

IDC MarketScape: Worldwide Communications Platform as a Service 2025 Vendor Assessment

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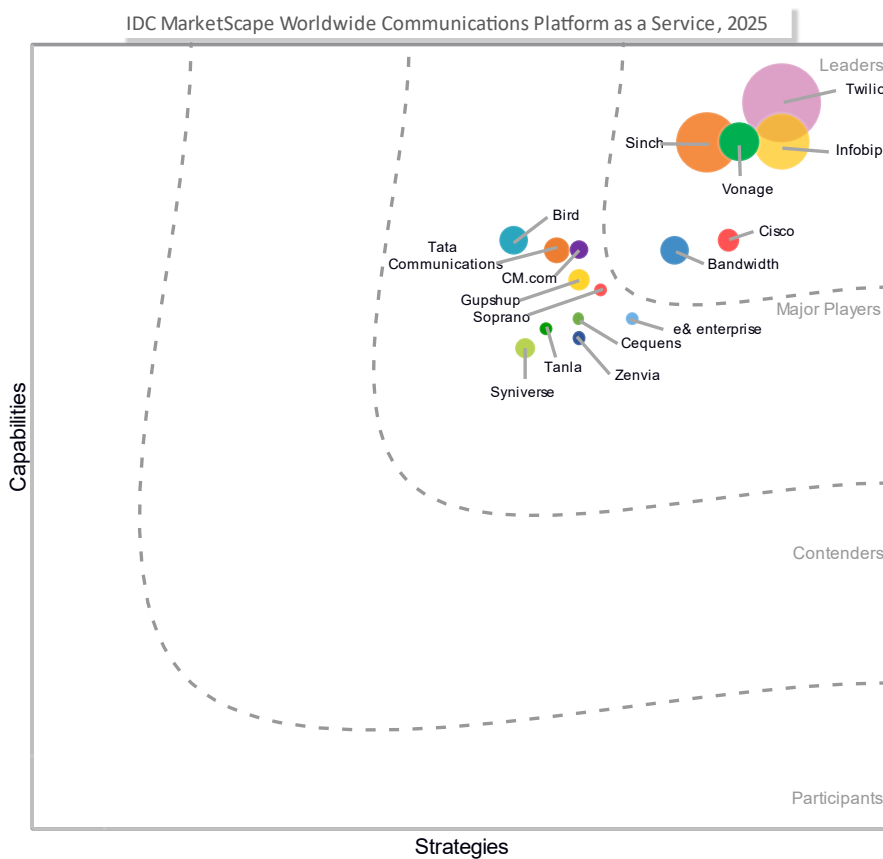
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IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Communications Platform as a Service Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

The communications platform-as-a-service (CPaaS) market is evolving rapidly. CPaaS providers must focus less on large volume messaging transactions and more on differentiated solutions driven by AI intelligent tools to deliver tangible outcomes and KPIs for businesses. The segment has grown rapidly over the past decade, but the growth has slowed from over 20% per annum up to 2022 to 9.5% during 2024. This reflects a confluence of macroeconomic factors such as high interest rates as well as maturation of the application programming interface (API) segment and how companies leverage CPaaS.

However, AI-driven engagement may well signal a recovery to double-digit growth in 2025. The past 24 months were turbulent and characterized by decreasing valuations, high operational costs, and challenging platform integration and a renewed drive for profitable growth. Investors are seeking improved operating efficiency, agile operations, and the ability to meet compliance and security demands of enterprises in the face of an onslaught of fraud.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC included CPaaS providers that met the following requirements for inclusion in this IDC MarketScope:

- Offers service in multiple countries or continents
- Had CPaaS revenue of at least \$50 million in 2023

ADVICE FOR TECHNOLOGY BUYERS

The following is a list of key attributes and factors for enterprises to consider in choosing a CPaaS partner:

- **Seek tangible benefits and KPIs:** Providers should offer the ability to reduce acquisition and operations costs while minimizing complexity and improving customer retention, scaling and enhancing customer engagement management, and creating new avenues for revenue.
- **Use the power of automation, AI, and data:** Businesses must seek CPaaS providers that can demonstrate the ability to reduce complexity while integrating a diverse range of applications and platforms to produce improved business

outcomes (e.g., lower marketing and operational costs). Rich data and analytic insights can also be leveraged for value-added services revenue.

- **Focus on security and fraud prevention:** Security and fraud mitigation remain top of mind for enterprises that continue to lose billions of dollars every year. It is key to look for CPaaS providers that offer simplified tools to counteract artificially inflated traffic, which has become an issue across continents, including Europe.
- **Leverage unified and conversational engagement:** These include the provision of unified APIs that enable access to a diverse range of channels, with AI capabilities being used to automate channel preferences based on regional or regulatory requirements.
- **Able to offer seamless integration:** CPaaS providers should offer tools (including SaaS capabilities) and AI-driven automation that allows companies to easily integrate with a diverse array of legacy and other third-party platforms.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Bandwidth

Bandwidth is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Bandwidth has been in existence since 1999 and offers CPaaS including voice, messaging, and emergency services on a global basis. The company is headquartered in Raleigh, North Carolina, but has physical offices in another 5 countries located in Europe and Asia. Bandwidth owns its own global IP network that offers coverage in over 67 countries and territories across all 4 regions of the world. The company is a national operator in 31 countries and has 1,100 employees.

Bandwidth is a unique CPaaS provider with an owned and operated network that provides voice and CPaaS services to a wide variety of cloud communications UCaaS and CCaaS platform providers as well as large enterprises and text messaging platforms. The company's portfolio includes voice, messaging, emergency services, and authentication APIs. For enterprise customers, Bandwidth has a BYOC model that facilitates a reliable, efficient, and cost-effective alternative to telcos voice services. Through its Maestro platform, the company offers BYOC integrations through simple plug-and-play integration with contact center platforms, including Genesys and Five9;

UCaaS platforms including Microsoft, Cisco Webex, and Zoom's suites; along with conversational AI and authentication vendors such as Google Dialogflow, Cognigy, and Pindrop.

Strengths

Bandwidth has been a major CPaaS provider for over a decade. The company is a tier 1 networking provider with its own global IP network and has a reputation for reliability and customer service with an excellent retention rate and an average customer tenure of 11 years. The company has grown organically and is profitable. Bandwidth's initial focus was on the provision of voice services for the calling plans behind all major contact center and UCaaS providers.

Recently, the company launched its next-generation Universal Platform, its seamless global experience featuring a single unified API for service deployment and management in over 67 countries. The company is also growing rapidly in messaging services and will launch Rich Communication Services (RCS) in early 2025, with WhatsApp to follow soon after.

In the AI sector, Bandwidth's AIBridge feature with Maestro offers integrations with Google's Dialogflow and Cognigy AI. The company is implementing additional functionality that will facilitate orchestration of additional AI engines including Kore.ai and Omilia to be deployed in 2025. The goal is to provide a diverse choice of AI capabilities enabling intelligent call routing for conversational communications use cases leveraging virtual agents for call deflection.

Challenges

Despite its global footprint, Bandwidth depends heavily on the North American market, and as a result, is late to the game of offering OTT channels. It will face a deluge of competition as it seeks to gain a foothold in the provision of RCS and other OTT channels. However, the company's messaging business is growing rapidly with a robust and loyal customer base, and it has the expertise and personnel to be ready for enhanced messaging launches in 2025.

Consider Bandwidth When

Consider Bandwidth if your company is seeking a reliable, carrier-grade global voice and messaging platform with an efficient, automated deployment experience and renowned customer support. If you are an enterprise deploying major UCaaS, CCaaS, and conversational AI platforms, Bandwidth's open, vendor-agnostic approach will make it easier to deploy and manage your applications than legacy SIP trunk providers. Its global Universal Platform offers automated, seamless provisioning and management. The company is a provider of phone numbers and emergency services.

Bird

Bird is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Bird was founded in 2011 as Mobile Tulip and was shortly after renamed MessageBird. In February 2024, the company was rebranded to Bird, following the public launch of Bird CRM. Bird is headquartered in Amsterdam, the Netherlands; has 5 other offices in key cities around the globe; and counts around 500 employees globally. Bird has its own in-house telecommunications stack that allows it to operate as a licensed carrier (in 6 countries) and communicate with operators globally. It has 250 direct connections and 600 global connections.

In the past decade, Bird has made several acquisitions to further strengthen its portfolio and expand its market presence. Its acquisitions of 24sessions (a Dutch video streaming platform) and Hull (a U.S. company) in early 2021 bolstered its (mobile) video and real-time customer data platform (CDP) capabilities, respectively. The acquisition of SparkPost, one of the world's extensive email notifications companies, which also took place in 2021, was a major step forward for Bird. It underpins the company's strong email API position and boosted its customer footprint in the United States.

At the end of 2022 and early 2024, the company went through two substantial restructuring phases whereby its workforce shrank with one-third and 20%, respectively. After rebranding to Bird CRM early 2024, the company's branding was subsequently shifted from a focus on selling CPaaS (communications APIs) and related SaaS offerings to become an AI-first CRM for marketing, sales, customer services, and payments. Its AI customer data platform plays a crucial role across its portfolio of solutions. Its AI-powered automation capabilities are found in its process automation portfolio, which includes marketing and customer services, email, flow automation, and AI chatbots offerings.

In the years before its rebranding, Bird had put a lot of effort into strengthening its no-code SaaS (enterprise) offering that provides knowledge workers a way to build customer journeys, automation, and personalized interactions by means of its low-code/no-code flow building tools. It also focuses on developing its CDP-based SaaS portfolio for conversational marketing use cases and offers an integrated online payment via third-party payment platforms. This paved the way for its revised offering strategy. That said, the company's wide range of communication APIs (including voice, messaging, and numbers) are still very much accessible for developers to build their own integrated applications.

Strengths

Bird differentiates its offers through innovation initiatives and leveraging the power of its large-scale network. The company shows differentiation in branding, in product, and from a go-to-market perspective. It has a comprehensive portfolio with a prominent place for marketing, customer services, and payments, which is accessible to various personas from various market segments and industries. Its clear focus on AI and automation across the board is beneficial to guide enterprises in becoming digitally resilient businesses.

Challenges

In the past, Bird had been growing its business at a rapid pace. Challenging times in the CPaaS market drove the company to divest personnel and turn to more automation-driven processes, with a new marketing pitch focused on CRM. To maintain its position and brand as a global company with a local touch, it needs to extend its partner base to provide local support to augment automation. Being an API-first company for a long time, Bird needs to increase investments in raising more awareness around its new brand, not only with end users but with all constituents in the wider partner ecosystem.

Consider Bird When

Consider Bird if your company requires effective customer engagement and SaaS/CRM solutions in marketing, customer support, and payments solutions that are underpinned by AI, automation capabilities, and a solid global coverage.

Cequens

Cequens is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Cequens is based in Dubai, United Arab Emirates (UAE), and it has offices in 6 countries including the Middle East, West Africa, and Asia. It serves over 1,200 customers from a presence in 14 countries. The company has over 270 employees and provides services to over 150 countries. Cequens has been in business for 15 years and launched its CPaaS platform initially offering an SMS API in 2014. It is self-funded and claims to be profitable. It offers a portfolio of messaging, voice, and authentication APIs for a variety of use cases including marketing and customer service and engagement. It has a multilayered platform hosted in 7 geographically dispersed redundant datacenters and offers direct connectivity with 8 operators groups serving over 128 countries.

Strengths

Cequens has a diverse platform of SaaS and communications APIs, with a strong foundation of direct connectivity to a large number of mobile operators, and

comprehensive coverage of the MEA region, with 99% uptime reliability. The company has experience in implementing advanced conversational commerce solutions with WhatsApp and RCS and has infused its portfolio with AI capabilities for Intelligent Bots and omni-channels conversations. The company claims to be one of the first regional providers to offer an AI Agent solution, and it also offers a unified API and workflow management solution called OmniLink Studio, which offers centralized management for personalized and targeted customer engagement. It also offers a full suite of professional services, low-code visual builder tools, and regulatory compliance assistance.

Challenges

Cequens has a well-rounded portfolio of relevant messaging and support tools and multinational coverage and footprint. However, while the company is expanding its presence, it may not be the right fit for companies with broad global requirements.

Consider Cequens When

Consider Cequens if you are a midsize or large enterprise company with a substantial presence in MEA and Europe and require regional specialized knowledge and compliance expertise. Cequens is a nimble company with direct connectivity and reliability and aggressive plans to expand geographically.

Cisco

Cisco is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Cisco offers CPaaS services via its Webex Connect Platform that is part of Cisco's broader Webex portfolio. It is focused on enhancing customer and employee engagement by integrating various communication channels and platforms and leveraging AI capabilities. The company has offered API solutions for over 20 years via its IMI mobile acquisition. The company serves medium-sized and large enterprise customers and is available in over 200 countries and regions across all continents. It is based on a cloud-native architecture with streamlined delivery across 8 regional sovereign instances.

Cisco offers secure, multiregional focus designed to help customers comply with local data residency and access regulations and provide regional resources for training, debugging, and program support. It features low-code/no-code tools with prebuilt modules, integrations to existing systems, omni-channel support, AI capabilities, and enterprise controls.

Webex Connect is an enterprise-grade CPaaS platform that enables the orchestration and automation of end-to-end customer journeys across multiple communication channels, including messaging, voice, and authentication APIs, with seamless integration with existing business systems. Webex Connect API suite offers access communications across 13 channels, including for consuming real-time events from various business systems including CRM, helpdesk, field service management, and contact centers, as well as other vertical applications by programmatically passing data to Webex Connect as part of the event payload, and then customize the messaging delivered to consumers without having to build application logic to tie the systems together. Webex Connect is tightly integrated with other Webex solutions, including Webex Suite, Webex Contact Center, and Webex Control Hub. This integration allows for a seamless communication experience across different platforms and devices.

Strengths

The primary strength of Webex Connect is its long history as a CPaaS operator and tier 1 aggregator along with the immense global operational, expertise, and distribution prowess of Cisco. Cisco has made significant inroads in consolidating its Webex Contact Center and CPaaS portfolio to provide a seamless dashboard for automation, leveraging the underlying Webex infrastructure, as a foundation platform for enterprise customer experience (CX). The company has positioned its AI Agent as a key catalyst enhancing enterprise "Proactive Journeys" and interaction with human agents. AI Agent will be omni-channel, multimodal, and multilingual, and it will allow human agents to leverage data from LLMs or private enterprise knowledge databases while integrating seamlessly with contact center and other CRM platform workflows. Most importantly, AI is substantially highlighting and complementing the platform's strength in automation and orchestration tasks.

Challenges

The key challenge for Webex Connect is to remain visible among the vast IT portfolio offerings of Cisco. The company has made progress integrating CPaaS into the overall Webex narrative and leveraging the go-to-market channels of Cisco, but CPaaS is still a relatively small aspect of the broader Webex and Cisco portfolio.

Consider Cisco When

Consider Cisco if you are a large enterprise with diverse employee communications and customer engagement requirements. The company offers one of the most comprehensive integrated and orchestrated platform CX journeys and a scalable global solution with the requisite regional compliance, expertise, and support.

CM.com

CM.com is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

CM.com was founded in 1999 and is headquartered in Breda, Netherlands. Early 2021, the vendor went public and is listed on Euronext. The CPaaS provider counts approximately 750 employees and has 23 offices in 15 countries across the globe, with the biggest presence in Europe, followed by APAC. CM.com provides connections in 234 countries across all regions and has over 120 direct connections with MNOs globally. The expansion of direct connectivity is mostly focused on the APAC and MEA regions. The company services around 400 enterprise customers from a wide variety of industries.

CM.com's CPaaS product portfolio consists of:

- Connectivity services including SIP trunks, phone numbers, and supplier network services
- Cloud communication channel APIs (i.e., voice, email, messaging, and verification)
- OTT messaging via WhatsApp, RCS, Viber, and many other channels

In addition to its CPaaS product segments, the company offers convenience solutions that primarily focus on security measures to support customers with reducing artificially inflated traffic (AIT). These include services such as number verification and validation, OTP APIs, IVR, and identity match.

Its SaaS portfolio key assets revolve around its conversational AI cloud, mobile (customer) services, and marketing (including CDP) cloud solutions. Building blocks or connectors between its CPaaS and its (SaaS) cloud solutions include its conversational router (to determine the state of a conversation and switch between applications) and its AI Decisioning Engine (which analyses customer behavior and preferences to predict the next buying stage). CM.com also sees GenAI, its in-house CDP, and marketplace as key elements to enhance and sell its SaaS offerings. Its most recent acquisition of two companies in data science and ML in the Netherlands demonstrates the vendor's keen focus on AI/ML.

The company's initial sweet spot is in software technology for mobile messaging and payments (and ticketing); CM.com is a licensed payment service provider (PSP) in Europe, which is rather unique in the CPaaS vendor space. This enables the vendor to offer CPaaS, SaaS, and payment solutions via a single platform offering (e.g., ID scan integrated in ticket purchasing).

CM.com has a keen focus on investing in RCS (convert SMS traffic to RCS and simplify onboarding for RCS) to bolster its messaging channels portfolio. Another strategic

investment area for the vendor is in the network API realm. It expects most success to be found in identity solutions to strengthen OTP and identity use cases. It recently announced its verification as a service (which can also be silent authentication) on every channel whereby customers only pay for a successful verification.

Strengths

CM.com is an established CPaaS player with a strong footprint in Europe and good global coverage that also offers private network deployments. Its drive for innovation is reflected by its robust in-house AI, automation of CDP capabilities, and recent acquisitions. Its conversational commerce and integrated payments offering is also a clear value proposition for many online operating companies, as well as its high-level performance standards and customer support.

Challenges

Decreasing margins of the CPaaS commodity services and other economic instabilities led to stakeholder pressures and budget cuts for many CPaaS vendors in the past few years. Despite its in-house expertise, strategic acquisitions, and differentiating offerings, revenue has shown a downward trend since 2022. The company has been successful in improving margins in 2024, which is a step in the right direction to turn the tide. The company will need to further increase awareness of its value propositions and expand its partnership ecosystem geographically but also vertically to seek co-creation opportunities. This will expand its customer base and further grow its enhanced/managed services revenue.

Consider CM.com When

Consider CM.com if you are looking for a CPaaS provider that aside from basic CPaaS capabilities can offer a complete digital conversational commerce solution stack (including AI-infused solutions for customer services, marketing automation, and integrated payments), has expertise in security solutions, and strong local support and regulatory know-how in the European region.

e& enterprise

e& enterprise is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

engageX, the Customer Experience (CX) division of e& enterprise, was launched in 2020 and since then continues to provide CPaaS solutions to over 3,000 enterprise customers across United Arab Emirates and Kingdom of Saudi Arabia (KSA), with plans to expand to additional countries. engageX processes over four billion transactions annually. The CPaaS company offers a wide range of communication APIs, including

voice, SMS, video, email, video messaging, number masking, and multifactor authentication, along with advanced features such as conversation APIs, chatbots, and visual workflow builders. It integrates with third-party applications including customer relationship management (CRM), contact center as a service (CCaaS), unified communications as a service (UCaaS), and payment systems.

engageX covers the full customer engagement journey across marketing, operations, and support. The company's AI/ML capabilities include natural language processes (NLP), sentiment analysis, predictive analytics, intelligent routing, and personalization to enhance customer interactions. In addition, it complements e& enterprise's cloud contact center, CRM, IT managed services, and contact center BPO for a comprehensive customer engagement stack.

e& enterprise offers developer tools and APIs that enable businesses to integrate communication capabilities into their own applications and services. The company also offers premise-based custom solutions as required for segments such as government and the military. Its pricing models include pay-as-you-go pricing, monthly subscription pricing, or usage-based pricing based on different business needs.

The company has implemented multiple strategies for growth, including expansion into new geographies (e.g., Türkiye, KSA) and launching new capabilities (generative AI [GenAI], martech, and CRM), new services (CX consultancy), and low-cost sales channels through channel partners and digital sales.

Strengths

engageX has a diverse portfolio of products and services including CPaaS, SaaS, and custom solutions to help businesses with omni-channel engagement strategies, automation, and operational efficiency. Its platform offerings are designed for localized regulatory compliance requirements. The company also operates a fully owned payment gateway platform with in-house development and support team to enable enhancements and customizations.

engageX's GenAI-powered CX solution enables personalized, real-time applications for enhanced customer engagement across multiple channels. engageX leverages AI and ML in its conversational AI chatbots, virtual assistants, and IVR systems. These tools understand intent, sentiment, and customer history, allowing for seamless, humanlike interactions across messaging, voice, and video channels. The company is creating a unified generative AI layer that will be embedded within all applications across capabilities (Martech, CPaaS, and CCaaS). The company also has a diverse range of integration and ecosystem partnerships to help drive growth.

To cater to the SMB market, e& enterprise utilizes digital sales channels, offering packages that address most of the CPaaS use cases (omni-channel connectivity, chatbots, and omni-channel agents).

Challenges

The engageX customer base is still relatively small, primarily based in the UAE and neighboring countries. However, the company is in the process of expanding its footprint into new countries and regions, as well as investing in enhancing its brand awareness.

Consider e& enterprise When

Consider e& enterprise if your company is seeking strong expertise in regional markets backed by an advanced CPaaS platform, diverse set of integrated components, and professional assistance. The company offers an excellent CPaaS ecosystem that offers customized multichannel communication to enhance customer engagement and accelerate digital transformation.

Gupshup

Gupshup is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Gupshup serves over 50,000 customers located in 31 countries. The company has a physical presence in 12 countries, with a focus on providing conversational engagement capabilities. The company currently generates over 10 billion messages per month in more than 100 languages. Owing to the ongoing demand for GenAI-powered conversational solutions in India and international markets, Gupshup ramped up hiring efforts globally in FY24, growing its workforce by 20% to 1,400 people. While India has been a primary market for Gupshup, other regions, across the globe, Latin America has emerged as a key growth segment for the company over the past three years. Gupshup has doubled its customer base in several international markets and has developed a client base of various global brands.

Strengths

In the first half of 2024, the company launched Conversation Cloud, a software-as-a-service (SaaS) tool suite integrated with AI, enabling voice and text communication to enhance engagement between businesses and customers. The Conversation Cloud consists of three key modules — Converse, Advertise, and Communicate — that enable conversational relationship management across the full customer life cycle. Gupshup's GenAI offering, ACE LLM, is a family of fine-tuned LLMs that bring together combinations of various open-source AI models implemented on different use cases

across the customer life cycle. These include powering domain-ready conversations, understanding nuances like intents, entities, utterances, and customer behavior.

Gupshup launched Agentic Framework to simplify building conversational journeys using a no code and create AI Agents using prompts. These autonomous agents provide responses, make decisions, and orchestrate workflows. The framework is self-learning and can manage various scenarios. Currently in initial trials, the framework uses in-house agentic models and prebuilt tools and APIs. In addition, Gupshup products include features like AI prompt-based journey creation, AI copywriting, and AI co-pilot for live agents.

Gupshup recently expanded into the Gulf Cooperation Council (GCC) region, supporting various initiatives across UAE and Kingdom of Saudi Arabia. Entry into UAE aligns with the UAE Government's "Dubai Universal Blueprint for Artificial Intelligence" initiative. While Gupshup's strategic entry into the Kingdom aims to revolutionize customer engagement and support Vision 2030's digital goals using Conversation Cloud platform. To further support the needs of Saudi businesses, Gupshup offers ACE LLM to enable the development of highly intelligent, humanlike chatbots in Arabic language. This AI-powered solution will help brands deliver superior conversational experience with personalized and culturally relevant customer interactions.

Challenges

With the increased competition in the conversational AI Gupshup is strengthening its GenAI efforts to provide enterprises personalized, humanlike chatbots. However business controls and guardrails could prove to be a challenge. Despite Gupshup's international expansion into the GCC, Middle East, and Europe regions, its brand recognition is still primarily limited to India and will take time to increase its international recognition. Like other conversational AI chatbots, Gupshup is vulnerable to threats like malware and DDoS attacks, but the company has a dedicated security team following industry best practices and adhering to standard regulatory frameworks can mitigate these risks.

Consider GupShup When

Consider Gupshup if you are a mobile-first company leveraging omni-channel personalized marketing and commerce and support solutions. The company has excellent GenAI-powered chatbots and a proprietary fine-tuned built atop foundational model called ACE LLM, a family of GPT model helps enterprises to head start in building AI-powered conversational experiences.

Infobip

Infobip is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Infobip has been serving the cloud communication platform market since 2006 and has steadily grown to become a well-established and key player in the global CPaaS market. Initially founded in Croatia, Infobip is now headquartered in London, the United Kingdom, and it has over 3,400 employees across more than 73 offices worldwide. The company has a presence in 56 countries and serves more than 10,000 enterprise customers globally:

- Infobip's global cloud communications platform consists of more than 40 datacenters and more than 800 direct operator (MNO network) connections. It has a global network that can terminate traffic in 190 countries and supply local numbers in 150 countries worldwide. Its acquisitions in North America of OpenMarket (the U.S. cloud communications player) in 2020 and Peerless Network (established U.S. VoIP provider) in 2022, have increased its coverage and presence in the region. Infobip also acquired Anam in 2021, strengthening its position in the SMS firewall market; and expanded its reach with the developer community through the purchase of developer-focused Shift Conference in 2021 and Netokracija, a publisher of content for developers, in 2022.
- Infobip's cloud platform solution stack is comprehensive and spans the following services and audiences:
 - Connectivity layer and telco (core enablement) solutions are underpinned by its infrastructure and network layers and include services from telco firewall solutions, number offerings, and tooling for quicker provisioning to verification services and so forth.
 - It has programmable channels for developers, that is, API sets for simple customized communication (e.g., a comprehensive range of [OTT] messaging, voice, video, authentication APIs) as well as modular sets of APIs (CPaaS X) to increase platform automation (reducing operational load) and speed up time to market.
 - Software solutions that target the business user include a customer data platform (called People), customer engagement hub (Moments), chatbot building platform (Answers), and cloud contact center solution (Conversations). Headless SaaSx is Infobip's microservices-based composable software stack, providing sets of APIs that are designed around specific use cases (e.g., Conversations APIs).

- Infobip's Marketplace is targeted at developers, SIs, independent software vendors (ISVs), and customers to publish and consume applications built on the platform.

Infobip's vision to be the "platform in the center of cloud communication ecosystem" is also reflected by the company's partnership with Nokia and telecom partners to realize the vision of the GSMA Open Gateway and CAMARA initiatives. The goal is drive standardization to increase the accessibility of network APIs for developers, accelerating co-creation and scaling of successful use cases. Infobip's acquisition of Anam (SMS firewall solutions company) strengthens the company's range of security capabilities and services as part of its telco enablement offering.

Through the Infobip AI Hub, AI (generative and predictive) is entrenched in all its services layers and products (from telco enablement services to developers and business user solutions) to drive automation, efficiencies, and highly personalized customer (B2B and B2B2C) engagements.

Strengths

Infobip is a key player in the CPaaS market with a global footprint and strong capabilities underpinned by its broad portfolio for enterprises as well as a carrier-grade service offering. Its thought leadership, appetite for innovation, and agile organizational structure has led to steady growth of its presence across the globe. It has also maintained a solid financial profile, despite the challenging times for the CPaaS market.

Challenges

Infobip has made great strides recently to improve its brand recognition on a global scale. What will remain challenging for the company going forward is to continue to educate its audiences (partners and customers) of the breadth and depth of its products and services to monetize on investments. Its partner expansion strategy and increased focus on professional services resources are certainly a step in the right direction to reach different audiences with a clear message and the right level of support.

Consider Infobip When

Consider Infobip if global scale and local regional support are a key requirement for your company. Infobip's comprehensive portfolio of services spans telco as well as enterprise needs, ranging from carrier-grade services and CPaaS to highly customized SaaS services and high-level customer support.

Sinch

Sinch is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Sinch has been serving the cloud communication platform market since 2008. The CPaaS provider is headquartered in Stockholm and is listed on the Nasdaq Stockholm since October 2015. It has a global workforce of around 4,200 employees in 67 countries (with physical offices in 53 countries) and serves over 150,000 enterprise customers worldwide.

Sinch has made a lot of acquisitions (funded by four investors) in the first six years after going public. Key acquisitions in 2020 included those of SAP Digital Interconnect, Wavy, ACL Mobile, and Chatlayer BV. In 2021, Sinch acquired Inteliquent and Pathwire, a United States-based voice communications and email delivery platform, respectively, which clearly bolstered its capabilities in voice, messaging, and email delivery capabilities in the United States. MessageMedia (an Australian SMB-focusing messaging provider) closed the row of acquisitions in 2021.

Sinch's communications platform has direct carrier connections to more than 600 MNOs globally, powering more than 800 billion interactions per year. Its platform and services can be categorized across three key product suites:

- Its network connectivity suite offers a set of services and software for telecom operators and communication service providers (SPs) to connect directly into Sinch's global communications network. Sinch offers interconnect services for both voice calling and SMS messaging, as well as emergency services, and operator software.
- Its API portfolio (targeted at developers) consists of communication APIs ranging from voice to messaging, email, video, verification, conversational APIs, and phone numbers.
- Its application portfolio targets business users such as marketing or customer success teams. Sinch offers four core applications including email marketing via Mailjet, messaging solutions via Engage, contact center solutions via Contact Pro, and a chatbot builder/conversational AI platform via Chatlayer.

On top of its (natively integrated) UCaaS offering, Sinch has over 500 strategic integrations including native partnerships with key CRM systems, collaboration and contact center platforms, and CDPs, with particularly deep integrations with Adobe, SAP, and other major cloud providers. AI-driven product development is at the heart of Sinch's road map, with a large focus on enhancements to conversational AI, knowledge base AI, and GenAI assist across campaign platforms. Other focus areas are artificially inflated traffic detection and prevention services and RCS. Being among the first to

release RCS (2018) and recently surpassing 1 billion RCS messages, Sinch is keen on further accelerating adoption of RCS for end users across all its product offerings.

Strengths

With its global reach and local presence in 60+ countries, Sinch has a strong foundation for reliable performance, quality service support, and regulatory expertise. Its comprehensive portfolio addresses the needs of distinctive business sizes and user groups, ranging from an advanced API suite for developers to specific use cases such as marketing campaigns, utility messages, identity and verification, and customer service. Its sweet spot is in the midmarket and large enterprise segment across a variety of verticals, with a differentiated services stack for the telco segment. Sinch is an innovative company with a keen focus on AI and other advanced technologies. The company has always been profitable, and in the next year, will focus on returning to growth leveraging its considerable expertise and experience in growth sectors such as RCS.

Challenges

Despite a significant market cap drop in the course of 2021, Sinch still demonstrated healthy growth in 2022. While sustaining earlier growth rates has been challenging and revenue growth has stalled since then, the company remains focused on overcoming these hurdles. Its restructuring and focus on AI, also internally, has enhanced efficiencies and agility of the organization. It will need to leverage its multidimensional portfolio and expertise to expand its higher-margin services share of the business. Opening to joint ventures in the network API realm and intensifying collaboration and co-creation efforts with its extensive partner ecosystem are other means to accelerate scale and drive revenue. This will consequently grow investors' confidence, which is needed to continue to invest and keep ahead of the curve.

Consider Sinch When

Consider Sinch if you are a global operating company seeking a CPaaS provider with a deep, global coverage; a robust portfolio spanning a wide range of communications APIs and SaaS solutions with profound marketing and customer engagement capabilities; and/or have a high need of native integrations across your applications estate. In addition to the vendor's global coverage, local and regional companies will also benefit from Sinch's local regulatory expertise in countries across Europe, the United States, Brazil, and India.

Soprano

Soprano is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Founded in 1994 and headquartered in Sydney, Australia, Soprano began as a mobile messaging software platform and has since evolved into a global CPaaS leader. With over 300 employees across 12 global offices, Soprano operates in 16 countries spanning 4 continents and manages over 20 billion transactions annually on its platform. Soprano has grown steadily over the years both organically and via acquisition and services over 4,500 large enterprise customers and MNO providers around the world.

Soprano Connect, the flagship CPaaS product, serves large enterprises and governments and includes a broad scale of cloud communication APIs including voice, messaging, video, mobile web, email, and verification. The robust and flexible platform supports organizations in creating tailored, scalable, and secure communication solutions to enhance customer engagement and streamline operations. It supports advanced messaging controls and services, including RSS Feed triggers, Microsoft Azure Logic Apps connectivity, Active Directory integration, and a visual drag-and-drop interface for designing and orchestrating communication integration sequences.

Soprano also offers a multichannel conversation API in the Soprano Connect CPaaS platform including a no-code conversational AI and automation capability, which enhances customer engagement and operational efficiency without requiring technical expertise. In addition, it offers an AI-driven voice chat and chatbot and live agent integrations into contact centers, with the flexibility to offer integration to multiple contact center platforms.

Soprano has significantly enhanced its offerings in fraud prevention and security, moving beyond traditional two-factor authentication (2FA) services with its Silent Network Authentication (SNA), SIM Swap detection, and Passkeys as a Service, as well as in AI/ML and on GenAI in particular. With a strong foundation in RCS, Soprano is strategically enhancing its focus on RCS as a pivotal messaging channel.

Strengths

Soprano is an established player in the global CPaaS market. Its Soprano Connect "Integrate Anything" API solution easily connects with (horizontal and vertically specific) third-party applications. The company will continue to expand its geographic reach while driving advancements in generative AI and automation. In addition to its comprehensive enterprise offerings, it has a robust white-label platform for MNOs. Its large presence and expertise in countries in the APAC region enables Soprano to offer high-level compliance and regulatory support in this region. As a midtier player and a company that is self-financed, Soprano continues to grow steadily over the years, making it a financially stable company.

Challenges

Soprano has a deep relationship with network operators, which drives a significant portion of its revenue. Its main challenge is gaining visibility and traction in the Americas region, something that can be achieved by broadening its partner ecosystem and expanding its channel distribution channels to target additional market segments and achieve higher-margin revenue services.

Consider Soprano When

Consider Soprano if you are a large enterprise, government, agency, MNO, or ISV seeking a partner with a deep portfolio of messaging and omni-channel solutions, underpinned by advanced security and AI-enhanced automation capabilities.

Syniverse

Syniverse is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Syniverse has been a prominent mobile messaging company for over three decades, boasting a vast global IP network and having a presence in 11 countries, with coverage in 193 countries across multiple continents. With its mobile messaging heritage, the company offers direct connectivity to over 380 operators and connectivity to over 800 mobile operators. In recent years, Syniverse has developed a robust CPaaS platform, offering a suite of services including SMS, OTT messaging, voice, and authentication APIs. This platform integrates with various enterprise applications such as Salesforce, Oracle HCM, Adobe Campaign, and SAS Customer Intelligence 360 to offer enhanced customer engagement utility for businesses. The company focuses on the large enterprise Fortune 2000 segment.

Strengths

The company has two key differentiators: its global network and interconnection with mobile operators and its expertise in creating complex customer engagement solutions for large enterprises. Syniverse's strategic approach is based on deploying specialized sales teams across regions. It has an integrated co-creation model (dedicated solutions engineers' customer success teams reviewing KPIs and use case ideation to streamline desired business outcomes) that is implemented through professional services and collaborative workshops. Over the next two years, the company's focus is to continue expanding its global press. It will expand WhatsApp and RCS Business Messaging, continue its focus on innovating with customers on messaging use cases, continue developing mobile identity and authentication and AI-enabled features, and expand its white-label messaging offering to carriers.

Challenges

While Syniverse is well known to service providers, cloud, and content providers for its mobile connectivity platform, it's not as well known for its CPaaS platform, which is marketed as a generic marketing customer service solution. A more focused and specific approach that includes AI capabilities will help the company gain visibility in this segment.

Consider Syniverse When

Consider Syniverse if your company is a large global enterprise with a complex customer marketing or engagement requirement, with a need for professional/consulting co-creation expertise. The company also brings a wealth of compliance expertise from its global presence and service provider connectivity.

Tanla

Tanla is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Tanla has been a cloud communications provider for almost 25 years. The company has over 1,059 employees globally and serves over 3,000 large enterprise customers primarily in Asia/Pacific region, but it also has customers in North America, Western Europe, LATAM, and CEMA regions. The company has 10 global offices across India, Singapore, and Middle East. Tanla focuses on two collaborative products that are catering to the diverse needs of the entire digital ecosystem: digital platforms and enterprise communications. The company allows communications between enterprises and customers through APIs and applications that span a wide range of channels, including SMS, email, voice, RCS, OTTs (such as WhatsApp, Truecaller, Facebook Messenger, and Instagram), and push. Tanla processes more than 800 billion interactions annually and claims to process a substantial amount of India's A2P SMS traffic on its Wisely platform.

Strengths

Tanla has a diverse range of products and solutions including communication network API functionality for voice, messaging, email, video, and MFA. Tanla focuses on both horizontal and vertical solutions combined with flexible deployment options. Tanla integrated AI/ML capabilities across its products to deliver personalized communications and AI-driven insights, optimizing communication strategies and secure transactions. Tanla launched Wise Albert, an AI engine that processes vast amounts of communication data to generate insights and improve decision-making using AI/ML and NLP. Wise Albert helps enterprises analyze customer interactions, predict trends, and optimize messaging strategies in real time.

Partnerships and acquisitions remain a key strategy for Tanla's portfolio expansion and enhance its global presence. In 2023, Tanla acquired ValueFirst from Twilio to strengthen its presence in India and APAC and accelerate its international expansion into Saudi Arabia, UAE, and Indonesia markets. Tanla collaborated with Truecaller, aiming to expand its capabilities in providing enhanced communication channels by leveraging RCS, WhatsApp, and other OTT messaging services. Tanla collaborated with a major tech company on the Wisely ATP platform to combat scams on messaging platforms.

Tanla is actively exploring and evaluating participation in global initiatives like the GSMA Open API Gateway and CAMARA Network API program, which focus on building standardized, interoperable APIs for communication networks.

Over the next two years, Tanla anticipates significant changes in channel distribution strategy, focusing on partnerships with ISVs, collaboration with largest telecommunications companies (telcos) in India, engage with developers, and co-creation partners to foster innovation and strengthen its market positioning.

Challenges

With the CPaaS market becoming increasingly competitive, Tanla faces the challenge of strengthening its brand in key markets in a cost-effective manner. The company has some traction with operators but should grow its base among independent developers and enterprises.

Consider Tanla When

Consider Tanla if you are a service provider or enterprise company seeking a company that can offer a wide range of services for all large-scale secure communications business applications and enhanced AI-driven solutions. Tanla's Trubloq.ai, an anti-spam DLT platform, is an advancement that integrates cutting-edge GenAI technology that benefits various businesses including enterprises, telcos, regulators, and other users. Its Wisely ATP platform with AI/ML capabilities helps curb scam at its root, leveraging takedown as a service.

Tata Communications

Tata Communications is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Tata Communications is a part of a large conglomerate that offers telecommunications, consulting services, and a unified communications platform with a comprehensive suite of CPaaS, CCaaS, and UCaaS product and services. The company has over 13,500 employees globally and a reach of over 190 countries.

Tata Communications' omni-channel portfolio includes voice, messaging, email, OTT chat apps, social, push notifications, and video communications providing comprehensive customer engagement. The company offers workflow designs and APIs, integrating vendor-agnostic conversational AI, enterprise app connectors, and translation capabilities. In 2023, Tata Communications acquired Kaleyra, an API-based platform engaging customers with omni-channel business communications and personalized messages, chatbots, and programmable campaigns across channels. The acquisition has significantly enhanced Tata Communications' service offerings.

Tata Communications is focusing on expanding its global presence, particularly in the United States, by repositioning itself as a key player enabling enterprise digital transformation. The company's strategy centers on the digital fabric concept, which signifies simplifying network management, cloud, and interactions in hyperconnected IT environments.

The company brings together tools, platforms, skills, and expertise to help customers build agile infrastructure, enable compelling employee and customer experiences, and the deployment of cyber-resilient connected solutions. Backed by its solutions-oriented approach, proven managed service capabilities, and cutting-edge infrastructure, Tata Communications enables a hyperconnected ecosystem powered by network, cloud, mobility, Internet of Things (IoT), collaboration, and security services. Over one-third of the world's internet routes are connected to Tata Communications' network. It connects businesses to 80% of the world's top cloud providers.

Strengths

The company offers a competitive suite of products for customer interactions and enhanced its network capabilities with 400+ direct connections to operators in addition to its infrastructure elements that include SIP, IPX, Mobile Signaling, and Mobile Messaging Hub. The acquisition of Kaleyra has expanded Tata Communications' CPaaS capabilities by adding 10DLC registration for customers that have U.S. operations and launched programmable voice and WhatsApp campaigns globally.

Kaleyra AI platform provides an intuitive UI to generate and deploy chatbots without coding, automates the creation of templates through generative AI, and provides centralized template management system for omni-channel campaigns.

Tata Communications has a suite of security features and has collaborated with Palo Alto Networks to deliver unified network and cloud security, ZTNA 2.0, and SASE. These essential solutions are stitched into a single cloud and cybersecurity fabric to simplify and streamline enterprise security management.

Challenges

The Kaleyra acquisition has strengthened Tata Communications' brand and reach beyond its traditional customer base, but it will need to increase brand awareness, leverage its new acquisitions, and tailor its solutions to the needs of specific markets in the North American and European markets.

Consider Tata Communications When

Consider Tata Communications if you are a large enterprise company looking for a comprehensive integrated platform that includes CPaaS, CCaaS, and UCaaS, harnessing the potential of AI to enhance customer experience.

Twilio

Twilio is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Twilio is a large global CPaaS and offers one of the most diverse and comprehensive global cloud communications platforms. The company has more than 320,000 customers and 10+ million developers. It processed 2 trillion interactions on its platform during 2023. Its coverage spans over 240 countries and regions, with phone numbers offered in over 110 countries, leveraging more than 4,800 carrier partners. The company also has a CDP platform, Segment — that ingests 400,000 events per second and reports 900 million data points analyzed daily.

During 2024, the company reiterated its strategy for future success based on the dynamic integration of its communications and CDP platforms, enhanced with AI-powered capabilities. According to its CEO Khozema Shipchandler, "The goal is to help companies unlock value in AI, orchestrating intelligent interactions at scale." The company's strategic focus and differentiation is rooted in empowering businesses to deliver one integrated experience with comprehensive contextual data, world-class communications, and AI-driven efficiencies. During 2024, the company implemented the following operational priorities:

- **Smarter interactions.** Consolidated platform for interactions bringing data, communications channels, and AI together to build unique customer experiences at scale
- **Global reach.** Meeting customers where they are through the global reach and breadth of channels offered by Twilio
- **Contextual engagement.** Enabling customer-facing teams and automated systems to facilitate delightful experiences with contextual interactions that surface at the right time

- **Trusted scale.** Enabling features that provide visibility and guidance that meets compliance, security, and data privacy requirements

Strengths

Twilio has a multilayered platform with a broad and diverse array of services. The company's communication channels include all basic mobile messaging, voice, email, video, and OTT channels including WhatsApp, with RCS Business Messaging launched in 2024. It has a global platform that is integrated via direct connectivity with the global telecom operators. Twilio's R&D allocation expenditure is almost 25% of revenue, and the result is the company is the most innovative cloud communications platforms in the world.

Twilio is also one of the global leaders in the CDP segment, and has a strong contact center platform with Twilio Flex. The company builds on those key pillars with an array of orchestration tools including low-code Visual Builder, AI-driven fraud mitigation, Predictions, and AI engagement models for customer personalization. It also has a premier suite of purpose-built solutions to meet enterprise requirements for key experiences throughout the customer journey, including end-to-end user authentication and identity, omni-channel marketing and promotional campaigns, efficiency-driving customer acquisition, and highly personalized human and self-service customer support.

Challenges

The most pressing challenge for Twilio is to provide improved margins by managing costs and improving efficiency and scalability across its platform. While its growth has slowed from its peak years, the company still has a broad global footprint. The company has pledged to meet profit goals during 2025, and it has made steady gains during 2024. Another key challenge will be differentiation in the provision of AI-based solutions, which is rapidly becoming table stakes, although its history of innovation and significant R&D budget provides an advantage.

Consider Twilio When

Consider Twilio if you are a large enterprise or digital entity that requires a broad array of communications and digital engagement solutions. Twilio still provides the most seamless suite of customer engagement solutions on a global basis. It offers a class-leading array of prebuilt integrations with thousands of IT partners, and it has a reputation for quality, reliability, and ease of use. With one flexible platform for every interaction, Twilio offers an integrated experience with contextual data, communication, and trusted AI.

Vonage

Vonage is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Vonage, now a subsidiary of Ericsson, has a 20-year heritage in the cloud communications segment. Vonage's CPaaS platform was created over a decade ago and offers coverage to over 200 countries and territories serving over 120,000 enterprises. The company is headquartered (HQ) in New Jersey, United States, and along with offices across the United States, it has offices in several countries in Europe and the Asia/Pacific region. It has approximately 2,300 employees worldwide and over 1.6 million registered developers. Vonage delivers more than 25 billion messages and over 30 billion video minutes per year. The company has a broad and deep portfolio of voice, messaging, video, email, and advanced services including AI-driven conversations and identity and security solutions.

The Vonage Communications Platform (VCP) is a diverse cloud communications platform that includes CPaaS, UCaaS, and contact center capabilities. In early 2024, the company launched the Global Network Platform for the deployment of network APIs. Vonage's merger with Ericsson has added another dimension to the company, providing it with access to immense engineering resources and Ericsson's deep ecosystem of telecommunications clients and partners. Vonage has launched a suite of network API offerings facilitating authentication, anti-fraud, device status, and locations as well as on-demand QoS capabilities. The company also launched the Vonage Network Registry, which provides a unique registration process for developers and a standardized approval process for communication SPs looking to vet them.

Strengths

Vonage has one of the most diverse CPaaS platforms with a global and geographically balanced client base across the Americas, Europe, and Asia/Pacific regions. The company offers a comprehensive unified API that provides full access to its identity, messaging, voice, email, and video APIs. The company is especially strong in the messaging and video segments. It has focused on implementing and enabling RCS and intelligent voice applications. It has an extensive voice API suite including WebRTC/In-App-branded calling and AI Virtual Assistants integrated with its AI Studio. The video platform offers AI capabilities and an immersive composition feature. Vonage has extensive experience in the enhanced messaging segment, offering WhatsApp and other channels on a global basis, and RCS is currently available in 15 countries, with the U.S. launch planned for 2025.

Vonage has a long history of integrating AI capabilities throughout the Vonage's CPaaS technology stack. Its customers are not required to use external AI modes separately,

although users can leverage third-party AI integration through open interfaces. The Vonage AI suite includes the following: AI Studio is a complete, conversational AI solution that is powered by an in-house NLU engine along with knowledge AI — a beta service that seamlessly integrates customers' knowledge base data with Vonage Virtual Assistants for advanced Q&A and FAQ use cases. AI Studio is integrated into the Vonage Voice, SMS, and social messaging APIs and can be accessed directly through a developer dashboard. Developers can build applications using the Vonage visual flow builder — a no-code/low-code conversation flow tool — to create and deploy virtual assistants or use the Vonage built and managed AI Virtual Assistant (where Vonage provides conversational designers, professional and managed services).

Vonage Network APIs, in partnership with telecom operators, has a goal of providing businesses with a unique competitive edge. It complements Vonage's core CPaaS offering through seamless authentication, intelligent identity solutions, and enhanced video capabilities, including quality on demand (QoD) and location services. These powerful APIs enable businesses to elevate commoditized services by adding differentiated, high-value experiences.

Designed to address the specific needs of customer segments, Vonage APIs deliver purpose-built solutions that drive measurable results. By adding tangible value, these capabilities help businesses forge stronger customer relationships, improve retention, and contribute to higher margins.

Challenges

Vonage, which is now a division within Ericsson, has been an integral aspect of its parent company's push into establishing Network APIs, which has also been its key marketing identity over the past 18 months. Since the focus of Ericsson's Network API strategy has shifted, Vonage must reassert its position as both a key partner of the new venture announced by Ericsson and 12 of the world's largest operators, but also as an independent CPaaS provider. It also must maintain a strong flow of R&D resources to maintain pace with global CPaaS competition.

Consider Vonage When

Consider Vonage if your company is an enterprise or large-scale telecom operator that requires a broad range of APIs on a scalable global platform for AI-driven customer engagement solutions.

Zenvia

Zenvia is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide communications platform as a service.

Brazilian-based Zenvia has been a CPaaS provider for just over 20 years. The company currently offers services across Latin America and has its headquarters in São Paulo. Zenvia serves over 1,300 enterprise customers and counts over a 1,000 employees. Its services coverage extends to 40 countries across the globe. It acquired several companies, including Sirena, D1, Smarkio, SenseData, and Moviedesk, which has allowed the company to diversify its portfolio. The company launched its first public offering in 2021 and is listed on the Nasdaq. The company is also aligned with Twilio, which purchased a minority stake in the company in 2021.

Over the past few years, the company has expanded its scope beyond CPaaS into the SaaS segment, particularly the CX realm. Zenvia Customer Cloud is the vendor's CX solution that enables businesses to engage with customers in a personalized and effective manner resulting in higher sales, satisfied customer, and lower churn. It includes low-code/no-code flow builders for customer journey automation. In addition, it comprises GenAI-based chatbots, multichannel sales, customer service support, and marketing campaign solutions. Its (in-house) customer data platform (QUANTUM) is a key component to its Customer Cloud offering and sentiment analysis, with data from ERP systems for a comprehensive customer profile and actionable information.

Strengths

Zenvia offers a broad portfolio of APIs, CPaaS, and SaaS solutions. In the past two to three years, the company has been focusing on expanding its SaaS portfolio, for example, Zenvia's Customer Cloud offering, which consists of use cases such as marketing omni-channel campaigns, sales conversions, and customer services as key go-to-market solutions. Small businesses and midmarket companies used to make up most of the revenue, but with its compelling enterprise-grade SaaS suite, it has grown its enterprise client base considerably. The combination of SaaS and CPaaS stack enables the vendor to facilitate an integrated and automated customer journey for its customers. Apart from its B2C go-to-market strategy, B2B2C is becoming a focal part of the business, whereby its focus on wholesale plays an important part. Despite stiff competition in the market, Zenvia shows that it is executing well on its strategy in balancing growth and profitability since its IPO. Results show double-digit growth, a result of SaaS expansion in the SMB segment and higher CPaaS volumes. The company has also branched out into neighboring regional countries, such as Argentina.

Challenges

Zenvia is a well-established brand in Brazil. And although growth is healthy, it is of course off a relatively small base. As such, Zenvia is seeking to focus less on CPaaS and more on the SaaS segment going forward. It extended focus on wholesale and on telcos with its Open Gateway network API-enabled SIM swap offering is certainly a step in the right direction.

Consider Zenvia When

Consider Zenvia if you are a company that is seeking to benefit from digital customer experience tools to enhance and personalize customer engagement with your customer, build effective marketing campaigns, and increase sales conversion. Zenvia provides an attractive offering for SMB but increasingly also for the large enterprise segment and includes an effective road map for omni-channel engagement. In the LATAM region, it has a high degree of local regulations and compliance expertise.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to

provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

This IDC MarketScape assesses providers categorized as communications platform-as-a-service (CPaaS) vendors. CPaaS facilitates cloud-based hosting and management of application programming interfaces (APIs). CPaaS providers offer communications APIs, which are routines, and tools that simplify the programming process required to create and implement real-time communications solutions. APIs can be embedded into enterprise applications, including mobile apps and web platforms, that enhance and automate business process applications. CPaaS offers developers APIs in multiple coding languages that can work in the language of their choice (Node.js, Ruby, PHP, .NET, Java, Python, Perl, and ColdFusion), prototype in hours, and stand up a production run in days.

CPaaS allows developers to test/dev software in a cloud environment that can then be integrated into a diverse range of third-party software and platforms, including CCaaS, SaaS, UCaaS, and other platforms to improve both internal communications and enhance external customer engagement. Usage is generally based on the cloud model, with no up-front hardware and software costs, no contracts or commitments, and no subscription fees. Payment is based on micro billing tied to actual usage.

Over the past two years, CPaaS providers have expanded coverage facilitating various low-code/no-code tools, integrating access to customer data via their own CDP or external CDP, and other solutions aimed at further simplifying customer engagement. Most CPaaS providers also provide AI tools, primarily integrating with external AI models to help customers refine marketing and engagement and facilitating commercial transactions.

Strategies and Capabilities Criteria

Tables 1 and 2 include market-specific definitions and weights specifically tailored for CPaaS providers. These were used to assess each vendor's performance and determine their specific place on the IDC MarketScape chart. Table 1 shows the definitions and weighting criteria used to evaluate CPaaS providers' strategies. Table 2 shows the definitions and weighting criteria used to evaluate CPaaS providers' capabilities

TABLE 1

Key Strategy Measures for Success: Worldwide Communications Platform as a Service

Strategies Criteria	Definition	Weight (%)
Functionality or offering strategy	Agile portfolio evolution in AI, SaaS, and network APIs	20.00
Financial/funding	History of steady growth, average or above sector earnings, and predictable funding	10.00
GTM and channel strategy	The vendor demonstrates a GTM strategy to expand the breadth, reach, and quality of channel and developers/co-creation	15.00
Customer delivery	Demonstrating dynamic vision for growth of a broad array of customers segments, ease of use/access points, support, and services	10.00
Growth	Vision for growing the business (regions and GTM) and goals for achieving positive margins and future growth	15.00
Innovation	Differentiation in innovation plans, speed, and iterations of new applications and solutions	10.00
R&D pace/productivity	Structure to facilitate new technologies to drive innovation, willingness to invest in R&D, and pace of innovation/new features	10.00
Partner ecosystem	Vision for building/attracting (new) best-of-breed IT/(vertical) industry partners to assimilate a broad range of integrations	10.00
Total		100.00

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Worldwide Communications Platform as a Service

Capabilities Criteria	Definition	Weight
Functionality or offering capabilities	Portfolio diversity in APIs (e.g., voice, messaging, video, security, email)	20.00
Customer service offering	Ease of use — tools, simplified app creation, and support for skilled and casual developers	10.00
Customer service delivery	Documentation, onboarding, tiered support offerings, and regional compliance support	5.00
Portfolio benefits	Tangible ROI and KPIs of platform solutions	15.00
Range of services	Enhanced solutions that go beyond basic APIs; examples include CDP, contact centers, professional services, and AI tools	20.00
Platform integrations	Ease of integrating with legacy software, CCaaS, UCaaS, CRM integrations, and payments	10.00
GTM and channel partner ecosystem	Scope of internal sales channel/(innovative) marketing, channel partnership, and developer focus	10.00
Network platform	Global footprint, number of capabilities, network licenses, and geographic support	10.00
Total		100.00

Source: IDC, 2025

LEARN MORE

Related Research

- *RCS Will Provide Momentum to CPaaS Messaging in 2025* (IDC #lCUS53055524, January 2025)
- *European Communications-Platform-as-a-Service Forecast, 2024-2028* (IDC #EUR152836224, December 2024)
- *IDC's Worldwide Communications Platform as a Service Survey, 2024: Usage Patterns* (IDC #US52784924, December 2024)

- *IDC FutureScape: Worldwide Enterprise Connectivity 2025 Predictions* (IDC #US52633824, October 2024)

Synopsis

This IDC study provides an assessment of communications platform-as-a-service (CPaaS) market through the IDC MarketScape model.

"The communications-platform-as-a-service market is evolving rapidly," according to Courtney Munroe, research vice president, Worldwide Telecommunications Research at IDC. "The CPaaS segment is fragmenting as companies seek to redefine and consolidate operations and streamline strategies to sharpen differentiation. Enterprises are demanding tangible business outcomes, and over the next year, CPaaS providers will facilitate AI-driven solutions to facilitate enhanced customer engagement solutions."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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