

Communication Platforms Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***iSG** Research



Communication Platforms

The need for communication with consumers and customers has evolved dramatically in recent years, transforming how enterprises connect to meet a wide range of needs. Today's communication platforms, often referred to as CPaaS (Communications Platform as a Service), operate as services with APIs and integrations across the internet and carrier networks, enabling seamless interactions across any channel and device, resulting in greater efficiency and cost-effectiveness.

These CPaaS platforms have become essential for enterprises aiming to improve efficiency and interactions while delivering impactful communication experiences. With the rapid advancements in cloud computing, artificial intelligence (AI) and collaborative capabilities, enterprises must carefully assess communication platforms to ensure they meet both current



ISG Research defines CPaaS as a cloud-based software infrastructure that facilitates communications across multiple channels and interfaces while enabling integration with carriers and devices.

and future business requirements while providing flexibility, security and scalability in an increasingly complex regulatory environment.

ISG Research defines Communication Platforms as a Service (CPaaS) as a cloud-based software infrastructure that facilitates communications across multiple channels and interfaces while enabling integration with carriers and devices. These platforms support encryption, data residency, privacy and authentication. They are evolving to interface with Unified Communication as a Service (UCaaS), combining chat and messaging across networks using APIs and developer studios to create seamless interactions across various systems.

Over the past decades, the evolution of text messaging along with programmatic interactions through APIs has advanced to support multimedia messaging and phone number provisioning via telecommunications carriers. Communication platforms serve as the foundational layer for interacting with consumers, facilitating

everything from basic text chat and calling to sophisticated video conferencing, workflow automation and AI-enhanced experiences. CPaaS provides a technical framework that enables enterprises to standardize the communication technology stack while allowing flexibility to meet diverse business requirements and addressing emerging sustainability concerns through carbon footprint optimization.

The evolution of communication platforms began with unified communications and collaborative software that have continued to develop over the past two decades. With the transformation of cloud computing, these technologies have transitioned into more accessible



platform-as-a-service and software-as-a-service models offered through subscription-based pricing. Consequently, the industry has established requirements for CPaaS, which support unified communications alongside collaborative tools and embedded communication experiences.

The market is evolving as AI technologies and consumer expectations shift beyond CPaaS and UCaaS to enable more interactive experiences. Recently, these platforms have integrated advanced artificial intelligence that goes beyond basic chatbots, including AI meeting assistants that can transcribe discussions, summarize content, create action items and provide real-time language translation. Additionally, the support for omnichannel communications and the availability of low-code/no-code development studios have simplified the deployment of communication systems.

To address the need for seamless communication, enterprises require platforms that integrate effectively with existing business processes and applications through workflows. Expanded low-code/no-code capabilities empower business users to create sophisticated communication processes without developer assistance. The ideal platform offers a unified communication experience that is accessible from any device or location, allowing enterprises to meet both simple and complex needs while ensuring seamless interactions. Through 2027, a new breed of collaboration and communications platform will evolve from today's communication platform and unified communication as-a-service software to meet modern business requirements.

Enterprises need platforms that scale globally while ensuring consistent interactions and compliance with expanded data sovereignty requirements regarding where communication data can be stored and processed, particularly in Europe and Asia. These platforms must also adhere to stricter emergency services regulations (E911/NG911) for remote workers and address increasingly stringent web accessibility standards, including updated Web Content Accessibility guidelines (WCAG), Section 508, and regional requirements like European EN 301 549. Additionally, the platform should support both current communication needs and emerging use cases through flexible deployment options, open APIs and robust integration capabilities.

Successful communication platform software must provide several critical capabilities to meet enterprise requirements. It should be built on a cloud-computing foundation with edge computing capabilities to enhance performance and reliability, supporting all communication modalities through automation and workflows, along with comprehensive analytics and insights across text, audio and video interactions. Integration capabilities must extend beyond

Collaboration & Communication
Market Assertion

Through 2027, a new breed of collaboration and communications platform will evolve from today's communication platform and unified communication as-a-service (UCaaS) software to meet modern business requirements.

Mark Smith
Chief Software Analyst

ISG Research



basic interoperability to encompass contact centers, CRM systems, marketing, sales, websites and customer experiences, reflecting the increasing convergence between internal communication platforms and customer-facing systems.

Consumers should be able to switch seamlessly between devices and communication methods, including chat, collaboration tools and telephony across various carriers and networks. Advanced enterprise deployments require platforms that support extensive APIs and multiple languages, protocols and routing capabilities to enable internal and external interoperability. This includes features such as authentication, WebRTC, programmable numbers, emergency calls, social messaging, mobile identity and notification systems. Additionally, the platform must offer robust administration features for effective governance and management, supporting users, groups and organizations with configurable policies and procedures.

Enterprises should view the selection of communication platforms as a strategic investment by assessing the current communication landscape to identify fragmentation, redundancies and communication gaps. When evaluating software providers, buyers should prioritize platforms that offer comprehensive API and integration capabilities, support multiple communication modalities and embrace AI while also providing the flexibility to adapt to evolving business needs. Enterprises should take into account the provider's innovation roadmap, particularly in terms of AI capabilities beyond basic chatbots, edge computing options and compliance with enhanced data sovereignty regulations. By choosing the right technology, enterprises can establish a cohesive foundation for long-term communication excellence in an increasingly complex and regulated digital environment.

The ISG Buyers Guide™ for Communication Platforms evaluates software providers and products in key areas, including platform support with AI, analytics and insights, chat support, communication administration and integration, intelligence workflow and a marketplace for third-party applications. This report evaluates platforms based on the ability to unify APIs and methods across communication channels with carriers and networks, integrate with business workflows and provide comprehensive management capabilities.

This research evaluates the following 21 software providers offering products that address key elements of communications platforms as we define them: 8x8, Bandwidth, Bird, Cisco, CM.com, Gupshup, Infobip, Microsoft, Mitel, Oracle, RingCentral, Route Mobile, Sangoma, Sinch, Syniverse, Tanla, Tata Communications, Tencent Cloud, Twilio, Vonage and Zoom.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Communication Platforms is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for CPaaS software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for communication platforms to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of CPaaS technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment time and



eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of CPaaS software. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating communication platforms and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



Key Takeaways

The needs for communication platforms (CPaaS) are rapidly evolving, addressing essential for seamless, omnichannel interactions via APIs and integrations but also to support Rich Communication Services (RCS) and voice. AI, cloud, and low-code tools reshape modern CPaaS platforms are merging with UCaaS and collaboration tools to form unified ecosystems. With rising demand, enterprises must prioritize scalable, AI-enabled platforms with strong integration and compliance. Choosing the right solution is a strategic move to streamline workflows and support future innovation.

Software Provider Summary

The research study reveals that while all software providers offer feature-rich platforms, the real value lies in how well those features align with growing enterprise needs without introducing unnecessary complexity. Infobip emerged as the top performer overall, followed by Twilio and Zoom, with Infobip leading in seven categories. Providers were categorized into four performance rating tiers—Exemplary, Innovative, Assurance and Merit—based on their combined Product and Customer Experience scores. Exemplary providers, including Zoom, Twilio, Oracle and Microsoft, demonstrated strong performance across both.

Product Experience Insights

Product Experience was 80% of the overall evaluation, spanning Capability (35%), Adaptability (15%), Usability (10%), Manageability (10%) and Reliability (10%). Leaders in Product Experience included Infobip, Twilio and Microsoft. Adaptability is a differentiator, with Oracle, Infobip and Microsoft leading. In terms of Capability, providers with API, AI and marketplace support—like Infobip and Twilio—outperformed those focused narrowly on messaging. Manageability assessed the governance and security features, where Oracle, Infobip and Microsoft again led, highlighting administrative simplicity. Infobip, Oracle and Tencent Cloud led in Reliability. Usability, critical to adoption, saw Infobip, Zoom and Sinch as top performers.

Customer Experience Value

Customer Experience comprised 20% of the evaluation, split evenly between Validation and TCO/ROI. Infobip, Twilio, and Oracle emerged as Leaders in both categories. Validation assessed how well providers support the customer lifecycle, including onboarding, support, and roadmap transparency. Oracle, Infobip, and Microsoft showed strong leadership here. TCO/ROI evaluated the ability to demonstrate strategic value and cost-effectiveness; Twilio, Infobip and Zoom led this area with clear information to help enterprises justify investments.

Strategic Recommendations

While capabilities remain a key selection factor, enterprises must consider customer experience, cost-effectiveness and innovation roadmap. Software providers with configurable platforms are better positioned to meet evolving enterprise needs. As CPaaS platforms converge with UCaaS and AI capabilities, prioritize providers that offer scalable, secure and AI-powered solutions, supported by customer engagement and strategic product investment.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Infobip atop the list, followed by Twilio and Zoom. Companies that place in the top three of a category earn the designation of Leader. Infobip has done so in seven categories; Oracle in four; Microsoft in three; RingCentral, Twilio and Zoom in two; and Sinch and Tencent Cloud in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

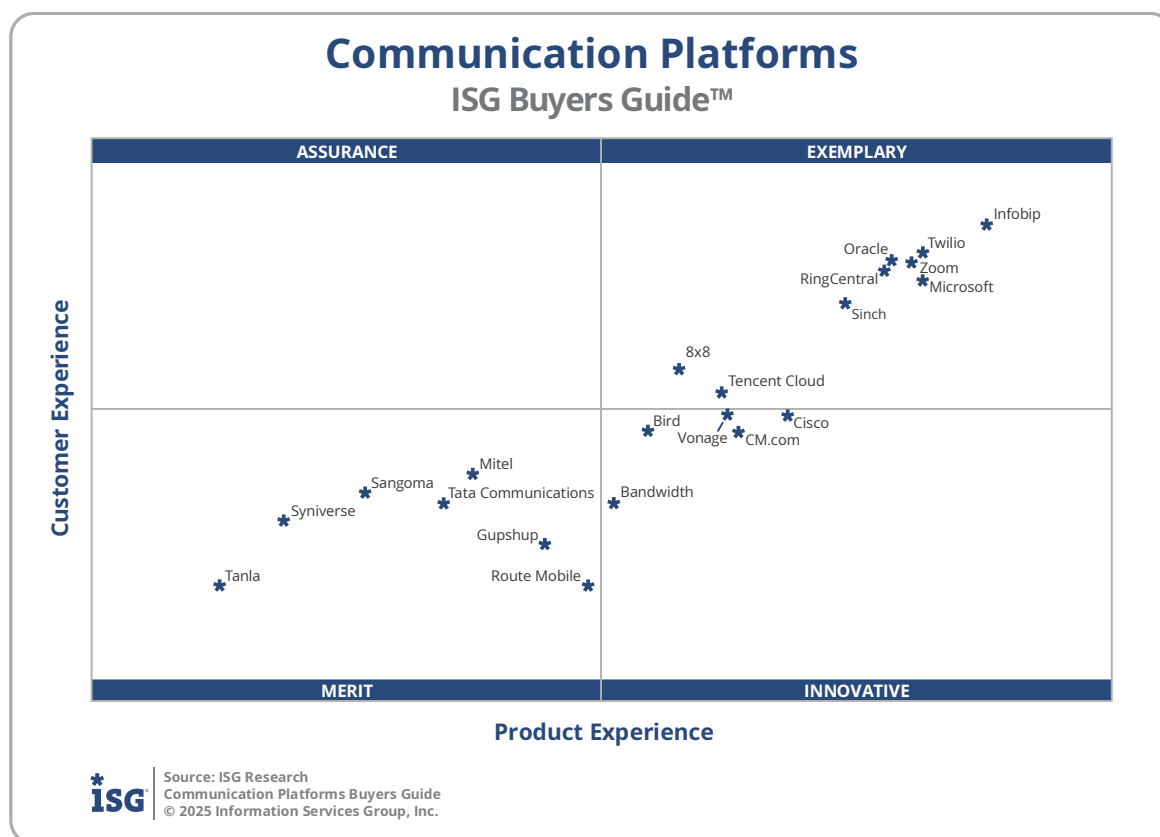
The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

Communication Platforms Overall

Providers	Grade	Performance
Infobip	A-	Leader 85.7%
Twilio	A-	Leader 82.2%
Zoom	A-	Leader 81.8%
Microsoft	A-	81.7%
Oracle	A-	81.4%
RingCentral	B++	81.1%
Sinch	B++	79.4%
Cisco	B++	75.3%
Tencent Cloud	B+	73.0%
Vonage	B+	72.7%
CM.com	B+	72.4%
8x8	B+	71.4%
Bird	B+	69.0%
Bandwidth	B	66.0%
Gupshup	B	63.2%
Route Mobile	B	63.1%
Mitel	B-	61.4%
Tata Communications	B-	60.4%
Sangoma	B-	57.7%
Syniverse	C++	52.1%
Tanla	C+	49.2%



Source: ISG Research
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Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: 8x8, Infobip, Microsoft, Oracle, RingCentral, Sinch, Tencent Cloud, Twilio and Zoom.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Bandwidth, Bird, Cisco, CM and Vonage.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. No providers were rated Assurance.

Merit: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are: Gupshup, Mitel, Route Mobile, Sangoma, Syniverse, Tanla and Tata Communications.



We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle communication platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (10%), Capability (35%), Reliability (10%), Adaptability (15%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Infobip, Twilio and Microsoft were designated Product Experience Leaders. While not Leaders, Zoom, Oracle and RingCentral were found to meet a broad range of enterprise requirements for CPaaS.

Communication Platforms

Product Experience

Providers	Grade	Performance
Infobip	A-	Leader 70.0%
Twilio	A-	Leader 67.1%
Microsoft	A-	Leader 67.0%
Zoom	A-	66.8%
Oracle	A-	66.2%
RingCentral	A-	66.1%
Sinch	B++	64.8%
Cisco	B++	62.3%
CM.com	B++	60.1%
Vonage	B+	59.8%
Tencent Cloud	B+	59.7%
8x8	B+	57.7%
Bird	B+	56.3%
Bandwidth	B	54.8%
Route Mobile	B	54.0%
Gupshup	B	52.5%
Mitel	B	50.2%
Tata Communications	B-	49.2%
Sangoma	B-	45.6%
Syniverse	C++	40.9%
Tanla	C+	38.8%



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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience (CX) and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Infobip, Twilio and Oracle. These category Leaders best communicate commitment and dedication to customer needs. While not Leaders, Zoom, RingCentral and Microsoft were also found to meet a broad range of enterprise customer experience requirements.

Software providers that did not perform well in this category were unable to provide sufficient information on their website on their customer experience and the leadership supporting it and why it is a world class approach and valuable for customers. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how software providers support their customer experience.

Communication Platforms

Customer Experience

Providers	Grade	Performance
Infobip	B++	Leader 15.8%
Twilio	B++	Leader 15.5%
Oracle	B++	Leader 15.4%
Zoom	B++	15.3%
RingCentral	B++	15.3%
Microsoft	B++	15.1%
Sinch	B+	14.8%
8x8	B	13.8%
Tencent Cloud	B	13.3%
Vonage	B	13.0%
Cisco	B	13.0%
CM.com	B	12.7%
Bird	B	12.7%
Mitel	B-	11.9%
Sangoma	B-	11.7%
Bandwidth	B-	11.6%
Tata Communications	B-	11.5%
Syniverse	C++	11.1%
Gupshup	C++	10.8%
Tanla	C++	10.3%
Route Mobile	C++	10.2%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Communication Platforms in 2025, a software provider must be in good standing financially and ethically, have at least \$75 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

The ISG Buyers Guide™ for Communication Platforms (CPaaS) required software providers and products to have platform support with communication administration and integration with APIs and methods across communication channels with carriers or networks while also having the ability to integrate with business workflows.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant CPaaS products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
8x8	8x8 Experience	Spring 2025	May 2025
	Communications Platform	Spring 2025	May 2025
	8x8 Connect	8.24	June 2025
	8x8 Work		
Bandwidth	Bandwidth Maestro	N/A	June 2025
Bird	Bird CRM	N/A	June 2025
Cisco	Cisco Webex Connect	45.6	June 2025
CM.com	CM.com CPaaS Mobile Service Cloud, Conversational AI Cloud	N/A	June 2025
Gupshup	Gupshup CPaaS, Console	19.0	June 2025
Infobip	Infobip CPaaS X	Turquoise	June 2025
Microsoft	Microsoft Azure Communication Services	N/A	June 2025
Mitel	Mitel CloudLink Platform	1.4	June 2025
	Mitel Workflow Studio	June 2025	June 2025
Oracle	Oracle Enterprise Communications Platform (ECP)	P-Cz5.0.0	June 2025
RingCentral	RingCentral CPaaS – RingEX RingSense	N/A	June 2025
Route Mobile	Route Mobile CPaaS	N/A	June 2025
Sangoma	Sangoma APIdaze	N/A	June 2025
Sinch	Sinch Customer Communications Cloud	N/A	June 2025
Syniverse	Syniverse CPaaS Concierge	N/A	June 2025
Tanla	Tanla Wisely	N/A	June 2025
Tata Communications	Tata Communications Kaleyra CPaaS	December 2024	December 2024



Tencent Cloud	Tencent Cloud CPaaS services	N/A	June 2025
Twilio	Twilio Messaging	N/A	June 2025
Vonage	Vonage CPaaS and Communication API	N/A	June 2025
Zoom	Zoom Meeting and Video SDK, Zoom Phone	N/A	June 2025



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	CPaaS Platform	Revenue	Geography	Customers
AWS	AWS Amplify, Amazon Connect, Amazon Pinpoint, Amazon SES, Amazon SNS, AWS Chime SDK	No	Yes	Yes	Yes
CEQUENS	CEQUENS CPaaS	Yes	No	Yes	Yes
Dialpad	Dialpad Ai, Dialpad Connect, Dialpad Platform	No	Yes	Yes	Yes
e&enterprise	engageX CPaaS	Yes	No	Yes	Yes
Google	Google Cloud Google Workspace	No	Yes	Yes	Yes
Mitto	Mitto Conversations	Yes	No	Yes	Yes
Nylas	Nylas	Yes	No	Yes	Yes
Pexip	Pexip Connect, Pexip Secure Meetings, Pexip Video Platform, Pexip VPaaS	No	No	Yes	Yes
Plivo	Plivo	Yes	No	Yes	Yes
Soprano	Soprano Connect	Yes	No	Yes	Yes
Talkdesk	Talkdesk GNC	No	Yes	Yes	Yes
Wildix	Wildix	Yes	No	Yes	Yes
Zoho	Zoho One, Zoho Workspace, Zoho Cliq and Zoho Meeting	No	Yes	Yes	Yes



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

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About ISG

ISG (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.