Brightlink's CPaaS targets enterprises and CSPs with enhanced user experience

OCTOBER 24 2019

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Cloud communications technology and platform provider Brightlink has launched version 2.0 of its communications PaaS, with new features that aim to enable enterprises to easily access and integrate communications capabilities into their business processes.

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Introduction

Brightlink recently announced a major update that bolsters its communications PaaS (CPaaS) offering, targeting the growing enterprise segment and communications providers with added features and an enhanced user experience. 451 Research projects strong and growing demand for CPaaS as it expands beyond its traditional market of developers and startups, and as adoption in the enterprise segment takes off. Our CPaaS Market Monitor projects the market will continue to grow at a 33.4% CAGR, reaching $11.4bn by 2023. This is a large and lucrative market, but the company will face intense competition. We look at how the new features in its CPaaS Platform 2.0 differentiate Brightlink and align with key trends driving demand for embedded, real-time communications for employee- and customer-interfacing interactions.

451 TAKE

451 Research projects that the CPaaS market will grow at a fast pace as enterprise adoption takes off. This will require a different approach to the early days of CPaaS, focusing on addressing enterprise requirements. The CPaaS Platform 2.0 release aligns with these trends, and should place Brightlink in a good position to benefit from the growing relevance of embedded communications in the enterprise segment. Furthermore, its one-stop-shop offering – with capabilities that include cloud applications, CPaaS and network services – should appeal to enterprise customers looking for a more complete and integrated set of solutions. Its key challenge will be gaining visibility in a crowded and intensely competitive space where – despite its differentiation – other players have gained a dominant mindshare.

Context

Brightlink is a communications platform and technology company that delivers voice, messaging, analytics and cloud-based solutions. It was founded in 2009 and is based in Atlanta. 451 Research estimates the company's revenue in 2018 to have been below $50m.

The company's products and services, which include voice, messaging, analytics and cloud-based applications for communications, build on the capabilities of its nationwide IP network, which provides over 100 carrier interconnections and global reach to more than 70 countries and 150 worldwide access points. Its customer base includes large technology vendors, communications service providers and large enterprises. It also has a reseller channel that targets enterprises and SMBs. Named customers include large organizations such as Sprint, Google, Blackboard and Directed.

According to 451 Research's M&A KnowledgeBase, Brightlink has made two acquisitions. In May it acquired Stitchtel Communications, a cloud communications provider, and in 2016 the assets of 365 Wireless to expand its wireless messaging capabilities. The company's customer base is composed of large enterprises, in addition to communications service providers around the globe.

Products

Brightlink aims to differentiate its CPaaS offering based on a full technology stack, which includes network services, CPaaS integrations and cloud applications. In May the company announced the 2.0 release of its CPaaS Platform, with new features and capabilities focused on providing ease of use, an intuitive web interface, prebuilt tools and direct programmatic access via APIs.

Brightlink's CPaaS Platform 2.0 release includes four major areas of capabilities:

- **Voice API Manager.** This web interface offers prebuilt tools that enable easy provisioning and porting of numbers globally and support call forwarding, E911 registration, Caller ID registration, and the ability to search for vanity numbers and number ranges leveraging Brightlink APIs.

- **Messaging API Manager.** It provides prebuilt access to Brightlink APIs to activate and enable SMS/MMS messaging on any number, including landlines. Other features include support for longer messages (more than 160 characters), delivery confirmation and receipts with real-time analytics, and domestic and international SMS and MMS messages.

- **SIP API Manager.** The platform allows easy activation, management and configuration of SIP trunks utilizing Brightlink APIs. Key features include the ability to add virtual communication channels, point-and-click SIP trunks to any endpoint, and calibrate usage according to traffic flow, geography and size.

- **API Command Center.** This provides direct API access and supporting resources, such as API reference document sample codes and system responses. It also allows users to test API connectivity and API management from a single location.

Brightlink aims to differentiate from pure-play tech players that focus primarily on developers on the demand side of the equation by providing prebuilt tools via a web interface that enables easy access to the communications features in its platform. The company is focused on aggregating the full range of capabilities and access to its partners on the supply side for the benefit of its customers.

Additionally, by offering a full set of capabilities across the technology stack, including cloud applications, CPaaS and network services, Brightlink seeks to be a one-stop shop that delivers a more complete, flexible and integrated set of solutions to enterprise customers. For example, customers can utilize its cloud PBX application for end users with phone numbers and additional voice services provisioned by the CPaaS and have usage on the Brightlink network fully bundled into the solution.

Competition

Brightlink plays in a competitive and dynamic space. Our M&A KnowledgeBase shows increased activity in recent years, with seven CPaaS-related transactions so far in 2019. This speaks of an increasingly competitive landscape, with a wide range of vendors with different approaches targeting the CPaaS opportunity.

Key competitors include pure-play CPaaS providers like Twilio, a pioneer in the cloud communications arena and de facto market leader. Other pure plays include Plivo and Sinch. The competitive landscape for Brightlink also includes carriers that have expanded into CPaaS, such as Bandwidth and Voxbone.

Other CPaaS players targeting the enterprise segment include Vonage, which built its CPaaS offering based on its acquisitions of Nexmo in 2016 and TokBox in 2018; IntelePeer, which is positioned as an enterprise-focused CPaaS 2.0; and Kaleyra, which in 2018 announced the pickup of Hook Mobile and its expansion into the US market. A recent entrant is cloud communications provider 8x8, which recently acquired CPaaS provider Wavecell.

SWOT Analysis

STRENGTHS

The company's trajectory as a provider of business communications services gives it a good understanding of enterprise requirements. This is reflected in the CPaaS Platform 2.0 release, with features and capabilities that should appeal to enterprise customers.

WEAKNESSES

The CPaaS space is dominated by a small number of vendors with strong name recognition. Brightlink can benefit from expanding its efforts to evangelize the benefits of its enterprise-focused approach.

OPPORTUNITIES

Our CPaaS Market Monitor projects the market will continue to grow at a 33.4% CAGR, reaching $11.4bn by 2023. This is a large and lucrative market; growth will be driven by increased demand from the enterprise segment, which Brightlink primarily targets.

THREATS

The biggest threats come in the form of an increasingly competitive market with other vendors expanding their reach to target the same opportunities. According to 451 Research's M&A KnowledgeBase, there have been a total of seven CPaaS-related acquisitions in 2019.