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# The Hyperscaler Reality Check:
# Compete or Complement?

Why the Channel Wins by Complementing
Hyperscalers and Exploiting Its Data Advantage

# Intro

- 3 × Innovate UK award winner

- Team of telecoms and data science specialists

- Channel-first white-label platform

- Multi-tenant partner architecture

- Model-agnostic Voice AI infrastructure

- Enterprise integrations, fast deployment

# Intro

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# The AI Investment Explosion

Hyperscalers are investing hundreds of billions into AI infrastructure. Examples:

- **Microsoft** investing $13B+ into **OpenAI**

- **amazon** investing billions into **ANTHROP\C** & **OpenAI**

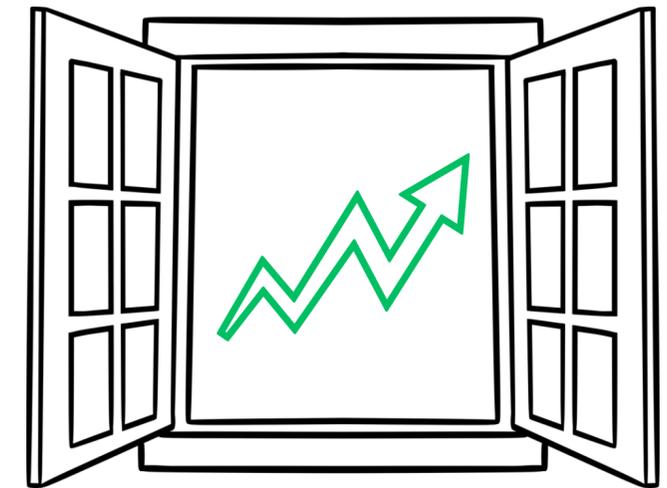- **Google** investing heavily into ✦ **Gemini** and AI infrastructure

The compute and infrastructure layer of AI is already arguably largely decided (for now)

# The Window of Opportunity

Past waves:

- Cloud migration
- Managed security
- UCaaS

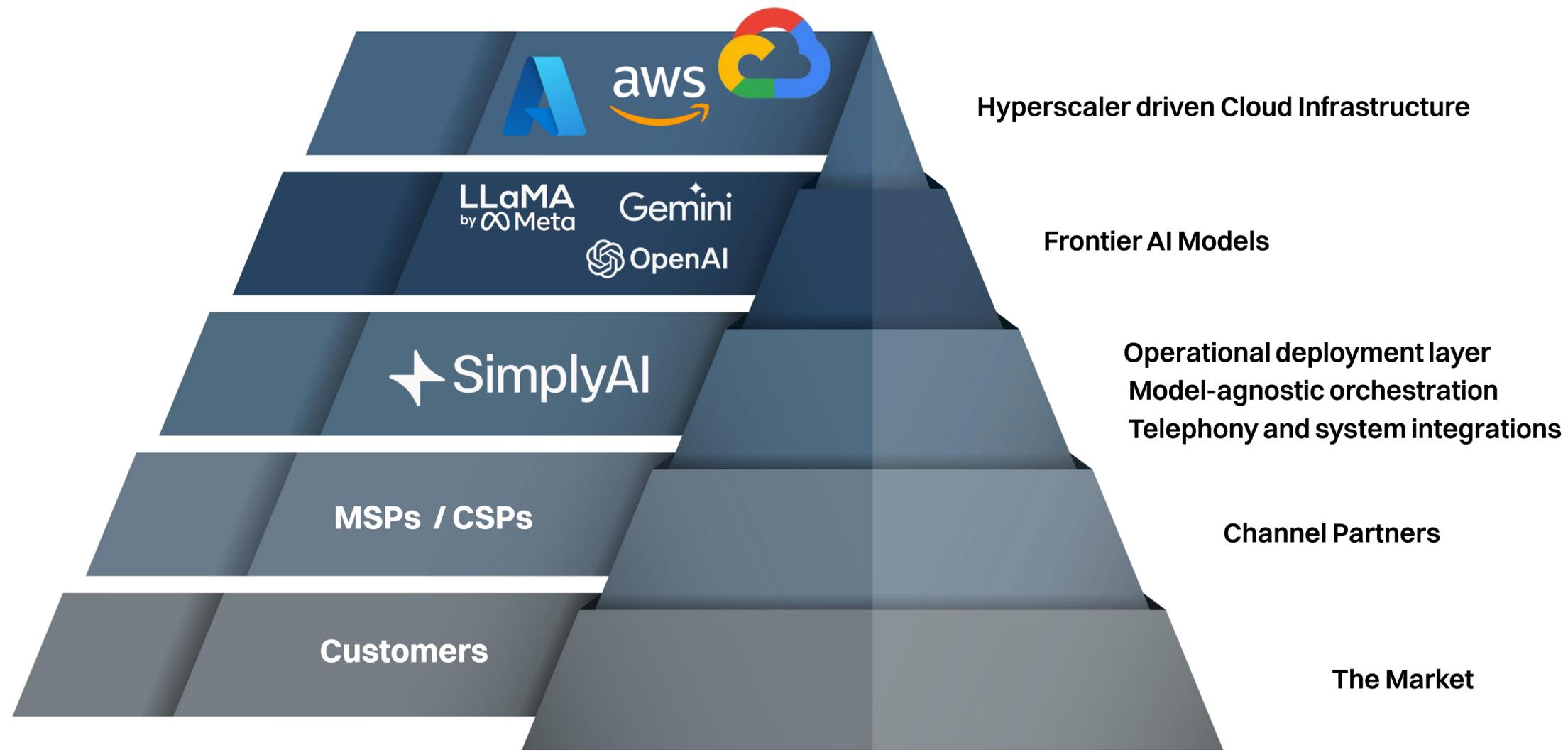**Next wave: Voice AI enabled Comms**

# The Real Question...

- **The question is not:** Can we compete with hyperscalers?

- **The real question is:** Where do MSPs and CSPs sit in the AI value chain so hyperscalers make our businessstronger?

The compute and infrastructure layer of AI is already arguably largely decided (for now)

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Hyperscaler driven Cloud Infrastructure

Frontier AI Models

Operational deployment layer
Model-agnostic orchestration
Telephony and system integrations

Channel Partners

The Market

**AI innovation happens in models and infrastructure. Value is realised in operational deployment.**

# **Hyperscalers are servicing downstream (in some cases)**

- Infrastructure

- AI models

- Productivity solutions

- Collaboration platforms

- Contact centre capabilities

*E.g. Azure+ OpenAI + Copilot + Teams*

# Why Competing Horizontally Fails

Hyperscalers inevitably dominate on:

- Capital

- Compute

- Global distribution

- R&D

They optimise for horizontal scale and standardisation.

# The Hyperscaler Paradox

Hyperscalers excel at building platforms.

… But they struggle to deliver operational change inside millions of businesses without channel expertise and final mile distribution.

Platforms scale. Operations require context and proximity.

# **Where the Channel Wins**

MSPs and CSPs sit at the operational edge of technology. They control:

- Customer relationships
- Infrastructure deployment
- Systems integration
- Ongoing service delivery

# The Channel's Unfair Advantage

1. Operational proximity

   • Access to how businesses actually work.

2. Embedded data flows

   • Continuous access to operational data across customers.

# The Data Advantage CSPs and MSPs Don't Always Realise They Have

Operational datasets already exist:

- Call recordings and metadata
- Support tickets and service logs
- Network telemetry
- Security alerts
- Communications usage patterns

AI turns these signals into automation and intelligence.

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# E.g. Comms Data

AI analysis of conversational data can generate:

- Customer insight
- Conversation summaries
- Sales coaching
- Service quality analysis

# Service Desk Data

AI can use ticket datasets to:

- Triage tickets
- Draft responses
- Suggest remediation steps

Turning service desks into AI assisted operations.

# Horizontal Niches

Repeatable operational problems across industries:

- Appointment scheduling
- Inbound enquiry handling
- Service triage
- After hours support

# Communications as an Automation Layer

Businesses still rely heavily on:

- Phone calls

- Inbound enquiries (Email, Messaging, Web, etc)

- Customer service interactions

AI can automate and enhance these workflows.

# Voice Based Automation

**Voice AI can support:**

- Call triage

- Appointment booking

- Lead qualification

- After hours enquiries

Comms becomes an information-rich automation interface.

# Why This Is a Complementary Strategy

**Hyperscalers build:**

- Infrastructure

- Compute

- AI models

**The channel builds:**

- Operational workflows

- Automation services

- Managed deployments

# The Recipe for Success for Channel Partners

**Combine:**

- Operational data
  - Connect systems through APIs and ingestion pipelines
  - Make data accessible to agents and automation workflows
- Horizontal automation
  - Scheduling and logistics updates
  - Handling inbound enquiries through voice and web agents
- Managed services
  - Escalation workflows and human-in-the-loop support
  - Prompt tuning and workflow improvements

# In Summary...

Hyperscalers and the channel play different but complementary roles in the AI economy.

Hyperscalers build the intelligence infrastructure. **The channel delivers the final mile of value.**

When these two forces work together, organisations can move from AI experimentation to real operational outcomes driven by the channel.

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