

Vendor Profile

Infobip Vendor Profile: AgentOS Connects Communications Scale with AI Interaction Orchestration

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IDC OPINION

IDC views Infobip as one of the strongest global challengers in the communications platform-as-a-service (CPaaS) market. Its communications foundation is rooted in extensive direct carrier connectivity, broad channel coverage, local market operations, and infrastructure designed to support high-volume and regulated workloads. Above this foundation, Infobip is seeking to differentiate AgentOS through context and intelligence, orchestration, and an open platform that developers, partners, and technology providers can build on. Infobip describes the longer-term direction as AI interaction orchestration spanning customer-facing and internal workflows, with the proposition evolving toward outcome-driven orchestration over time. The strategic direction is credible, but execution will determine the degree to which the company can shift its customer and revenue mix toward higher-value software and orchestration while preserving the economics and reliability of its core communications business. In addition:

- AgentOS, generally available since April 2026, brings Infobip's previously separate SaaS products into a more unified platform and now sits at the center of the company's product strategy. It combines AI agents, journey orchestration, customer data, analytics, and human support on top of Infobip's global communications infrastructure. Its strategic value lies in coordinating the workflow around a customer interaction: understanding customer context, determining the appropriate action, executing that action through enterprise systems and communications channels, and transferring responsibility to a human operator when required. This expands Infobip's role beyond communications delivery toward the business processes these communications support.
- Infobip is positioned for enterprises seeking to connect outbound engagement with inbound service across multiple markets, channels, and enterprise systems. Its direct operator relationships, regional operations, and established communications infrastructure provide AgentOS with a substantial execution foundation. Combining these assets with customer context, orchestration, and a shared human workspace can reduce the number of separate components required to implement customer

engagement workflows. Infobip's modular approach also allows customers to adopt individual capabilities or a broader platform alongside existing technology investments.

- Competitive advantage will need to be demonstrated at the workflow level rather than through feature breadth alone. Capabilities such as memory, model choice, human handoffs, and open interfaces are becoming competitive requirements rather than durable differentiators. Infobip has a strong opportunity that lies in combining these capabilities with its communications infrastructure, channel expertise, local execution, and implementation support. The critical test is whether this combination can consistently reduce deployment complexity, improve customer outcomes, and deliver attractive total economics at scale.
- AgentOS continues to evolve as a platform with tangible customer deployments and a clear strategic role within Infobip's portfolio. Success in its next phase will depend on demonstrating repeatable production outcomes, robust governance, integration depth, and a simpler operating experience across the platform. Buyers should validate production references, governance controls, implementation effort, commercial models, and measurable business outcomes when evaluating AgentOS.

IN THIS VENDOR PROFILE

This IDC Vendor Profile examines Infobip's transition toward a broader AI interaction orchestration proposition, with AgentOS as the central focus. Current deployments remain concentrated in customer engagement and service workflows, but Infobip's longer-term ambition extends to orchestration across customer-facing and internal interactions. This document assesses the company's operating foundation, product capabilities and maturity, commercial model, implementation ecosystem, and outlook.

SITUATION OVERVIEW

Infobip has evolved from an international SMS connectivity provider into a broad cloud communications and customer experience platform. The company competes in a market where programmable communications, contact center, customer engagement, customer data, identity, and AI orchestration increasingly overlap. This convergence not only expands Infobip's addressable market but also places it in direct competition with hyperscalers, CRM and contact center vendors, marketing platforms, and other CPaaS providers.

Today, customer communications increasingly involve several connected tasks such as identifying a customer, retrieving information, updating a business system, selecting a channel, and resolving an exception. Adding an AI agent to one touch point does not coordinate these tasks by itself. This creates an opportunity for providers that can join customer context, workflow execution, communications delivery, and operational oversight.

It also brings communications providers into closer competition with customer service, marketing, and enterprise AI platforms.

Company overview

Infobip is evolving from a global communications provider to an intelligent orchestration platform

Infobip was founded in Croatia and formally established under the Infobip name in 2006. The privately held company is led by Co-founder and CEO Silvio Kutić, with Co-founder Izabel Jelenić serving as CTO. Infobip initially focused on simplifying the operational complexity of sending application-to-person messages across fragmented mobile operator networks. From that foundation, it expanded internationally through local offices, direct operator relationships, proprietary infrastructure, and a broader portfolio spanning voice, email, rich messaging, authentication, contact center, customer engagement, and customer data.

Acquisitions have complemented this expansion by adding capabilities in priority markets and adjacent parts of the communications stack. OpenMarket strengthened Infobip's position in U.S. enterprise messaging, Peerless Network added U.S. voice infrastructure and licenses, Anam Technologies expanded its messaging security capabilities, and Shift strengthened its developer community reach. Most recently, the July 2026 acquisition of SocketLabs added enterprise email infrastructure and multi-provider management capabilities, extending Infobip's position in email delivery and deliverability.

Today, Infobip combines communications infrastructure and regional delivery capabilities with product engineering, enterprise account teams, and an ecosystem of partners. The company has more than 3,500 employees and over 75 offices across 6 continents, reaches more than 190 countries, maintains more than 800 direct mobile network operator connections and more than 40 data centers and auxiliary locations, and serves over 10,000 active customers. Its customer base spans digital-native businesses, large enterprises, financial institutions, retailers, travel and hospitality providers, healthcare organizations, public sector entities, technology platforms, and mobile operators. Commercial models range from consumption-based connectivity and APIs to SaaS subscriptions, managed services, and professional services, with emerging outcome-oriented models.

This operating model is particularly relevant for enterprises managing customer journeys across markets with different channel preferences, sender-registration requirements, carrier rules, regulatory environments, and language requirements. Infobip's local presence and solution engineering capabilities can help translate a common platform into deployments adapted to individual markets. However, this breadth also creates an economic and operational trade-off: Extensive local coverage and bespoke implementation capabilities

make the model relatively resource intensive, increasing the importance of standardization, reusable software, and repeatable delivery as the business scales.

AgentOS is central to this transition. Rather than representing another standalone product, it supports Infobip's move toward a more unified, software-led operating model by bringing previously separate SaaS capabilities together and providing a common orchestration layer across communications channels, customer data, human interactions, and AI agents. Infobip is also positioning AgentOS as an open and modular platform that developers, partners, and technology platforms can build on through APIs, Model Context Protocol (MCP), integrations, and reusable components. This gives Infobip an opportunity to extend its role beyond communications delivery into the coordination of broader customer-facing and internal workflows.

Infobip enters this next phase from a stronger financial position. In 2025, turnover increased 16.5% to \$2.335 billion, while adjusted EBITDA reached \$200 million, strengthening the company's capacity to invest in platform development and expansion. Its strategy is increasingly centered on becoming an intelligent orchestration layer connecting enterprises, communications networks, customer data, human interactions, and AI agents.

Company strategy

Infobip is using AgentOS to move up the stack while protecting its communications core

Infobip's strategy is to protect and expand the company's large communications base while shifting its product and revenue mix toward richer channels, software, data, identity, and AI-led orchestration. This reflects the broader evolution of the communications market from message delivery toward engagement, intelligence, and increasingly autonomous customer interactions.

In response, Infobip has expanded from channel APIs toward a modular platform model that allows customers to consume individual APIs, packaged applications, embedded capabilities, or a more integrated stack. Strategic priorities include RCS and OTT messaging, global voice, email, network APIs and identity, conversational applications, customer data, and AgentOS. A model-agnostic approach, open interfaces, and integration with enterprise systems are important because most large organizations will operate heterogeneous AI, CRM, ERP, and data environments rather than standardizing on a single technology stack.

The breadth of Infobip's portfolio is an important competitive asset. It spans SMS, MMS, RCS, WhatsApp, and other messaging applications, as well as email, voice, video, push and in-app messaging, authentication and identity, customer engagement, contact center, conversational AI, customer data, and carrier-facing services. This breadth can support

multichannel procurement, orchestration, and failover, but it also creates a packaging challenge. Infobip must make product boundaries, editions, dependencies, data residency requirements, and service responsibilities easy for customers to understand as the portfolio becomes more integrated.

At the foundation is Infobip's communications platform, providing APIs, channel connectivity, orchestration, delivery reporting, and compliance capabilities. AgentOS sits above this infrastructure as the strategic AI-native orchestration layer for customer-facing and, over time, internal workflows. It brings together Infobip's customer engagement and contact center capabilities with agentic AI and unifies capabilities previously delivered through Moments, People, Answers, and Conversations. Legacy service names remain within Infobip's published service descriptions as of July 2026, suggesting a transition period as existing products and customers move toward the new architecture.

AgentOS is structured around a conversational customer data layer, AI orchestration, and human handoffs, with deployment and integration options designed to support self-service use, partner-led embedding, and broader platform development. Notable platform value can live where identity, consent, customer profiles, conversation history, policy, and analytics are reusable across applications and channels rather than simply presented through a common interface or commercial wrapper.

The wider portfolio strengthens the AgentOS proposition when these capabilities improve the execution of an end-to-end customer journey. RCS and WhatsApp enable richer interactions; voice supports real-time assistance and escalation; email extends confirmations and follow-up; and authentication, identity, and network signals can strengthen trusted transactions. Infobip's announced acquisition of SocketLabs on July 9, 2026, further extends this proposition through additional email infrastructure and multi-provider management capabilities.

AgentOS: Unifies customer data, AI, communications, and human engagement in a common operating layer

Generally available since April 2026, AgentOS brings together capabilities previously marketed through Moments, Answers, Conversations, and the People customer data layer into a broader AI-native platform proposition. It combines customer data, journey orchestration, AI agents, knowledge retrieval, omni-channel communications, human engagement, and analytics across marketing, sales, service, and support use cases.

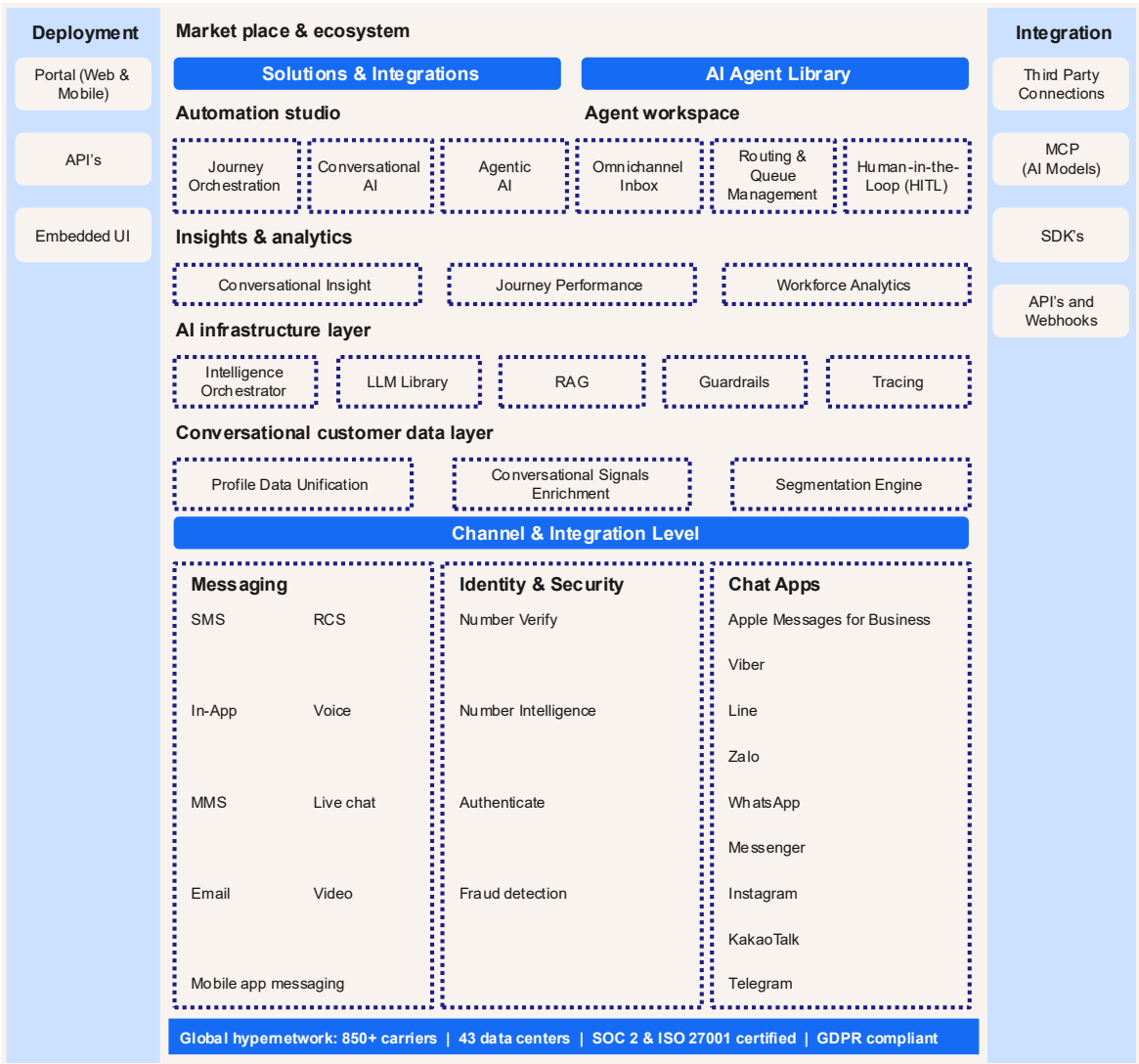
At the architectural level, Infobip operates a hybrid architecture using its own infrastructure alongside public cloud services. This includes 1,300+ physical servers, 35,000+ virtual machines, 15,000+ application instances, microservices, Kubernetes, and more than 1,000 daily deployments. Direct and private connectivity options, regional processing, and disaster recovery design are relevant for regulated and latency-sensitive workloads.

This allows AgentOS to extend Infobip's communications and identity infrastructure with a conversational customer data layer; AI infrastructure services for model selection, retrieval, guardrails, and observability; an automation environment for orchestrating journeys and agent workflows; and an agent workspace supporting omni-channel routing and human-in-the-loop supervision. Agent development is supported through no-code tooling, configurable templates, and SDK access for more customized implementations.

The architecture allows different forms of automation to be applied according to the complexity and risk of a task. Rules-based workflows can manage predictable steps, while AI agents can address interactions requiring knowledge retrieval, interpretation, or reasoning. Human operators can enter the same workflow when judgment or escalation is required, with conversational context retained during the handoff. This hybrid model can reduce unnecessary use of autonomous agents while improving control and testability for more consequential interactions.

FIGURE 1

Infobip AgentOS architecture



Source: Infobip, 2026

Infobip demonstrated this model at its 2026 Analyst Summit through a retail scenario that began with a WhatsApp promotion, progressed through product selection and customer data capture, and generated an email confirmation. An order-shipped event subsequently triggered another WhatsApp journey. When the customer requested human assistance, the interaction moved into Inbox, where the operator could access customer details, previous conversations, an AI-generated summary, and suggested responses. Infobip also demonstrated a PSTN call initiated from the workspace. Payment was simulated, so the

scenario demonstrated workflow integration rather than a verified production payment transaction.

The demonstration combined deterministic journey triggers with an orchestrator agent, specialist agents, API-based tools, and human escalation. This is an important architectural characteristic because it allows automation to be selected based on the task rather than requiring every stage of a journey to use an autonomous agent.

Customer data provides continuity across these interactions. Demonstrated profiles included attributes such as product choice and delivery address alongside activity history and events that could trigger subsequent journeys. This provides a mechanism for connecting communications behavior with downstream operational action. Existing customer profiles and conversation history should, however, be distinguished from the more structured context and memory capabilities that Infobip described as early access. These are intended to improve context sharing among AI agents and human operators.

Knowledge preparation is another component of the architecture. Infobip describes a proprietary retrieval-augmented generation pipeline and agentic chunking approach for preparing enterprise content for retrieval. This addresses an important deployment requirement because customer-facing agents depend not only on the underlying model but also on the quality, structure, maintenance, and accessibility of enterprise knowledge.

AgentOS also uses multiple integration approaches. In addition to the Model Context Protocol, Infobip demonstrated a connector catalog, direct API-based tools, Exchange applications, and support for customer-operated MCP servers. Salesforce contact and event synchronization and Shopify were among the examples shown. This flexibility is relevant for large enterprises operating heterogeneous CRM, commerce, AI, and data environments that require different patterns for synchronization, transactional actions, and user interface integration.

Analytics connects these components at the interaction level. In the demonstrated environment, a single interaction could span Journeys, Chatbots, and Inbox, with configurable conversion funnels and recommendations relating to unsuccessful topics, API failures, and delivery issues. This is more strategically useful than measuring individual messages in isolation, particularly when interaction outcomes can be connected to the relevant enterprise system of record.

The architectural significance of AgentOS is therefore its ability to allow rules, AI agents, enterprise systems, and human operators to participate in the same customer journey while maintaining shared customer context.

AgentOS: Differentiation will depend on integration depth, governance, and proven production outcomes

Agent creation alone is unlikely to provide durable differentiation as similar capabilities become standard across enterprise software. Infobip's intended AgentOS differentiation is broader: context and intelligence, orchestration, and an open builder platform layered on its communications execution foundation. The opportunity is to combine these capabilities with customer identity, enterprise integrations, direct communications execution, and human operations so AI can participate in end-to-end workflows rather than remain confined to a single interaction. Delivering this proposition across complex enterprise environments will require depth in integration, governance, model flexibility, observability, and reusable developer and partner tooling.

Infobip emphasizes a model-agnostic approach, allowing customers to work with different model providers while retaining core execution capabilities on its own infrastructure. This can provide greater flexibility around cost, latency, performance, and data handling. Governance is equally important: AgentOS includes approval workflows, tracing, guardrails, configurable levels of autonomy, and human intervention through Inbox. The value of these capabilities ultimately depends on how effectively they operate together in production.

Floward provides an early example of this integrated model. In June 2026, the online flower and gifting company deployed AgentOS to manage sharp seasonal increases in customer service demand. The implementation combined specialized AI agents with WhatsApp journeys and live-agent escalation, including automated address collection, FAQs, and order change workflows. Infobip reported that the solution was designed, tested, and deployed in under two months, enabling Floward to handle peak conversation volumes up to 13 times normal levels without scaling customer service head count at the same rate.

On Valentine's Day, Floward handled 54,000 conversations while maintaining one-minute response times at 95% SLA performance. The company also reported a 15% reduction in customer service costs, a 17 percentage point year-over-year improvement in AI containment, and a 12 percentage point increase in customer satisfaction. Floward is extending the same AgentOS foundation into revenue-generating use cases, including e-invitations that combine approval workflows, recipient notifications, and gift prompts. These vendor-published results are not independent benchmarks, but they provide useful evidence that Infobip can combine AI agents, communications workflows, customer data, and human escalation in a production environment under significant demand peaks.

AgentOS longer-term differentiation depends less on individual AI features and more on Infobip's ability to make communications, customer context, integrations, governance, and human intervention work together consistently across enterprise workflows. Repeatable evidence that this combination can reduce operating costs, absorb demand spikes, and improve customer outcomes will be more important than feature breadth alone.

AgentOS: Scale will depend on commercial clarity, partner distribution, and repeatable delivery

Infobip combines local and regional sales coverage with solution engineering, customer success, professional services, and global account coordination. Its partner ecosystem is also becoming more important. In 2025, Infobip reported almost 1,300 signed partners and stated that partnerships accounted for 30% of revenue from new customers.

Routes to adoption range from developer-led and self-service use to larger enterprise transformation projects. Customers can adopt the broader platform, start with a defined AI use case, add selected capabilities to an existing stack, or build a customized solution. This flexibility reduces the need for wholesale platform replacement and broadens Infobip's addressable opportunity.

The ecosystem spans mobile operators, hyperscalers, systems integrators, consultancies, agencies, ISVs, resellers, and CRM and commerce platforms. Infobip has highlighted collaborations with AWS and Deloitte Digital, alongside integrations with major enterprise applications. For AgentOS, partners are relevant not only as implementation resources but also as routes to market and builders of embedded propositions, integrations, and reusable solutions. As AgentOS moves Infobip further into AI-enabled workflows, the effectiveness of this ecosystem will influence both distribution and delivery scale.

Commercially, AgentOS separates platform and AI consumption from underlying communications delivery. Customers pay a platform fee that includes access, named human agent seats, and an AI credit allowance. Message processing and AI activity are metered separately, while channel charges continue to vary by geography, channel, and volume. Existing communications customers retain their channel rates when adopting AgentOS, according to Infobip.

TABLE 1

AgentOS pricing separates software activity from communications delivery

Charge	Charging basis	Commercial treatment
Platform fee	Fixed monthly charge	Platform access, named seats, and AI credit allowance
Processing fee	Per message processed	Applies across AI agents, human agents, and journeys
AI credits	AI feature consumption	Metered separately from message processing
Channel fees	Channel, geography, and volume	Charged separately; existing channel rates carry over

Source: Infobip, 2026

The model introduces several charging dimensions, but Infobip says its local teams work with customers to scope use cases, estimate expected traffic and AI usage, and structure the relevant components into an overall commercial package that can include the platform fee. This can improve up-front cost predictability for defined workloads. Buyers should nevertheless evaluate total workflow economics and sensitivity to changes in message volume, AI consumption, channel mix, and achieved business outcomes rather than assess the platform fee in isolation.

Infobip is also evaluating outcome-based monetization models, where pricing can increasingly align to measurable business outcomes rather than only platform, message, or AI consumption.

Scaling AgentOS will require Infobip to make both distribution and delivery more repeatable through partners. Reusable integrations, deployment patterns, evaluation frameworks, certification, and partner enablement can allow systems integrators, agencies, technology platforms, and other partners to take AgentOS to market and build on top of it while reducing dependence on specialist Infobip resources for each implementation. IDC therefore sees commercial clarity, reusable platform components, and repeatable partner-led routes to market and delivery as important to scaling AgentOS beyond high-touch enterprise projects.

FUTURE OUTLOOK

IDC expects AgentOS adoption to expand first within Infobip's existing communications customer base, particularly where enterprises can connect AI to measurable service, sales, and engagement workflows. Near-term progress will be reflected in broader production

deployments, customer expansion, and improving software and AI economics rather than feature counts. Over time, Infobip intends to extend AgentOS beyond customer-facing use cases toward broader AI interaction orchestration, including internal workflows and partner-built propositions. Longer-term, agent-to-agent interaction could create new opportunities around identity, context exchange, and verified execution, although the commercial model and timing remain uncertain.

ESSENTIAL GUIDANCE

Advice for Infobip

- **Prove AgentOS differentiation through production outcomes.** Infobip should focus less on expanding AI feature breadth and more on demonstrating repeatable customer outcomes such as faster deployment, lower operating costs, higher containment and resolution, and measurable revenue or customer experience improvements. This will be critical as capabilities such as agent creation, model choice, memory, and human handoffs become increasingly common across competing platforms.
- **Simplify the platform, integrations, and commercial model.** AgentOS must become easier to buy, integrate, and operate. Infobip should reduce complexity across product boundaries, pricing dimensions, connectors, governance controls, and implementation requirements, so customers can understand total workflow economics and deploy use cases without excessive customization.
- **Industrialize partner distribution and delivery while continuing to invest in communications and identity capabilities and strategies.** Infobip should use partners, reusable deployment patterns, certification, standardized integrations, APIs, MCP interfaces, and reusable components to expand routes to market and reduce dependence on high-touch internal delivery. At the same time, it should anchor AgentOS differentiation in the combination of context and intelligence, orchestration, an open builder platform, and communications execution assets such as direct carrier connectivity, identity, regional execution, and trusted customer workflows.

LEARN MORE

Related research

- *IDC's Worldwide Communications Platform as a Service Taxonomy, 2026* (IDC #EUR154600226, August 2026)
- *Market Share: Worldwide Communications Platform as a Service Shares, 2025* (IDC #US54406026, July 2026)

- *Market Forecast: Worldwide Communications Platform as a Service Forecast, 2026–2030* (IDC #EUR154573426, July 2026)
- *Top 5 CPaaS Trends for 2026* (IDC #US53713426, March 2026)

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