



GLOBAL CCAAS MARKET 2025-2029

Competitor Leaderboard

Prepared for Tata Communications



1.1 Why Read This Report

This section provides an overview of the product offerings of leading Contact Centre-as-a-Service (CCaaS) vendors. This does not consist of an exhaustive list of CCaaS vendors operating in this market but, rather, a selection of 18 CCaaS vendors that Juniper Research judges to be leading the market due to a range of factors discussed below.

The CCaaS market is evolving; the integration of AI into agent and customer experience is changing the dynamic of the market to focusing on high customer engagement and satisfaction. This has created a requirement for advanced customer relationship management (CRM) tools and dashboards for omnichannel capabilities, to enable enterprises to manage their customer communications in a single interface. With most CCaaS vendors having deployed such features within their platforms, the key focus for vendors must be on differentiating their experience platforms from other vendors.

Juniper Research is a Europe-based provider of business intelligence. We specialise in providing high-quality data and fully researched analysis to manufacturers, financiers, developers, and service/content providers across the communications sector. Juniper Research is fully independent and provides unbiased and reliable assessments of markets, technologies, and industry players. Our team is drawn from experienced senior managers with proven track records in each of their specialist fields.

Key CCaaS Market Takeaways

Generative AI and Agentic AI Crucial to Meeting Demand for Enhanced Customer Experience

Juniper Research has identified generative AI and agentic AI as crucial to meeting the rising demand for enhanced customer experience in contact centre communications. Generative AI has been integrated into chatbots to widen their capabilities to respond to customer queries. Additionally, it has been deployed in agent support to provide real-time assistance and recommendations to agents and ensure compliance is met during interactions.

Agentic AI has enabled CCaaS capabilities to be more predictive; anticipating factors such as spikes in traffic and trends in contact reasons. This provides enterprises with the data required to prepare their contact centre accordingly, based on required agent levels and common enquiries.

These developments in AI are making customer interactions more seamless and of higher quality; owing to better equipped contact centres, and agents having the resources to solve issues effectively and quickly. This creates smoother customer interactions, in turn enhancing customer satisfaction.

Customer Experience Platforms to be the Future of CCaaS

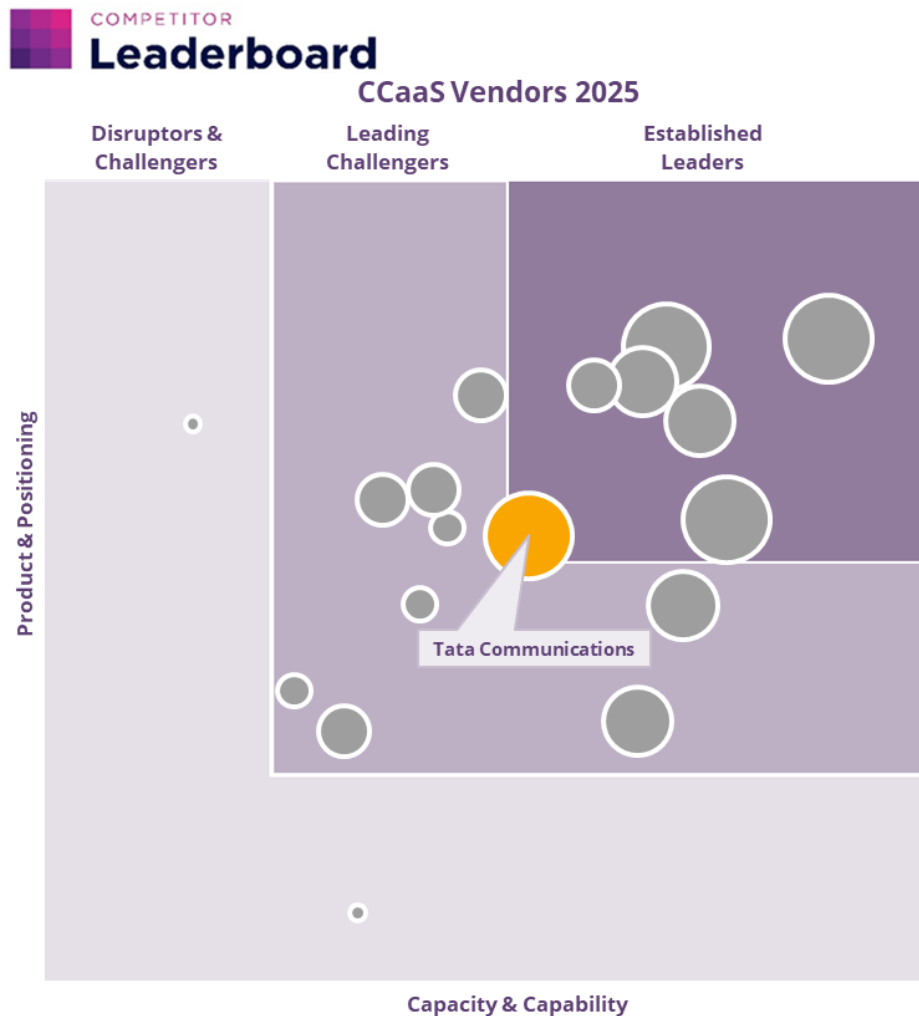
Juniper Research has noted a key shift in the dynamic of the CCaaS market, with the market switching from basic call centres to conversational, high-quality customer experiences. To meet this changing demand of communications platforms, Customer Experience-as-a-Service (CXaaS) platforms, which unify solutions such as CCaaS, Communications Platform-as-a-Service (CPaaS) and Software as-a-Service (SaaS), are increasingly being demanded by enterprises to create seamless interactions between contact centre capabilities and wider business functions.

This further contributes to improving both customer and agent experiences, which is in high demand in the current market. Unifying these solutions will particularly benefit contact centre services, due to the ability to utilise the expertise of other departments within a business, seamlessly, to support a customer. Additionally, this unification enables seamless operations for the business, with controlling solutions being in one place, rather than outsourcing solutions from multiple vendors.

To capitalise on this market shift, vendors must utilise application programming interfaces (APIs) to integrate their solutions into a single, unified solution. This must include ensuring that features such as customer data platforms (CDPs) remain seamlessly integrated into CCaaS platforms, despite the wider integration with other solutions such as CPaaS.



Figure 1: Juniper Research Competitor Leaderboard: CCaaS Vendors



Source: Juniper Research

TATA COMMUNICATIONS

Juniper Research has ranked Tata Communications as an Established Leader in CCaaS, as scored in the Juniper Research Leaderboard.

Tata Communications offers a comprehensive CCaaS portfolio, with its Customer Interaction Suite providing a strong basis for this. This solution provides the foundations for two-way messaging; utilising conversational AI and APIs.

Tata Communications' substantial investment and innovation into both customer and agent experience within CCaaS will position it well in the CCaaS market over the next few years. Specifically, Tata Communications' INSTACC TX solution's ability to integrate into a single dashboard is critical, as CCaaS solutions and wider customer experience platforms become more complex for agents to manage.

Furthermore, Tata Communications' integration of AI into its CCaaS platforms is crucial to its future prospects, with enterprises and customers demanding increased automation and higher quality experiences within CCaaS, which AI can facilitate. This has been achieved through Tata Communications' use of conversational AI, as well as AI being utilised in solutions such as real-time agent assist. These solutions are crucial in capitalising on the future CCaaS market, due to the overarching trend of enterprises demanding automation in CCaaS and high-quality experiences.



1.2 Tata Communications



Table 2: Juniper Research Competitor Leaderboard Heatmap: Tata Communications

	Capacity & Capability					Product & Positioning					Market Presence
	Experience in the CCaaS Sector	Financial Performance in the CCaaS Sector	Size of Operations in the CCaaS Sector	Marketing & Branding Strength	Extent & Breadth of Partnerships in the CCaaS Sector	CCaaS Service & Product Offerings	CCaaS Market Coverage	Customer CCaaS Deployments	Innovation in CCaaS Score	Future Business Prospects in the CCaaS Sector	
Tata Communications	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
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Source: Juniper Research

i. Corporate Information

Part of the Tata Group, Tata Communications is a CommTech player that powers its customers’ hyperconnected ecosystems through its digital fabric.

Tata Communications brings together tools, platforms, skills, and expertise to help its customers build agile infrastructure, enable compelling employee and customer experiences, deploy connected solutions, and build cyber resilience. Tata Communications carries around 30% of the world’s Internet routes and connects businesses to 80% of the world’s cloud giants and four out of five mobile subscribers. Its capabilities are underpinned by its global network, the world’s largest wholly owned subsea fibre backbone, and a Tier-1 IP network with more than 600 operator connections in 190 plus countries and territories worldwide.

The leadership team at Tata Communications includes Amur Swaminathan Lakshminarayanan (Managing Director and CEO), Bhaskar Gorti (EVP, Cloud & Cybersecurity Services), Genius Wong (EVP, Core and Next-Gen Connectivity Services, and CTO), Kabir Ahmed Shakir (CFO), Natarajan Sivasamban (EVP and Head of Operations), Sumeet Walia (EVP, Chief Sales & Marketing Officer), Tri Pham (EVP, Corporate Strategy Head), and Troy Reynolds (Chief Legal & Compliance Officer).



Table 3: Tata Communications' Select Financial Information (₹ in crore), FY 2022-23 & FY 2023-24

	FY 2023-24	FY 2022-23
Gross Revenue	₹20,969	₹17,838
Net Revenue	₹7,991	₹7236.28

Source: Tata Communications' Integrated Annual Report

Tata Communications completed the acquisition of Kaleyra, in October 2023, for \$100 million. This acquisition has allowed Tata Communications to leverage Kaleyra's expertise in technology, engineering, and research and development, including its CPaaS solutions. It is also helping to add new points of presence in the US, Latin America, the UK, Italy, the Middle East, and Asia Pacific.

Tata Communications' Customer Interaction Suite is part of its Integration Fabric, which enables contextual, seamless and personalised customer interactions for enterprises.

ii. Geographical Spread

Within North America, Tata Communications has four offices in the US, as well as one office in Montreal, Canada.

In Europe, Tata Communications has offices based in Germany, the UK, Spain, Russia, France, Netherlands, Norway, and Poland. It also has six offices in India, including its Mumbai headquarters.

Tata Communications also has a vast system of networks which provide coverage across the Americas, Europe, the Middle East and Africa, Asia Pacific, as well as India and neighbouring countries; allowing it to provide services around the world.

In Asia Pacific, Tata Communications operates out of Hong Kong, Malaysia, Singapore, and Australia. It also has an office in Dubai, UAE.

iii. Key Clients & Strategic Partnerships

Tata Communications' customer portfolio spans a variety of industries, including automotive, financial services, construction, consulting, eCommerce, education, energy, finance, government, healthcare, holdings, utilities, information technology (IT) and IT-enabled services, legal, manufacturing, media and entertainment, pharmaceutical, real estate, retail, services, sports and telecommunications.

An example of one of Tata Communications' customers is Isansys, a digital healthcare provider. Isansys leverages WhatsApp's API with Tata Communications' Kaleyra to help notify healthcare professionals of patients' early warning signs in real-time.

Tata Communications also empowered India's leading eCommerce company, Flipkart, to grow, with advanced call masking, optimised delivery rates, and high-speed support for seamless customer experiences.

Tata Communications previously formed strategic partnerships with AWS, Cisco, Google Cloud, Microsoft, MotoGP™, SailGP, and Singapore Airlines.

Tata Communications has also launched its AI cloud infrastructure, powered by NVIDIA's graphics processing units (GPUs). The first phase, launched at the end of 2024, resulted in one of India's largest cloud-based supercomputers utilising NVIDIA Hopper GPUs. Through this collaboration, Tata Communications strengthened its position as a key enabler of AI-driven solutions across sectors such as manufacturing, healthcare, retail, and banking and financial services.

In February 2024, Tata Communications announced a partnership with Microsoft to provide flexibility in collaboration and connectivity on Microsoft Teams for enterprises in India. Its GlobalRapid platform will enable Indian enterprise users and multinationals with local presence to make and receive Public Switched Telephone Network (PSTN) voice calls on any Teams device, anywhere across the globe, using the Operator Connect platform.

iv. High-level View of Offerings

Tata Communications offers its Customer Interaction Suite which enables brands to hyper-personalise customer interactions throughout the entire lifecycle journey. It is



scalable, omnichannel and tailored to local markets. It takes the focus from communication enablement to platform-based bespoke business outcomes.

Tata Communications' CCaaS offering, InstaCC™, services enterprises across the globe. The InstaCC™ ecosystem targets customer service, telemarketing, collections, and Workforce Engagement Management (WEM).

a) Tata Communications' Customer Interaction Suite (CIS)

Tata Communications' CIS makes it possible for enterprises to engage their customers in two-way conversations; messaging works both ways (business to customer and customer to business), and businesses working with Kaleyra's APIs are able to manage both sent and received messages. Tata Communications' CIS solutions include SMS, MMS, rich communications services (RCS), email, push notifications, one time password (OTP), and video, as well as:

- **Conversational AI** – this allows for automation of customer engagement flows with AI-based chatbots. It enables enterprises to scale their personalised conversations with customers.
- **Programmable Voice** – Tata Communications offers voice APIs for inbound and outbound calling, Interactive Voice Response (IVR), and call masking use cases.
- **WhatsApp Business API** – a Meta business solutions provider (BSP) partner for WhatsApp Business platform since 2019, Kaleyra was awarded Best Cloud API partner of the year in 2023. Striving for continuous innovation, Kaleyra provides WhatsApp Pay features and is currently a Beta partner for WhatsApp Calling. WhatsApp Business APIs can be used to provide notifications and customer service experiences. This can include image sharing, electronic tickets, video tutorials, audio files, QR codes, the position of the closest store, and any sort of document.

Enterprises can also leverage interactive buttons, such as call-to-actions and quick-reply buttons, within WhatsApp to obtain immediate responses from their audience.

b) Tata Communications INSTACC™

InstaCC™ is a CCaaS solution designed to deliver flexible, scalable, and compliant customer engagement. It supports deployment across private, public, or hybrid cloud environments, with tailored customisation, seamless integration, and continuous real-time monitoring of essential contact centre key performance indicators (KPIs). InstaCC™ ensures adherence to global security and regulatory compliance standards, while offering an end-to-end managed approach that drives faster time-to-market, enhanced accountability, and a unified, connected experience for both customers and agents.

InstaCC™ consists of the following solutions:

- **InstaCC™ Cloud** – a global, carrier grade multi-tenant, cloud contact centre solution designed to enhance customer and employee experiences. Flexible, scalable, and compliant, it accelerates time-to-market and simplifies operations. InstaCC™ Cloud seamlessly integrates with Microsoft Teams, leading CRMs, and other enterprise platforms; empowering businesses to unify communications and workflows. Tata Communications serves as a single strategic partner; bringing together network, voice, and front-end contact centre technology to deliver seamless, omnichannel customer engagement.
- **InstaCC™ TX (Total Experience)** – an AI-powered, platform-agnostic solution powered by Kaleyra AI that unifies contact centre systems across cloud, on-premises, and hybrid environments. It integrates multiple automatic call distributions (ACDs) into a single agent desktop; eliminating the need for multiple tabs or logins. With drag-and-drop functionality, real-time agent assist, sentiment analysis, and summary analysis, InstaCC™ TX helps agents solve customer problems quickly; reducing brand churn and improving customer Net Promoter Scores (NPS). Additionally, it ensures a smooth, disruption-free migration experience.
- **InstaCC™ Assure** – a managed services offering that provides a strategic approach to transforming how enterprises operate and utilise their contact centres; enhancing customer interaction and driving higher NPS. By integrating AI and automation, Tata is building tools-driven managed services that streamline operations, reduce manual intervention, and enable more-efficient and scalable



services for operating contact centre platforms. This empowers businesses to deliver seamless, intelligent customer experiences, while optimising performance and boosting customer satisfaction.

Tata Communications' partner hosted cloud contact centre solutions include Amazon Connect by Tata Communications, Webex Contact Centre powered by Tata Communications, and Genesys Cloud CX™ powered by Tata Communications.

c) Tata Communications Vayu AI Cloud Platform

This solution features large-scale GPU computing, Large Language Model Operations (LLMOps), and serverless functions that enable enterprises to build, train, and deploy models at scale with maximum efficiency. There are two key aspects to this solution:

- GPU-as-a-Service (GPUaaS) – this provides high-performance GPUs for AI and Machine Learning (ML) workloads, with comprehensive security with encryption features.
- AI studio – this enables enterprises to accelerate AI innovation with integrated cloud solutions. With data cleaning and integration for AI-ready datasets, it also enhances AI with context-aware model capabilities.

This fully managed AI platform with multi-cloud contact consists of sovereign infrastructure and cloud-to-edge continuum to differentiate itself from other service providers.

1.3 Juniper Research Leaderboard Assessment Methodology

Juniper Research provides details about 18 CCaaS solution providers. To qualify for the Leaderboard, companies must be involved in the direct provision of CCaaS solutions. The companies included here have developed specific expertise in the space, although some embarked on the route earlier than others and therefore have a wider customer base or geographical reach. Additionally, it must be noted that many service providers here have developed CCaaS solutions alongside other services which comprise a higher proportion of the company's revenue.

This research covers a significant number of vendors; however, we cannot guarantee that this list is exhaustive. Juniper Research's approach is to use a standard template to summarise the capability of players offering CCaaS services. This template concludes with our view of the key strengths and strategic development opportunities for each vendor.

We also provide our view of vendor positioning in the CCaaS market using our Juniper Research Leaderboard technique. This technique, which applies quantitative scoring to qualitative information, enables us to assess each vendor's capability and capacity, in addition to its product and position in the market. The resulting Leaderboard exhibits our view of relative vendor positioning.

1.4 Limitations & Interpretations

Our assessment is based on a combination of quantitative measures, where they are available, (such as revenue and numbers of employees), that indicate relative strength, and also of qualitative judgement, based on available market and vendor information as published. In addition, we have added our in-house knowledge from meetings and interviews with a range of industry players. We have also used publicly available information to arrive at a broad, indicative positioning of vendors in this market, on a 'best efforts' basis.

However, we would also caution that our analysis is almost by nature based on incomplete information, and therefore with some elements of this analysis we have

had to be more judgemental than others. For example, with some vendors, less detailed financial information is typically available if they are not publicly listed companies. This is particularly the case when assessing early-stage companies, where a degree of secrecy may be advantageous to avoid other companies replicating elements of the business model or strategy.

We also remind readers that the list of vendors considered is not exhaustive across the entire market but, rather, selective. Juniper Research endeavours to provide accurate information. While information or comment is believed to be correct at the time of publication, Juniper Research cannot accept any responsibility for its completeness or accuracy, the analysis is presented on a 'best efforts' basis.

The Leaderboard compares the positioning of 18 CCaaS vendors based on Juniper Research's scoring of each company against the above criteria that Juniper Research has defined. The Leaderboard is designed to compare how the vendors position themselves in the market based on these criteria. Relative placement in one particular unit of the Leaderboard does not imply that any one vendor is necessarily better placed than others. For example, one vendor's objectives will be different from the next and the vendor may be very successfully fulfilling them without being placed in the top right box of the Leaderboard, which is the traditional location for the leading players.

Therefore, for avoidance of any doubt in interpreting the Leaderboard, we are not suggesting that any single cell in the Leaderboard implies in any way that a group of vendors is more advantageously positioned than another group, just differently positioned. We additionally would draw the reader's attention to the fact that vendors are listed alphabetically in a unit of the Leaderboard and not ranked in any way in a cell of the Leaderboard.

The Leaderboard is also valid at a specific point in time, April 2025. It does not indicate how we expect positioning to change in future, or indeed in which direction we believe that the vendors are moving. We caution against companies taking any decisions based on this analysis, it is merely intended as an analytical summary by Juniper Research as an independent third party.

Table 4: Juniper Research Competitor Leaderboard: Scoring Criteria

Category	Scoring Criteria	Relevant Information
Capability & Capacity	Experience in the CCaaS Sector	Here, Juniper Research has evaluated each company's experience in the CCaaS market and has considered the length of time each vendor has offered a CCaaS solution.
	Financial Performance in the CCaaS Sector	This factor evaluates the overall financial performance of the vendor by evaluating its disclosed revenue, investments, and acquisition values.
	Size of Operations in the CCaaS Sector	A measure of the scale of activity for each company in the CCaaS market sector. Here, Juniper Research considered the overall geographical penetration of the vendor based on the number of physical locations from which the vendor operates.
	Marketing & Branding Strength	In this section, Juniper Research evaluates the strength of the vendor's brand recognition within the CCaaS sector.
	Extent & Breadth of Partnerships in the CCaaS Sector	Here, Juniper Research evaluates the total number of disclosed partnerships and the breadth of these partnerships within the CCaaS market sector. Where information is not available, Juniper Research has considered the level of customers and interactions handled by each company to estimate the number of partnerships required for these services.
Product & Positioning	CCaaS Service & Product Offerings	Here, Juniper Research has given a weighted score for technologies that are considered important to facilitate in the CCaaS sector. These features include AI capabilities, omnichannel, agent assist, intelligent routing, virtual assistants, and any other features such as live reporting and insights.
	CCaaS Market Coverage	In this criterion, Juniper Research has provided a weighted scoring of products offered within the CCaaS market, as well as the range of industries in which these products are offered.
	Customer CCaaS Deployments	The extent of the vendor's customer base, measured in both the number of customers and the scale of those customers' businesses.
	Innovation in CCaaS Score	Score of Juniper Research's opinion of the company's innovation or plans for innovation.
	Future Business Prospects in the CCaaS Sector	Score of Juniper Research's opinion of the company's future prospects in the market.
Market Presence	Market Presence	Here, Juniper Research assesses the total market presence of each vendor, taking into consideration the size of the company and its impact on the global CCaaS market.

Source: Juniper Research

About Tata Communications



Tata Communications is a leading digital ecosystem provider that powers today's fast-growing digital economy. The company enables the digital transformation of enterprises globally, including 300 of the Fortune 500; unlocking opportunities for businesses by enabling borderless growth, boosting product innovation and customer experience, improving productivity and efficiency, building agility, and managing risk.

With its solutions-orientated approach, proven managed service capabilities and cutting-edge infrastructure, Tata Communications drives the next level of intelligence with its cloud, mobility, Internet of Things, collaboration, security and network services.

Tata Communications has been a part of the rich heritage of the Internet in India. Over the last 25 years, enterprise-enabled services have been essential to the adoption of digital services in the country. From utility to transformation, connectivity is an essential fabric of sustenance for the economy.

About Juniper Research



Juniper Research was founded in 2001 by the industry consultant Tony Crabtree, in the midst of the telecoms and dot-com crash. The business was fully incorporated in February 2002 and has since grown to become one of the leading analyst firms in the mobile and digital tech sector.

Juniper Research specialises in identifying and appraising new high-growth market sectors within the digital ecosystem. Market sizing and forecasting are the cornerstones of our offering, together with competitive analysis, strategic assessment and business modelling.

We endeavour to provide independent and impartial analysis of both current and emerging opportunities via a team of dedicated specialists - all knowledgeable, experienced and experts in their field.

Our clients range from mobile operators through to content providers, vendors and financial institutions. Juniper Research's client base spans the globe, with the majority of our clients based in North America, Western Europe and the Far East.