



GLOBAL CONVERSATIONAL COMMERCE MARKET 2023-2028

Competitor Leaderboard

Prepared for Tata Communications



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1.1 Why Read this Report

This section details the product offerings of leading conversational commerce service providers. Given the expanse of both the mobile messaging and eCommerce ecosystems, this report is not intended to provide comprehensive coverage of all the vendors operating in this market but introduces the reader to 19 conversational commerce vendors that Juniper Research considers to be leaders in the market.

The profiles in this section are representative of the leading players in the provision of conversational commerce services, with all players assessed here being capable of managing and processing transactions via conversational channels. Many of the players scored here will have a particular focus, such as messaging or smart speaker commerce, but can be considered leading players in the conversational commerce space taken as a whole.

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 Commerce Market Takeaways

Leading Players Must Offer VAS (Value-added Services)

In order for brands and enterprises to build customer loyalty and trust, and therefore drive increased spending, conversational commerce vendors must offer VAS that can be used at each stage of the purchasing journey. VAS are important for generating customer leads, guiding a customer through the payments process, as well as facilitating engagement post-transaction. One VAS that will be especially important is loyalty programs, as they enable a customer to feel connected with a brand. Without the development of value-added services for a range of use cases, enterprises will opt for a conversational commerce vendor that offers a VAS tailored for the desired use case.

Need for Personalized Consumer Experiences to Drive Conversational AI Developments

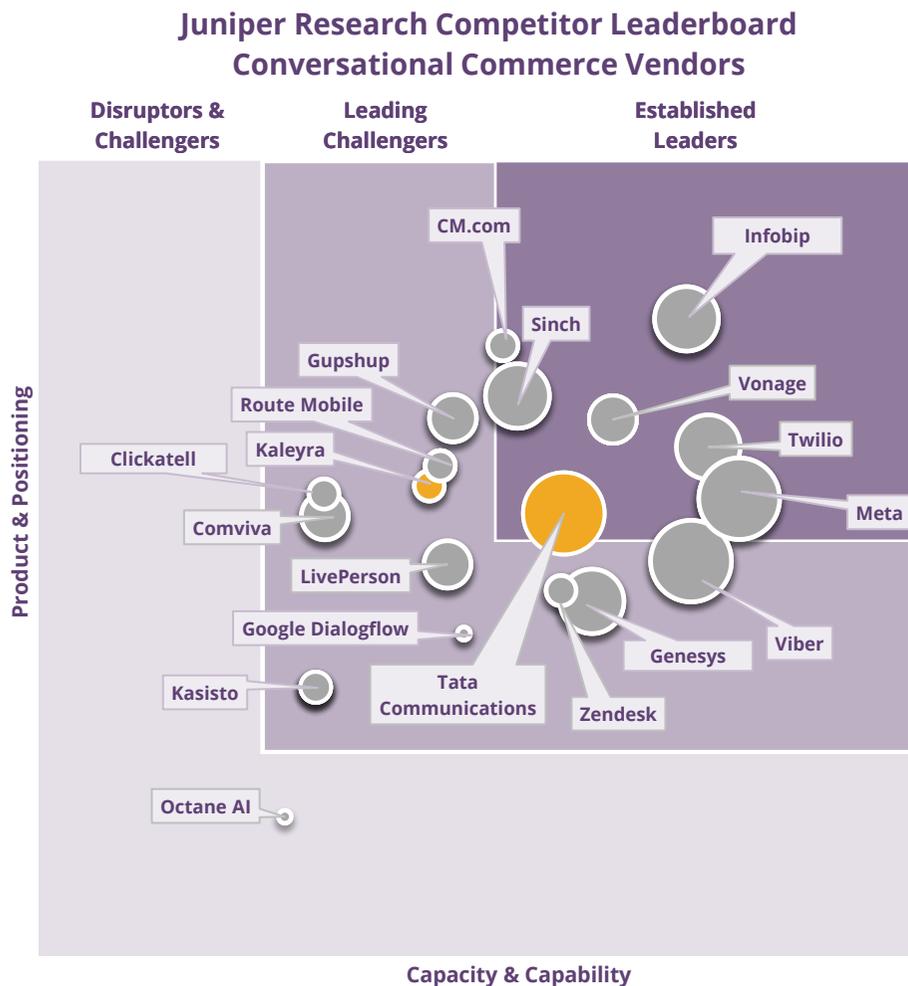
Consumers want a shopping experience that can better replicate a bricks-and-mortar store, and therefore want interactions with brands that are more humanlike and personalized. Vendors need to ensure that they provide a conversational AI solution that can understand and interpret a consumer's needs, in order to provide personalized recommendations and offers based off a user's previous purchases and searches. A more humanlike experience will also help to build a consumer's trust in interacting with chatbots. Offering a more personalized and humanlike experience will in turn drive a higher spend across conversational commerce channels.

LLMs to Be a Disruptive Element for Conversational Commerce across Voice Assistants

As LLMs become more sophisticated, one benefit will be that more languages will be supported over voice assistant speakers. Over time, this will increase the number of users of voice assistants, as more users will be able to communicate in their native language, which will increase confidence in conversational commerce interactions across this channel. In addition, there will be improvements in NLP (Natural Language Processing), which will lead to smoother interactions between the user and speaker.



Figure 1: Juniper Research Competitor Leaderboard: Conversational Commerce



Source: Juniper Research

TATA COMMUNICATIONS kaleyra

Tata Communications has been identified as an established leader in Juniper Research’s Conversational Commerce Leaderboard 2023. In particular, Tata Communications scored highly for its experience in the conversational commerce market, as well as its strong market presence driven specifically by its impressive number of partnerships and comprehensive technology portfolio through the acquisition of Kaleyra in October 2023.

Tata Communications’ acquisition of Kaleyra, an international company within the messaging space, for \$100 million, will allow Tata Communications to leverage Kaleyra’s channel offerings and payments solutions, in order to offer a range of industries and use cases.

In particular, Kaleyra has expertise across key industries for conversational commerce; including banking and finance, retail, travel and transportation, and digital ticketing, which meant that it scored highly for its conversational commerce market coverage. Kaleyra also has a large client base of 3,800 customers, which will benefit from Tata Communications’ extensive network of mobile operator connections, specifically with the increasing deployment of RCS.

Additionally, as part of the Tata Group, Tata Communications has strong financial backing, and therefore, it will be able to invest in value-added services, such as the efficient implementation of conversational AI, and fraud prevention measures to facilitate a seamless customer experience.

Through the acquisition of Kaleyra and investment into value-added services, Tata Communications will remain an established leader within the conversational commerce market.



1.2 Tata Communications

TATA COMMUNICATIONS

Table 2: Juniper Research Competitor Leaderboard Heatmap: Tata Communications

	Capability & Capacity					Product & Position					Market Presence
	Financial Performance in the Conversational Commerce Sector	Size of Operations in the Conversational Commerce Sector	Extent & Breadth of Conversational Commerce Partnerships	Marketing & Branding	Experience in the Conversational Commerce Market	Conversational Commerce Market Coverage	Conversational Commerce Service & Product Offerings	Conversational Commerce Product Strength	Extent of Innovation in the Conversational Commerce Market	Future Business Prospects	
Tata Communications	High	High	High	High	High	High	High	High	High	High	High

High

Source: Juniper Research



i. Corporate Information

Tata Communications is part of the Tata Group, an Indian multinational corporation. For the 2022-2023 financial year, Tata Communications reported consolidated revenue of USD \$2.2 billion.

Table 3: Tata Communications' Select Financial Information (\$m), 2021-2023

	2021-2022	2022-2023
Gross Revenue	\$2,244.5	\$2176.2
Net Revenue	\$884.0	\$882.8
Conversion Rate (INR/USD)	0.01342	0.01220

Source: Tata Communications Integrated Annual Report

Tata Communications is a global digital ecosystem enabler with clients in more than 190 countries and territories. The company enables digital transformation of enterprises globally with connected solutions, core and next-generation connectivity, cloud hosting and security solutions, and media services. 300 of the Fortune 500 companies are its customers, and the company connects businesses to 80% of the world's cloud giants.

The company owns and operates the Tata Communications Global Network, a submarine cable network that provides connectivity to countries on a worldwide scale, with 300 PoPs (Points of Presence) across the globe. Moreover, Tata Communications is part of several cable consortia, including the ADC (Asia Direct Cable) Consortium, SEACOM, Unity, PIPE Pacific 1 (PPC-1), SMW-3, SMW-4, SAFE/SAT3, Japan-US, China-US, and APCN-2.

The executive team at Tata Communications includes Amur Swaminathan Lakshminarayanan (Managing Director & Chief Executive Officer); Aadesh Goyal (Chief Human Resources Officer); Genius Wong (Executive VP – Core and Next-Gen Connectivity Services, Chief Technology Officer); Mysore Madhusudhan (Executive VP – Collaboration and Connected Solutions); Kabir Ahmed Shakir (Chief Financial Officer); Srinivasan CR (Executive VP – Cloud and Cybersecurity Services, Chief Digital Officer); Sumeet Walia (Executive VP, Chief Sales and Marketing Officer); Tri Pham

(Executive VP – Corporate Strategy Head); Troy Reynolds (Chief Legal & Compliance Officer).

Tata Communications completed the acquisition of Kaleyra in October 2023, for \$100 million. This acquisition will allow Tata to leverage Kaleyra's expertise in technology, engineering, and research and development, including its CPaaS solutions.

ii. Geographical Spread

Within North America, Tata Communications has three offices in the US, as well as one office in Montreal, Canada. In Europe, Tata Communications has offices based in Germany, Spain, Russia, France, Poland and UK. Tata Communications has six offices in India, including the company's Mumbai headquarters.

In Asia Pacific, Tata Communications operates out of Hong Kong, Malaysia, Singapore, and Australia. Tata Communications is also present in UAE.

In July 2020, Tata Communications secured a Type B telecom license in Saudi Arabia; entitling Tata Communications to provide ISP (Internet Service Provider) and related telecom services to enterprises. This enables the company to make the shift from offering services as a foreign carrier in the Middle East to a local licensed service provider.

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, IT/ITES, legal, manufacturing, media and entertainment, pharmaceutical, real estate, retail, services, sports and telecommunications.

In October 2021, Tata Communications expanded its partnership with Cisco. As a result of this new collaboration, Cisco Meraki has been added to Tata Communications' ecosystem; offering Wi-Fi services based on Wi-Fi 6 technology and SD-WAN (Software-defined Wide Area Network) services.

In January 2022, Tata Communications partnered with Zain to launch a smart street lighting project across Saudi Arabia.



In February 2022, Tata Communications announced a partnership with Eclat Media Group, a global sports broadcaster. As a result, Tata Communications will power more than 4,000 hours of content annually.

In March 2022, Tata Communications was selected as the official broadcast connectivity provider for Formula 1. Tata Communications transfers more than 100 video feeds and over 250 audio channels between the Grand Prix venue and F1's Media & Technology Centre in the UK. This enables F1 to broadcast a live feed to more than 500 million fans.

In August 2022, Tata Communications partnered with Genesys to enhance its InstaCC (CCaaS) platform with digital features to improve its customer engagement. InstaCC is an omnichannel CCaaS platform, and this partnership strengthens the company's position as an end-to-end digital customer experience provider. Its Tier 1 network allows the company to provide highly responsive customer service solutions over a range of communication channels.

Tata Communications has also previously formed strategic partnerships with AWS, Cisco, Google Cloud, Microsoft, MotoGP and SailGP.

iv. High Level View of Offerings

In 2022, Tata Communications launched Tata Communications CIS (Customer Interaction Suite) that enables brands to hyper-personalize customer interactions throughout the entire lifecycle journey. By integrating mobile marketing platforms, conversational AI, CCaaS, and CPaaS, Tata Communications provides a comprehensive solution to provide contextual customer experiences at scale during every stage of the buyer journey. It brings together the power of data, personalisation, and automation to help brands engage with their customer base.

Tata Communications CIS is scalable, omnichannel and tailored to local markets. It takes the focus from communication enablement to delivering bespoke business outcomes.

Tata's Communications CIS offers a range of capabilities like omnichannel customer interaction manager, a no-code platform for easy creation of complex customer journeys, conversational chatbot leveraging AI to power contextual, human-like

conversations, a cloud contact center (InstaCC), and a video commerce platform (DIGO VX).

The company has adopted a direct sales model for engagement to attract existing Tata Communications enterprise customers. Additionally, Tata is prospecting for new sales opportunities in regions such as North America, Europe, Southeast Asia, Australasia, and India through market engagement at trade events and online media channels. Consequently, the vendor's market momentum has yet to gain significant traction, with Tata Communications Customer Interaction Suite currently supporting over 200 customers across multiple industries and regions.

Tata Communications Customer Interaction Suite offers advanced functionalities for personalized customer experiences, aligning with current market trends beyond traditional CPaaS vendors' A2P (Application-to-Person) messaging legacy. Tata Communications Customer Interaction Suite has several significant milestones on its planned roadmap, including updates to conversational AI and advanced analytics, additional connectors (Salesforce, Moengage, Cisco, etc), and new add-on services (SMS firewall, fraud scores, and new channels like email).



1.3 Kaleyra



Table 4: Juniper Research Competitor Leaderboard Heatmap: Kaleyra

	Capability & Capacity					Product & Position					Market Presence
	Financial Performance in the Conversational Commerce Sector	Size of Operations in the Conversational Commerce Sector	Extent & Breadth of Conversational Commerce Partnerships	Marketing & Branding	Experience in the Conversational Commerce Market	Conversational Commerce Market Coverage	Conversational Commerce Service & Product Offerings	Conversational Commerce Product Strength	Extent of Innovation in the Conversational Commerce Market	Future Business Prospects	
Kaleyra	High	High	High	High	High	High	High	High	High	High	High

Source: Juniper Research



i. Corporate Information

Kaleyra is an international company in the CPaaS space; specializing in mobile messaging services for banks, financial institutions, eCommerce players, OTTs, software companies, logistic enablers, healthcare providers, retailers, and other large organizations worldwide. The company operates globally with offices in APAC, the EU, the UK, the US, and the Middle East.

Through a globally owned platform, Kaleyra manages integrated multi-channel communication services featuring messaging, push notifications, emails, instant messaging (including WhatsApp for Business), programmable voice services, virtual numbers and chatbots. In 2022, Kaleyra processed approximately 51.5 billion messages and 8.1 billion voice calls.

Kaleyra, originally known as Ubiquity, was founded in 1999 by Dario Calogero. In 2018, the business was rebranded as Kaleyra Inc. after the acquisition of Solutions Infin.i

Table 5: Kaleyra's Total Revenue (\$m), 2020-2022

	2020	2021	2022
Total Revenue	\$147.4	\$267.7	\$339.2

Source: Kaleyra

The acquisition of Kaleyra by Tata Communications, a global digital ecosystem enabler, was completed in October 2023, for \$100 million. Through this acquisition, Kaleyra will bring its expertise in technology, engineering, and research and development, and it will leverage Tata Communications' large customer base and extensive network of MNO connections.

ii. Geographical Spread

Kaleyra is headquartered in Milan, Italy, with other offices in a variety of locations in the US, India, Greece, the Dominican Republic, the Netherlands, South Africa, Germany, the UAE and the UK. The company has more than 600 employees worldwide.

iii. Key Clients & Strategic Partnerships

Kaleyra offers its products and solutions across many industries, including banks and financial services, transport and logistics, travel and tourism, healthcare, education, entertainment, agencies, media and telecom, eCommerce, and retail.

Kaleyra has over 3,800 global customers. Businesses using Kaleyra's solutions include Air Asia, Amazon Pay, Banca Sella, Banca Widiba, Bosch, Flipkart, Intesa Sanpaolo, Moneyfarm, Nexi, Oxfam, Rakuten Viber, Santagostino TATA 1mg, and Zomato.

Kaleyra has strategic partnerships with Oracle (integrations with Eloqua and Responsys), Amazon Web Services, Meta, Google, Visa, Selligent, Zoho, and others. Juniper Research also notes that Kaleyra's products are compatible with LeadSquared, Oracle, OpenCart, Shopify, WebEngage, HubSpot, Zapier, and Zoho CRM. Kaleyra's compatibility with eCommerce platforms and CRMs will appeal to eCommerce businesses and large enterprises who want to integrate messaging in their customer service offering.

In March 2019, Kaleyra became an official WhatsApp Business Solution Provider and in 2023, it got awarded as Partner of the Year by Meta for Cloud API. As a result, Kaleyra can offer its enterprise customers access to WhatsApp Business communications through an integrated API.

In December 2021, Kaleyra supported Banca Widiba, an Italian bank, in the launch of video communication technology. This collaboration strengthens Kaleyra's presence within the banking and financial services sector, supporting the customer relationships fostered by Banca Widiba.

In January 2022, Kaleyra partnered with Banca Sella, another Italian bank, to provide video solutions for the bank's wealth management solution. The new solution, named Sella Global Advisory, will enable users to make virtual appointments and meet with bank representatives over audio and video calls.

In February 2022, Kaleyra partnered with Bosch Group to power communications for Bosch mobility solutions in India. This partnership allows Bosch to build a secure omnichannel to engage with their customers through multiple messaging channels



including RCS, SMS, MMS and more. The collaboration will further benefit Kaleyra's global image, with Bosch being a Fortune 500 brand.

In June 2022, Kaleyra partnered with Santagostino, a large Italian healthcare network, to improve accessibility through the provision of remote assistance. As a result of this partnership, Kaleyra will support the network in launching new digital user experiences, aiming to reduce wait times and increase customer satisfaction rates.

In August 2022, Kaleyra announced that it had partnered with Truecaller, a caller ID service provider, to further establish its safe and trusted business communication services. This will be done through using Truecaller's Verified Business Caller ID solution. This solution allows for the verification of caller IDs and increasing response rates on voice calls.

Kaleyra has also worked with Oxfam, where it was able to use Kaleyra's unique offering, which combines RCS with mobile payments. This allowed Oxfam to send rich messages to its subscribers with carousels with different gift options for monthly payments. This increased engagement and due to the Oxfam verification, enabled people to have trust in the branded messages they received.

In August 2023, Kaleyra announced a partnership with Talisma Corporation, Pvt. Ltd, a customer experience solutions provider in India, which will result in Kaleyra Video, a WebRTC audio and video calling tool, being added to Talisma's Customer Relationship Management and Digital Engagement Platform. This video interface is customizable with a company's brand and will provide a consistent customer journey.

iv. High Level View of Offerings

Kaleyra offers an omnichannel cloud 'all-in-one' communication platform; offering capabilities such as text messaging, instant messaging, video, and voice. The aim of this omnichannel platform is to help enterprises communicate with their final users with the most efficient and cost-effective omnichannel solution.

Kaleyra also offers specific APIs for several channels and services like SMS, email, voice, push notifications, WhatsApp, OTP, Video, RCS messaging API, and two-way SMS. As a telco operator itself in Italy, its services go through secure connections directly with MNOs or other international partners. For large companies in need of

high-security levels, Kaleyra guarantees secure connections to external entities, and a centralized authentication system with a personal login and password policy. Integration with existing systems comes at a low cost because Kaleyra's systems are easy to integrate, thanks to the consultancy services offered by the company.

Moreover, the company's WhatsApp Commerce Feature allows its customers to implement features such as product catalogue browsing, automatically generated product lists, links to cards and messaging, all directly within the WhatsApp interface.

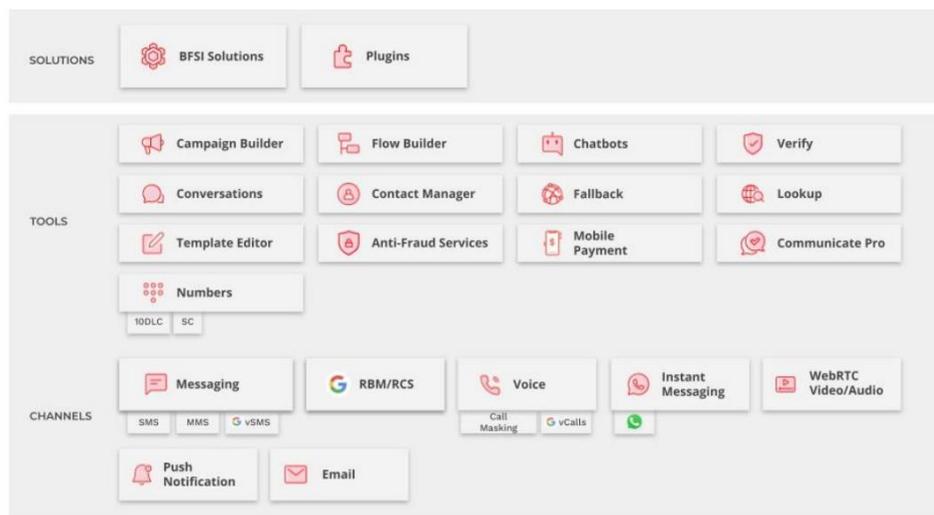
Kaleyra's platform makes it possible to engage customers in two-way conversations; messaging works both ways (business to customer and customer to business), and businesses working with Kaleyra's APIs are able to manage both sent and received messages. Kaleyra can process five thousand messages per second, with the capability to increase the throughput with additional server power and speed. The platform support 87 languages and is capable of stitching together concatenated messages of up to 4,000 characters.

Kaleyra allows banks to deliver transactional messages in a timely fashion so that, for example, users receive their mobile PIN and OTP in the shortest time possible and can continue their online banking operations. Kaleyra offers a feature to identify and significantly reduce account frauds and reduce phishing and hacking attempts through 2FA. It also supports automated, encrypted OTP generation and verification to enable 2FA on different platforms with its 'Verify' service.

Kaleyra's Voice API connects customers through call-masking and click-to-call technology. The former safeguards privacy by connecting agents directly without exposing their actual phone numbers, while the latter allows customers to engage instantly with a touch of a button or icon. Customers can connect with businesses through a help desk, a CRM, or a website; empowering seamless communication and productivity. Meanwhile, Kaleyra's outbound dialing automates personalized key messages. The user-friendly platform helps clients get started quickly.



Figure 6: Kaleyra's Communications Product Suite



Source: Kaleyra

Kaleyra's communication platform has a multitude of tools and features, including:

- **Messaging APIs** – suitable for transactional messaging, OTP creation and verification, and marketing messaging.
- **RCS** – Kaleyra allows brands to communicate with their customers through RCS, which provides a secure, trusted, innovative and highly-relevant messaging channel to customers. In December 2021, Kaleyra released RCS Broadcast Messages as part of its 'ComPro' platform in India, the UK and US. This announcement builds on Kaleyra's acquisition of mGage, which was selected as an official Google RCS distribution partner in the US and UK.
- **WhatsApp Messaging APIs** – Kaleyra's 'WhatsApp for Business' API allows clients to send WhatsApp instant messages worldwide by engaging in one-on-one conversations with a large addressable user base.

- **Video** – this solution improves the overall customer experience of brands, by offering live video, audio, and chat capabilities to communicate with their customer over a call. The interface can be customized with the brand's logo and colours.
- **Voice** – this communication channel connects customers to agents and connects agents to end users without revealing their actual numbers through the use of number masking. Businesses can also create IVR workflows for customer journeys initiated by incoming calls.
- **Chatbots** – This solution allows conversations initiated by users to be managed automatically by an AI-based bot. The chatbot uses Kaleyra's proprietary NLP algorithms to determine conversation intent and to map the user's input phrases.
- **Numbers** – Virtual numbers allow businesses to obtain a short- or long-code number to connect with customers. Kaleyra enables companies to use national numbers, which allow them to operate globally whilst maintaining a local feel, as well as mobile and toll-free numbers.
- **Reports Analytics Layer** – enables businesses to create insightful reports, such as cost reports or marketing campaign summaries.



1.4 Juniper Research Leaderboard Assessment Methodology

Juniper Research provides updates 19 conversational commerce vendors. To qualify for the Competitor Leaderboard, companies must be involved in the direct provision of conversational commerce service. The companies included here have developed specific expertise in the conversational commerce sector, though some embarked on the route earlier than others and therefore have wider customer bases or geographical reach. It includes established specialists, such as Infobip and CM.com, through to companies where mobile is part of a wider communications suite, such as Tata Communications and Kaleyra.

This research covers a significant number of vendors; however, we cannot guarantee that all players in the market are included. Our approach is to use a standard template to summarize the capability of players offering conversational commerce 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 using our Juniper Research Leaderboard technique. This technique, which applies quantitative scoring to qualitative information, enables us to assess each player's capability and capacity, as well as its product and position in the broader market for conversational commerce services. The resulting Leaderboard exhibits our view of relative vendor positioning.

1.4.1 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 platform providers based on Juniper Research's scoring of each company against the criteria that Juniper Research has defined. The Leaderboard is designed to compare how 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 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 the cell of the Leaderboard.

The Leaderboard is also valid at a specific point in time, October 2023. 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 7: Juniper Research Competitor Leaderboard Scoring Criteria: Conversational Commerce Vendors

Category	Scoring Criteria	Relevant Information
Capability & Capacity	Experience in the Conversational Commerce Market	Here, Juniper Research has evaluated each company's experience in the conversational commerce market and has considered the length of time each vendor has offered a conversational commerce solution.
	Financial Performance in the Conversational Commerce Sector	The date at which the company first entered the conversational commerce market, most notably the date at which conversational commerce solutions were offered commercially to clients and the year in which the company was founded
	Size of Operations in the Conversational Commerce Sector	The total number of locations in which a vendor has a physical presence, including offices, manufacturing, and client support centres, the number of countries in which vendors support conversational commerce deployment, the number of messaging and voice engagements over the conversational commerce platform in the last 12 months
	Marketing & Branding	Strength of marketing efforts, including the average duration of each site visit.
	Extent & Breadth of Conversational Commerce Partnerships	Total number of partnerships; range of industries covered by strategic partnerships.
Product & Position	Conversational Commerce Service & Product Offerings	Weighted scoring of conversational commerce services, considering the breadth of messaging channels and payment integrations supported by each vendor's platform.
	Conversational Commerce Market Coverage	Verticals served by each vendor's conversational commerce; total number of connections with operator networks.
	Conversational Commerce Product Strength	Number of products in launched in the last 12 months and the number of compliances that are adhered to
	Extent of Innovation in the Conversational Commerce 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	Number of employees involved with the provision of conversational commerce services.

Source: Juniper Research



About Tata Communications

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 powered by cloud, mobility, Internet of Things (IoT), 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 Kaleyra



Kaleyra, Inc. is a global provider of mobile communication services to financial institutions, e-commerce players, OTTs, software companies, logistic enablers, healthcare providers, retailers, and other large organizations worldwide. Through its proprietary platform and robust APIs, Kaleyra manages multi-channel integrated communication services, consisting of messaging, rich messaging and instant messaging, video, push notifications, e-mail, voice services, and chatbots.

Kaleyra's technology makes it possible to safely and securely manage billions of messages monthly with over 1,600 operator connections in 190+ countries, including all tier-1 US carrier.

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.