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Don't Assume

AI Voice for CSPs: The SMB Opportunity

A practical growth strategy for regional telcos, Tier-1s, ISPs, CLECs and MSPs

A Disruptive Analysis *thought-leadership* paper commissioned by Alianza

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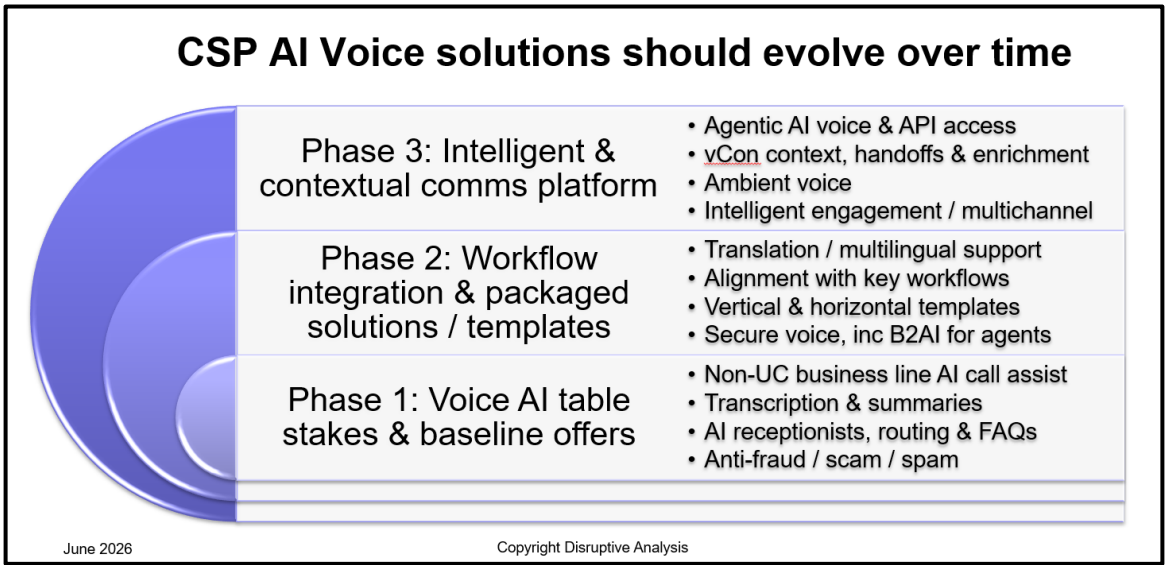
Core thesis & summary

The next wave of **AI Voice services** will not be captured only by hyperscalers, contact-centre specialists, AI pure-plays or smartphone platforms. A commercially meaningful middle ground exists for **regional telcos, Tier-1 operators, ISPs, CLECs and MSPs**, especially among **SMBs that still rely on fixed numbers**, informal receptions, non-desk frontline staff and appointment-driven workflows.

The opportunity is not to build new LLMs or agentic "AI employees". It is to become the **managed orchestration layer** for AI-enhanced business communications: numbering, routing, policy, consent, call handoff, transcripts, workflow integration and trusted escalation, **anchored on the SMB-centric voice services that CSPs already provide**.

Smaller and midsize **CSPs can win a significant role**, leveraging existing business phone lines and cloud-voice platforms. However, they need to **pay careful attention to phasing of AI capabilities**, aligning sophistication with the growth of their own skills and their customers' acceptance of new services. Larger operators also have a huge role to play here, but may have more options, especially where they already have major AI initiatives.

This also helps operators to **turn a disintermediation risk into a partnership opportunity**. Hundreds of niche, highly verticalised new entrants are creating conversational AI solutions, which could reduce the value of CSP voice services, or directly compete. Instead, those companies could themselves potentially become a new source of demand for telephony access to SMBs, if CSPs offer the right APIs and orchestration abilities.



This paper goes beyond the basic question of whether AI and Voice are converging (which they clearly are) and instead examines *which sectors and applications* are most relevant for normal mid-size CSPs and their typical business customers.

In particular, the paper considers SMBs, where CSPs often provide voice services for employees and functions that are less exposed to UC / CC. Ordinary phone calls anchored

on fixed numbers still dominate many business interactions, rather than pure online or app-based access. Yet these also offer scope for various innovative AI enhancements.

Many SMBs have limited IT and integration resources, and sit somewhat awkwardly between the target for consumer-grade voice AI and enterprise-grade XaaS. This means that **for smaller CSPs, the addressable opportunity is very different** from that of a hyperscaler, traditional UC vendor, an AI lab, a Tier-1 carrier with sizeable AI development resources, or a specialist CCaaS or CPaaS platform.

The practical lesson is that **the overall market is broad, but the feasible market is narrower**. The opportunity will also vary depending on the specific sectoral footprint and geographic region a given operator covers.

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Introduction and definitions

In the last few years, myriad combinations of AI technology and voice communications have emerged. Many have been built on existing contact centre (CC) and unified communications (UC) platforms, where AI is already being used for transcription, summarisation, quality monitoring and agent-assist functions.

Other AI capabilities have started to be embedded into smartphone diallers, and more recently in some prototype consumer calling experiences, where translation and scam detection can sit directly in the path of a call.

At a very high level, telco-relevant AI voice propositions can be grouped into B2B and B2C categories. While this paper focuses on B2B, some small businesses are likely to fall into the B2C realm – although they tend to be micro-businesses or individual contractors more reliant on mobile voice than fixed-line.

- **B2B Voice AI propositions** include AI receptionists, smart call routing, summarisation and transcripts, multilingual support, compliance-oriented recording and analytics, trusted voice and anti-scam services, and workflow-linked voice automation for bookings, dispatch or service coordination.
- **B2C Voice AI propositions** include live translation, scam and spam screening, personal call assistants, call summaries, elder-care or safety assistants, and on-device voice and dialler control tools that blur the line between telecom service, handset feature and AI application.

In general, both of these involve adding AI to voice services: the operator starts from numbering, call control, routing, voicemail, recording or hosted PBX and augments those functions with intelligence embedded in or around the call. AI is used to make existing communications smarter, safer, more searchable or more useful.

Voice AI vs. AI Voice

The alternative approach to convergence is adding Voice to AI. The starting point is an LLM, chatbot, agent runtime, conversational AI app, device or workflow platform. Voice and – in some cases - telephony access are then added as input and output channels.

Many of these applications sit "beyond the call", outside traditional telecoms altogether. They include voice interfaces directly embedded in chatbot apps, speech-to-speech AI, automatically generated podcasts, synthetic voices and agentic applications that treat telephony as just one input or output channel.

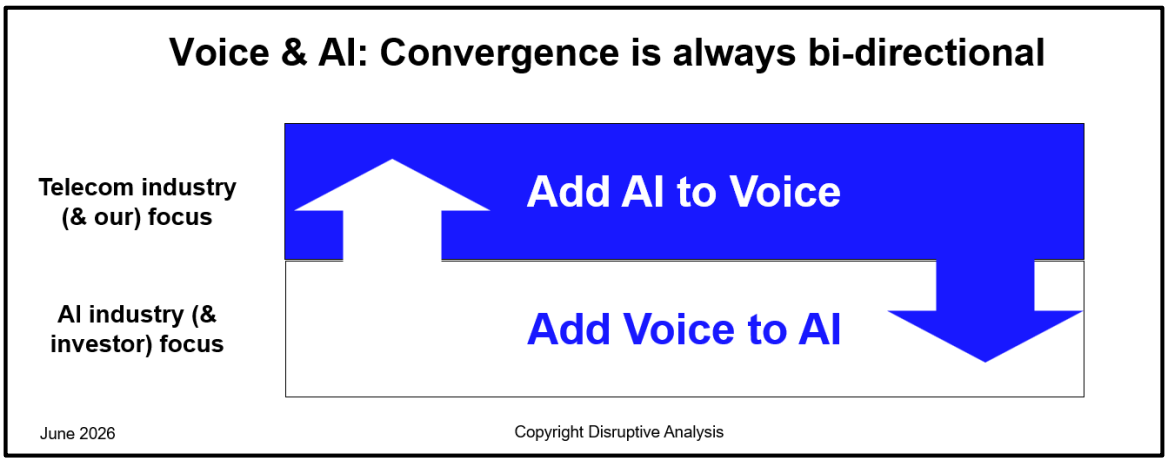
The next convergence steps add telephony, SIP connectivity or realtime audio APIs. Some conversational AI providers are becoming quasi-operators in their own right, using call-forwarding to integrate with telephony workflows, or even seeking to port numbers away from traditional CSPs. They may also integrate new hardware platforms and devices such as AR / VR headsets or in-vehicle voice.

These can be better described as "Voice AI" rather than "AI Voice", although the distinction is blurry – and likely to converge further over time, as AI platforms or third-party

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applications start to add telecom functionality such as identity, regulatory support and appropriate codec / media handling.

Ideally, telcos would broaden their horizons to voice and voice AI in general, rather than just variants of telephony that Alexander Graham Bell would recognise. But for smaller CSPs, the first domain is where they usually have the stronger commercial right to play, at least in the short term. But over time, the whole broader voice market could open up.



The structure of a call & what changes with AI

To understand how and where AI can add value to calls and the types of applications discussed later, it is important to start with a good foundation of the underlying structure of voice services. Many people never really think through what the *components* of a typical call are.

Even a basic phone call explicitly or implicitly includes aspects of identity, purpose and intent, urgency, policy, context, timing, sentiment, reputation, an eventual outcome and a sequence of actions that may need to happen afterwards.

The best approach is to divide a call into its component steps, and then drill into how AI can improve or change each of those:

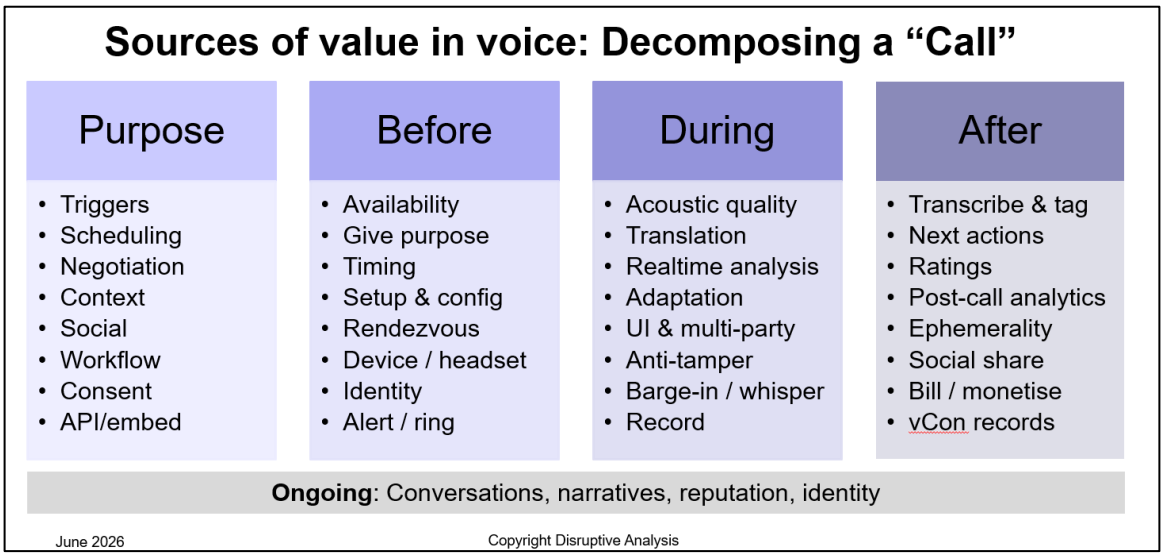
- Coordinating and arranging a call
- Immediately before the call
- Call setup / answer
- During the call
- Call end / teardown / handoff
- After a call

In addition, there is the longer-term perspective of an ongoing conversation or interaction, that may include multiple calls, messages and other modes of communication.

This decomposition is especially relevant because each stage creates a possible orchestration point for AI Voice solutions. AI can help before the call by understanding

context and availability; during the call by routing, translating, summarising or detecting risk; and after the call by producing structured records, next actions and workflow updates.

A CSP does not need to own every component. But it can own the policy and service layer that decides which components are invoked, under what permissions, with what fallback, and with what commercial packaging. That can offer value both to end-users and to the application (or "experience") providers.



Once a CSP sees a call in that broader way, voice stops being just a near-utility and becomes a workflow ingredient, and ultimately an enabler of new business models or a "fabric" of intelligent communications. As value moves from voice connectivity to voice/workflow intelligence, it is important that CSPs maintain as many control and orchestration roles as possible.

Why orchestration matters more than the AI model

Most AI voice demos focus on the model, the voice, the accent, the latency or the apparent fluency of the conversation. Those all indeed matter. But they are rarely what determines whether a service works commercially, especially for a telco.

In production, AI voice functions will succeed or fail on orchestration, governance and workflow. This is the process of deciding who or what answers, what the AI is allowed to do, when a human must be involved, how the call is routed, how consent is captured, what data is retained, which adjacent SaaS system is updated, and what happens after the call ends.

For a fixed CSP, this is potentially good news. The operator already owns or influences many of the key orchestration points, such as the business number, SIP trunk, hosted PBX, SBC, call routing policy, voicemail, recording, billing relationship, local support model and sometimes the broadband connection itself. *Note: in some markets, mobile operators have a greater role with SMB business numbers and the "front reception" function – something which is being exploited by other competing providers such as WhatsApp.*

The strategic question is therefore not "can a regional CSP build better AI than a hyperscaler or AI lab?" It is "*can it package and govern AI voice inside the communications environment it already controls, and sell to existing and new customers?*"

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The opportunity for smaller & midsize CSPs

A handful of global-scale Tier 1 operators, with the ability to create "AI factories" with thousands of engineers, or the capital to deploy GPUs in their own datacentres or at cell sites, make the most visible headlines about AI Voice.

T-Mobile US has announced live translation in its mobile network, AT&T and various others have AI receptionists for consumers, Korean operators SKT and LG U-plus have demonstrated personal voice assistants for the elderly or people living alone. But while impressive, those examples are distractions for this paper's audience, far-removed from the product catalogues and engineering constraints of a normal ISP or CLEC.

For many regional or tier 2/3 operators, the concept of "AI-enriched voice communications" may sound more ambitious (or more obscure) than realistic. They vary widely, but a typical CSP's or MSP's day-to-day commercial world will often still be dominated by broadband ISP access, business voice lines, hosted PBX, SIP trunks, UC resale, managed Wi-Fi, SD-WAN, security, or local IT support.

The right question is not whether a smaller CSP can develop its own LLM, or partner directly with a frontier AI company or trillion-dollar semiconductor manufacturer. It is whether that operator can use partner ecosystems, existing communications assets and local market knowledge to offer selected higher-value AI functions on top of existing voice solutions and infrastructure.

However, sequencing is really important here.

Some AI features are rapidly becoming "table stakes", necessary in order to compete with capabilities now bundled free into commercial UC or other applications, or even just basic phone lines. There is also an emergent risk of disintermediation, as conversational-AI SaaS players attempt to insert themselves directly via call-forwarding or other mechanisms. The rapid adoption of WhatsApp for customer interaction by small businesses is a warning sign – this could accelerate in the AI era. A response to these risks is urgent, to limit customer churn or value erosion.

The next phase is about new, monetisable, AI voice services – probably a narrow set of commercial targets, given constraints on typical internal skill base, testing and deployment timelines, and the need to train both staff and customers on the benefits.

Later, many CSPs can become more sophisticated and ambitious with voice AI, especially integrating it into business workflows, exposing orchestration APIs and functions to the SaaS providers, or monetising truly intelligent models of communications, context and engagement.

A central point is that the fixed-voice infrastructure is becoming strategically important again, either as physical elements or cloud functions. SBCs, SIP application servers, hosted PBXs, number management, routing policy, recording platforms and fraud controls are not usually considered as AI assets. But they are now precisely the orchestration and control points that determine whether AI voice works in production.

Key dependencies for CSPs

Yet there needs to be realism as well as vision. AI voice combines several domains which may be challenging. Smaller CSPs will need to learn – or lean on vendors for - new models of call control, different styles of media handling, new acoustic patterns arising from synthetic voices, low-latency speech recognition and so on.

They must also contend with multiple voice-adjacent or non-functional changes, such as better text generation and management, workflow/SaaS integration, new security surfaces, legal disclosure and consent rules, and data retention and model governance concerns.

Fortunately, CSPs can avoid the need for deep expertise in all of these areas on day one, by partnering or assembling third-party capabilities. Whether they can productise and commercialise AI voice successfully depends less on abstract AI maturity and more on five concrete dependencies:

- **Existing customer base:** Customer mix varies widely and will drive strategy at a top level. A CSP that mainly serves residential or SoHo sectors should prioritise trusted voice, simple AI receptionist offers and business-number continuity. A provider with a stronger base of hosted PBX or SIP trunk customers may gain more from AI conversation summaries, transcription, analytics and workflow integrations. Special considerations apply for CSPs with significant public sector, healthcare or legal customer bases.
- **Internal skills**: The focus should be more on operational rather than AI / algorithmic skills, such as product management, support models, prompt and response design, governance and regulation, quality assurance / testing and security. CSPs will start with a variety of existing skill levels; that will drive initial focus on white-label products vs. inhouse integrations into workflows and larger systems, or eventually customised AI models for localisation and differentiation.
- **Local channel structure:** Some operators sell directly, while others go to market via MSPs, local IT resellers or agent channels. The more indirect the route to market, the more the offer should look like a repeatable managed service with clear setup templates, pricing logic and support models.
- **Specific *realistic* addressable markets for that operator:** The relevant addressable market is the subset of organisations that significantly depend on fixed or business voice, and which incur real costs or other problems when calls are missed or mishandled. Those that are not "knowledge work" businesses are less likely to already have mature UC or contact-centre stacks – for instance, appointment-driven, service-led and local trade businesses, as well as many front-desk or dispatch-centric organisations. Those sectors are also harder for major hyperscalers and large enterprise software vendors because the average deal size is smaller, workflows are fragmented and integration work is local.
- **Regulatory alignment:** There are rapid changes in rules for both voice services and AI more broadly, with difference between global regions and administrations. AI voice will need careful disclosure, as well as guardrails on sensitive topics, observability, consent management, fallback options and privacy / data access. For instance, in the US, the FCC has already clarified that AI-generated voices used in robocalls fall within the 'artificial voice' framework under the TCPA, and has explored broader disclosure rules for AI-generated robocalls and robotexts.

Governance will be essential, especially if CSPs want to sell "trusted voice" services as part of their AI strategy.

Operator archetype	Typical strengths	Typical weakness	Best first AI voice plays
Rural ILEC / fibre ISP	Trusted local brand, fixed lines, SMB broadband, field support	Thin software team; weaker app and API culture, limited UC	AI receptionist, missed-call capture, spam/scam screening, transcription as managed add-ons
Urban CLEC / hosted PBX provider	Business customer density, SIP/UC expertise, multi-site SMBs	May over-focus on seat-based UC economics	AI receptionist, summaries, call analytics, vertical workflow connectors
Broadband-first ISP with light voice bundle	Large installed base, trucks, billing and local sales	Voice not typically a core competence	Partner-led AI overlay on existing numbers; bundle with broadband and support contracts
MSP-integrated communications provider	App integration skills, CRM/IT relationships, local project delivery, UC / CC exposure	May lack telco-grade call governance. Less massmarket SMB reach	Core UC + AI features, Workflow-oriented AI voice packs, white-label offers, partner APIs and templates

Source: Disruptive Analysis

The SMB gap for AI voice and CSPs

Small businesses can be defined in many ways – cohorts by revenue, or by number of employees, perhaps 1-250 staff as a benchmark. There are dozens of sub-segments and niches.

But they all share a common set of needs. They are trying not to miss customers, appointments, urgent requests, deliveries, supplier calls or staff messages. And while they do not want to become AI system integrators, they can benefit from "managed outcomes".

Some SMBs are already "AI-primary" – software development firms, graphics design and content organisations, research institutions and others at the cutting edge of "knowledge work" are working actively with chatbots, copilots, AI coding, automation and agent workflows. Some are already experimenting with AI voice, and in a few cases already exploiting it commercially. But these niche players are not the centre of gravity here.

The vast majority of SMBs work in the physical economy – manufacturing, agriculture, construction, retail, hospitality and catering services, logistics and maintenance, personal services like hair and beauty, small medical and veterinary practices, auto repair and so on. Some are not really "enterprises", such as local governments or community / religious bodies, but should be included as well.

This cohort of companies generally have limited computing skills, small phone systems or just single lines, and perhaps just a basic website and email. Their day-to-day operations still depend heavily on phone calls, often involving informal handoffs and frontline staff being interrupted constantly, switching between devices, calendars, paper notes and ad-hoc forwarding.

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Many tasks, phone calls and workflows aren't really fully-fledged "business processes", in the way that sales and marketing, or supply-chain management are. Instead, they are messy, one-off or semi-structured interactions.

An increasing proportion of them use "vertical" software or cloud solutions for their specific industry, and a certain set of automated communications. A hairdresser may send SMS appointment reminders, a construction company might have a contractor scheduling system, a dentistry practice may have a basic UC system, and so on.

Individuals may use AI chatbots or perhaps run their finance and accounting tools and spreadsheets with the help of copilots. But the organisations are unlikely to create their own software with AI coding tools or use AI for analysis of their customers' behaviour and preferences.

Callers still expect a human or human-like interaction. AI voice can improve those workflows directly, without requiring the business to become a sophisticated software buyer.

This is the overlooked middle ground between high-end enterprise contact-centre adoption / AI automation, and consumer mobile call enhancement.

Such SMBs often buy "managed outcomes" rather than software descriptions. For a business owner, a proposition of "answer my calls better" is more likely to succeed than trying to suggest their overworked, cross-domain single IT specialist (who is probably just the company's designated geek) should "deploy an agentic conversation platform".

Large businesses	SMBs
Formal receptionist, IVR or CCaaS environment	Informal reception, hunt group or simple business line
Dedicated IT, security and integration teams	Limited IT skills, often one generalist or external MSP or reseller
Major architecture programmes and app portfolios	Patchwork of SaaS apps, spreadsheets and manual workarounds
Procurement cycles and RFP-led buying	Outcome-led buying based on simplicity, urgency and trust
Can justify bespoke AI projects	Need low-friction managed services with visible ROI

Source: Disruptive Analysis

The central revelation here is that AI Voice is much better-suited than IVR or scripted automations for a broad range of unstructured, unanticipated queries and interactions. While some calls will be inappropriate to automate and will need escalation-to-human, others will be simple but unique or infrequent.

A small business needs to handle phone-calls asking about nearby parking options, apologising for a late train and a missed appointment, asking to speak to a manager, or

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how a courier can deliver a birthday present to a staff member. This is where AI running against normal phone-lines can make a real difference.

For CSPs, this is the opening. The product is not "AI". The product is fewer missed calls, better handoff, less staff interruption, cleaner records and more bookings captured from the existing business number.

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Phased introduction of AI Voice: managing the complexity

CSPs should view AI Voice as an ongoing evolution, adding new services, skills and capabilities over time, while addressing the lowest-hanging fruit in terms of customer expectations and competitive pressures.

The first phase is a mix of "table stakes" AI offers to respond to what is happening elsewhere in the marketplace, plus basic ways to enrich existing voice plans and numbering assets with automation and initial signs of intelligence.

This contains two different commercial categories that should not be confused:

- **Defensive**: transcription, summaries, spam warnings or basic AI features that customers may soon expect inside UC and business voice bundles. These may preserve ARPU more than expand it.
- **Monetisable**: AI receptionist, missed-call capture, after-hours answering, appointment intake, overflow handling and workflow-linked follow-up. These solve visible business problems and can be sold as outcomes rather than features.

This avoids distractions from longer-term AI concepts that need protracted development and testing cycles, while also reducing the risks of disintermediation by new software / SaaS providers that start to cherry-pick specific functions. It also allows fixed / broadband CSPs to avoid head-on fights with mobile device and OS vendors, and also to help side-step the large enterprises targeted by some CPaaS players.

Later phases should be iterative and progressively more ambitious, extending what works, adding specific workflows or templates for different horizontals and verticals, as well as embracing new platform capabilities such as agentic AI and (eventually) ambient voice.

Timing	Main goal	Representative offers	CSP skills / partner need
0–12 months	Defend and refresh business voice / basic UC	AI receptionist; missed-call capture; call summary & transcription; basic aspects of trusted voice	Semantics, prompt fluency, provisioning & customer onboarding, consent mgmt, support models
12–36 months	Differentiation & monetisation with workflows, create repeatable vertical & solution packs	Vertical front desks, booking and dispatch templates; SaaS connectors; call analytics; multilingual & translation. Compliance packs. Secure voice. Niche options such as AI podcasts.	Integration skills, partner identification & management, usage-based pricing, data handling, solution packaging, ROI proof-points, account targeting, regulatory & compliance navigation.
36+ months	Innovation hub. Become a platform / ecosystem layer (where justified)	Developer APIs; context- & vCon-driven data services; agentic orchestration; orchestration hooks for SaaS providers, ambient voice support	How to expose capabilities safely without losing commercial control. Willingness to monitor market developments & rapidly change course where needed

Source: Disruptive Analysis

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They should also look to embrace the new cohort of verticalised conversational-AI providers, by providing easy hooks, APIs, orchestration and integration into the telephony core, removing the overhead for SaaS companies to deal with the complexities of numbering, voice regulation, routing, consent and so on.

Operators should use each phase to improve on multiple vectors such as skills, operations and governance, and observe and course-correct based on evidence of customer demand and feedback.

At the same time, they also need to be fully aware of the sheer speed of the AI revolution and be prepared to accelerate or re-focus as the market – and likely unanticipated developments – unfold.

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Initial core AI voice product set (0-12 months)

For most smaller and midsize CSPs, the first phase of AI Voice offers should be deliberately conservative. They should aim to create a small product family that is easy to explain, fast to deploy and anchored on customers' current voice environments.

The basic phone line is the most natural starting point. The business main number is still a core asset for many SMBs, even when many employees are mobile and messaging-heavy. An operator that can make that number smarter, without requiring a disruptive migration or clunky forwarding approaches, can retain relevance and control.

They should also keep a close eye on direct competitors' and substitutes' AI features, to understand what could be "table stakes" to avoid churn – especially in the UC / CC sectors if they have inhouse solutions. They should also watch rivals' reliance on forwarding and / or number-porting, as these can be brittle or add friction – useful as a marketing / sales vector.

In many cases, the initial anchor points will be an AI receptionist, plus call summarisation and transcription, and a basic version of "trusted voice":

- **AI Receptionist** for a business main number. This can deal with basic tasks initially and expand in scope over time. The likely starting set of problems will include call routing and human handoff with context, missed-call capture, out-of-hours answering, voice messaging and a "voice FAQ" such as opening hours and address. This is perhaps the most "telco-shaped" outcome because it anchors on fixed numbers, hunt groups, and existing hosted PBX routing logic. Alongside voice, there will also be a need for basic multi-channel operations, such as low-friction follow-up through SMS, WhatsApp or email.
- **Call summary & transcription** extends call-recording into a deeper and more structured product. This could include searchable call history, workflow pushes to email / CRM and other systems, with a view to extension into a full strategy for conversational data and vCons over time (see later section). It would also need to fit with existing governance requirements on recording, such as disclosure and consent.
- **Trusted voice** including anti-spam and anti-scam tools, linked to identity signals, and warning and screening mechanisms for authenticity. There are two angles here – firstly awareness of AI-generated "fake" inbound voice calls or agents, and secondly AI detection of suspicious or undesirable content during human calls, such as social engineering attempts.

These services can sit on top of ordinary business voice plans, SIP trunks or hosted PBX offers and can be positioned as productivity and revenue-protection tools rather than IT projects.

Basic AI Voice acting as CCaaS

Contact centre AI is already a broad trend – perhaps driving the AI Voice sector overall, especially with leading edge synthetic voice, and integration into sales or CRM workflows. But for many smaller CSPs, this is not a suitable early battlefield to fight on their own.

Larger CCaaS vendors and CPaaS providers already dominate the high-end market for agent assist, IVA (intelligent virtual agents), analytics, outbound call orchestration and deep CRM integration. Regional operators should mostly approach this space as partners, resellers or integration channels.

But as well as voice AI *for* contact centres, there is also an option for voice AI to act *as* a lightweight contact centre for SMBs (and CSPs) that have simpler needs. This could either replace a traditional CCaaS offer or extend the market to a new entry-level tier.

Some SMB customers will just want a simple inbound service desk, or a localised customer service function. Some may have seasonal peaks in calls, cope with staff absences, or want to run a one-off campaign. In those cases, operator-hosted AI with limited CCaaS features can become part of a wider solution - especially where location-specific support, number ownership or broadband bundling create stickiness.

In addition, a basic CC capability offers a starting point for evolution, such as capturing vCon contextual data for customer support and CRM, as discussed later in this report.

AI Voice for hosted UC

Smaller CSPs may also already offer hosted UC and PBX capability natively from their existing network infrastructure and software / cloud stack. Increasingly, such solutions face competition from major-brand UC platforms, which are embedding some AI features even on entry tiers.

AI transcription, note-taking, summaries, call search and meeting intelligence are rapidly becoming expected (free) features. While not all of these are essential for all customers, omission will soon start to become noticeable, especially on conferencing platforms intended to compete with Teams, Zoom, Meet or Webex.

It may be tempting to overestimate direct monetisation potential – but unfortunately in many cases these features are better used to defend ARPU, reduce churn or justify migration to a richer cloud communications bundle.

Again, this path offers future expansion options, such as vCon capture or initial APIs and hooks for broader AI integration in future. Ultimately all UC systems will have to become "agentic citizens" – or else they risk becoming the future's version of an old key-system.

Start with internal users and applications

There is one other important consideration in the earliest phase of AI Voice. CSPs should start their AI Voice journey with their *own internal needs*, plus those of selected "friendly" customers. Few enterprises or SMBs will trust their service provider with new AI-enriched services unless they have "eaten their own dogfood" and demonstrated clear value.

Even if they just trial and deploy the solutions referenced here at small offices or remote sites, they will generate valuable internal expertise and fine-tuning, while simultaneously providing a showcase for their wider customer base.

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Second phase AI voice, 12-36 Months

Once a CSP's initial phase of AI Voice products are commercialised, stable and with early customer uptake and usage, the next phase focuses more on selected business workflow integrations and deeper conversational-data intelligence, as well as scope for some interesting and innovative niche offers.

This can yield more direct monetisation and differentiation and also start to encourage the conversational AI / SaaS providers to approach the telcos for access to telephony capabilities, rather than attempt to engineer and integrate everything inhouse.

There are four main pillars here:

- **Workflows:** AI voice for selected verticals' workflow integration (see below)
- **Trust:** Enhanced trusted and secure voice
- **Language:** Translation and multi-lingual services
- **Data:** Conversational data management and analytics

There are likely to be sub-phases here, depending on the specific operator and its skills and customer base. But the core approach is the same: incremental addition of AI capability, aligned with governance and demand.

There will also be additional AI enhancements to CSP-hosted UC and CC, but these will broadly parallel the developments in the dedicated UCaaS and CCaaS sectors, and are not detailed here, for brevity.

In addition to these services – which are customisable but still relatively generic – CSPs should also seek out a few more niche, innovative offers, either as valuable add-ons, or to give "spice" to existing packages and bundles. This could include bonus features such as AI-generated podcasts (linked to company blogs or marketing content), or early examples of integration with systems such as alarms, vehicles or audiovisual systems. There is also scope to bundle AI copilot or chatbot subscriptions with business bundles, although these would likely not be voice-primary.

Some of these could also be relevant to consumer / residential customers as well as SMBs – and there may also be some specific hybrid B2B/B2C applications, such as eldercare assistant or AI companions, based on collaborations with social-care or health organisations.

AI voice for vertical workflows and SaaS integrations

This category is the most important in the medium term, linking voice to SaaS and workflows for SMBs. A generic AI receptionist can answer basic queries about opening hours and route calls, but it rarely knows enough to handle detailed tasks and questions without specific training or integrations, as well as guardrails on sensitive topics.

Certain tasks are specialised but "templatable" and well-suited to AI voice workflows.

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For example, a property company's maintenance service calls can be categorised into urgent vs. non-urgent and routed or escalated appropriately. Rebooking a restaurant table, or increasing the number of diners, should be easy to accomplish as well.

But other questions will be harder and will need to be handed off to human operators at the appropriate point. For example, should a restaurant's AI assistant be allowed to provide information about allergens, given liability risks? Could a spa's AI discuss the suitability of different packages as a birthday gift?

The strategic approach for CSPs should be to choose a handful of local sectors where "call pain" among their customers is obvious, the software stacks are fragmented, and the operator can partner effectively – and where it is confident of its own governance processes. Over time, it can extend the approach to additional sectors as it gains experience and reputation.

Vertical workflow example - Salons

A local hair or nail salon might use a platform such as Timely[1] to manage their bookings and payments. But while this may be good for taking bookings via the web, or perhaps a mobile app, it will typically not support automated phone bookings, changes or basic inquiries such as directions or questions about parking.

Instead, the salon will likely still have a normal phone number from their CSP and will need to have a human (likely one of the working frontline staff) take the call. Out-of-hours, there may be a message or voicemail – or perhaps, a forwarding function to one of the team's mobile phones, which may involve a clunky two-device lookup of the calendar on a laptop or switching between apps on their smartphone.

Clearly, that is sub-optimal. When front-of-house staff are not managing a phone-based booking calendar manually, they can focus on the client experience, upselling treatments, and handling more complex enquiries.

The company will also not want to change its number (which it may have had for years, painted on signage or vehicles, as well as on countless websites), or risk disruption while porting it to another provider or CPaaS platform. While porting can seem simple, if the existing CSP also bundles telephony with other services such as broadband or managed Wi-Fi, it may not be ideal to carve out a specific voice element. Forwarding and porting are also complex for multi-site businesses that may have separate numbers at each location.

The opportunity is for the CSP to offer AI-based assistant services on that existing number – perhaps integrated with the normal web-based SaaS platform as well, but at least offering a "smart answering" function that can answer basic questions, make or change bookings, send details to the user by email or SMS – and not have to use an unnatural IVR tree.

The CSP can thus become the "managed conversation and orchestration layer" that sits between callers, business numbers and the relevant SaaS platforms or other systems of

[1] https://www.gettimely.com/

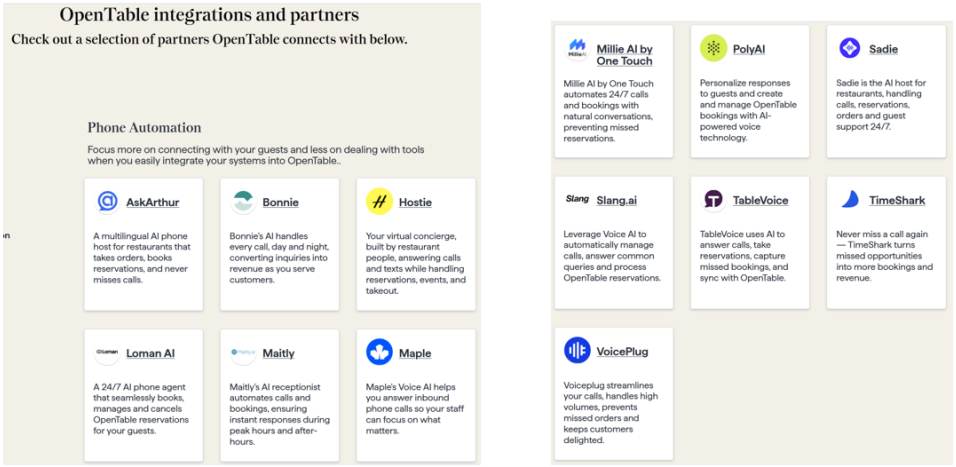
record. There is often a specific need for these applications to use conventional *telephone calls* rather than a browser- or app-based voice session.

Often, people will rely on a number in their contacts, rather than using an app or webpage, especially if they are walking or driving. And for returning or outbound communications, it makes little sense to "call" a browser or app rather than the native dialler.

The personal-care example is a simple one, but similar opportunities exist for retailers, restaurants, vehicle maintenance, dentists and vets, local taxi companies, real-estate agents, gyms / sports trainers and others, especially in sectors where there are many independent small businesses competing with larger chains.

At present, relatively few of these SaaS platforms support AI voice functions, but this is already changing quite rapidly in some sectors. For example, in personal care, Fresha[2] and Zenoti[3] have AI receptionist functions which answer calls, schedule appointments, handle client questions, support call forwarding and use a knowledge base. Some others have AI chatbots for website interactions or SMS / WhatsApp queries. And in the hospitality sector, OpenTable lists 13 different providers of AI phone automation suitable for making restaurant bookings or other inquiries, while other providers have in-house solutions.

AI Voice integrations for SME SaaS: OpenTable example



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In other words, CSPs will need to consider whether they will compete, complement or collaborate with such offers on a sector-by-sector basis. This will also likely vary by region. This will favour those operators that are close enough to their specific SMB customer base to understand their levels of sophistication and SaaS / AI preferences.

One important factor here - even where vertical SaaS platforms have an existing AI option, they will typically focus on back-office tasks such as inventory management, staff

[2] https://www.fresha.com/help-center/knowledge-base/calendar/100680-ai-receptionist-overview
[3] https://www.zenoti.com/platform/ai-receptionist

scheduling or pricing strategy – not voice AI interactions via automated receptionists or front desks.

And if they have AI voice for some tasks, they may still rely on a human-answered telephone for others. For instance, while some restaurants may have an AI voice integration for their reservation system, it may be unsuitable for handling supplier delivery inquiries or staff scheduling management as well.

Sector	Why voice still matters	Good first offer for CSPs	Typical SaaS / software vendors
Personal care & wellness	Not all bookings online. Calls arrive while staff are with customers. Bookings and FAQs are repetitive	AI receptionist linked to booking reminders and missed-call capture. Ability to handle FAQs such as directions / parking	Timely, Booksy Fresha, Vagaro Phorest, Zenoti Treatwell
Restaurants & hospitality	Phone reservations and changes are common. Peak-time call overflow, deliveries, reservations, directions and special requests	Front-desk AI plus reservation / back-of-house handoff and multilingual answering	ResDiary OpenTable Resy SevenRooms Square
Contractors / home trade	Calls are taken in vans or on-site; urgency and scheduling matter. Note-taking is awkward. Suppliers, teams & sub-contractors often voice-centric	Lead capture, transcripts, dispatch triage, after-hours answering and call summary. Messaging integration	Jobber, Housecall Pro, Tradify, ServiceTitan, Workiz, FieldPulse, JobLogic
Dental, vets, clinics	Urgency, high value of appointments, confirmations and basic enquiries. Directions & parking requests.	Human-fallback receptionist, reminders, transcripts and compliance-ready records	Provet, Covetrus, CareStack, Dentrix, Opendental, Tebra, Curve Dental, EzyVet, DrChrono
Auto service / repair	Calls concern availability, estimates, drop-off timing and parts status	Routing, intake capture and SMS/email follow-up	Shopmonkey, Tekmetric, Shop-Ware, Autoleap,
Property / real estate	Mixed inbound enquiries, handoff needs, meeting schedules & changes, maintenance requests	Smart routing, searchable conversations and follow-up obligations and basic CRM update	Buildium, Doorloop, Dezrez, AppFolio, Entrata, Reapit, Yardi Breeze
Venues & meeting spaces	Detailed inquiries, viewing arrangements, logistics & special requests, deliveries, accessibility, catering	Summarisation & actions, call routing / out-of-hours, FAQs	Tripleseat Event Temple Momentus iVvy

Source: Disruptive Analysis

That means that here is a particular opportunity for operators to offer standardised interfaces to allow these providers to hook into existing telephony systems easily, rather

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than needing to pursue options such as call-forwarding or number-porting, which may pose particular challenges for some customer groups. It seems likely that most AI SaaS specialists have better things to focus on than recreating their own telecom infrastructure and dealing with customer support and regulatory compliance.

Enhanced trust and security for AI voice

This is essentially a continued upgrade path for the trust-oriented solutions outlined above. However, the nature of threats tends to be fast-moving and unpredictable, so it is difficult to be prescriptive here on the exact types of solutions that CSPs will need to adopt.

However, some of the possible domains include:

- Caller authenticity-checking via mechanisms such as "voice captchas", or perhaps newly emerging forms of "agent identity" based on tokens or unique cryptographic identifiers.
- In-call monitoring of certain keywords, such as those related to financial transactions, passwords, or other sensitive information. Awareness of AI voice-phishing risks.
- Use of third-party mechanisms, such as some of the CAMARA anti-fraud APIs, especially for inbound calls from mobile numbers.
- Alignment with new regulations around attestation and numbering

One challenge is that on a 24-month horizon, there will likely be some legitimate uses of AI voice agents by SMBs' customers and suppliers, and so it will be important to think of ways to distinguish between "good and bad" inbound AI calls. This is what Disruptive Analysis calls "B2AI" and suggests that eventually CSP platforms should be prepared for machine-readable identity, policy and routing rules, as AI entities start to place, receive or intermediate calls.

Translation and multi-lingual voice support

Some of the most high-profile announcements and demonstrations for AI voice relate to realtime translation services. However, some of this is being handled in-network by the largest carriers and cloud providers, or alternatively on-device (including on earbuds) by major smartphone and accessory vendors.

For smaller CSPs, the key opportunity is around multi-lingual front-desk support for call routing and basic queries. An interesting potential value-add could be support for more unusual local dialects or accents. This will likely involve partnering with relevant language specialists.

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Medium/long-term AI voice opportunities

The longer-term Voice AI opportunity is much broader and deeper than just smarter phone calls. Over time, voice is becoming one of the main interaction layers through which AI systems collect context, coordinate work and authenticate intent.

This "intelligent communications" concept is already seen with consumer-grade chatbots, with some user groups already moving towards a voice-primary interface. Indeed, the smart speaker trend of the last 10 years long predates the more recent LLM style of AI interaction.

For telcos, this creates both potential upside and risk. The positive aspect is that voice can once again become strategically important. Potentially, CSPs can themselves become platform providers for AI voice, orchestrating SaaS specialists' access to numbering, call-routing, identity and control, via standardised interfaces.

The negatives are that operators either get distracted by attractive future concepts before they have built a commercial bridge from today, that device or AI specialists steal a lead again and disintermediate them or undermine their value propositions – or that telcos get stuck in the 150-year old belief that voice and telephony are synonymous.

Disruptive Analysis has long described voice as being a superset, with "calls" just a single modality and application subset. The future of voice seems to be proving that distinction.

A useful framing is to separate a range of AI voice futures. Some are extensions of current calling services: better automation, richer conversational data, more consumable APIs, more context-sensitive routing. But others are genuinely new domains: ambient voice, B2AI interactions, hybrid cloud-edge inference for voice applications, and agentic engagement models.

CSPs should be aware of all of them but should not assume that every future domain deserves immediate product investment.

Five long-term trajectories deserve particular attention:

- **Future vCon evolution**. Conversation records may become as important to enterprise communications as documents and messages are today. vCons allow conversations to be shared across trust boundaries with more context than a simple call detail record or recording file.
- **Complex & regulated verticals.** Some sectors such as healthcare, education, legal, finance, utilities, insurance and local government are theoretically attractive, because calls and other voice-centric interactions are valuable and workflows are often documentation-heavy. But they are also difficult because the tolerance for AI-driven errors, inefficiencies or weak data governance is much lower. CSPs are likely to require strong partnerships, existing customer relationships and tight controls and oversight to exploit these with AI voice services.
- **Emergency calling & communications.** Emergency and safety-critical voice is a specialist category. It is obviously heavily regulated, but also often mandatory. There are, however, some interesting developments around AI occurring here, such as in-call analytics of sentiment and even breathing patterns – for example,

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for recognition of respiratory or other medical events. These are not areas where smaller CSPs can be expected to innovate themselves, but they should be aware of any changes in the relevant platforms and be prepared to support them. There are also more straightforward requirements around multilingual support, transcription and operator assistance.

- **Eldercare and social care:** There is growing interest in AI Voice for care-related applications. These are not strictly healthcare or formal medical uses but can be adjacent. For instance, people living alone can benefit from interacting with voice assistants or companions, and there may also be important applications for those with mobility issues or various forms of cognitive impairment. In some cases, integrations with smart speakers and other devices may be relevant.
- **Ambient voice AI:** Ambient voice[4] is an emerging concept, based on capturing and analysis (or acting on) conversations between humans and/or AI in the real world. Early examples include note-taking AI systems for doctor/patient interactions, or even the use of AI voice for order-taking at drive-thru restaurant terminals. Robots with voice interfaces could fit into this category too. Telcos and CSPs have various potential roles to play here, especially around managing consent and authenticity, as well as voice-optimised connectivity and maybe edge-computing.

There is also sixth, cross-cutting theme here – the role of voice-related APIs, and how they can be exposed to developers, enterprises and other service providers. This is a huge domain in its own right, which overlaps with network quality, identity, fraud-management and AI platform access, as well as call-control and acoustics.

Conversational data management, recording and vCons

Recorded calls are not new. Some sectors such as financial services have regulations that specify recording of certain calls, while others use call recordings as a central element of CRM solutions, or for staff training and performance evaluation.

What changes in the AI era is that the conversation becomes useful as a structured object rather than just a stored media file. Plain recordings are hard to search, hard to exchange across systems and often poorly governed. They also do not link together easily with other media types to form overall ongoing interactions, with context, transcripts, identity, metadata and flow.

A combination of AI voice and new standards such as that created by the vCon initiative enable communications to shift from a call or minute as the underlying quantum, to a new world where the fundamental unit is a conversation.

In simple terms, a vCon is an emerging standardised "conversation data container" that can incorporate the calling/messaging parties, media content, metadata, analysis and attachments in one governed object. It can allow for redaction, consent, or additional optional elements to be added.

[4] https://www.linkedin.com/pulse/in-person-ambient-voice-new-domain-telecoms-ai-dean-bubley-lxbbe/

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For CSPs (and developers and cloud platforms), the potential significance is huge. A portable conversation object makes it much easier to undertake search, audit, dispute resolution, analytics, handoff between applications or people/functions, and eventually cross-provider interoperability. CSPs could create and use vCons to sit inside larger AI-driven workflow ecosystems without surrendering all value to the higher-level application vendors. This has significant consent requirements, which will need to be managed. In future, there may also be competitive tensions about "owning the conversation", similar to those around "owning the customer".

As a practical example, consider an interesting potential value-add for SMBs: the provision of analytics around conversations inbound to a business. What actually *are* the most frequently asked questions? Are there any that are surprising and unique to specific businesses or regions? Which questions are resolved quickly, and which involve multiple calls, people, messages or other interactions? And is there a way to map these to business value, reputation or other non-call metrics? A vCon approach could help create a rich data resource, while protecting privacy and personal information.

AI Voice agents and agentic systems

Agents deserve careful treatment. The term "AI Voice agent" is often used sloppily. It could just mean a conversational front-end that can answer, route, or capture information. In some definitions, almost any AI Receptionist is an "agent" or part of an "AI workforce".

A true agentic AI system is broader. It can plan, choose tools, perform multi-step work, and coordinate actions across software systems, using APIs and MCP (Model Context Protocol) servers as interface layers. It may even continue working after a call or conversation ends or have a persistent role and memory.

A useful three-tier scale for categorising AI voice agents is this:

- Level 1 is deliberately limited: a front-desk AI agent linked to a business number or group, which can answer inbound calls, identify basic caller intent, capture relevant (structured) details and hand off cleanly.
- Level 2 is a workflow-driven voice agent, which can make bookings, arrange deliveries, or undertake basic tasks such as rescheduling meetings within a set of clear rules.
- Level 3 is a full agentic system, with reasoning, tool use, ability to undertake multi-stage actions and coordinate with other agents and applications. This is more akin to the current popular trials of agent systems.

This phasing means that guardrails, governance and controls need to be implemented carefully, especially to mitigate the risk of unpredictable or emergent multi-agent and cross-domain behaviour.

In particular, agents capable of making outbound AI Voice calls are much more complex, both in terms of technology, optimisation and performance, and in terms of regulatory and compliance implications.

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Most near-term telco offers will use voice interfaces, without needing full agentic autonomy. CSPs will often treat agentic functions as an optional capability, layered on top of proven robust voice workflows. Tool use, calendar access, CRM updates, or dispatch actions can be added selectively, once the baseline AI voice experience itself has been proven as stable, and valued by customers.

A fully autonomous multi-step business agent that can reason across several systems – and use voice as just one element of this - is more ambitious, higher risk and much harder to govern. At the moment, however, it seems likely that voice will not be *central* to the general push towards agentic AI systems. Coordination and governance will likely lie elsewhere in the CSP's business, perhaps with the more general API team.

A useful resource is the AI Voice report from CPaaSAA. Although it is aimed more at CPaaS providers than normal CSPs, it is good for its ontology of enterprise AI deployments and focus on the roles of voice agents, with a hierarchy broadening from transcription and summaries toward AI dialogue, appointments, lead qualification and process streamlining.

Runtime (where in the overall system the AI and audio functions actually operate) and orchestration (the control and coordination functions) are treated as the key control points, which has parallels here: a CSP should ultimately aim to monetise voice agents where it controls numbering, routing, disclosure, handoff and conversation data.

Key elements of agentic voice governance, which CSPs could offer bundled for SMB or enterprise customers include:

- Clear authority boundaries and easy human override mechanisms.
- Limited tool access rather than open-ended autonomy (eg with permissions for CRM, calendars or vertical apps).
- Per-call logging, disclosure and fallback rules.
- Commercial packaging linked to specific outcomes such as captured appointments, reduced missed calls or faster triage.

Ambient voice AI

Ambient voice is another longer-term expansion domain. Here, voice is captured from an in-person interaction, workplace or field context, rather than from a formal call. The audio becomes a first-class input to AI note taking, dispatch, CRM, workflows, or safety procedures. In sectors such as healthcare, field service, inspections and professional services, this can be more transformative than classic call automation.

This a separate interaction domain in which in-person speech is captured, analysed and integrated with CRM, ecommerce and vertical applications. There could be AI-synthesised voice involvement directly (for example at a kiosk or ATM), or AI analytics applied to human conversation. Consider capturing voice conversations at a flight check-in desk, a car repair workshop, or a doctor's consultation room. The commercial logic changes as the opportunity is often triggered by microphones in stores, clinics, vehicles, field kits, desks, wearables or smart spaces - rather than by a phone line or PBX seat.

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For telcos, ambient voice could expand their addressable market beyond calls towards a much broader "Internet of microphones", with new opportunities such as managed devices, secure low-latency connectivity, new workflow integrations. and trusted data transport. This is still mostly conceptual – and there will be a host of privacy and consent issues.

Smaller CSPs should watch out for development of ambient voice in sectors such as retail, field-service and healthcare - but should not chase it pre-emptively as it will likely take a few more years to mature.

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Competitive landscape

There is already a complex stakeholder and competitive landscape for AI voice. Different provider types (small/large CSPs, AI companies, UCaaS & CPaaS providers, hyperscalers etc) are all aligned with different models of future voice evolution.

For smaller and midsize CSPs, the strongest alignment is in business AI receptionists, trusted voice and AI-assisted calls for non-UC workflows such as bookings, dispatch or frontline coordination. There is particular strength for addressing niche/vertical SMBs with high use of voice calls with irregular customers and the general public. These have high friction, low automation and limited scope for traditional UC/CC solutions.

Alignment for those CSPs is much weaker in offering generic voice interfaces to AI chatbots, creating agentic "AI workforces" or in the highest-end contact-centre AI stack, where cloud platforms and specialist vendors already have structural advantages.

Over time, CSPs could act as channel and integration partners here, however. There are already examples of telecom operators bundling AI chatbots for subscribers, albeit mostly in mobile contexts and for consumers. Bundling a premium AI service for SMBs could be a value-add, while beyond that there is the potential to act as a more open platform for vertical specialists to integrate to the telephony universe more simply.

The colour-coded matrix below (green = best fit, red = worst) helps distinguish which moves are defensive and which are more monetisable. Formal contact-centre AI and generic UC AI are partly defensive for smaller CSPs, but they may need partner offers there to remain credible. Consumer translation and call assistants are important expectation-setters, yet they are usually shaped by mobile operators, handset makers and cloud/device ecosystems, rather than fixed-line providers.

By contrast, the hidden forward-thinking category is the one which many AI observers gloss over: front-desk automation and workflow-linked voice for SMBs. This is where number continuity, local installation, business support, sector familiarity and managed service can be differentiators and sources of value. It is also where buyers are often too small or too fragmented for large platform sellers to serve elegantly.

The CPaaS providers are well-placed for certain AI Voice use-cases but may struggle with others. They have an obvious fit with contact centres and voice agents, but are less well-suited to complex, long-tail and verticalised workflows, or where multiple AI tasks need to run concurrently on calls.

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Pathways to AI + Voice

	CC / CCaaS AI summaries APIs analytics, agents	UC / UCaaS AI: transcripts, summaries etc	Voice interface to AI chatbots & agentic workers	AI-assisted calls for non-UC workflows	Business AI receptionist for front desk	Consumer call AI assistant / translation / scam detection
Small / midsize CSPs, ISPs, MSPs	With partners	With partners / as channels	Long term, with partners	With partners		Medium term with partners
Large CSPs & MNOs + inhouse AI	Some inhouse + partners	With partners / as channels	Inhouse AI factory / partners	Some inhouse + partners		
UCaaS / CPaaS pure-play				Some inhouse + APIs		
AI + Cloud platforms / labs	MS / Google Claude / OpenAI	With established UC footprint		Vertical / tool + APIs	Partner opportunity	With partners / acquisitions
Device suppliers				Niches, eg PoS or industrial		Apple, Google, Samsung etc
Specialist SaaS	Vertical CCaaS	Vertical UC			Some verticals	

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There is also another emerging competitor class: the SaaS companies mentioned earlier. The risk is that vertical SaaS platforms try to absorb the entire customer interaction layer, including AI voice and even the phone number. This is a significant risk if overall customer value moves to the intelligence layer, rather than call control and voice transport. CSPs should not assume that "the call" will remain theirs by default – they could be disintermediated. Some sectors have already seen early steps by certain application providers around voice, so urgency is increasing.

AI voice architecture for CSPs

Architectural options for AI Voice will have many dependencies on CSPs' specific existing estate, skills, ambition and partner model. Providers often run hybrid legacy voice infrastructures built around softswitches, SBCs, media gateways, SIP application servers or hosted PBX platforms.

Others are further along in their shift toward cloud communications stacks or run existing inhouse CPaaS / CCaaS platforms. A few may start anew from general AI platforms and work "outwards", adding voice and telecom functions.

Working out exactly how and where to instantiate AI services – as well as the additional layers for data management and governance – is still relatively opaque and dynamic. There will also be significant differences between fixed and mobile platforms and architectures, as the latter will need to work alongside IMS/VoLTE, SIMs and 5G cores.

The sponsor of this study, Alianza, has a specific vision of an "intelligent communications fabric" which allows hybrid models to be accommodated and evolve into platforms. That is reflective of a possible new market category, which bridges existing telephony / communications platforms with AI and intelligence enablers and agents.

Initially, the call core (infrastructure) should likely remain the stable and regulated control plane for numbering, routing, continuity and emergency handling. New AI functions will sit above that control plane (orchestration) in a service layer (experience) that is easier to change, easier to partner around and easier to expose through APIs.

The target architecture for small, midsized and large CSPs is essentially an "AI voice service fabric" (likely with some messaging and video components as well) that sits above traditional voice control.

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Conclusion

Strategic stance

Tier-1 and other CSPs on the leading edge of AI innovation have multiple options, including creation of consumer propositions as well as B2B. Some of them have major relationships with key AI labs, or investments in specialist voice AI developers, and can also tie applications into network evolutions such as edge-AI inferencing.

Smaller CSPs should not try to build, integrate or resell every flavour of AI voice, but instead lean more on trusted vendors with pre-integrated capabilities. They should be disciplined about where they have a right to play, where they can realistically differentiate and where they will be challenged by other stakeholders with greater resources.

Telcos often have a customer relationship around the existing business main number, as well as incumbency in fixed and hosted business voice services. They also have local support (including in-person), synergies with connectivity / ISP solutions and a better understanding of regional SMB business issues.

That discipline should lead to a phased strategy. Near term, operators should package three to five products that solve obvious SMB problems, with close alignment with existing services and a recognition that some are "table stakes" vs. competitors, while others may offer monetisation upside.

They need to be alert to the risks of value erosion, if "call intelligence" migrates outside their control, and look to reinforce existing propositions rapidly, even if it initially means keeping prices flat.

Next, operators should look at extending their AI Voice reach into SMB workflows, including via partnerships with SaaS providers (and potentially AI players), as well as more-ambitious uses such as realtime translation and initial use of vCon wrappers. They may need to expand their in-house software/AI skill-set and also closely watch regulatory issues for AI communications. However, few developers will want to create one-off integrations with each CSPs, so standardised or templated interfaces and schemas will be important.

Longer term, CSPs should progressively evolve towards a cloud- and API-based voice services fabric that can support more advanced voice agents, ambient voice use cases and full conversational and multi-channel "intelligent engagement" services. They will likely need to focus on specific vertical and horizontal sectors workflows, while leaving the other "long tail" segment for developers and other partners to address – although potentially these can become additional revenue sources, if they can be onboarded as tenants on the existing telephony network, rather than creating their own alternatives.

For telcos, voice is back. But not in its old, traditional form of straightforward PSTN calls and minutes. **The value is in the conversation, not the call**: what context, who participated, what was decided, which workflow, what needs to happen next, and which systems should be updated. **That is an orchestration problem, above all**.

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AI is turning voice services and functions from a narrow telephony product into a programmable, contextual, workflow-sensitive interaction layer. But that does not mean CSPs should chase every AI voice use case. The landscape is too broad, too fast-moving and too full of attractive distractions.

The questions which determine the **realistic short-to-medium term targets** are:

- What will customers expect as "table stakes" before direct monetisation?
- What are customers willing to pay for, in the short term?
- Which offers require new skills for operators, and which can quickly be enabled and deployed via existing network platforms and moderate upgrades?
- How can technical, commercial and regulatory risks be avoided or mitigated?
- How can CSPs avoid direct competition against hyperscalers, major CPaaS providers, smartphone OS suppliers and AI platforms?
- How can the explosion of new, verticalised conversational AI providers be turned into potential API customers, rather than posing a disintermediation risk?

Sophisticated AI-powered contact centres and next-gen CRM / customer engagement will be fought as a multi-way contest between Tier-1 CSPs, major vendors, CPaaS providers, hyperscalers and AI specialists. In-call AI agents and personal assistants for consumer voice, will be similar, but also add mobile emphasis, huge regulatory oversight and device vendors and social-network app players as rivals.

The most credible opportunities for regional telcos, voice-capable ISPs, CLECs, and smaller MSPs **lie in the under-served SMB middle market**. These customers still rely on business numbers, informal front desks, frontline staff, patchy SaaS adoption and local trust. They have limited AI use today, and do not need a general-purpose "AI workforce" or complex agentic narratives. They need fewer missed calls, cleaner handoffs, better records, safer screening and tighter links between voice and the tools they already use.

This is not just AI on top of standard telephony. It is a chance to **repackage voice as part of managed business outcomes**.

Companies that can carve a niche in the space will not always be the ones with the loudest AI rhetoric or newest, coolest brands. They will be the ones that choose a few addressable domains, modernise their communications architecture, create useable APIs and build the partnerships, internal skills and appropriate sales / marketing and product focus needed to move from demos to deployment.

SMBs are not just another customer segment. They impose the discipline that AI voice badly needs: simple products, visible ROI, operational reliability and human fallback. That is exactly where **smaller CSPs can still matter, as well as focused Tier-1s**.

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About Disruptive Analysis

Disruptive Analysis is a specialist and independent technology industry analyst and advisory company run by well-known telecoms-sector expert, futurist and provocateur Dean Bubley.

Founded in 2002, it provides consultancy services, expert reports and articles, speaking engagements and broad insights into telecoms, networks, communications services, policy, cloud, edge and AI infrastructure sectors.

It operates via multiple publication channels, private strategic advisory engagements, conference keynotes and executive workshops.

Ongoing research themes include:

- Voice + AI
- Telecom operator strategy
- 5G, 6G, Wi-Fi and satellite connectivity evolution
- Technology policy & regulatory issues
- Network & communications APIs
- Telco AI use-cases and deployment models
- Enterprise and indoor wireless systems
- Technology sovereignty & geopolitics
- "Telco-futurism"

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