

Microsoft AI and Cloud Ecosystem

A report comparing providers' capabilities to help decision-makers more effectively source services more effectively



Executive Summary 03

Introduction

Definition 08
Scope of Report 09

Sweet Spot

Appendix

Methodology & Team 14
Author & Editor Biographies 15
About Our Company & Research 18

*Report Author: Dr. Tapati Bandopadhyay
and Sameen Mohammed Siddique*

Driving enterprise transformation by leveraging Microsoft AI and cloud for AI-powered modernization

The ISG Provider Lens® Microsoft AI and Cloud Ecosystem 2026 — U.S. report examines how service providers support enterprises as Microsoft shifts from cloud-first enablement to AI-native operating models across productivity, data, platforms and managed services. The study evaluates four quadrants: Microsoft Productivity and Business Process Services, Azure Data Transformation and AI Services, Azure Managed Services and Azure Professional Services, assessing provider capabilities, market positioning and execution across advisory, implementation and managed services within the defined scope of the study.

The U.S. Microsoft AI and cloud ecosystem is undergoing a structural shift as enterprises transition from cloud-first to AI-first operating models. This evolution is marked by the

integration of data platforms, productivity tools and business applications into unified intelligence layers powered by Microsoft Fabric, Azure OpenAI and Copilot. Enterprises are no longer treating AI as an overlay but embedding it directly into their workflows, enabling continuous decision-making, automation and optimization at scale.

Market context: forces reshaping the U.S. ecosystem

U.S. enterprises are moving beyond migration-driven cloud adoption to operationalize AI securely and at scale. Macroeconomic pressures, including interest rates, cost constraints and scrutiny, are focused on efficiency, measurable ROI and faster time to value. The Microsoft ecosystem supports this shift by integrating AI, data, analytics and productivity across Fabric, Foundry and Copilot, amid rising regulatory and protection requirements.

From cloud adoption to AI-native enterprise execution: The Microsoft AI and cloud ecosystem in the U.S. has entered a new transformation phase. With the core platform

U.S. partners lead
with **AI-native**
models and **data-**
to-AI platforms,
driving outcomes
at scale.



Executive Summary

established, organizations are shifting toward scaling AI across operations. AI is increasingly embedded into workflows, enabling real-time insights, automation and continuous optimization, positioning it as a core enterprise capability driving productivity, efficiency and innovation.

AI and data workloads redefine Azure

consumption patterns: AI and data workloads are reshaping Azure consumption, with Azure Consumed Revenue (ACR) increasingly driven by AI-intensive, data-centric use cases rather than infrastructure scale. U.S. enterprises are shifting to Fabric, Azure AI Services and always-on analytics, creating distributed, continuous usage patterns. This change elevates the importance of cost governance, rightsizing and FinOps, as organizations pursue predictable AI costs while scaling Copilot, agents and analytics through efficient architectures and controlled execution.

AI-driven innovation balanced by trust and governance:

As enterprises scale AI, trust, security and governance are becoming foundational enablers. Organizations are building responsible AI frameworks, identity-

centric architectures and traceable data pipelines to ensure compliant, auditable deployments, enabling confident enterprise-wide AI adoption that can deliver long-term value while mitigating risk.

Platform convergence accelerating value

realization: Microsoft's integrated platform spanning Fabric, OneLake, Copilot Studio and Azure AI is reshaping enterprise technology design by converging data, analytics, AI and automation. This approach accelerates time-to-value, reduces complexity and supports scalable, AI-ready foundations for continuous innovation and operational efficiency.

Co-innovation with Microsoft and with clients:

Co-innovation in the U.S. Microsoft ecosystem operates on parallel tracks, with Microsoft and enterprise clients, and leading providers connect both. With Microsoft, it centers on service adoption, co-developed architectures, accelerators and roadmap alignment across Copilot, Fabric and agent frameworks. With clients, it focuses on applied problem solving, translating capabilities into reusable assets and scalable production outcomes that deliver faster value.

Enterprise priorities: how enterprises are adopting and scaling

Scaling AI from pilots to enterprise-wide impact:

U.S. enterprises are accelerating the transition from experimentation to production-scale AI deployment. The focus is on embedding AI into everyday workflows, enabling Copilot-led productivity, intelligent automation and agent-driven execution. Enterprises are prioritizing solutions that deliver repeatable outcomes, seamless integration and measurable business impact, turning AI into a core driver of enterprise performance.

Building governed and scalable AI operating models:

Governance is emerging as a key enabler of scale. Enterprises are establishing AI CoEs, policy-driven control frameworks and real-time monitoring capabilities to ensure that AI systems operate reliably and responsibly. These governance structures enable organizations to scale AI confidently while maintaining visibility, control and alignment with business and regulatory requirements.

Maximizing value through cost transparency and optimization:

Economic efficiency remains a critical priority. Enterprises are embedding FinOps practices into AI and cloud operations, enabling real-time cost visibility, optimization and alignment with business outcomes. By linking AI investments directly to measurable value, organizations are ensuring that innovation is both sustainable and economically impactful.

Adopting platform-centric and product-aligned models:

Organizations are evolving toward platform-based operating models, where they treat digital platforms as long-term strategic assets. Enterprises expect service providers to not only build but also operate, enhance and continuously optimize these platforms, enabling ongoing innovation, resilience and business agility.

Enterprises prioritize marketplace-ready, governed AI solutions:

U.S. enterprises increasingly expect to source AI, data and industry solutions through the Microsoft Commercial Marketplace to accelerate



deployment while retaining governance and cost control. Marketplace offerings are favored when they provide pre-integrated architecture, transparent pricing, security and compliance validation.

Key enterprise priorities shaping sourcing decisions:

- Prioritizing production-ready AI and Copilot deployments that deliver secure, scalable and outcome-driven business value
- Emphasizing integrated governance frameworks across data, AI and automation to enable trusted innovation
- Embedding cost optimization and financial accountability into cloud and AI operations
- Selecting partners that can deliver platform-driven transformation and continuous value realization

Provider dynamics

Service providers in the U.S. Microsoft AI and cloud ecosystem are undergoing significant strategic repositioning to align with evolving enterprise demands.

Shift to AI-first, platform-led delivery:

Providers are reorganizing their portfolios around AI-first transformation, integrating Microsoft 365, Azure data platforms and business applications into unified delivery models. The emphasis is on platform-centric architectures that enable seamless integration across productivity, analytics and operations.

Investment in proprietary IP and accelerators:

Leading providers are differentiating through proprietary frameworks, accelerators and platforms that industrialize delivery. These assets include migration factories, AI enablement frameworks, governance toolkits and agent orchestration layers that reduce time-to-value and improve consistency across engagements.

Advancement of agentic AI capabilities:

Developing agentic AI systems represents a key area of innovation. Providers are building multi-agent architectures that automate complex workflows, integrate with enterprise systems and enable autonomous decision-making under human supervision. This marks a transition from assistive AI to operational AI embedded in business processes. Providers

are increasingly designing solutions where Copilot and AI agents act as orchestration layers rather than standalone features. In productivity and business process services, this means structuring workflows so collaboration tools trigger transactions, analytics and automated actions across Dynamics 365 and Power Platform. In managed services and operations, agents are used to automate monitoring, remediation and optimization tasks under defined trust boundaries and approval checkpoints, balancing autonomy with control.

Convergence of build and run responsibilities:

In Azure managed services and professional services, providers are blurring traditional boundaries between transformation projects and steady-state operations. Providers are extending their role beyond implementation to full lifecycle ownership, covering strategy, build, run and optimization. They differentiate themselves by offering lifecycle ownership models that extend from strategy and migration through continuous optimization, embedding FinOps, security controls and reliability engineering into day-to-day operations rather than layering them on after deployment.

Managed services are evolving into continuous control planes that manage cost, performance and governance across cloud and AI environments.

Outlook (12-24 months): accelerating shift toward agentic and autonomous enterprises

Over the next 12 to 24 months, the Microsoft AI and cloud ecosystem in the U.S. will continue evolving toward AI-native, platform-driven enterprise models, with intelligent capabilities embedded across business operations.

- AI will become a default operating layer across enterprise functions.
- Multi-agent systems will expand, enabling autonomous workflows and real-time decision-making.
- Enterprises will consolidate into unified data and AI platforms for scalability.
- Responsible AI, compliance and data governance will become critical competitive factors, particularly in regulated industries.



Leading indicators:

- Increased enterprise investment in AI-ready data platforms
- Expansion of Copilot and agent-based deployments
- Growth in demand for AI-driven managed services
- Adoption of outcome-based transformation models

Strategic priorities for enterprises:

- Prioritize data governance and quality to enable reliable AI outcomes.
- Establish responsible AI frameworks with policies for compliance, bias mitigation, transparency and accountability in AI systems.
- Build organizational readiness through upskilling employees, cross-functional collaboration and adopting structured change management.
- Focus on measurable value creation by aligning AI use cases to strategic business goals and clearly tracking ROI and impact.

Strategic priorities for service providers:

- Invest in scalable AI platforms, tools and accelerators to enable efficient enterprise-wide adoption.
- Strengthen governance, auditability and compliance capabilities to meet enterprise and industry standards.
- Deliver tailored value across sectors that address specific challenges and requirements in industries such as healthcare, finance, manufacturing and retail.
- Demonstrate business impact through frameworks and metrics that help clients quantify AI benefits, track performance and communicate value to stakeholders effectively.

Future action: building future-ready enterprises with AI at the core

U.S. enterprises should formalize AI-native operating discipline on Microsoft platforms before expanding Copilot, agentic workflows and Fabric-led intelligence at scale. This process requires centralized AI and data governance that enforces architecture, security, identity and lifecycle controls. Enterprises

should mandate AgentOps, MLOps and FinOps runbooks aligning AI usage with business KPIs, consumption thresholds and risk controls. Providers must deliver outcome-based reusable accelerators and governance frameworks enabling repeatable, auditable and marketplace-ready offerings.

Microsoft's future strategy

At Build 2026, Microsoft signalled a structural shift from leveraging partner models such as OpenAI and Anthropic to developing its own frontier stack alongside partner offerings. This strategy supports long-term self-sufficiency and models you can trust, with clean, non-distilled data lineage as the key value proposition to regulated enterprises. Its MAI Superintelligence Team launched seven in-house MAI models spanning reasoning, coding, image generation, transcription and voice. Led by the flagship MAI-Thinking-1 reasoning model, these capabilities are integrated across GitHub Copilot, VS Code, PowerPoint and Microsoft Foundry. Microsoft positions the models as competitive with leading rivals while emphasizing efficiency and lower cost. It also introduced the Frontier Tuning tool, which lets

enterprises customize the models on their own data, co-designed with its in-house Maia 200 silicon for increased cost efficiency. Microsoft also introduced the Microsoft Scout, its first always-on Autopilot agent built on the open-source OpenClaw framework and the Work IQ context layer. Microsoft Scout works across Teams, Outlook, OneDrive, SharePoint, desktop and browser environments to prepare meetings, identify risks and resolve conflicts proactively. The agent stack is wrapped in enterprise governance, including per-agent Microsoft Entra identities, OS-level sandboxing via Microsoft Execution Containers, Purview DLP and sensitivity labels, and human-in-the-loop gates for high-consequence actions.

i. What it means for service providers

- From Copilot to agent orchestration: Enterprise demand is shifting from deploying assistant seats toward designing and operating governed multi-agent systems with clearly defined trust boundaries and approval checkpoints.



Executive Summary

- Model customization as a service: Frontier Tuning turns domain fine-tuning into a productizable engagement, creating differentiation based on accuracy and cost efficiency rather than generic model capability.
- Multi-model optionality and economics: Providers can architect the right model for each task across MAI, OpenAI and Anthropic, drawing on MAI's cost efficiency while taking ownership of FinOps for always-on workloads.

ii. Provider roadmap for enterprise readiness

Meeting enterprise demands requires a phased roadmap that prioritizes foundational capabilities before scaling and monetization:

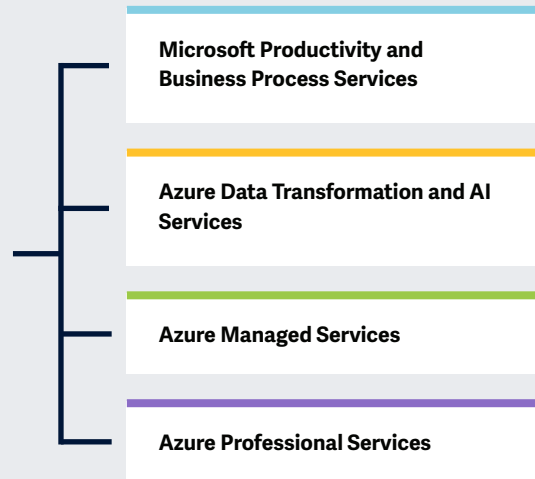
- Establish the data foundation: Given how data readiness has become central to Microsoft's enterprise positioning, providers should begin with Purview-based classification, labeling and lineage clean-up. Enterprises are prioritizing these capabilities, and these capabilities carry a clear requirement for strict guardrails, since agents are only as trustworthy as the data and the permissions they inherit.
- Engineer AgentOps into the build: As autonomous agents can act using credentials and perform consequential actions, enterprises will require verifiable containment and auditability before granting them production access. Providers should, therefore, embed per-agent identities, sandboxing, policy-as-code allow-and-deny lists, and human-in-the-loop gates from the outset rather than retrofitting them. Governance built in from the outset transforms an agent demonstration into a solution that security and compliance teams can approve for production use.
- Differentiate through Frontier Tuning: As generic model capabilities become increasingly commoditized, durable advantage shifts to those tuned on a client's own clean data with a defensible lineage. Providers should establish repeatable, auditable fine-tuning processes with documented data provenance because in regulated sectors such as BFSI, healthcare, defense and the public sector, buyers view the ability to prove how a model was trained as a procurement requirement rather than an afterthought.
- Operate at scale with FinOps: Always-on agents continuously consume compute resources and can spawn sub-agents, driving ongoing costs. With enterprises increasingly tying measurable ROI from AI investments, providers should attune cost governance and chargeback models to these continuous consumption patterns and give clients real-time cost visibility and predictable unit economics before agent fleets scale.
- Scale and monetize: Once the foundational capabilities, governance and cost controls are in place, the opportunity moves from one-off builds to repeatable, productized offerings. Providers should operate and optimize agent fleets as a managed control plane and package governed, transparently priced accelerators on the Microsoft Commercial Marketplace. This will enable enterprises to quickly adopt these offerings while retaining control, and give providers a scalable, recurring revenue stream.

In 2026, the Microsoft AI and cloud ecosystem is enabling enterprises to move beyond cloud adoption to AI-native, outcome-driven transformation. Unified data platforms, Copilot-led productivity, agentic AI and intelligent cloud operations accelerate innovation, improve efficiency and convert AI investments into measurable business value. Governed scalability and platform cohesion are making AI a sustained competitive advantage.



Key focus areas for **Microsoft AI and Cloud Ecosystem 2026** study

Simplified Illustration Source: ISG 2026



Definition

The Microsoft AI and cloud ecosystem represented connected intelligence at Ignite 2025, marking the rise of Frontier Firms, which are agent-operated, human-led organizations. Microsoft addresses enterprise needs through a unified IQ layer that integrates Work IQ, Fabric IQ and Foundry IQ, combining insights from productivity tools, analytics, collaborative platforms and AI-driven service innovation.

Microsoft is deeply embedding AI into Microsoft 365, with Copilot-powered features such as Facilitator and AI agents in Teams, automating meetings and enhancing collaboration. At Ignite 2025, Microsoft introduced Agent 365 to manage AI agents across workflows. Voice commands, AI-generated summaries, agenda assistants and insight cards are becoming increasingly common, while Copilot continues to unlock cross-application productivity using organizational data. By tailoring deployments to client contexts, partners can address key AI challenges such as cultural shifts, trust, large-scale adoption and ROI.

Providers are moving from cloud migrations to strategic business process redesigns, leveraging the Microsoft Agent Framework, Zero Trust architecture and security roadmaps. Partners are emerging as key architects by differentiating with proprietary IP and using new Power Platform App Agent tools to build connected apps, agents, Power BI reports and workflows via low-code/no-code platforms. AI-native capabilities now include generative actions and intelligent document processing for complex automation.

Dynamics 365's 2025 release improves vertical and business process capabilities with agent-based automation, predictive insights and strong Power Platform integration. An enhanced Dataverse enables AI-ready experiences with advanced business logic and search. Providers harness Microsoft Fabric, Foundry, Azure OpenAI and cognitive architectures to deliver scalable analytics and advanced AI solutions.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services: Microsoft Productivity and Business Process Services, Azure Data Transformation and AI Services, Azure Managed Services, and Azure Professional Services.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and portfolio attractiveness
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Sweet Spot

Korcomptenz

Overview

Korcomptenz is a privately held, New Jersey-based Microsoft modernization specialist. Serving the midmarket and upper-midmarket, it combines Dynamics 365, Microsoft Fabric, Power Platform, Microsoft AI Foundry, Copilot Studio and Azure AI to connect business applications, data and AI-enabled execution. It defines its position by turning Microsoft business applications into governed, outcome-led operating models with measurable impact rather than just being seen as a broad-scale SI.

Key Provider Capabilities

- **Platform products:**
- **Business-application modernization with lifecycle coverage:** Korcomptenz delivers advisory, migration, implementation, integration, hypercare and rescue support across Dynamics 365, Microsoft 365 and Power Platform, giving it credibility beyond initial deployment.
- **Altiris* as an operational intelligence layer:** Altiris provides a differentiated Microsoft Fabric-based platform anchor that connects ERP, CRM, WMS, supply chain and shop-floor data to support governed visibility, AI-enabled analytics and operational decision-making.

- **KPI-oriented Copilot and agent workflows:** Korcomptenz positions custom Copilot and agent workflows beyond productivity assistance, focusing on governed process execution, business logic, ERP and CRM workflow integration, as well as KPI tracking. Some of the supply chain agents include Cold Storage voice-enabled supply chain agents.
- **Verticalized Microsoft IP:** Assets such as Altiris BankIQ, Altiris HealthcareIQ, Altiris ESGenius, and industry templates show a repeatable pattern of packaging Microsoft capabilities into domain-led use cases rather than relying only on custom implementations.
- **Value-led transformation governance:** Through its Business Value Register, Korcomptenz links initiatives to KPIs, baselines, realized value and financial impact, strengthening the argument that transformation is built around business outcomes and not only feature deployment.
- **Platform-based delivery model:** It offers standardized rollout patterns, packaged offerings, managed operations and scalability of global delivery support, while keeping delivery complexity below that of large multi-tower integrators with its unique Agile Value delivery methodology.

Note: Altiris*, formerly known as SmartForge

Benefits Delivered

- **Rapid reporting and decision-making,**
- **Broad KPI visibility across business units,**
- **Proactive, role-specific AI based intelligence**
- **Reduced manual efforts in finance and operations**
- **Strong warehouse and supply chain throughput**
- **Measurable cost and productivity gains under a governed value-realization model that connects application modernization, data readiness and AI adoption.**



Korcomptenz

Sweet Spot

Korcomptenz's sweet spot lies in its Microsoft-led modernization programs, where ERP renewal, data readiness and AI-enabled execution must work in tandem.

Most SIs just implement an enterprise application. Korcomptenz does that, but also owns the intelligence layer and the cloud infrastructure on which it runs.

It is particularly relevant for midmarket and upper-midmarket organizations in manufacturing, retail, distribution, financial services and healthcare that wish to replace fragmented operating environments with unified Microsoft-based models.

The provider is best suited for buyers that are seeking Dynamics 365 modernization connected with Microsoft Fabric, Power Platform and Azure AI rather than split across

separate partners, workstreams and tools.

The combination of data, cloud and applications offers key benefits that can be summarized as follows:

- Real-time operational visibility across ERP, CRM and shop-floor, all unified in one intelligence layer
- Predictive manufacturing analytics and demand signals built on Microsoft Fabric
- AI-driven decisions embedded directly in Business Central (BC) workflows, and not as a separate dashboard
- Governed, auditable data lineage that is compliant by design
- Runs on Azure tenant, with no third-party data warehouse and no data leaving a client's environment

- Built and maintained exclusively by Korcomptenz without the need of a partner support.

Altiris, a smart intelligence platform provides a differentiated platform anchor for turning data into a governed operational intelligence layer, while its Copilot and agent approach extends Microsoft AI from productivity support into business workflow execution.

This approach makes Korcomptenz a strong fit for buyers seeking practical process modernization, reusable vertical IP and measurable value realization with low orchestration complexity rather than many large multi-tower transformation models.

Buyers should consider Korcomptenz when the priority is to connect business applications, data and AI into one Microsoft program with clear operational and financial relevance.

Future roadmap

Korcomptenz's roadmap points to deep Microsoft ecosystem specialization rather than expansion into broad SI breadth. The focus is on AI-enabled, industry-specific transformation built on Dynamics 365, Power Platform, Microsoft Fabric, Microsoft AI Foundry, Copilot Studio and Azure AI, supported by reusable IP, packaged accelerators and repeatable agent patterns. The company's emphasis appears to be on practical business-application modernization, Fabric-based data readiness, governed Copilot and custom-agent adoption, and verticalized use cases with measurable business outcomes.





Appendix

The ISG Provider Lens® 2026 – Microsoft AI and Cloud Ecosystem study analyzes the relevant/ service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Heiko Henkes

Lead Authors:

Dr. Tapati Bandopadhyay and Sameen Siddique

Editors:

Poulomi Nag and Dona George

Research Analyst:

Riya Tomar

Data Analyst:

Pooja Nayak

Consultant Advisor:

Shriram Natarajan

Project Manager:

Monika Pathak

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars (\$US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Microsoft AI and Cloud Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies

Lead Author



Dr. Tapati Bandopadhyay
Lead Analyst and Research Partner

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Lead Author



Sameen Mohammed Siddique
Lead Analyst

Sameen is a Lead Analyst at ISG, focusing on market and industry research across emerging technologies. She authors Provider Lens® studies covering areas such as intelligent automation, AWS, Google Cloud, Microsoft Cloud and AI ecosystem, and mainframes. In addition to these studies, she contributes to research articles exploring evolving technology landscapes. Her core areas of expertise include automation, the hyperscalers ecosystem, telecommunications, and retail.

Sameen has managed diverse technology, business, and consumer research teams, transforming market data into actionable insights and intelligence reports for several

leading firms. In her prior roles, she has worked on competitive intelligence, market feasibility and SWOT assessment, GTM strategy, customer satisfaction and brand health studies. Her expertise synthesizes advanced technological understanding for competitive positioning and emerging innovation trajectories for global and regional markets.



Author and Editor Biographies



Riya Tomar
Research Analyst

Riya Tomar is a Research Analyst at ISG, supporting Provider Lens® Ecosystem Studies. She brings over three years of experience in technology research and advisory services. In her current role, Riya contributes to service provider evaluations and market trend analysis. She collaborates with lead analysts to validate data, prepare the Enterprise Context and Global Summary sections and maintain consistency across reports.

Prior to her current role, Riya authored research reports and created custom client presentations for strategic advisory projects, translating complex datasets into actionable insights and delivering high-quality outputs for decision-makers.

Enterprise Context and Global overview Analyst



Heiko Henkes
Managing Director

Heiko Henkes serves as a Managing Director at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape.

Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

Study Sponsor





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties and cities) and higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





JULY, 2026

SWEET SPOT: MICROSOFT AI AND CLOUD ECOSYSTEM