

# Communication Platforms Emerging Providers Buyers Guide

Software Provider and Product Assessment

EXECUTIVE  
SUMMARY

**\*ISG** Research



## Key Takeaways

Enterprise communication has shifted from basic message delivery to coordinated, context-aware interactions across applications, systems, and user experiences. Emerging communication platform providers support this transformation with programmable messaging, voice, workflow, and API capabilities that help enterprises modernize both internal collaboration and customer engagement.

### Software Provider Summary

The ISG Buyers Guide™ for Communication Platforms Emerging Providers evaluates 11 software providers offering products supporting API-based communication, interaction orchestration and workflow-connected engagement. The research ranked the top three overall leaders as Telnyx, Exotel and Clickatell. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Clickatell, Exotel, MSG91 and Telnyx were rated as Exemplary with Plivo and Soprano rated as Innovative. CEQUENS and Nylas were rated as Assurance; and iBASIS, Mitto and Monty Mobile were rated as Merit.

### Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%) which includes adaptability, manageability, reliability and usability. Telnyx, Exotel and Clickatell achieved the highest performance as Leaders in this category, supported by API-based integration across channels and connectivity with carriers, networks and business workflows. Leaders demonstrated enterprise-grade platform capabilities that support business and IT needs across varied deployment, governance and user contexts.

### Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Nylas, Telnyx and Exotel were the Leaders in this category showing strong customer commitment and clear dedication to customer needs. Providers with lower performance often lacked sufficient information to demonstrate customer success, commitment to customer experience or structured value through TCO/ROI.

### Strategic Recommendations

Enterprises should treat communication platforms as strategic orchestration infrastructure for real-time engagement, not merely as standalone messaging tools. When working with emerging providers, they should use them selectively where innovation, specialization, responsiveness and commercial flexibility create advantage, while carefully validating scale, governance, ecosystem maturity, global reach and long-term viability.



## The Findings

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider's website, the buying process and the customer journey.

### Overall Scoring of Software Providers Across Categories

The research finds Telnyx atop the list, followed by Exotel and Clickatell. Providers that place in the top three of a category earn the designation of Leader. Exotel and Telnyx have done so in 5 categories; Clickatell in 3; and Nylas and Plivo in one category.

### Communication Platforms Emerging Providers

#### Overall

Providers	Grade	Performance
Telnyx	B	<b>Leader</b> 68.4%
Exotel	B-	<b>Leader</b> 62.2%
Clickatell	B-	<b>Leader</b> 57.3%
Soprano	B-	56.3%
Plivo	C++	54.0%
MSG91	C++	53.9%
Nylas	C++	53.5%
Mitto	C++	51.9%
CEQUENS	C++	50.6%
Monty Mobile	C+	47.7%
iBASIS	C	37.9%



Source: ISG Research  
Communication Platforms Emerging Providers Buyers Guide  
© 2026 Information Services Group, Inc.



## About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit [research.isg-one.com](https://research.isg-one.com).

## 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 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 and research, in-depth knowledge and governance of provider ecosystems, and the expertise of its 1,500 professionals worldwide working together to help clients maximize the value of their technology investments.

## About the Authors



### **David Menninger**

*Executive Director, Software Research and Distinguished Analyst*

David Menninger leads the overall team for software research and advisory for supporting IT and expertise in AI software at ISG. With over three decades of experience in enterprise software, Dave's leadership has advanced digital transformation with information and insights for enterprises around the world.