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Omdia Universe: CPaaS Platform Providers, 2025

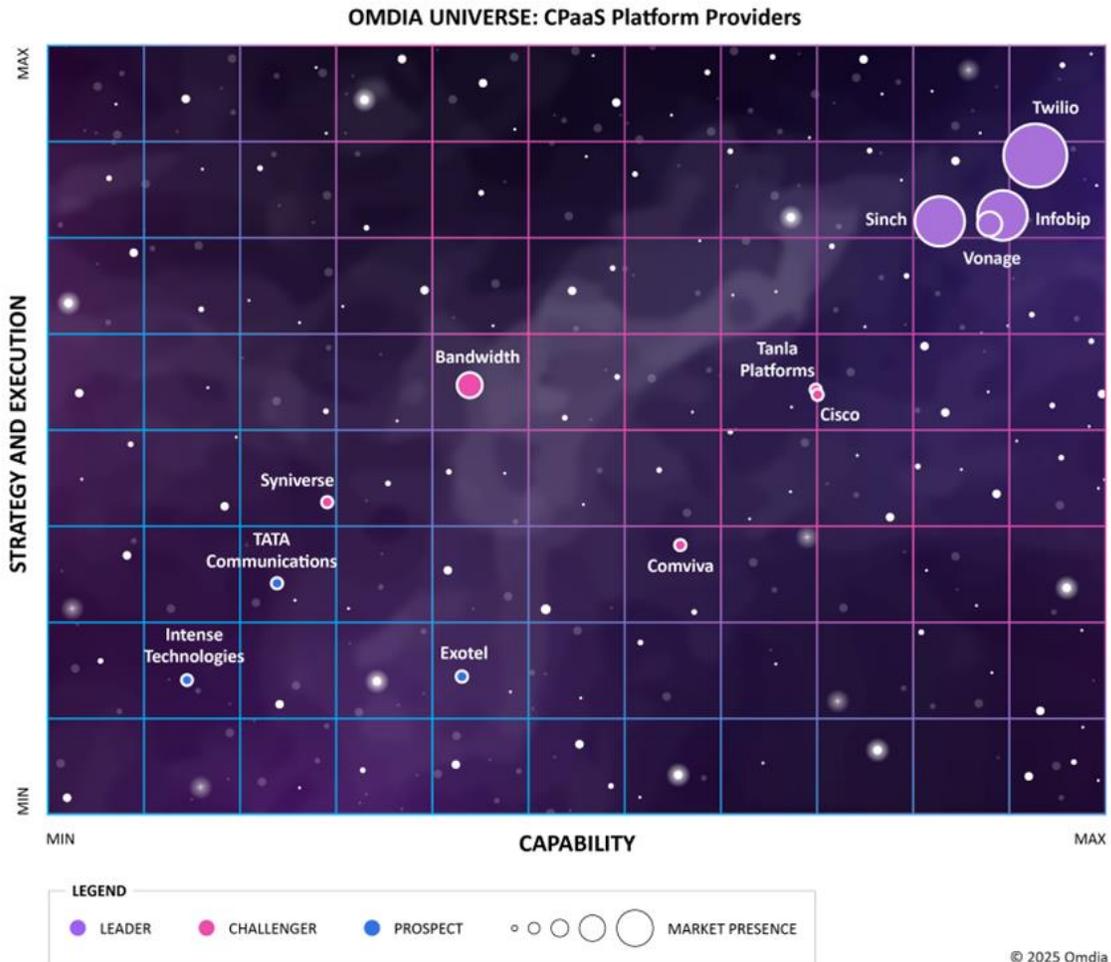


Summary

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



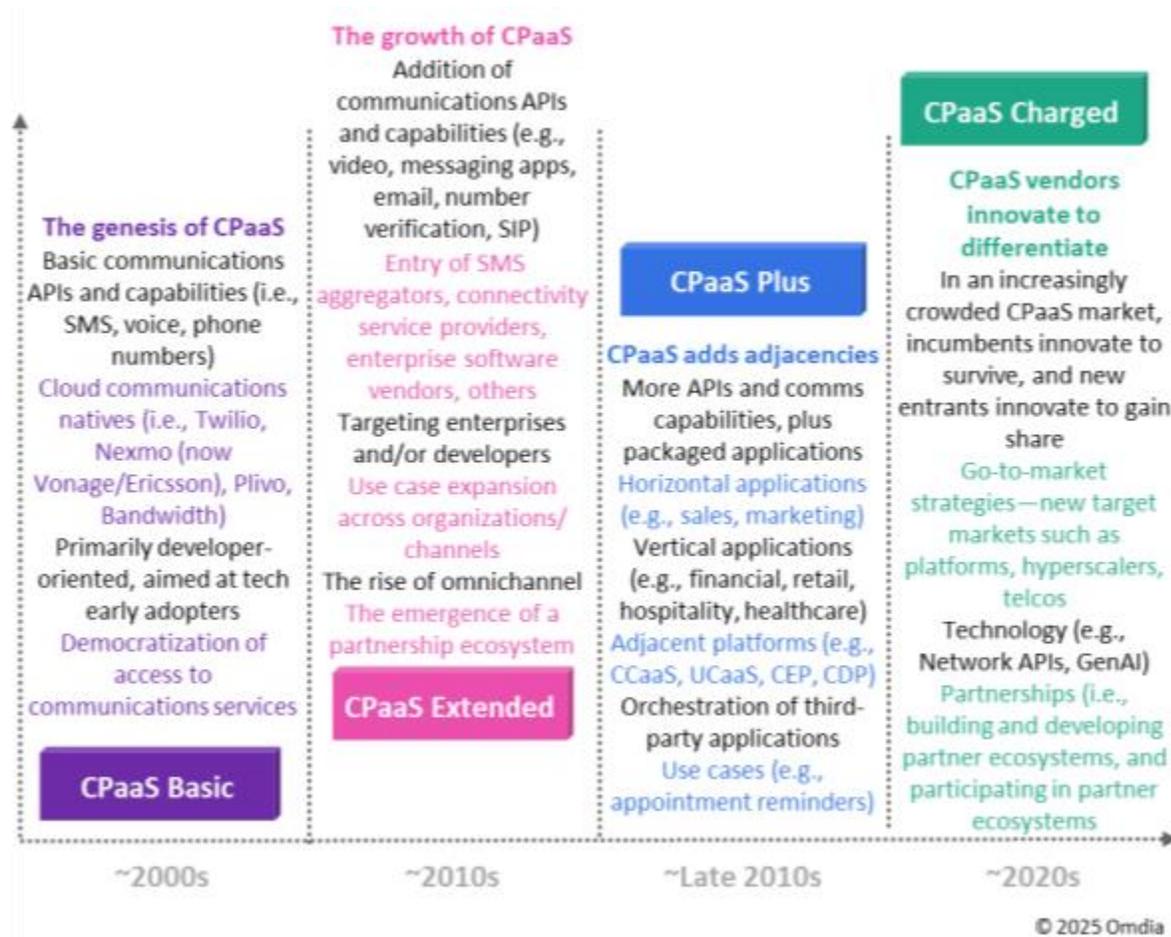
Source: Omdia

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

“Native” CPaaS vendors	SMS aggregators, connectivity service providers	Enterprise software vendors, network equipment providers	Telcos, telco alliances/hyperscalers
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
Leaders	
Twilio	Twilio CPaaS
Sinch	Customer Communications Cloud
Infobip	Infobip CPaaS
Vonage	Vonage Communications Platform
Challengers	
Bandwidth	Maestro
Cisco	Webex Connect
Comviva	NGage
Syniverse	Concierge
Tanla Platforms	Wisely
TATA Communications	Customer Interaction Suite
Prospects	
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.

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 4**), 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 4: 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

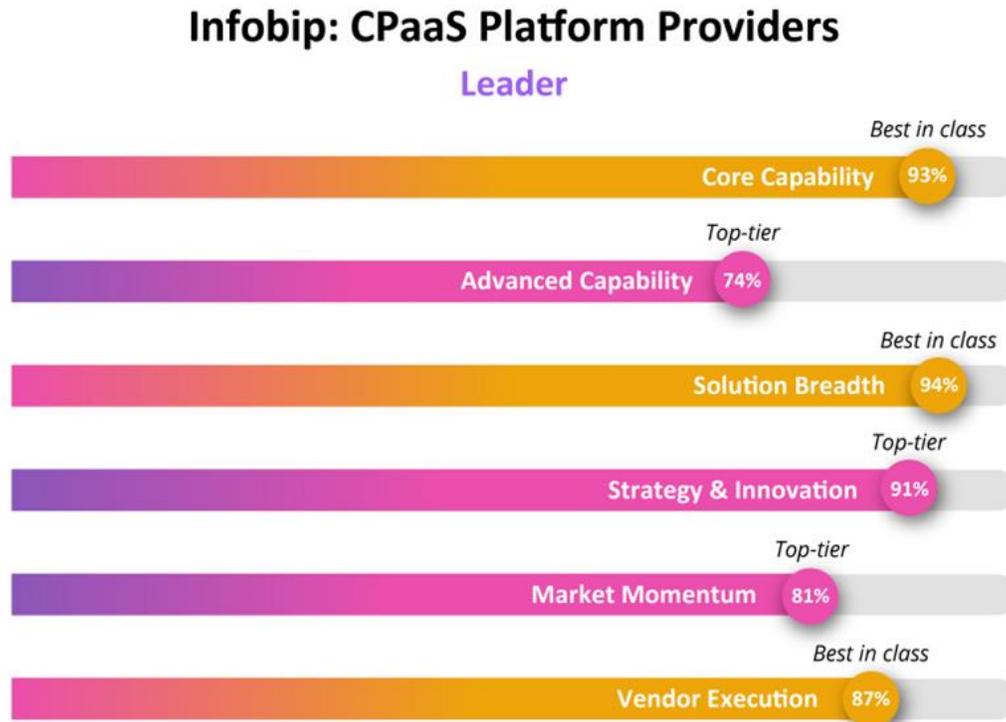
Infobip is classified as a leader in this Omdia Universe. It is a leader or equal leader on the leaderboard for three of the 12 categories scored in the CPaaS Omdia Universe, with a minimum of 10 points above average scores for 11 of those categories. Its highest scores are in AI capabilities, innovation, 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 5**). “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 5: 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.

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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