



Why Read This Report

This section details several vendors active in the conversational AI space. Stakeholders increasingly recognise the revenue opportunities to be gained from deployment, so the number of players in conversational AI provision has risen. This report is not intended to provide comprehensive coverage of all the vendors operating in this market, but introduces the reader to 17 conversational AI vendors which Juniper Research considers leaders in the market.

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 able to provide 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 Conversational AI Competitor Leaderboard Market Takeaways

i. Vendors Remain Focused on Improving Intent and Sentiment Analysis

In 2026, intent and sentiment analysis remain central to ensuring that customer conversations are routed to the right chatbot or human agent at the right time. By more accurately identifying customer intent, taking into account context and interaction history, conversational AI systems can respond more efficiently and precisely to customers; enhancing the user experience. This continued improvement also enables a higher proportion of customer interactions to be automated; further increasing value for enterprises.

ii. Contact Centre Providers Must Embrace the Shift from IVR to Conversational AI Services

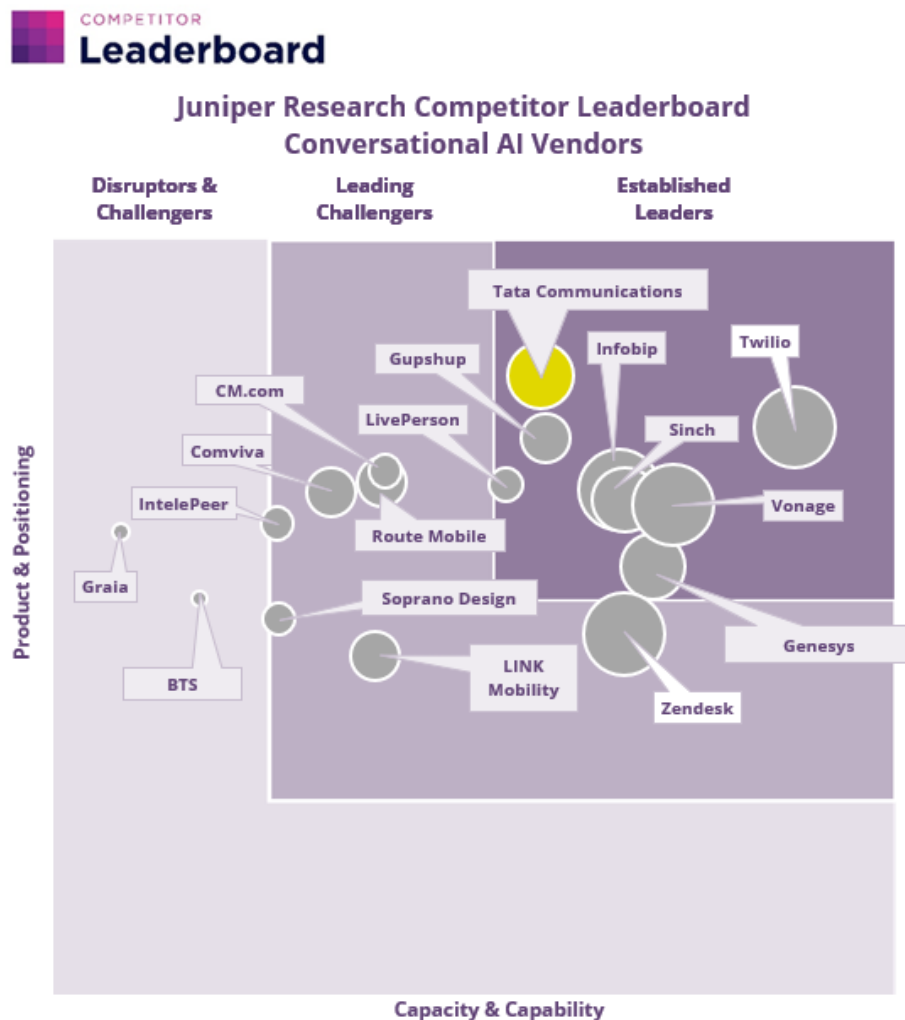
Contact centre solutions that currently rely on traditional IVR systems for self-service and call routing must now offer IVR experiences powered by conversational AI, as these provide clear advantages over legacy touch-tone or menu-based systems. Voicebots built on conversational AI can deliver improved natural language understanding and personalised experiences based on customer history. This enhances both intent and sentiment analysis, and ensures that calls are escalated to human agents when necessary, particularly for complex or sensitive scenarios.

iii. Focus on OTT Messaging Channels at Present, but RCS Must Not Be Ignored for Future Growth Opportunities

In 2026, growth in over-the-top (OTT) messaging chatbots is still expected to outpace rich communication services (RCS)-based chatbots; reflecting the maturity and reach of established OTT platforms. The RCS ecosystem is, however, beginning to develop more rapidly following Apple's adoption, with operators continuing to onboard to RCS. Juniper Research recommends that conversational AI vendors integrate RCS business messaging into their offerings and provide tools to support the deployment of conversational AI across this channel, as RCS growth is anticipated to accelerate from 2026 onwards; creating new opportunities for richer, native messaging experiences.



Figure 1: Juniper Research Competitor Leaderboard: Conversational AI Vendors



Source: Juniper Research

TATA COMMUNICATIONS

Juniper Research has ranked Tata Communications as an Established Leader in the Conversational AI Market, as scored in the Juniper Research Competitor Leaderboard.

- Tata Communications scored highly on the range of its conversational AI service and product offerings, and on its investments into conversational AI solutions. This broad range of services puts the company in a strong position to benefit from the convergence of network, cloud, and communications platforms, especially as it continues to expand its Communications Platform as a Service (CPaaS) and digital interaction capabilities. Support from the Tata Group also enhances its credibility, scale, and access to enterprise clients, while continued investment in AI, automation, and cloud-native platforms should help drive the growth of more intelligent and integrated engagement solutions.
- Tata Communications also benefits from a global network infrastructure and a strong enterprise customer base, which gives it a solid platform for developing and scaling conversational AI solutions. Its extensive subsea cable network and worldwide connectivity assets allow it to deliver high levels of reliability, security, and performance, all of which are important differentiators for multinational clients. This combination of reach, infrastructure, and customer relationships positions the company well to support demanding AI-driven use cases across different markets.
- Juniper Research has also highlighted the company's marketing and branding in conversational AI as a notable differentiator, placing it in a strong position to benefit from the sector's expected growth. Tata Communications should now accelerate its shift toward AI-native and agentic CX capabilities, deepen integration across its cloud and engagement platforms, and broaden its appeal to developers and digital-native enterprises. A greater emphasis on higher-margin services, including orchestration, analytics and sector-specific solutions, will be key to building differentiation and supporting long-term growth.



Table 1: Juniper Research Competitor Leaderboard Heatmap: Conversational AI Vendors – Tata Communications

	Capacity & Capability					Product & Positioning					Market Presence
	Financial Performance in the Conversational AI Sector	Size of Operations in the Conversational AI Sector	Extent & Breadth of Conversational AI Partnerships	Marketing & Branding	Experience in the Conversational AI Market	Conversational AI Market Coverage	Conversational AI Service & Product Offerings	Cross-channel Capabilities	Extent of Innovation in the Conversational AI Market	Future Business Prospects	
Tata Communications											

High

Source: Juniper Research



i. Corporate Information

A part of the Tata Group, Tata Communications is a leading CommTech player which 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. The company's 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.

Table 2: Tata Communications' Select Financial Information (₹ in crore), 2024-2026

	FY 24-25	FY 25-26
Gross Revenue	₹23,109	₹24,803

Source: Tata Communications' Integrated Annual Report 24-25; 25-26

Tata Communications completed the acquisition of Kaleyra, in October 2023, for \$100 million. Through this acquisition, Tata Communications has leveraged Kaleyra's expertise in technology, engineering, and research and development, including its CPaaS solutions. Tata Communications also added new points of presence in the US, Latin America, the UK, Italy, Middle East, and Asia Pacific.

In December 2025, Tata Communications announced it had acquired a majority stake in Commotion Inc; an AI-native enterprise SaaS platform with operations in the US and India. With this, Tata Communications accelerates AI integration across its Digital Fabric offerings, including within its Customer Interaction Suite.

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, the Netherlands, Norway, and Poland. It also has five offices in India, including its Mumbai headquarters.

Furthermore, Tata Communications has a vast system of networks which provide coverage across the Americas, Europe, the Middle East and Africa, and 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 offices in Dubai and Abu Dhabi in the UAE, and in Sri Lanka.

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 is Flipkart, a leading eCommerce company in India. Flipkart leverages Tata Communications' voice calling functionalities, especially call masking services, to ensure privacy during deliveries to its 500+ million customers.

Tata Communications has also previously formed strategic partnerships with Meta, AWS, Cisco, Google Cloud, Microsoft, Genesys, and NiCE.

- In October 2025, Tata Communications announced a partnership with NiCE to support enterprise contact centre modernisation by integrating Kaleyra's AI-powered Customer Interaction Suite with the NiCE CXone Mpower CX AI platform. The combined offering enables AI-driven automation, workforce augmentation, and workflow orchestration; helping enterprises improve omnichannel consistency, operational efficiency, and drive growth.
- 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.

iv. High-level View of Offerings

Tata Communications' Kaleyra is the interaction fabric that helps enterprises strategically align and redefine customer and employee interactions across channels and touchpoints. The Kaleyra Customer Interaction Suite (CIS) offers CPaaS, Contact Centre as a Service (CCaaS), AI-powered Customer Experience Platform (CXP), and other agentic AI solutions that power customer interactions right from acquisition, transaction, engagement, and retention, to loyalty. It is scalable, omnichannel, and tailored to local markets. It takes the focus from communication enablement to delivering bespoke business outcomes.

a) Kaleyra CPaaS

Kaleyra CPaaS makes it possible to engage customers in two-way conversations where 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. Kaleyra CPaaS solutions include SMS, MMS, RCS, email, push notifications, OTPs, video, and others. It also offers capabilities such as:

- **Conversational AI:** allows for automation of customer engagement flows with AI-based chatbots. It enables enterprises to scale their personalised conversations with customers.
- **Voice Calling:** Tata Communications offers voice APIs for inbound and outbound calling, IVR, and call masking use cases; assisting with its major voice communications customers, such as Flipkart.
- **WhatsApp Business API:** Kaleyra has been a Premier Meta business solutions provider (BSP) partner for the WhatsApp Business platform since 2019. 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 receive immediate responses from their audience.

b) Kaleyra CCaaS

Kaleyra CCaaS offers omnichannel contact centre solutions, including a global, multi-tenant CCaaS solution catering for businesses of all sizes. It offers integration with CRM systems, Microsoft Teams, bots, and social media.

c) Kaleyra AI

Tata Communications offers Kaleyra.ai; a unified, AI-powered CXP that seamlessly integrates customer data, interactions, and automation. Built on cutting-edge agentic AI capabilities, the platform empowers enterprises to deliver highly personalised, context-aware interactions across every customer touchpoint. The pillars of Kaleyra.ai include:

- **Composable CDP:** the platform builds real-time, 360° customer profiles by aggregating data from all touchpoints. Its zero-copy architecture ensures secure, instant access to data without duplication. With prebuilt integration across 200+ CRMs, CDPs, and analytics tools, enterprises can accelerate deployment and unlock value faster.
- **Agentic AI and Automation:** with over 200 pre-built AI agents, enterprises can enable natural, intelligent customer interactions at scale. Enterprises can dynamically segment audiences for more relevant engagement, while a continuous learning engine refines customer experience strategies based on real-time data and behaviour.
- **Hyper-personalisation & Journey Orchestration:** the platform delivers true 1:1 personalisation at scale by predicting each customer's most relevant content, channels, and products. It enables consistent engagement across a wide range of channels, including email, WhatsApp, SMS, push notifications, voice, RCS, and social platforms.



- **Insights & Reporting:** enterprises gain insights into campaign performance and customer care operations. A/B testing helps optimise visual and content strategies, while conversational analytics track agent effectiveness and identify opportunities to enhance the overall customer experience.

d) Kaleyra Voice AI

Kaleyra offers enterprise-grade, AI-powered natural and adaptive voice agents for contextual and intelligent outbound and inbound customer interactions. Kaleyra AI offers simplified architecture, ultra-low latency, and expressive speech; designed to disrupt the traditional speech AI tech space.



Table 3: Juniper Research Competitor Leaderboard Scoring Criteria

Category	Scoring Criteria	Relevant Information
Capability & Capacity	Financial Performance in the Conversational AI Sector	Juniper Research has reviewed funding received by the vendor, how much the vendor has invested into conversational AI technology, and the total revenue which can be attributed to the provision of conversational AI services over the past 12 months.
	Size of Operations in the Conversational AI Sector	Here, we have assessed the number of countries in which conversational AI services are provided, the number of physical offices, and the number of enterprise customers using the vendor's conversational AI services.
	Extent & Breadth of Conversational AI Partnerships	For this factor, Juniper Research has assessed the vendor's total number of partnerships, as well as those which support the vendor's conversational AI capabilities.
	Marketing & Branding	Juniper Research has assessed the strength of marketing efforts, with a specific focus on online presence.
	Experience in the Conversational AI Market	Here, Juniper Research has evaluated each company's experience in the conversational AI market, considering the length of time each vendor has offered a solution that leverages conversational AI.
Product & Positioning	Conversational AI Market Coverage	Here, Juniper Research assesses the conversational AI capabilities provided for different verticals, including retail and eCommerce, banking and finance, healthcare, transportation and logistics, and other.
	Conversational AI Service & Product Offerings	Juniper Research has assessed different capabilities of the vendor's product offerings for conversational AI. Here, the voice and messaging capabilities, payment integration, language support, generative AI models, agentic AI frameworks, and data analytics are each assessed.
	Omnichannel Capabilities for Voice and Messaging	Here, Juniper Research assesses the number of messaging channels supported by the vendor for omnichannel communication, as well as the integration of contact centres for voice.
	Extent of Innovation in the Conversational AI Market	Score of Juniper Research's opinion of the company's innovation or plans for innovation.
	Future Business Prospects	Score of Juniper Research's opinion of the company's future prospects in the market.
Market Presence	Market Presence	Assessment based on number of employees, number of enterprise customers using conversational AI services, and revenue from the provision of conversational AI.

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 is part of the rich heritage of the Internet in India. Over the last 25 years, its 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.

For more information about Tata Communications, please visit:

<https://www.tatacommunications.com/>

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.

For more information about Juniper Research, please visit:

<https://www.juniperresearch.com/home>