ANYMESSAGE

CARRIER COVERAGE WHITEPAPER

Global Carrier Coverage

How the AnyMessage / IDM group built direct carrier connectivity across 200+ countries — what the footprint means for deliverability, latency and compliance, and why the direct-connection question is back on the table for enterprises, aggregators and public operators in 2026.

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ABOUT THIS GUIDE

Carrier coverage is infrastructure, not procurement line

The conversation about messaging carrier coverage in 2026 has matured. For mature enterprises, international aggregators and public operators, the question is no longer "does this vendor cover my destinations" but "how is the coverage constructed, what does the routing look like under stress, and what does the compliance picture look like across the footprint". This guide addresses that deeper question.

Written for enterprise platform leads, international aggregators, and carrier-side partners evaluating interconnect options. The guide covers why coverage matters beyond the checkbox, how direct connectivity differs materially from aggregated routing, the AnyMessage / IDM group footprint, and the regional realities that make a pan-global message strategy never quite as uniform as the map suggests.

Contents

> **About the group.** This guide covers the combined carrier footprint of AnyMessage and its sister company IDM — interactive digital media GmbH — operating as a group under United Capital ownership. Where the footprint is described, it is the group footprint.

CHAPTER 01

Why carrier coverage actually matters

Four reasons carrier coverage is infrastructure rather than a procurement checkbox — and why the difference between "we cover X country" and "we cover X country well" is measurable in practice.

D

Deliverability

Each hop between sender and destination operator is an opportunity for filtering, throttling, or DLR loss. Direct operator connections deliver higher and more consistent delivery rates than multi-hop aggregation, especially during carrier incidents.

L

Latency

For OTPs and authentication, latency compounds commercial impact. A two-second latency penalty on OTP delivery measurably reduces conversion in high-funnel flows. Direct routes reduce median latency and compress the long-tail of slow deliveries.

C

Compliance

Direct operator relationships give visibility into content-filter behaviour, sender-ID registration status, and operator-side compliance policy. Aggregated routes strip this visibility; what the operator blocked and why becomes opaque.

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Cost, honestly measured

Aggregated routes often look cheaper on per-message headline. Cost per successfully delivered message — which is what actually matters — routinely diverges from cost per sent, and the cheapest-route approach often loses on the real number.

THE INFRASTRUCTURE FRAME

Carrier coverage is the plumbing of enterprise messaging. In a procurement deck it looks like a checkbox; in operation it is the thing that determines whether an OTP arrives in two seconds or twenty, whether the auth flow converts or frustrates, whether the fraud alert lands before or after the damage is done. Treat it like infrastructure, because that is what it is.

CHAPTER 02

Direct vs aggregated connectivity

The two fundamental models for delivering messages to global destinations, what each actually looks like in operation, and how to tell which one your vendor is running.

The direct-connection model

The platform holds direct commercial and technical relationships with destination mobile operators. Messages transit a single SMPP bind (or REST equivalent) from the platform to the operator's SMSC, with no intermediary. This requires real carrier-relationship investment — commercial agreements, technical integration, ongoing relationship management, and the operational capability to run binds with each operator's specific quirks. Most mature CPaaS operators hold direct relationships in a handful of strategic markets and aggregate elsewhere.

The aggregator model

Smaller platforms, and many larger ones in tail markets, route through aggregators — specialist intermediaries that have built direct relationships with operators and resell those connections to downstream platforms. Aggregation can be multi-tier: aggregator A routes through aggregator B who finally reaches the operator. Each layer reduces visibility, inserts latency, and creates opportunities for route quality to degrade.

The hub model — GSMA Open Connectivity

The middle path: specialised SMS hubs that hold direct operator connections across dozens of countries and interconnect with each other. GSMA Open Connectivity (OC) certifies hubs meeting quality and governance criteria — roughly 40 worldwide. Hubs offer something closer to direct-connection quality and compliance visibility at global scale. The hub model is how international carrier-grade messaging is actually delivered.

How to tell what your vendor is running

- Ask for a destination-by-destination route map and the connection type per destination.
- Look for honest disclosure: "direct on top-20 destinations, aggregated elsewhere" is healthy; "global direct connectivity" is marketing.
- Watch for DLR integrity per-route — aggregated routes often have inconsistent DLR return.
- Check whether the vendor can provide root-cause on filter-rejected messages. Aggregated routes often cannot.

> **Honest disclosure.** The AnyMessage / IDM group operates a hybrid. AnyMessage runs direct-connection SMS in the EU; IDM operates an SMS hub with direct connections across 1,000+ operators and approximately 200+ countries via GSMA OC certification. For destinations where the group does not hold a direct connection, traffic is aggregated through partner hubs — disclosed route-by-route. This is the truthful shape of any provider at global scale.

CHAPTER 03

The AnyMessage / IDM group footprint

How a footprint covering 200+ countries and 1,000+ operator connections is actually built — and the specific strengths of the group's direct-connection portfolio.

The group structure

AnyMessage operates the EU and DACH-focused direct-connection portfolio — Germany, the wider EU and selected adjacent markets — with ISO 9001 / 27001 compliance and German-hosted infrastructure. IDM — interactive digital media GmbH — operates an SMS hub with GSMA Open Connectivity certification, holding direct operator connections across 1,000+ operators in 200+ countries. Since 2024 AnyMessage and IDM have operated as a group under United Capital ownership; customers of either can access the combined footprint through a single contract.

Strengths of the portfolio

- **EU and DACH depth.** Direct connections with major operators across the EU, with a particular focus on German compliance-sensitive deployments.
- **MENA reach through established relationships.** IDM has long-standing direct-connection coverage across the Middle East and North Africa.
- **GSMA OC certification.** The IDM hub is one of approximately 40 GSMA OC certified hubs worldwide.
- **Operator-grade operations.** 24/7 NOC, documented incident response, route-quality monitoring at hub level.
- **Compliance posture.** ISO 27001 compliant; GDPR-aligned by architecture; BSI C5 conformance activities in progress for the AM segment.

What the combined footprint means in practice

For an EU enterprise with international reach requirements — a global bank with European headquarters, an international aggregator wanting direct EU compliance posture, a global brand with regulated-sector EU operations — the group delivers one contract, one API, one compliance posture, and reach from the EU out to 200+ countries. EU-originated traffic retains EU compliance posture; international-originated traffic goes through IDM's hub with GSMA OC operational standards.

> **WHAT THIS IS NOT**
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> The group does not claim to run the largest messaging network in the world. Our claim is narrower and more defensible: direct-connection EU messaging built for compliance-sensitive deployments, with hub-grade international extension through GSMA OC. If global volume depth in every market is the primary requirement, other providers may be better-fit; our strength is the EU-first posture with genuine international reach, not the reverse.

CHAPTER 04

GSMA Open Connectivity

What GSMA OC is, what operator-grade hub operation actually requires, and why approximately 40 hubs worldwide carry the bulk of cross-border A2P traffic.

What GSMA OC is

GSMA Open Connectivity is the industry certification programme for SMS hubs — the specialised operators that sit between platforms and destination mobile operators, holding direct connections on both sides. OC certification requires meeting defined quality, compliance and governance criteria: direct operator agreements, technical standards for routing and DLR integrity, anti-fraud and AIT-detection capabilities, and ongoing governance participation with the GSMA. Certification is not a marketing label; it is a continuously-reviewed operational status.

Why approximately 40 hubs carry the weight

Running a hub at GSMA OC quality requires substantial and sustained investment — carrier relationships in every market served, technical infrastructure, 24/7 operational capability, and the governance capacity to participate in GSMA working groups. The economic and operational entry threshold limits the number of viable hubs to a few dozen. This is not a crowded market; it is a specialist-operator market where the same names appear at industry events year after year.

What OC certification buys the customer

- Direct operator connections on both ingress and egress sides of the hub.
- Transparent route mapping — the customer can see which operator each destination hits.
- Anti-fraud / AIT detection at hub level as part of the OC operational baseline.
- Participation in cross-industry trust framework activity — increasingly relevant as GSMA pushes verified-sender programmes.
- Governance recourse — material concerns can be escalated through GSMA, not just through commercial channels.

The direction of travel

GSMA trust-framework activity has intensified through 2024–2026, with the verified-sender programme and related initiatives. Expect OC hubs to carry increasing weight in verified-sender registration, AIT counter-measures, and cross-border compliance signalling. Being connected to an OC hub — rather than only to downstream aggregators — becomes progressively more valuable.

CHAPTER 05

Regional realities

The global messaging layer is not uniform. Each region has its own operator structure, regulatory posture and content-filter behaviour. A map that looks like a single footprint is always hiding per-region specifics.

Europe

Mature operator ecosystem, tight regulatory environment (GDPR + ePrivacy + per-country sender-ID regimes), strong direct-connection availability. Deliverability is generally high; compliance is the dominant variable. Germany and the Nordics run the tightest regimes; Southern Europe varies more.

MENA

Established relationships matter disproportionately. Several Gulf markets have specific A2P regulations, sender-ID regimes with local registration requirements, and operator-side content filtering that rewards direct-connection carriers with local presence. A market where working through an OC hub with established MENA relationships delivers materially better outcomes than routing through generalist aggregators.

APAC

Enormous variation between markets. India has its TRAI-regulated DLT framework for sender-ID and content registration; Indonesia has its own regulatory regime; Japan, Korea and Singapore each run mature but distinct ecosystems. Chinese messaging has its own constraints and is largely handled through specialist Chinese providers. A "pan-APAC" coverage claim always requires drill-down.

Americas

North America's A2P market is large, regulated (TCPA in the US), and dominated by 10DLC and toll-free messaging. Latin America varies widely — Brazil operates a mature market with specific regulations; smaller LatAm markets range widely in connectivity and compliance maturity.

Sub-Saharan Africa

Large and growing mobile subscriber base, but carrier relationships and direct connectivity are concentrated in a few operators per market. SMS remains dominant over richer channels in most of the region. An increasing focus for enterprise messaging; also an increasing focus for AIT and fraud detection.

> **THE UNIFIED TAKE**
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> "Global coverage" is always a simplification. The useful question is not how many countries a provider claims, but how the coverage is constructed per region, where the direct connections actually sit, and where aggregation fills the gaps honestly.

CHAPTER 06

Perspectives

What enterprises, aggregators and carriers each need from a coverage partner — and why the same footprint looks different from each of these seats.

From the enterprise seat

Enterprises need predictable deliverability on their core destinations, compliance posture aligned to their regulatory footprint, and a credible answer on incident response when things go wrong. For most EU enterprises, this means EU-first direct connectivity for European traffic and a clear story on international reach. Volume discount at the margin matters less than reliability at the core.

From the aggregator seat

Aggregators need wholesale relationships with hubs that deliver GSMA OC quality, honest disclosure of route constructions, and flexibility to interconnect. A hub with strong OC posture is a multiplier for a downstream aggregator; a hub with opaque routing is a liability. Compliance posture at the hub level matters for the aggregator's own downstream compliance story.

From the carrier seat

Mobile operators interconnecting with hubs need hub counterparts with AIT detection, fraud response, and the capacity to enforce operator policy (content filtering, sender-ID rules, commercial terms). A well-operated hub reduces the operator's own policing workload. Poorly operated hubs are a steady source of remediation calls.

The common thread

In every seat, the value of a carrier-coverage partner is a function of the same properties: direct-connection depth, transparent routing, AIT / fraud detection, compliance posture, incident response quality. The relative weighting differs; the underlying requirements converge.

> **The group's pitch, plainly.** EU-first compliance-grade direct connectivity through AnyMessage; global hub reach through IDM under GSMA OC certification; a single contract that packages both with honest disclosure of what is direct and what is aggregated. For customers whose primary requirement is EU compliance posture with genuine international extension, this is the combination we think works.

> *"A carrier coverage map is the easy part of messaging infrastructure. What actually differentiates providers is the operations beneath the map — the incident response, the route monitoring, the fraud detection, the honest disclosure of where the coverage is thinner than the marketing suggests."*

— IDM GROUP NETWORK OPERATIONS, 2026

Where the AnyMessage / IDM group fits. We are a European-anchored messaging group. AnyMessage handles EU and DACH direct-connection with compliance-first architecture; IDM operates the GSMA OC certified hub for international reach. Together, 1,000+ operator connections across 200+ countries — constructed honestly, operated under ISO 27001, and documented down to the per-destination route level on request. Comparable hubs exist at other OC operators; our strength is the compliance integration between EU and international layers.

ABOUT THE PUBLISHER

AnyMessage GmbH

AnyMessage is a German cloud communications provider headquartered in Lübeck. The AnyMessage Gateway (AMG) delivers SMS, RCS, WhatsApp Business, Voice, Email and Video through a single API, hosted entirely in German data centres and operating in line with ISO 9001 and ISO 27001. We serve enterprise clients in banking, insurance, healthcare, public sector, regulated retail and tourism, together with aggregator and carrier partners across the EU.

Since 2024 AnyMessage and *interactive digital media GmbH (IDM)* have operated as a group under United Capital ownership — AnyMessage focused on EU and DACH compliance-sensitive enterprise deployments, IDM focused on global carrier connectivity via one of approximately 40 GSMA Open Connectivity certified hubs.

1,000+	200+	~40	100 %
OPERATORS	**COUNTRIES**	**GSMA OC HUBS**	**MADE IN GERMANY**
Directly or via GSMA OC (group footprint)	Reachable on the combined network	IDM is one of them	AM infrastructure in German data centres

Who we serve

Enterprises across banking, insurance, healthcare, public sector, regulated retail and tourism. Carrier and aggregator partners across the EU and internationally. Because messaging is mission-critical for many of our clients, specific references are available on request under NDA.

> **TALK TO US**
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> If this guide raised questions about carrier coverage for your specific destinations, routing patterns, or compliance posture, we are happy to go through it route-by-route. Enterprise enquiries: contact@anymessage.cloud. Or call +49 (2173) 26505-0.

ANYMESSAGE

Let's start the conversation

ANY Message. ANY Content. ONE API. ONE APP.

Enterprise enquiries
ANYMESSAGE GMBH
✉ contact@anymessage.cloud
☏ +49 (2173) 26505-0

Partner programme
CARRIERS · AGGREGATORS · RESELLERS
✉ contact@anymessage.cloud
☏ +49 (2173) 26505-0

Online
WEBSITE · DOCS · APP
⌘ www.anymessage.cloud
☏ +49 (2173) 26505-0

Headquarters

AnyMessage GmbH · Moislinger Allee 9D · 23558 Lübeck · Germany
GDPR compliant · Made in Germany · Part of the United Capital group