genesys, Tata Communications, and Zoom emphasize AI choice and deployment flexibility across cloud, hybrid, and sovereign environments, while Smart Communications, Oracle, Salesforce, and Adobe stress governance, consent, and data lineage for regulated use cases. The pattern is clear: AI is shifting from an interesting feature in the demo to being the operating system for routing, personalization, and automation.

That leads directly to the third driver: unified, real-time customer data. Adobe Experience Platform, Oracle Unity, Salesforce Customer 360, CSG Xponent, NiCE Experience Memory, Genesys' Event Data

Platform, and Vonage's communications data layer all promise a continuously updated profile that spans channels and systems. 8x8, RingCentral, Zoom, Creatio, Avaya, Tata Communications, and Sprinklr push similar stories, even if the underlying data architecture differs. The goal is the same: provide a single customer memory that every channel and AI agent can tap into, so orchestration and next-best-action are grounded in reality rather than static CRM records.

Figure 2: CEP maturity indicators – Increasing intelligence, autonomy, and business impact

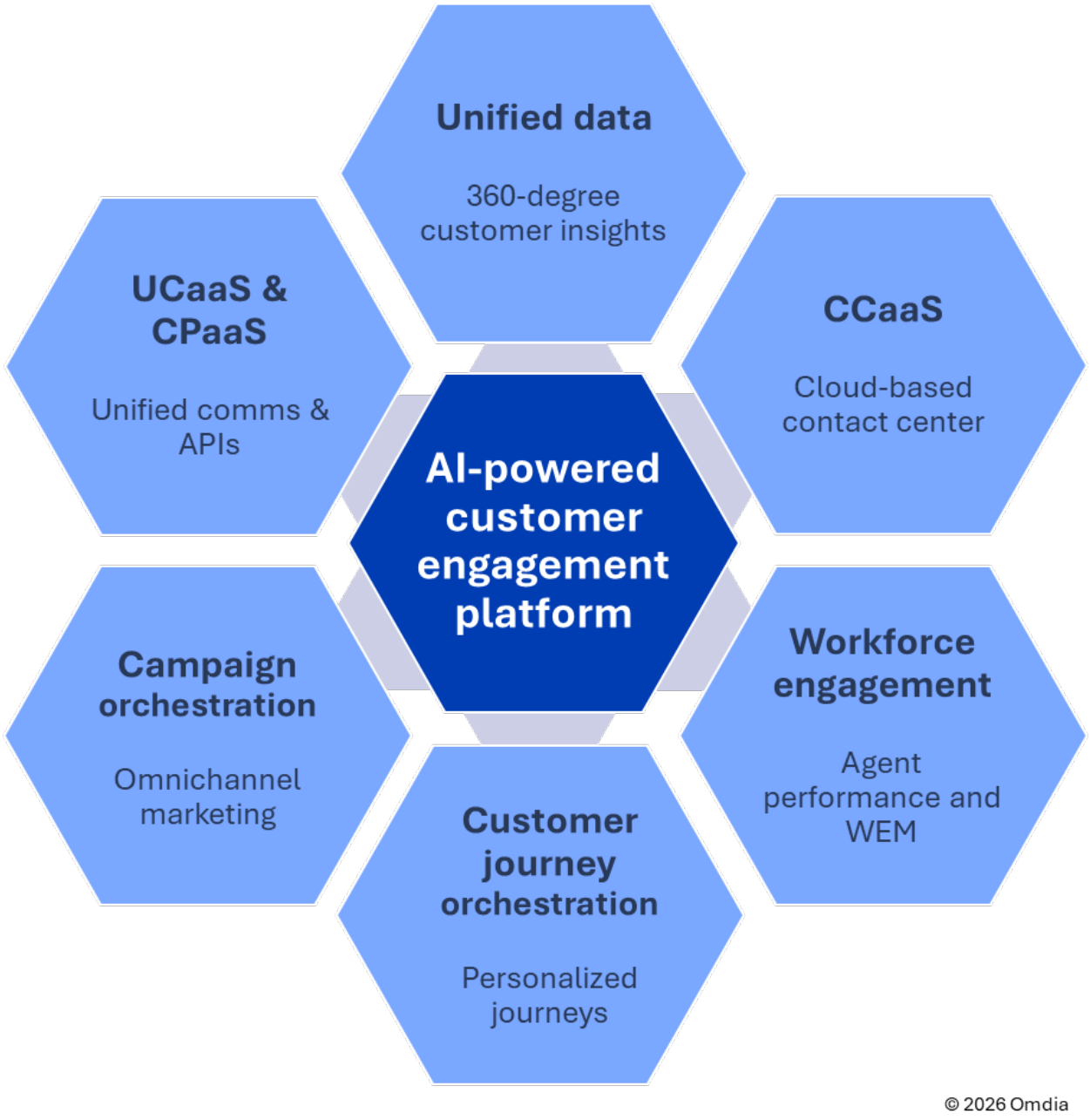


Source: Omdia

How 2025 M&A is building the AI native engagement stack

M&A activity in 2025 reinforced a clear direction in the CEP market: vendors are piecing together the missing layers required for AI native engagement—identity, data management, conversational and agentic AI, and workforce optimization—so they can orchestrate end-to-end experiences rather than deliver point features (**Figure 3**).

Figure 3: The AI powered CEP market continues to converge along several domains



Source: Omdia

Several of the year's most consequential transactions were explicitly about strengthening the data and AI foundation for engagement. Adobe's announced acquisition of Semrush (reported at approximately $1.9 billion) extends Adobe Experience Cloud from owned-channel execution into broader digital visibility intelligence across search and AI-driven discovery, capabilities that increasingly determine how customers find and evaluate brands. Salesforce completed its acquisition of Informatica, signaling that data management, governance, and integration are now treated as core CEP capabilities—not adjacent infrastructure—because AI-driven engagement depends on trusted, unified customer data. Twilio's acquisition of Stytch similarly elevates identity to a first-class layer in

customer engagement, positioning authentication, fraud resistance, and agent access controls as prerequisites for scalable AI-mediated journeys.

Contact center and employee experience adjacencies also experienced targeted consolidation. NiCE closed its acquisition of Cognigy, bringing enterprise-grade conversational and agentic AI deeper into the CX stack and accelerating the shift from scripted automation to autonomous resolution and workflow execution. RingCentral acquired CommunityWFM to add native, AI-first workforce management to RingCX, underscoring that performance management (forecasting, scheduling, and adherence) is becoming inseparable from CCaaS value propositions.

Beyond classic acquisitions, capital moves and ownership changes also shaped competitive dynamics. Genesys announced $1.5 billion in investment commitments from Salesforce and ServiceNow, an alignment that tightens ecosystem gravity around shared orchestration and data/process platforms rather than standalone CCaaS deployments. Private equity repositioning continued as Cinven agreed to acquire Smart Communications (CCM/ICM), reflecting investor conviction that regulated-industry communications and document-centric engagement will converge with broader CEP workflows and AI.

Notably, some vendors (e.g., Oracle, Zoom, Sprinklr, Avaya, 8x8, Dialpad, Sharpen, Tata Communications, Vonage/Ericsson) showed comparatively limited CEP-centric M&A in 2025 compared with product-led expansion and partnerships. However, the deals that did occur set the market's tone: CEP differentiation is increasingly defined by who owns the orchestration layers—data, identity, agentic AI, and workforce optimization—that make AI native engagement operational at enterprise scale.

Redefining customer engagement via platform convergence

From infrastructure to intelligence: The CPaaS-CEP convergence

CPaaS vendors and customer engagement platforms are increasingly converging around a common goal: enabling seamless, end-to-end customer conversations across every channel. What once were clearly separated layers of the stack are now moving toward a shared mandate centered on unified data, intelligent decisioning, and consistent governance. As customer interactions happen more in real time and become more conversational, enterprises are demanding platforms that can manage not just message delivery but the full lifecycle of engagement across marketing, service, and commerce.

This shift is driving CPaaS providers "northbound" into higher-value capabilities such as journey orchestration, agent assistance, AI-driven routing, and prebuilt engagement applications. At the same time, traditional CEPs are moving "southbound," embedding native communication channels, enhancing messaging depth, and taking tighter control over deliverability, compliance, and performance. These parallel moves reflect a recognition that communication infrastructure and engagement logic can no longer be treated as separate concerns.

As a result, the competitive battleground is forming at the convergence layer, where communications, customer context, and AI-powered automation come together. This layer is becoming critical for managing bidirectional, real-time interactions consistently across the enterprise, regardless of channel or use case. Vendors that can successfully integrate orchestration, intelligence, and communications at this layer are likely to define the next phase of the customer engagement platform market.

UCaaS moves down the stack toward the customer, extending collaboration into customer engagement

UCaaS vendors are undergoing a similar convergence, expanding beyond internal collaboration to play a more direct role in external customer engagement. Historically focused on employee-to-employee communications, UCaaS platforms are now extending their capabilities into contact center, customer calling, messaging, and video-enabled service interactions. This shift reflects growing enterprise demand for continuity between how employees collaborate internally and how they engage customers externally, particularly as hybrid work and digital-first service models become the norm.

As a result, UCaaS providers are embedding customer context, analytics, and AI-driven features such as real-time transcription, sentiment analysis, and agent assistance into live interactions. Many are also integrating more tightly with CPaaS and customer engagement platforms to support omnichannel workflows spanning voice, messaging, and digital channels. Rather than simply enabling conversations, UCaaS platforms are increasingly positioned as systems of action, participating directly in customer journeys and feeding interaction data back into broader engagement and orchestration layers.

Across the overall market, this convergence further blurs traditional platform boundaries and intensifies competition around who owns the real-time interaction layer. With CPaaS, CEPs, and UCaaS vendors all moving toward shared territory, differentiation is shifting away from standalone features and toward how well platforms interoperate, orchestrate intelligence, and scale across use cases. Ultimately, the vendors that can unify internal collaboration, external engagement, and AI-driven decisioning will be best positioned as enterprises look to simplify their stacks and deliver more consistent, high quality customer experiences.

Conversational AI and the new customer engagement stack

CEPs are undergoing a fundamental shift from passive orchestration layers to operational intelligence engines capable of reasoning, acting, and resolving customer needs end to end. Historically, CEPs, CCaaS, and conversational AI occupied distinct roles in the customer service stack: CEPs coordinated multi-channel journeys, CCaaS platforms handled telephony and routing, and conversational AI tools automated narrow tasks through bots. Generative AI (GenAI) has effectively collapsed these boundaries. Enterprises are no longer satisfied with tools that merely route interactions or deflect volume; they are demanding unified systems of action that combine intelligence, context, automation, and governance to deliver outcomes.

This convergence is reshaping buyer expectations and competitive dynamics. Traditional CCaaS vendors are rapidly adding AI features, but many remain constrained by legacy architectures designed for routing efficiency rather than real-time reasoning and execution. CEP vendors are embedding automation and analytics, but they often lack the depth of operational intelligence needed to orchestrate complex, multi-step resolutions across systems. At the same time, conversational AI providers are racing to evolve beyond intent recognition and scripted flows, pushing toward agentic capabilities that can safely execute actions within enterprise environments. As these markets collide, differentiation is shifting away from “who has the best bot” toward vendors that can deliver a cohesive resolution engine that unifies data, systems, policies, and actions.

In this emerging landscape, the most competitive platforms treat AI not as an add-on but as the core execution layer. A growing number of conversational AI vendors illustrate this direction by building LLM native, multi-agent architectures where reasoning and execution are foundational capabilities. This approach directly addresses the structural challenges enterprises face today: rising contact volumes,

brittle workflows, and the economic limits of scaling human labor. Rather than automating isolated steps, these platforms aim to operationalize intelligence, connecting customer context, enterprise systems, and governed AI agents into a single environment capable of resolving issues autonomously or collaboratively with humans.

Looking ahead, CEPs, CCaaS, and conversational AI are effectively collapsing into a single category centered on intelligent systems of action. To compete, existing players will need to demonstrate meaningful automation depth (beyond scripted flows), enterprise-grade governance and trust, and speed to value that allows organizations to deploy AI without years of replatforming. Vendors that remain anchored to legacy routing models or surface-level AI will struggle, while those that can combine data unification, agentic execution, and operational control will define the next generation of CEPs in an AI-first era.

Market leaders

Looking at the vendors that consistently rank as leaders in the CEP Universe, a clear pattern emerges (**Figure 4**). Even though these companies come from very different backgrounds—contact center, CRM, unified communications and collaboration, CX, or WEM—they are all building toward the same end state.

Figure 4: Vendor rankings in the customer engagement platform Universe

Vendor	Product evaluated
Leaders	
8x8	8x8 platform for CX
Adobe	Adobe Experience Platform
Creatio	AI native customer engagement platform
Genesys	Genesys Cloud CX
NiCE	CXone Mpower
RingCentral	RingCX
Salesforce	Salesforce Service Cloud
Sprinklr	Unified-CXM Platform
Twilio	Customer Engagement Platform
Challengers	
Avaya	Avaya Infinity
CSG	CSG Xponent
Dialpad	AI-powered customer communications platform
Oracle	Oracle B2C Service
Tata Communications	Kaleyra.ai
Vonage	Vonage Fusion
Zoom	Zoom Contact Center (CX)
Prospects	
Sharpen	Sharpen Contact Center
Smart Communications	The Conversation Cloud

Source: Omdia

First, the market leaders think like *platform* companies, not feature vendors. Instead of stitching together tools over time, they focus on creating unified, cloud native foundations that can scale globally and adapt without adding complexity. This architectural discipline matters because enterprises are tired of managing fragmented stacks that do not share data, context, or workflows.

Second, these leaders share a common view of engagement. They no longer see it as a series of isolated interactions, but as a continuous journey that spans marketing, sales, service, operations, and the back office. The goal is not just to handle conversations efficiently but to decide what should happen next and orchestrate outcomes across systems and teams.

Data and AI sit at the center of this approach. Every leading platform prioritizes real-time data unification and embeds AI directly into routing, decisioning, automation, and guidance. In these platforms, AI is not treated as an add-on or a chatbot layer; it is the intelligence that connects insights

to action in the moment. Increasingly, this includes agentic AI that can reason, act, and collaborate with human teams under enterprise guardrails.

Finally, their roadmaps point in the same direction. All are moving beyond basic automation toward intelligent orchestration and, ultimately, more autonomous operations. Importantly, automation is framed as augmentation, not replacement, freeing humans to focus on higher-value work while AI handles routine and predictive tasks.

Together, these traits explain why these vendors lead: they deliver consistency, intelligence, and measurable outcomes at enterprise scale.

Market challengers

Although these companies differ widely in heritage and go-to-market focus, they share several defining characteristics that explain why they are grouped as challengers in the CEP market rather than clear leaders. Most importantly, they are all credible, enterprise-grade platforms in transition, with each bringing meaningful strengths in infrastructure, data, AI, or orchestration but still working to unify those strengths into a fully coherent, market-leading CEP narrative.

At the solution level, they consistently emphasize unification and orchestration over point functionality. Rather than attempting to replace existing enterprise environments wholesale, these platforms focus on reducing complexity by connecting data, channels, and workflows across hybrid ecosystems. This approach acknowledges the reality that large organizations operate across multiple systems and transformation timelines.

From an infrastructure perspective, these challengers are built on serious operational foundations. They prioritize reliability, global scale, compliance, and deployment flexibility, often supporting hybrid cloud models, sovereign environments, hyperscaler partnerships, and carrier-grade networks. This makes them especially relevant for regulated, mission-critical, or multinational organizations where theoretical “cloud simplicity” frequently breaks down in practice.

From a vision standpoint, they are aligned around AI as a core capability rather than a bolt-on feature, though maturity levels vary. All emphasize governed, enterprise-safe AI focused on real-time assistance, orchestration, and execution—not unchecked autonomy. What ultimately holds them back from leader status is not ambition but cohesion of execution, as these vendors must overcome gaps in breadth, emerging market perception, or incomplete convergence across data, AI, and engagement layers. Collectively, they represent where the CEP market is heading—but not yet its final destination.

Market prospects

Although these companies come from different starting points, they share several important characteristics that explain why they appear as prospects in this Universe report rather than fully realized leaders. Most fundamentally, they are purpose-built to solve specific, high value engagement problems rather than dominate the broader, horizontal customer experience market. Each prioritizes deep expertise in a clearly defined domain, choosing to focus on effectiveness over platform breadth.

A second commonality is their pragmatic approach to AI. Rather than pursuing unconstrained generative automation, both vendors in this category emphasize controlled, purpose-driven AI. Their strategies center on enhancing quality, compliance, and usability, using AI to support and augment human decision-making instead of replacing it outright. This reflects a shared belief that trust, governance, and adoption are more important than complete automation, especially in regulated or operationally sensitive environments.

Both companies also deliver strong time-to-value for their target customers. They favor business-friendly tools and lightweight, cloud native architectures that avoid the long implementation cycles typical of larger, legacy platforms. As a result, they resonate with organizations seeking meaningful improvements without the risk and disruption of large-scale transformation.

Finally, their positioning as prospects is driven more by scope than by credibility. While neither company offers full end-to-end orchestration or broad engagement coverage today, both demonstrate clear product-market fit, measurable customer outcomes, and logical paths for expansion. Their inclusion as prospects reflects a market that is increasingly open to specialized, execution-focused platforms—so long as those platforms can evolve without losing the focus that makes them effective.

Opportunities

The CEP market has momentum right now because organizations are finally ready to simplify their fragmented CX ecosystems. The biggest opportunity for vendors lies in platform consolidation. Enterprises are tired of juggling separate tools for routing, messaging, analytics, workforce management, AI, ticketing, and data collection and management. Vendors that can credibly replace between three and seven point solutions with one unified platform are immediately attractive, especially as budgets tighten but expectations for digital experiences keep rising.

Another significant opportunity is the shift toward AI-driven automation and agentic workflows. Companies are looking well beyond chatbots—what they want now are AI agents that can complete multi-step tasks across systems, reduce manual work, and improve cost-to-serve and customer satisfaction. Vendors that can deliver measurable ROI with safe, governable AI stand to gain the most.

Modernizing legacy estates is another massive growth area. Any vendor that can help enterprises modernize without ripping out everything at once—especially those offering hybrid, sovereign cloud, or “bring your own AI” flexibility—has a clear competitive advantage.

Finally, regulated industries represent a significant long-term opportunity. Sectors such as healthcare, government, insurance, and financial services need airtight compliance, auditability, and data governance. Vendors that go to market with a trust layer via strong identity resolution, consent management, secure orchestration, and explainable AI can differentiate themselves quickly in these high value markets.

Threats

Despite strong demand, the CEP market faces real pressures that affect every vendor, regardless of position or architecture. The first major threat is the intensification of platform overlap. CCaaS vendors are moving into data and AI. CRM players are pushing deeper into omnichannel service. Marketing technology clouds are claiming journey orchestration. And orchestration specialists are positioning themselves as experience “brains” above the stack. This blurring makes differentiation harder and elongates deal cycles as buyers navigate conflicting narratives.

Another significant threat is AI commoditization. Capabilities such as transcription, summarization, sentiment scoring, and basic agent assistance are quickly becoming table stakes. As these features become indistinguishable across vendors, the risk grows that AI no longer drives premium pricing, forcing vendors to show differentiation through outcomes, vertical depth, or proprietary data advantages.

Hyperscaler pressure is also a real risk. As AWS, Google Cloud, and Microsoft advance their industry clouds, organizations may opt to assemble their own engagement stack using cloud native AI, orchestration tools, and communication APIs. This could squeeze traditional platform vendors unless

they deliver value that cloud primitives cannot replicate—especially around governance, real-time decisioning, security, and industry-specific tuning.

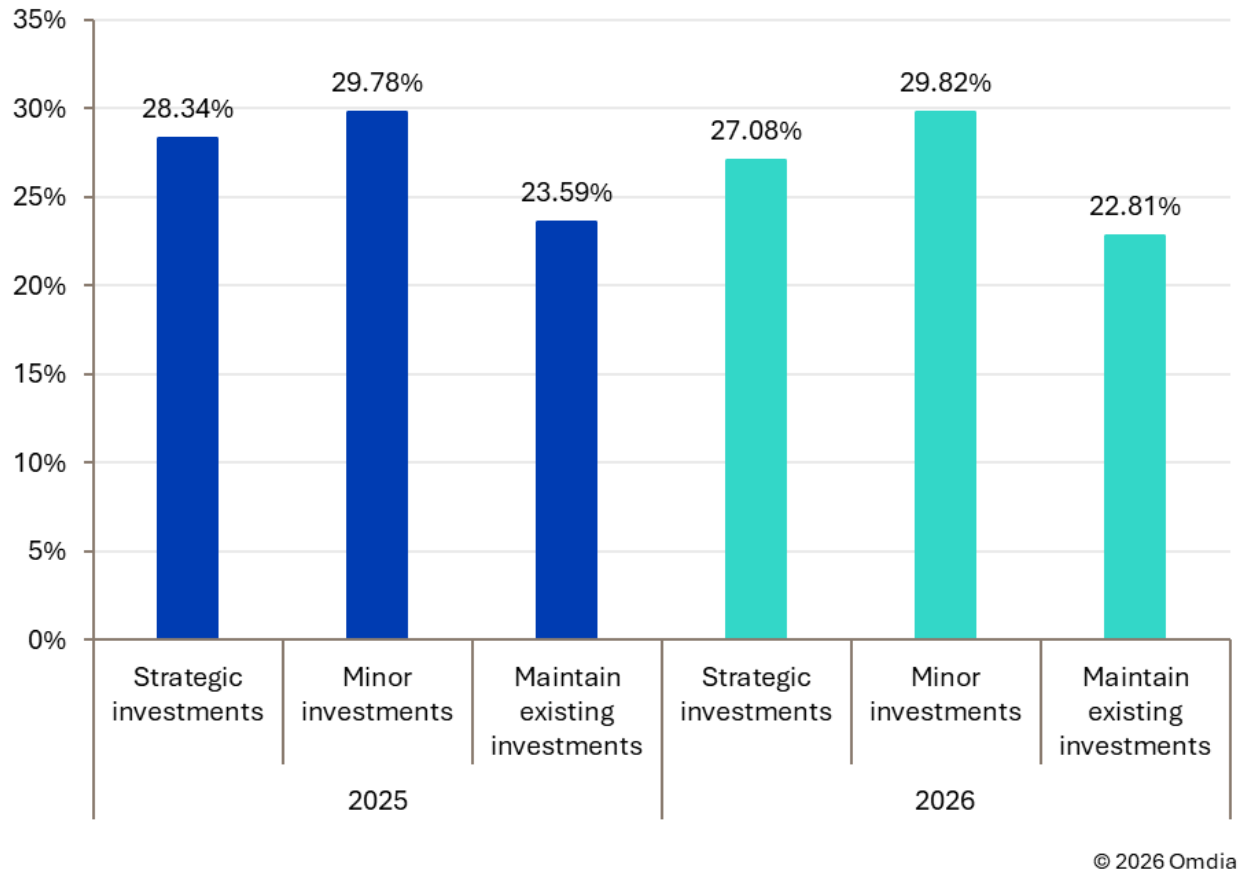
Complexity and adoption risk are equally serious threats. Many enterprises struggle to fully implement or operationalize the advanced capabilities they purchase. When customers are not able to realize value quickly, churn increases and vendor credibility erodes. Add to that tightening privacy and AI safety regulation, and the operating environment becomes even more challenging. In short, vendors must innovate quickly—but also responsibly—to stay ahead in a crowded, rapidly evolving market.

Market outlook

CEPs become core infrastructure

Companies are consistently committing real dollars to CEPs. Omdia's 2026 IT Enterprise Insights survey shows that investment percentages shift slightly year over year, with the mix of strategic and minor investments remaining strong across both 2025 and 2026 (**Figure 5**). That kind of stability typically happens only when a technology moves from "nice to have" into the category of operational backbone—the systems that get funded because the business cannot function competitively without them.

Figure 5: Year-over-year investment plans for CEPs



Source: Omdia

The share of respondents planning strategic investments—not just incremental upgrades—shows that organizations view CEPs as levers for competitive differentiation. When about 27-28% of companies are aiming for strategic spend across consecutive years, it is a sign that these platforms are becoming core infrastructure that drives lifecycle growth, retention, and personalization at scale.

Interestingly, even the cohort planning to maintain existing investments (about 23% signals that companies have already embedded these platforms deeply enough that they now must sustain them like any other mission-critical system. That level of ongoing commitment suggests customer engagement solutions now sit alongside CRM, data platforms, and cloud infrastructure as fundamental layers in modern digital operations.

Another important signal that CEPs are becoming core infrastructure is how many companies are putting strategic dollars behind these platforms. Roughly a quarter to almost a third of organizations are planning real, forward-looking investments, not just upgrades or maintenance. That highlights how enterprises now see CEPs as growth levers, not cost centers, and they expect these platforms to help drive higher retention and personalization at scale. In other words, CEPs are becoming tools that directly influence revenue and long-term customer value.

Just as interesting is the group that says they are simply going to maintain current investments. At first glance, that can sound conservative, but maintenance spending at this level usually means the platform is already deeply embedded. These companies are not questioning the value; they are budgeting for CEPs the same way they budget for cloud infrastructure or core data systems. This is a big milestone for any technology category, but for the CEP market, it means these platforms have become long-term infrastructure. This shift favors platforms that can grow with the enterprise, expand across use cases, and show measurable business impact over time.

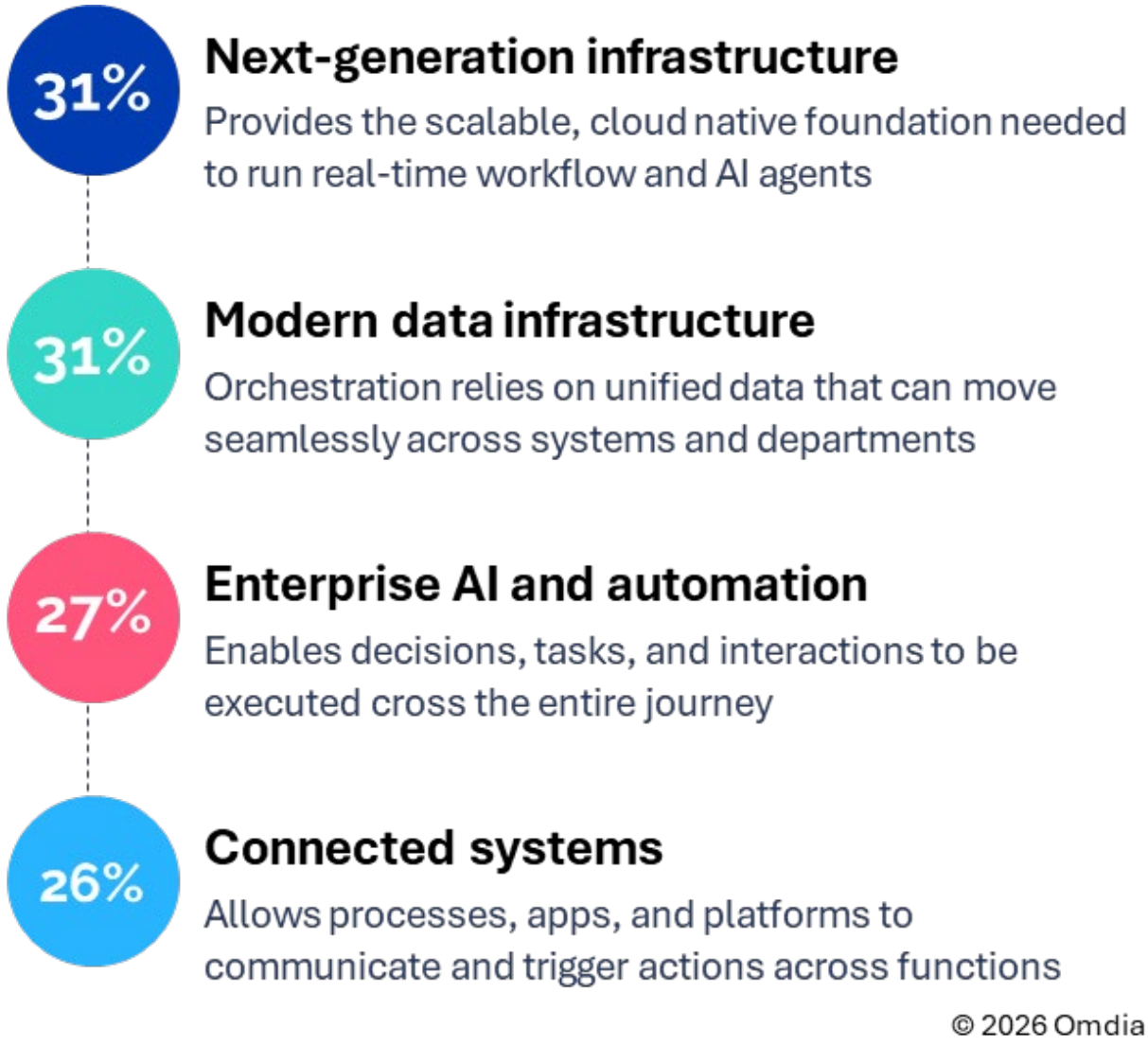
Enterprise orchestration across functions is a priority

As customer expectations continue to rise and digital engagement becomes more complex, enterprises are rethinking the foundations of how they operate. The challenge is no longer simply delivering better experiences via individual channels. It is coordinating every interaction, decision, and workflow across the entire organization in real time. That shift is driving a fundamental change in technology strategy from deploying point solutions toward building unified, intelligent platforms that can orchestrate engagement across functions.

This transition is clearly reflected in enterprise investment priorities. Rather than chasing incremental feature upgrades, organizations are concentrating their resources on the core infrastructure required to operate as a connected, AI-enabled business. Data architecture, systems integration, automation, and enterprise AI are now viewed as strategic enablers rather than back-office utilities. These capabilities form the connective tissue among marketing, sales, service, commerce, IT, and operations, enabling a single, coordinated operating model for customer and employee engagement.

Figure 6, which features the percentage of respondents to Omdia's 2026 IT Enterprise Insights survey who were asked to prioritize the top digital enabling technologies, illustrates how deliberate this shift has become. Enterprises are signaling that the next phase of digital transformation will be built on shared data, common platforms, and orchestration layers that span the organization. In this model, a single team or system no longer owns engagement. Instead, it is a continuous, cross-functional process that requires real-time intelligence, automated decisioning, and seamless execution across people, systems, and AI.

Figure 6: Top technology priorities for enabling digital strategies over the next 18 months



Source: Omdia

What emerges is a clear picture of where the market is heading: toward enterprise-wide orchestration as a core capability. The priorities highlighted in the data are not about optimizing isolated touchpoints. They are about building the operational backbone for end-to-end journey orchestration for customers and employees alike.

The top plans for enabling digital strategies point to AI native orchestration

According to Omdia's 2026 IT Enterprise Insights 2026 survey, 31% of respondents said next-generation infrastructure is a top priority, and another 31% cite modern data architecture. This signals that organizations are aligning around foundational capabilities rather than isolated upgrades (**Figure 6**). Add to that the 26% prioritizing connected systems, and it becomes clear that companies are building the unified foundations needed to orchestrate employee and customer experiences across functions, systems, and workflows, as well as support AI natively, not as an afterthought.

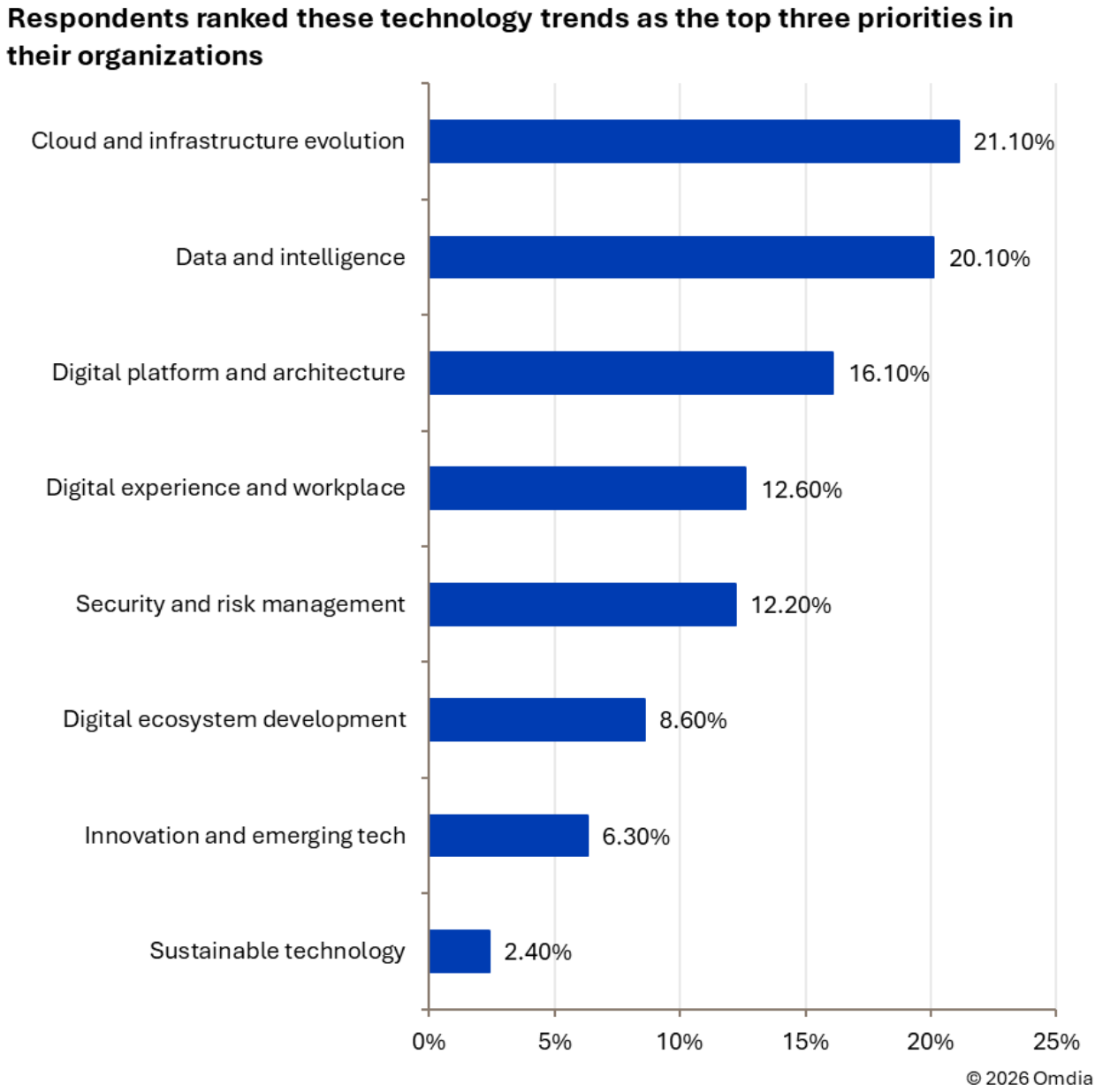
The technologies rated as *very important* reflect the backbone of experience orchestration. With modern data architecture (31%), connected systems (26%), and enterprise AI and automation (27%) ranking among the highest-priority enablers for the next 18 months, these investments signal a shift toward platforms that support real-time, shared data, scalable automation, and integrated digital environments—essential ingredients for orchestrating end-to-end experiences.

The growing strategic importance of AI highlights the urgency of orchestration. AI cannot deliver meaningful impact when deployed in isolated pockets. It requires unified data, consistent processes, and cross-functional workflows to generate enterprise value. As companies push toward AI native platforms, they are also accelerating the move toward coordinated, end-to-end experience orchestration across the business.

CX differentiation will come down to memory and context

Organizations are prioritizing the technologies that make context-rich customer experiences possible. According to Omdia's research, data and intelligence ranks as a top priority for nearly 20% of respondents (**Figure 7**). When data capabilities rise this high in the strategic stack, it signals that companies now see context as a competitive differentiator.

Figure 7: Data and intelligence rank as a top priority in 2026



Source: Omdia

The fact that cloud and infrastructure evolution is the single most prioritized category, with roughly 21% respondents ranking it as their top, with digital platform and architecture close behind at roughly 16% signals that enterprises are not just making technical upgrades; they are enabling long-term memory across customer journeys. Companies increasingly recognize that high performing CX depends on the ability to bring data together across channels and systems.

CEPs will move beyond service and into commerce and sales

CX is no longer a service-only conversation. According to Omdia's research, top priorities for 2026 include improving employee support, orchestrating AI across all workflows, and automating cross-

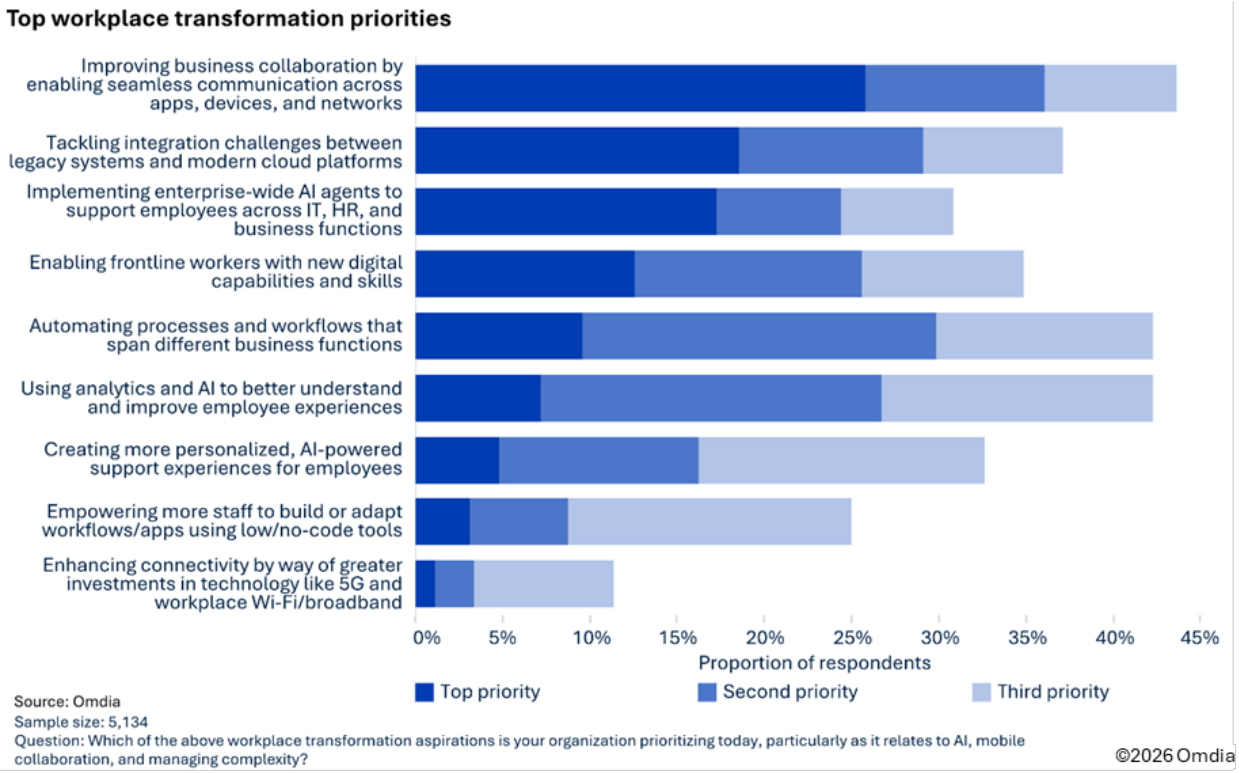
functional tasks. These priorities show that organizations are thinking far beyond the contact center. They are not service department goals—they are enterprise productivity and experience goals. And when enterprises start investing in these areas, CEPs naturally expand to support those broader needs.

A trend is emerging in which CX and conversational AI platforms serve as the connective layer among marketing, service, commerce, and operations. In recent months, some vendors have announced upcoming releases in the conversational commerce market. Such a strong emphasis on unified AI orchestration signals that companies want a single platform that can power journeys across the entire lifecycle, not separate systems for each department. The same intelligence that routes a customer issue or automates a support workflow is now expected to personalize marketing interactions, predict commerce behavior, and drive operational efficiency. This shift is pushing CX platforms beyond being interaction tools and into the role of enterprise experience engines.

Enterprise-wide AI agents signal a new operating model for CX

The data is clear: enterprises are ranking enterprise-wide AI agents as a top strategic priority (**Figure 8**). They do not want single-use bots or isolated copilots but AI agents designed to operate across IT, HR, operations, and business functions. This shift is more than a technology upgrade. It represents a fundamental change in how organizations are re-architecting the enterprise for the AI era.

Figure 8: Enabling enterprise-wide agents is a top priority in 2026



Source: Omdia

When companies prioritize enterprise-wide agents, they are implicitly acknowledging that AI can no longer live at the edge of the stack as an add-on feature. These agents require unified data, shared context, and deep integration across systems and workflows. They must reason across functions,

automate complex processes, and deliver personalized, real-time experiences for employees and customers. That is only possible on AI native orchestration platforms built from the ground up to coordinate data, processes, and intelligence across the entire organization.

This is why the rise of enterprise-wide agents is such a powerful signal for the future of CX. The highest-priority initiatives—cross-functional workflows, analytics-driven employee experiences, and personalized, AI-powered support at scale—all demand a common architectural foundation. They require platforms that can unify data, standardize processes, and orchestrate activity across people, systems, and AI.

The data points to a clear inflection point for CEPs. The next era of CX is not about deploying more point solutions or layering AI onto legacy stacks. It is about AI native, unified, and extensible orchestration platforms that become the intelligent backbone of the enterprise, connecting customers, employees, systems, and AI into a single operating model.

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:
  - CEP Functionality
  - AI/Automation
  - 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.

Twilio (Omdia recommendation: Leader)

Twilio should appear on your shortlist if:

- You want communications, customer data, and AI unified in one platform without stitching together separate CPaaS, CDP, and AI vendors.
- Global, reliable, and compliant communications at scale matter, with high API uptime, data residency, and controls suitable for regulated industries.
- You have teams that want to build differentiated, real-time personalized experiences, using an API-first platform, unified customer profiles, and extensible AI and agentic capabilities.

- You value omnichannel engagement and ecosystem strength, backed by deep partner integrations, enterprise-grade support, and a clearly AI-driven roadmap.

Overview

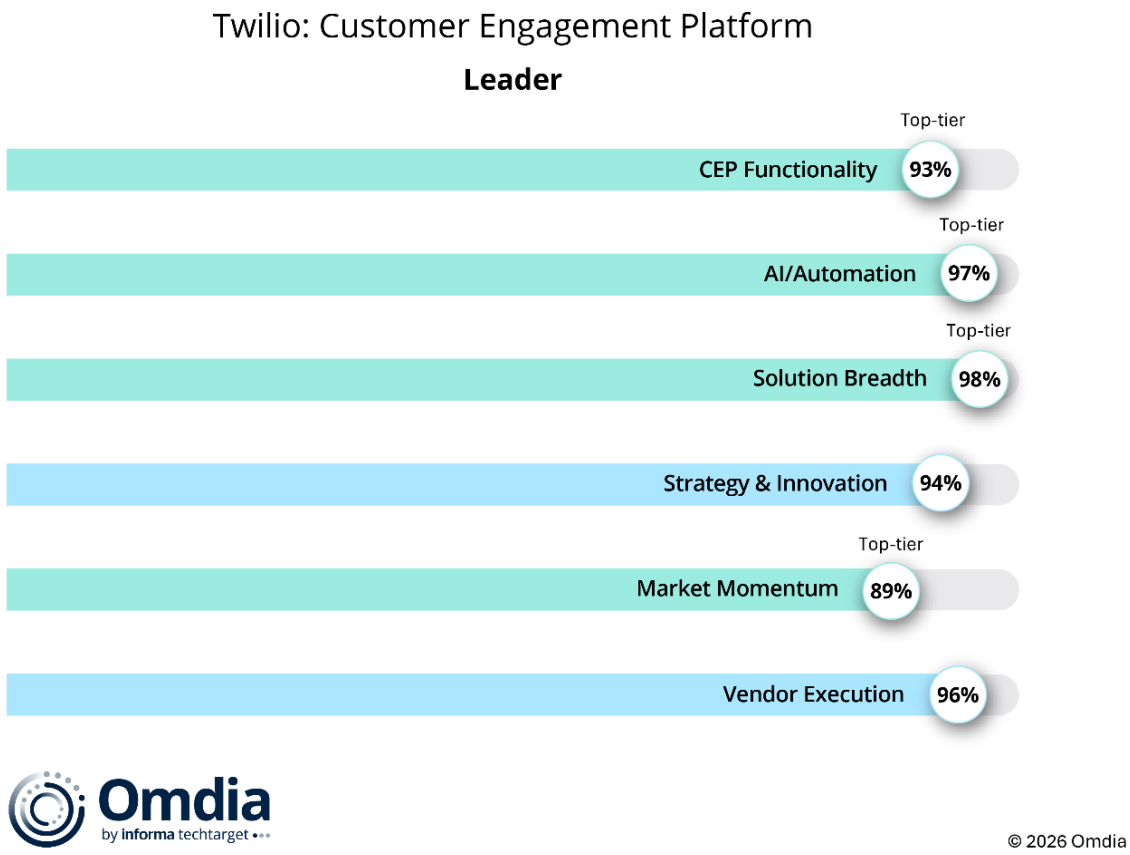
Twilio's leadership in this Omdia Universe starts with how deliberately it has evolved beyond its roots. While it is still synonymous with "communications as code," Twilio has steadily expanded that foundation into a much broader engagement layer that combines communications, data, and intelligence. By bringing together its CPaaS capabilities with a CDP and an AI-driven orchestration layer, Twilio enables enterprises to treat every interaction as part of a single, continuous relationship. Instead of one-off messages or isolated campaigns, interactions are informed by customer memory—who the customer is, what they have done before, and what context matters right now. This is a critical shift from transactional messaging to relationship-driven engagement.

Another reason Twilio consistently stands out is its platform-first mindset. Rather than positioning itself as a monolithic application that replaces existing systems, Twilio aims to be the connective tissue that everything else plugs into. Its APIs, identity capabilities, observability tools, and AI services allow enterprises and partners to build exactly what they need on top of a shared engagement fabric. Capabilities like Agent Copilot, Conversational Intelligence, and ConversationRelay enable organizations to improve agent efficiency, build conversational AI experiences faster while maintaining complete control over the user experience, and gain visibility into human and AI-driven interactions, making it easier to optimize performance in real-world environments. This flexibility and extensibility resonate strongly with buyers who want to innovate over time without locking themselves into rigid workflows.

Twilio's recent emphasis on unifying communications, contextual data, and AI further reinforces its leadership position. Enterprises today struggle with fragmented tools and siloed data across marketing, sales, support, and identity systems. Twilio directly addresses this by merging real-time conversational data with customer profiles pulled from CRMs, data warehouses, and other systems of record. The result is engagement that is omnichannel by default and context-aware at scale. The company's LLM-agnostic approach, which allows customers to bring their own AI models, also reduces risk and future-proofs investments, a key factor for enterprises still experimenting with GenAI strategies.

Ultimately, Twilio is viewed as a leader because it helps enterprises simplify complexity without sacrificing control. Its roadmap around compliance, identity, fraud prevention, and orchestration signals a long-term commitment to trust and scalability, not just innovation for its own sake. By positioning itself at the center of the CPaaS, CCaaS, CDP, and AI convergence, Twilio is redefining what a CEP looks like—one that remembers, adapts, and orchestrates across every touchpoint. That combination of vision, execution, and ecosystem leverage is what solidifies Twilio's place at the top of the category.

Figure 9: Omdia Universe ratings—Twilio



Source: Omdia

Strengths

- Twilio is strong when you want a single platform that unifies communications, customer data, and AI instead of managing multiple disconnected tools.
- It excels at real-time customer profiles and identity resolution, giving agents and AI an always-current view of each customer.
- The developer-first, API-centric approach makes it ideal for teams that want to build highly differentiated, custom customer experiences rather than rely on templates.
- Twilio stands out in global, trusted communications and reliably supports scale, compliance, and performance across countries and channels.
- Its AI and agentic capabilities support real work, including multi-step workflows, cross-system actions, and strong observability into AI performance.

Limitations

- Buyers expecting a prepackaged contact center experience may find that Twilio requires more design and configuration to get started.

- The breadth of the platform can create perception challenges, with some stakeholders still viewing Twilio primarily as a provider of messaging solutions as well as APIs.
- Advanced AI and data features can increase the total cost of ownership if they are not tied to clear use cases and disciplined adoption plans.

Appendix

Methodology

Generative AI disclosure statement

This report was created with the assistance of GenAI technology. While AI tools were used to support drafting processes for portions of this report, human experts thoroughly reviewed, verified, and approved all information before publication. The use of AI technology serves to enhance efficiency and consistency while maintaining our commitment to accuracy, quality, and professional standards. Any conclusions, recommendations, or opinions expressed in this report reflect the considered judgment of the human authors and contributors.

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

- Deployments: Vendors' customer engagement platforms must have a minimum of 40 enterprise deployments.
- Vertical industry coverage: Vendors must cater to a minimum of six distinct sectors.
- CEP technology criteria: To participate, vendor platforms must offer 8 of the 10 key criteria:

- Unified customer data model (Customer 360): The ability to ingest, unify, and maintain real-time customer profiles across all touchpoints and systems
- Omnichannel engagement orchestration: The platform supports coordinated, consistent, and contextual messaging across email, SMS, voice, social, chat, and in-app

- Customer journey management: Tools that design, deploy, track, and optimize multi-step customer journeys based on behavior, triggers, and decision rules; the tools should have a shared journey orchestration framework that allows multiple teams across multiple business units in an enterprise to coordinate across shared lifecycle stages (acquisition, onboarding, usage, and renewal)
- Personalization and decisioning engine: Real-time segmentation, next-best-action logic, dynamic content rendering, and AI-powered personalization
- Embedded AI/ML capabilities: Use of AI for intent prediction, content personalization, sentiment analysis, churn forecasting, and journey optimization
- Integration with enterprise systems: The ability to connect with CRM, CDP, ERP, support systems, and third-party tools via APIs, connectors, or middleware
- Analytics and outcome measurement: End-to-end visibility into engagement performance, journey ROI, conversion metrics, and customer behavior
- Security, privacy, and compliance: Features that support regulatory compliance (e.g., GDPR, CCPA, HIPAA), consent management, and secure data handling
- Scalability and performance: The proven ability to scale across global operations, high volume interactions, and enterprise complexity
- Product vision and innovation trajectory: A clear, forward-looking product roadmap that includes investments in GenAI, agent automation, self-service tooling, and evolving CX roles

Further reading

Omdia Universe: Customer Engagement Platforms 2025 (December 2024)

"Coopetition set to transform the customer engagement platform (CEP) ecosystem" (November 2023)

Omdia Universe: Customer Engagement Platforms, 2023–24 (October 2023)

"Customer engagement platform providers must evolve with changing customer needs" (July 2023)

"Leaders in the CEP category share three common attributes" (August 2022)

"Customer engagement platforms are the nexus of command and control" (July 2022)

Omdia Universe: Customer Engagement Platforms, 2022–23 (July 2022)

Omdia Universe: Customer Engagement Platform (CEP) for the Insurance Sector, 2022–23 (July 2022)

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Citation policy

Request external citation and usage of Omdia research and data via citations@omdia.com.

Omdia consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help you. For more information about Omdia's consulting capabilities, please contact us directly at consulting@omdia.com.

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