

Omdia Universe: Contact Center as a Service (CCaaS), 2026

Omdia view

The CCaaS industry has evolved from basic cloud-based call routing into comprehensive CXPs. Driven by the demand for digital-first interactions and rapid advances in artificial intelligence (AI), industry leaders are aggressively building AI-native ecosystems to automate support and empower agents.

The industry's current state

Today, omnichannel unification and native generative AI (GenAI) characterize technological sophistication in CCaaS. Modern platforms no longer treat voice, chat, email, and social media as siloed queues; they orchestrate them into a single, continuous, and context-aware customer journey.

Additionally, AI is deeply embedded in the daily workflow. Capabilities like intelligent virtual agents (IVAs), real-time agent-assist tools, and automated call summarization are now standard. However, there remains a disconnect between the excitement surrounding AI and scaled execution.

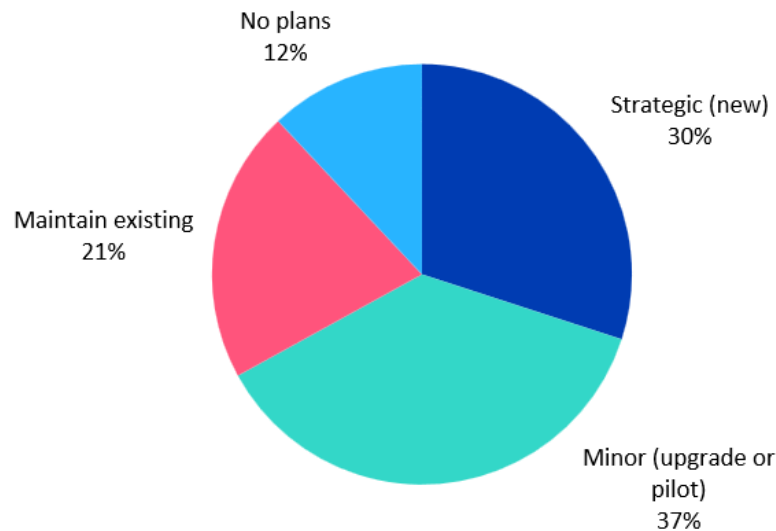
Where it is going and why

The CCaaS industry is rapidly transitioning from assisted AI to highly autonomous, agentic AI. In fact, according to Omdia's *IT Enterprise Insights Survey*, 67% of global contact center executives stated they plan to increase their investments in agentic AI in 2026, with 30% making a strategic (new) investment and 37% making a minor (upgrade or pilot) investment (see **Figure 2**).

Moving forward, the goal is “zero-touch” resolution, where AI handles the full complexity of routine and moderately complex customer interactions without ever needing human escalation. Furthermore, CCaaS solutions are converging with customer relationship management (CRM), unified communications as a service (UCaaS), and communications platform as a service (CPaaS) technologies.

Figure 2: 67% of contact centers plan to increase their agentic AI investments in 2026

2026 investment plans for agentic AI in contact centers



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Source: Omdia

Why is it going there? The answer lies in economics and evolving consumer expectations. Businesses face relentless pressure to reduce operational costs and maximize efficiency. Simultaneously, modern buyers demand immediate, conversational, and personalized support directly within mobile apps and messaging channels. By automating basic tasks, businesses free up human agents to handle high-value, high-empathy, and complex issues, thereby improving both customer and employee experiences (CXs and EXs).

Recommendations for buyers and CCaaS vendors

Given the speed of change, buyers should approach CCaaS adoption not just as a technology upgrade, but as a strategic business transformation. They should avoid buying unproven, disconnected AI add-ons. Instead, they should look for unified, AI-native platforms that natively integrate with their existing CRM and back-office systems. They should also ensure the CCaaS vendor has proven security, compliance, and global availability suitable for their specific vertical.

With many competitors in the CCaaS space, standing out requires more than just offering standard multi-tenant telephony. Vendors should broaden their horizons and act as strategic infrastructure partners rather than mere pipes. To this end, CCaaS vendors should prioritize open AI and orchestration. Rather than locking clients into proprietary large language models (LLMs), vendors should build integration layers that enable brands to dynamically route traffic across multiple AI providers based on cost, performance, and complexity. Vendors should also focus on compliance and security. Many enterprises hold back from adopting CCaaS because of privacy and governance concerns. CCaaS providers should aggressively accommodate strict security standards, especially for regulated industries like healthcare and finance. Additionally, CCaaS vendors should embrace transparent pricing. As usage of AI and digital channels grows, vendors should provide predictable, transparent pricing models that align with tangible business outcomes rather than just seat-based licensing.

The future of CCaaS lies in uniting data, intelligence, and human empathy into a single, cohesive customer journey. Vendors and their enterprise clients that successfully navigate this shift will define the next generation of enterprise software.

Analyzing the CCaaS universe

Market definition

The CCaaS market is defined as a cloud-based software model that replaces on-premises telephony hardware with comprehensive, subscription-based applications to manage customer service and EXs holistically.

A modern CCaaS solution is an agile, cloud native platform that orchestrates seamless omnichannel interactions and automates workflows to elevate customer satisfaction continuously.

When evaluating CCaaS solutions, enterprise leaders should consider several fundamental capabilities:

- **Cloud-based service:** CCaaS solutions reside in the cloud, eliminating the need for businesses to invest in and maintain on-premises hardware and software.
- **Routing and omnichannel interactions:** The core ability to manage and intelligently route multichannel conversations—including voice, email, chat, SMS, and social media—ensuring customers connect with the most appropriate live or virtual agent.
- **AI and automation:** Native AI technologies like GenAI, natural language processing (NLP), real-time call transcription, sentiment analysis, and IVAs help offload routine inquiries and empower live agents.
- **Workforce engagement management (WEM):** This includes tools to enhance the EX through workforce scheduling, quality assurance, performance monitoring, real-time coaching, and knowledge management.
- **Application and native communication connectivity:** Unified environments that provide reliable voice access alongside prebuilt application programming interface (API) integrations with your CRM platform.
- **Unified customer data:** This eliminates information silos by stitching together interactions and profiles from all channels into a single, real-time view, empowering teams and automated systems to deliver highly personalized experiences and meaningful conversations.
- **Process orchestration and analytics:** Dashboards and reporting tools that allow supervisors to monitor performance in real-time, analyze customer and employee insights, and manage complex, multi-touch customer journeys.
- **Subscription-based model:** CCaaS is typically offered as a subscription service, with businesses paying a recurring fee for access to the platform and its features.

Market dynamics

Big AI-deas: A new vision for customer service

The modernization of CX, moving from on-premises to cloud-based architectures to reduce costs and gain omnichannel agility, drives the CCaaS market. An overwhelming surge in AI is accelerating this transition, evolving past basic conversational chatbots. Today's platforms integrate robust conversational AI to interact with customers in a more human-like way, GenAI to draft communications and summarize interactions, and agentic AI, which involves autonomous systems that can perceive, reason, act, and learn to accomplish complex, multi-step tasks without continuous human intervention. Systems powered by agentic AI can autonomously understand intent, reason through complex problems, and execute end-to-end tasks on behalf of users without constant human oversight. Specifically, vendors and their clients are heavily investing in autonomous customer service bots, real-time agent augmentation, journey orchestration, and automated compliance tracking.

Despite these advancements, vendors face significant opportunities and threats. Opportunities include tapping into a large remaining global base of legacy systems waiting to be modernized and driving upsell revenue through AI usage-based or token-based pricing models. Conversely, threats loom large regarding data gravity, third-party AI governance, identity verification, and fraud detection.

Providers that fail to demonstrate strong security controls or cannot seamlessly orchestrate distributed tools face immediate rejection.

Market dynamics have cemented companies like 8x8, Genesys, NiCE, Sprinklr, and Tata Communications Limited (Tata Communications) as market leaders because they successfully address these multifaceted demands. 8x8 successfully integrates unified communications (UC) and contact center features for mid-market and large enterprise users. Genesys leverages its massive scale and joint solutions with CRM giants like Salesforce and ServiceNow to offer secure, tokenized AI capabilities. NiCE remains a global leader by providing robust, native agentic AI alongside deep WFM, while Sprinklr excels as an AI-driven experience management command center. Furthermore, Tata Communications merges flexible, global communications infrastructure with advanced CX intelligence, and M&A moves.

The 2025 CCaaS market experienced a wave of strategic M&A and investment activities, driven by the race to embed conversational and agentic AI directly into contact center platforms. Major market consolidations shifted the focus from third-party integrations to unified, native AI architectures.

8x8 acquired three companies over the past year: In2tel for network reach and global voice infrastructure, SIP Synergy for Microsoft Teams orchestration capabilities, and Maven Labs for platform integration and operational consolidation. Collectively, these acquisitions were presented as efforts to round out a UC architecture rather than bolt together standalone products. 8x8's philosophy is that AI performs best when communications, contact center interactions, messaging, workflow data, and customer context all reside on a common foundation.

NiCE acquired Cognigy. NiCE strengthened its CXone Mpower platform by acquiring the enterprise conversational and agentic AI company Cognigy for approximately \$955 million. This move signaled a major industry shift away from the "Bring Your Own Agent" model toward fully native, in-house AI architectures.

RingCentral acquired CommunityWFM. RingCentral expanded its homegrown RingCX platform by acquiring AI-first WFM provider CommunityWFM. The buyout enabled RingCentral to offer native, AI-driven scheduling and forecasting to its users.

Thoma Bravo acquired Verint. Private equity firm Thoma Bravo purchased Verint's CX automation business in an all-cash deal valued at \$2 billion. Thoma Bravo announced plans to combine Verint with its existing portfolio company, Calabrio, to build a comprehensive, AI-driven CX platform.

Figure 3: Vendor rankings in the CCaaS Universe

Vendor	Product(s) evaluated
Leader(s)	
8x8	8x8 Contact <u>Center</u>
Cisco	Cisco Webex Contact Center
Genesys	Genesys Cloud CX
<u>NiCE</u>	<u>NiCE CXone</u>
RingCentral	<u>RingCX</u>
Sprinklr	Sprinklr Service
Tata Communications	Tata Communications <u>Kaleyra CCaaS</u>
Challenger(s)	
Avaya	Avaya Infinity®
Dialpad	Dialpad Support
Vonage	Vonage Contact <u>Center</u>
Zoom	Zoom Contact Center
Prospect(s)	
Sharpen Technologies	<u>SharpenCX</u>

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Source: Omdia

Market leaders

CCaaS market leaders stand out by delivering seamless, end-to-end CXs through robust, highly integrated technology ecosystems. They empower enterprises to scale globally and operate efficiently.

These industry heavyweights share several defining characteristics:

- Unlike patchwork legacy solutions, leading platforms offer comprehensive, natively integrated suites spanning routing, workforce engagement, and analytics on a single code base.
- At the heart of their success is the integration of cutting-edge AI, shifting platforms from simple communication tools into intelligent, predictive ecosystems. These advanced AI engines deliver real-time knowledge, conversational self-service, automated intent recognition, and immediate interaction summarization, ensuring highly personalized CXs. What helps them stand out is their ability to innovate, especially in areas such as agentic AI

and intelligent virtual assistants, which autonomously resolve inquiries and augment human capabilities in real-time.

- Additionally, top-tier platforms offer true omnichannel integration. They dismantle data silos to unify voice, chat, social media, and messaging, allowing conversations to flow naturally across every touchpoint without losing historical context.

Market leaders also excel in enterprise orchestration. Rather than merely managing contact center agents, these platforms connect deeply with broader organizational workflows, CRM software, and internal knowledge graphs. This enables dynamic routing and coordinates end-to-end customer journeys.

By combining elastic infrastructure, conversational AI, cross-channel fluidity, and centralized journey management, industry leaders empower businesses to optimize operational costs and enhance agent productivity. Ultimately, the defining characteristic of these market leaders is their ability to transform contact centers from traditional cost centers into strategic, data-driven engines of proactive customer engagement.

Market challengers

Within the CCaaS ecosystem, market challengers—including prominent providers like Avaya, Cisco, Dialpad, RingCentral, Vonage, and Zoom—occupy a distinct strategic position. These vendors possess robust corporate viability, substantial operational scale, and highly reliable core telephony infrastructures. What defines them as challengers is their exceptional ability to execute on high-volume deployments and deliver strong UCaaS integration, creating seamless all-in-one collaboration suites. They effectively serve midmarket and large enterprises by offering competitive pricing, rapid deployment models, and intuitive, user-friendly communication tools that satisfy foundational contact center requirements.

Despite these significant strengths, challengers fall short of the Leader designation because of gaps in advanced, cutting-edge feature sophistication. While leaders offer native, deeply mature AI capabilities, complex WEM suites, and intricate omnichannel orchestration, challengers often rely on third-party partnerships or recent, less-integrated acquisitions to fill these technical voids. Furthermore, their platforms sometimes lack the deep vertical-specific customization, advanced data analytics, and global compliance architectures required by highly complex, multinational enterprises.

Further, CCaaS market challengers represent powerful, reliable alternatives to market leaders, driving industry innovation through aggressive pricing and UCaaS synergy. While they currently lack the native technological depth and sophisticated AI-driven capabilities of the top-tier leaders, their rapid development trajectories and strong execution ensure they remain formidable competitors capable of satisfying most modern enterprise communication needs.

Market prospects

A CCaaS market prospect, such as Sharpen Technologies (Sharpen), is an agile, emerging provider that delivers a robust, cloud native contact center platform, featuring reliable baseline voice and basic digital channel routing, a unified agent desktop, AI services, and foundational WFM tools. While the market prospect does not offer the completeness of vision and technological sophistication of the CCaaS market leaders, its primary strengths lie in its ability to offer a full CCaaS suite or a modular enhancement to an existing legacy system, while also offering price transparency, cost-effectiveness, and a 99.999% uptime service level agreement. These benefits make Sharpen ideal for businesses needing a functional, straightforward, and reliable platform.

Conversely, the market prospect is developing in areas such as deeply embedded native AI, third-party integrations, and scalability. Because the market prospect often requires third-party integrations for advanced capabilities such as workforce optimization (WFO), scaling operations can lead to fragmented analytics and higher operational costs.

Despite these limitations, Sharpen offers a remarkably strong, budget-friendly foundation that is actively evolving. By focusing on API openness, forming ecosystem partnerships, and gradually integrating advanced AI, analytics, and enterprise orchestration capabilities, Sharpen is continuously adapting to meet the growing demands of the modern contact center.

Opportunities

The rapid convergence of agentic AI and enterprise orchestration offers a powerful growth engine for CCaaS vendors, allowing them to transcend traditional telecom boundaries and evolve into core AI engagement hubs. Rather than just offering basic copilots or simple FAQ chatbots, modern CCaaS providers can now position themselves as the foundational layer for complex, multi-agent systems. This shift allows vendors to monetize end-to-end task completion through high-margin, consumption-based pricing models while anchoring themselves deeply within enterprise systems of record. By embedding advanced multi-agent orchestration tools directly into their platforms, vendors can expand their total addressable market from localized customer support desks to sweeping, cross-departmental operations.

There is also a significant opportunity for CCaaS vendors to provide an enterprise (or agent) control plane for clients. Unlike an AI orchestration layer, which coordinates dynamic, step-by-step tasks and workflows among multiple AI agents, an enterprise control plane wraps around the orchestration layer to enforce security, governance, and compliance at every boundary throughout the system.

For enterprise clients, these developments unlock unprecedented operational efficiency and an entirely reimaged CX. By transitioning from rigid, menu-driven interactive voice response (IVR) systems to goal-oriented agentic networks, companies can automate multi-step, complex workflows—such as real-time billing disputes or fraud-checked account updates—from start to finish. This shift is projected to resolve most common customer service issues autonomously and significantly slash support costs. Enterprise orchestration layers (such as the 8x8 AI Orchestrator, Genesys Cloud, NiCE CXone Mpower, Sprinklr's AI+ Studio, and Tata Communications's ThreadSpan) act as a digital maestro to synchronize these individual AI agents securely across CRM systems, WFM software, and back-office tools. This connection provides a unified, audit-compliant framework that handles the crux of support issues while gracefully escalating high-value, highly complex, and emotionally charged cases to human agents.

Threats

Investors are punishing publicly traded traditional software as a service (SaaS) stocks because of fears that AI agents will obliterate per-seat business models. CCaaS vendors should introduce new monetization plans by complementing traditional per-user, per-month licensing with value-based pricing that charges customers based on resolution rates, first-contact efficiency, or the total number of interactions successfully resolved by autonomous agents.

CCaaS vendors should also consider reframing their value proposition so they are not merely perceived as call routing utilities or pipe providers, but as AI-native CX orchestrators. To do this, they should highlight metrics that AI improves, such as cost-to-serve reduction, zero-hold times, and elevated customer retention.

Additionally, CCaaS vendors should publish AI ROI data to demonstrate how AI benefits enterprises and their customers. They can show how their AI reduces the need for human toggling (e.g., auto-populating CRM fields and generating case summaries) and scales overall business velocity, rather than simply erasing headcount.

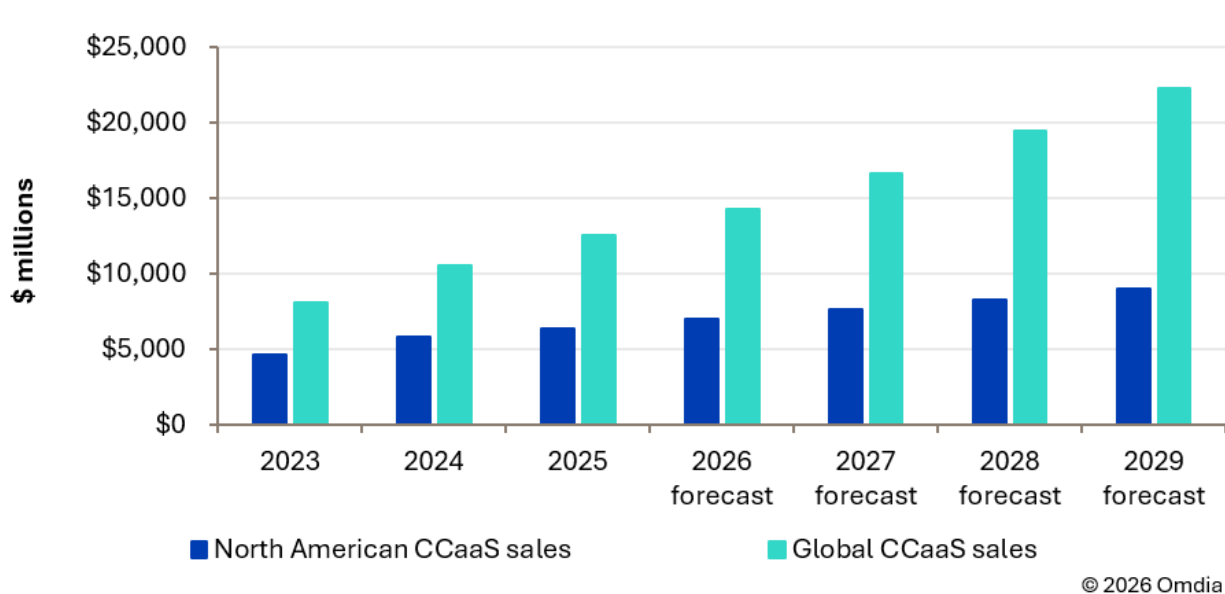
Transitioning to autonomous systems exposes the platform to new risks, such as goal hijacking and prompt injection. To secure customer data, CCaaS platforms should implement strict OAuth flows and identity-bound tokens to stop unauthorized spoofing. Because secure operations in regulated industries like finance and healthcare demand transparency, providers should also bake explainability and human-in-the-loop safety overrides into the core of their systems.

Market outlook

Omdia expects the North American CCaaS market to grow at a healthy rate over the next three years, from nearly \$7 billion by the end of 2026 to \$9 billion by 2029, representing a 9% CAGR (see **Figure 4**). This growth rate, while healthy, is expected to be slightly lower than the previous three-year growth rate (roughly a 14% CAGR from 2023 to 2026), which was largely fueled by the COVID-19 pandemic and post-COVID-19 pandemic lift-and-shift mass migrations to the cloud. However, growth in North America over the next three years will likely come from AI-driven automation, platform consolidation, enterprise orchestration, and tighter security.

The global CCaaS market is projected to grow at a faster rate (16% CAGR), from \$14.2 billion to \$22.3 billion from 2026 to 2029 (see **Figure 4**). Global CCaaS market growth rates over the next three years are expected to outpace North America because North America represents a more developed market where a large percentage of enterprises have already transitioned to the cloud, slightly lowering the near-term growth potential.

Figure 4: North American and global CCaaS sales, 2023—29



Source: Omdia

The deployment of generative and agentic AI solutions will accelerate investments in advanced contact center technologies. By the end of the forecast period, Omdia expects generative and agentic

AI technologies to be much more pervasive as centers leverage these solutions to automate various processes, such as writing post-call notes, interacting with customers via conversational chatbots, delivering agent-assistance capabilities to optimize live customer support, and automating end-to-end interdepartmental workflows. As these technologies help enterprises automate routine customer support tasks, highly skilled agents will be needed to handle more complex and high-value interactions.

Vendor analysis

Tata Communications Limited (Omdia recommendation: Leader)

Tata Communications should appear on your shortlist if:

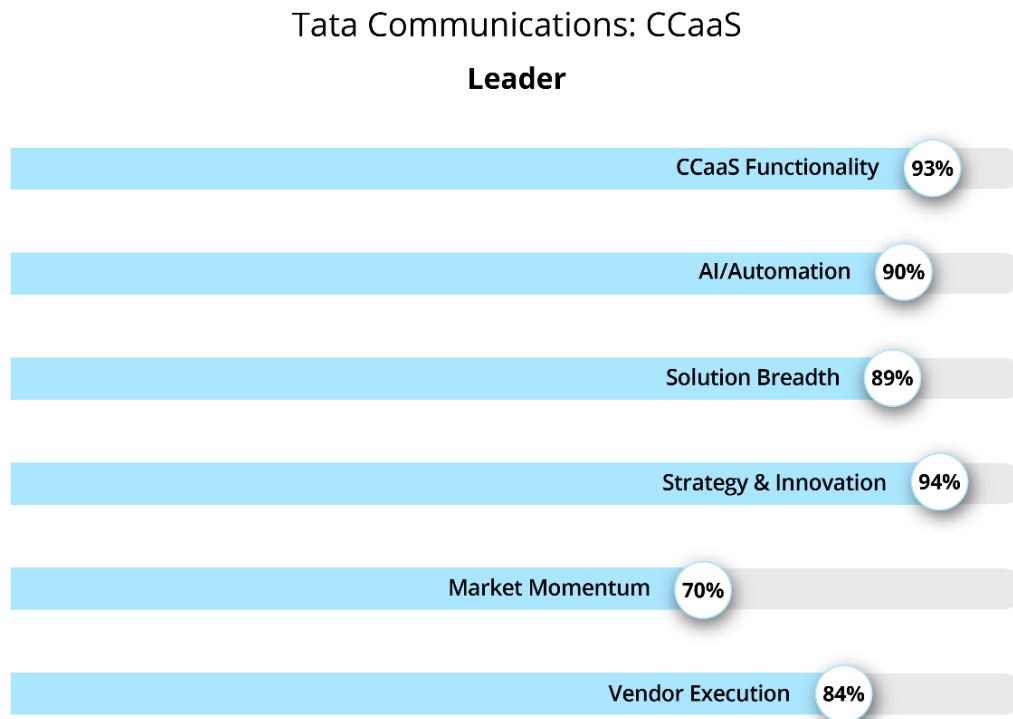
- You want a geo-redundant infrastructure with committed quality of service, integrated SLAs, and 24x7 network operating centers.
- You seek to build, test, and deploy conversational AI agents without standing up new infrastructure or adding extra vendors.
- You want to seamlessly extend the interactions on voice AI agents to be transferred to a human agent, based on the context and the sentiment of the call.

Overview

Tata Communications's CCaaS and CX portfolio has evolved significantly over the past five years, transforming from traditional contact center solutions to a comprehensive cloud-based platform. The company's October 2023 acquisition of Kaleyra, an established mobile communications and CPaaS provider, supercharged its CCaaS solution. By integrating Kaleyra's robust APIs and messaging technology with Tata Communications's Tier-1 global network—which routes roughly 30% of the world's internet traffic—the platform evolved into what Tata Communications calls Customer Interaction Suite. Today, the suite offers seamless CPaaS, CCaaS, and CX, removing the operational silos that frequently frustrate agents and customers.

For Tata Communications's Kaleyra CCaaS offering, the key market opportunities lie in AI-driven automation, real-time personalization, and cloud native CX solutions, enabling businesses to capitalize on emerging trends like agentic AI, conversational intelligence, and seamless multi-channel engagement.

Tata Communications expects its latest investment in Commotion to help the company's customers realize these opportunities. Commotion is the next-generation voice AI and CXP designed to deliver contextual, intelligent, and hyper-personalized engagement across every digital and physical touchpoint. With advanced CPaaS, CCaaS, and AI capabilities—including a composable customer data platform (CDP), agentic AI, journey orchestration, intelligent analytics, and global compliance expertise—the Customer Interaction Suite enables enterprises to deliver real-time, context-rich interactions across messaging, voice, email, customer service, and more. With more than 200 pretrained AI agents and native CRM, commerce, and analytics integrations, Tata Communications drives measurable outcomes like increased conversions, lower service costs, and improved retention.

Figure 14: Omdia Universe ratings—Tata Communications Limited


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Source: Omdia

Strengths

- Through the convergence of CCaaS, CPaaS, and agentic AI, the platform unifies complex contact center technologies, different customer applications, CRM solutions, and multiple communication channels into a single agent engagement console called Kaleyra TX Hub, providing enterprises and agents with a full view of the customer through one window.
- Thanks to the integration of Commotion, the platform heavily uses GenAI and conversational assistants. It features no-code conversational builders, automated WhatsApp template generators, and natural language (NL) data reporting, enabling business users to launch AI agents without any coding knowledge.
- Powered by Tata Communications's massive subsea fiber backbone, the company provides carrier-grade global reach and reliability, connecting to more than 400 mobile network operators globally and guaranteeing up to 99.99% uptime.
- Built with enterprise-grade compliance, the solution features highly secure, compliant frameworks, which makes it beneficial for strictly regulated sectors like global financial services.

- Clients benefit from the composable CDP by unifying fragmented touchpoints into a single 360-degree customer profile. This consolidated data feeds directly into the CCaaS platform, equipping agents with real-time context to deliver hyper-personalized support and resolve issues faster.

Limitations

- The solution does not offer built-in tools to collect real-time or periodic employee feedback. The platform enables data to be fed into clients' employee feedback management systems, allowing for the collection and analysis of real-time employee feedback.
- The platform does not track agent sentiment or burnout using AI or behavioral signals. While the platform can help supervisors identify when agent sentiment is low, it cannot automate break recommendations triggered by an agent's stress levels or low morale.
- Clients that want gamification, recognition, or reward programs for performance must build these capabilities themselves or integrate them into a third-party solution.

Appendix

Methodology

Omdia Universe

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

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

Inclusion criteria

To participate, vendor platforms must provide all 12 key criteria:

- **1. Cloud-hosted architecture:** The platform must be delivered from the cloud (public, private, or hybrid), with no requirement for on-premises hardware or software installation.
- **2. Native telephony capabilities:** The offering needs to include an integrated voice infrastructure over VoIP and/or PSTN networks—session border controllers (SBCs) and softswitches—with carrier-grade voice quality, high availability (99.99%+ uptime), call recording, disaster recovery, and SLAs.
- **3. Multichannel/omnichannel capabilities:** The solution should support inbound/outbound customer communications across voice, web chat, email, SMS, video, and social media, all from a single platform with a unified agent interface.
- **4. Subscription-based pricing model:** The vendor offers pay-as-you-go or monthly per-agent pricing with minimal upfront investment.
- **5. Interactive voice response (IVR) and self-service capabilities:** These include configurable IVR systems and AI-powered virtual agents to automate routine tasks.
- **6. Intelligent routing and queuing:** The platform routes customers to the most appropriate agents based on set criteria.
- **7. WEM tools:** The platform includes tools for agent scheduling, time and attendance tracking, quality management, performance analytics, and coaching.
- **8. Analytics and reporting:** Real-time dashboards and historical reporting to monitor key performance indicators (KPIs) like call volume, agent performance, customer behavior, etc.
- **9. AI and automation:** The solution includes automated self-service capabilities (e.g., chatbots, voicebots, and intelligent routing) and agent-assisted support (e.g., sentiment analysis, next-best-action, and call summarizations).
- **10. CRM and third-party integrations:** These include seamless integration with leading CRM systems and other enterprise tools.
- **11. Security, compliance, and data protection and privacy:** These involve compliance with industry standards such as the Payment Card Industry Data Security Standard (PCI-DSS), Health Insurance Portability and Accountability Act (HIPAA) in the US, General Data Protection Regulation (GDPR), and Service Organization Control 2 (SOC 2), as well as features like encryption, access controls, and audit trails.
- **12. High availability and disaster recovery:** These are built-in failover systems and redundant infrastructure.

Further reading

[*Global Contact Center Market Forecast—2024-30*](#) (May 2026)

[*2026 IT Enterprise Insights in the Contact Center Industry*](#) (February 2026)

[*Omdia Universe: Customer Engagement Platforms, 2026*](#) (February 2026)

[*2026 Trends to Watch: Contact Center*](#) (January 2026)

[*CCaaS Annual Tracker and Forecast—CY24*](#) (July 2025)

[*Market Landscape: Transforming Contact Centers with Cloud and AI Solutions*](#) (October 2024)

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