

Microsoft AI and Cloud Ecosystem

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



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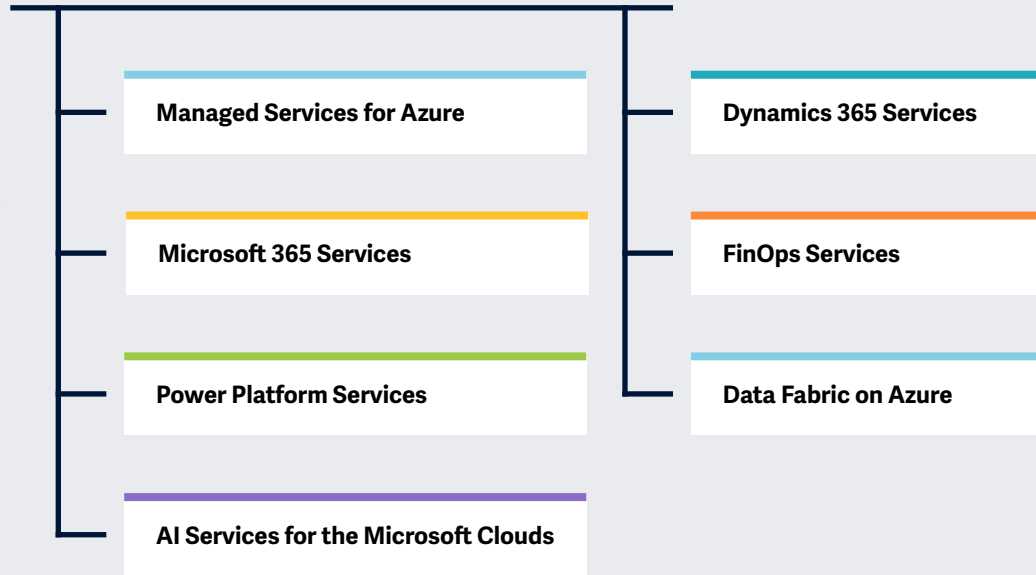
Microsoft is one of the world's leading technology providers, supported by a network of partners that augment its ability to help enterprises adopt its technologies. This network has experienced significant shifts over the past five years as Microsoft has undergone a major cloud transformation. Digital transformation has become a priority for most enterprises during this period, driving the demand for a new generation of software and services from Microsoft and its partners.

To address enterprises' needs, Microsoft focuses on several core areas — the Azure cloud platform; the Microsoft 365 suite of productivity offerings, including Windows 10, 11 and Office 365; AI services; business, automation and AI applications provided through Dynamics 365; Power Platform; and Microsoft Copilot. For service providers, success depends on delivering a robust set of services complemented by innovative capabilities and a strong relationship with Microsoft. Providers must stay informed about future developments in the Microsoft AI and Cloud Ecosystem and demonstrate their ability to drive innovation.

ISG analyzes how providers are positioned globally and in specific regional markets, including Australia, Brazil, Germany, Mexico and Switzerland, based on their portfolio strength and market competitiveness. While many providers offer Microsoft-related services in these regions, this report will exclusively focus on the leading competitors within each studied quadrant, encompassing global and regional providers.



This study evaluates providers' capabilities based on their product and service portfolio and competitiveness around the **Microsoft AI and Cloud Ecosystem**.



**For some regions, this quadrant may be split into two: one covering large accounts and another for local specialists as applicable in the respective regions*

Definition

The ISG Provider Lens™ Microsoft AI and Cloud Ecosystem study offers the following to business and IT decision-makers:

- Transparency and insight into the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- Focus on the global market and different regional markets, including Australia, Brazil, Germany, Mexico and Switzerland

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

Simplified Illustration Source: ISG 2024



Managed Services for Azure

Definition

This quadrant assesses managed public cloud service providers that enhance Azure's capabilities with professional and managed services, including IaaS and PaaS. These services include provisioning, real-time and predictive analysis, and operational management for clients' public cloud and multicloud environments. The aim is to optimize cloud workload performance, reduce costs and ensure compliance and security.

With nearshore and offshore options, providers are evaluated on their regional service delivery and sales capabilities. Beyond simple workload migration, they offer comprehensive tools and services to address critical business needs using Azure.

Typical offerings include professional services for CPU, memory and database management; update and patching services for operating systems, middleware and applications; a service portal for cost management and IT service; governance and compliance management; and supporting services such as incident management and automation. Many providers also develop services and solutions on Azure to help clients achieve their net-zero goals and meet ESG targets.

Eligibility Criteria

1. Experience in designing, building and **managing public cloud and multicloud** environments, with a focus on Azure
2. Support in developing software code and integrating **cloud-native and legacy systems**
3. Experience in implementing **Agile and DevOps** methodologies and integrating with enterprise clients' existing processes
4. Experience in automating APIs and **conducting cloud analytics**
5. Well-developed **security** practices and capabilities
6. Strong **partnership with Microsoft**, demonstrated by the number and category of relevant certifications, the duration of the association, and evidence of strategic co-operation around Azure



Definition

This quadrant evaluates service providers that assist enterprises with adopting, integrating and operating Microsoft 365, a SaaS-based productivity suite. Their services go beyond basic provisioning and migration; they deliver a high-quality, device-independent productivity suite that enables seamless teamwork, irrespective of location. These services adapt to user roles, fostering collaboration and integrating teams globally. Integration and implementation services are essential for this process as providers are evaluated on their support for Windows as a part of their Microsoft 365 portfolio.

Implementing SaaS-based workplace environments presents challenges for enterprises around collaboration, unified communication, file storage, performance, license costs and maintenance. Providers must proactively extend their offerings beyond basic Microsoft 365 implementation to address these challenges. They should provide assessment, consulting and solutions that assist clients' digital transformation journeys, requiring transparent communication and unique selling propositions that transcend basic workplace solutions.

Eligibility Criteria

1. Service portfolio that covers **technical consulting; licensing; and Microsoft 365 module integration, implementation and operation**
2. **Innovative solutions** seamlessly integrated with Microsoft 365 to shape the modern workplace, including AI capabilities, automation with a focus on RPA through Power Automate and other approaches, as well as advancements in the metaverse.
3. Microsoft Office **API management** that ensures appropriate use and enhances productivity
4. Ability to **migrate** workplaces to modern cloud environments and offer **workspace-as-a-service models**
5. Provisioning of Microsoft 365-based **unified endpoint suites** that integrate with advanced IAM technology and mobile device management (Intune or others)
6. Strong **partnership with Microsoft** that is measured by the number of certifications across categories such as Office 365, Intune, Windows and Azure; the duration of the association with Microsoft; and evidence of strategic co-operation in modern workplace solutions



Power Platform Services

Definition

This quadrant assesses providers that offer services for the enterprise-wide implementation of Microsoft Power Platform, including support and advanced training. Enterprises leverage these services to develop sophisticated applications for digital transformation, obtain insights into operations and optimize business processes. Providers utilize Power Platform's capabilities and educate enterprises on best practices for low-code application development. Providers in this quadrant excel at integrating Power Platform with various Microsoft business applications, such as Office 365, Dynamics 365 and Azure, and concepts such as DevOps, DataOps and MLOps.

The rise of citizen development has increased the demand for support in managing and embedding user-created applications using low-code and no-code development tools within Power Platform. The ability to integrate or migrate third-party tools is also important. Providers in this quadrant support Power Platform's analytics, process management, IT management and automation features. They understand clients' specific objectives and apply their data literacy to guide clients effectively, taking a holistic approach to enhance business performance.

Eligibility Criteria

1. Services that support enterprises' adoption of all Power Platform solutions — **Power BI, Power Apps, Power Automate and Power Virtual Agent**
2. Structured offerings and **IP** that enable easy adoption of Power Platform solutions and streamline **ongoing software operation**
3. **Technical support capabilities** that assist enterprises in adopting and managing Power Platform solutions
4. Evidence of delivering clear **business benefits** of using Power Platform solutions



AI Services for the Microsoft Clouds

Definition

This quadrant assesses providers offering services and solutions for the enterprise-wide development, adoption and management of AI across Microsoft's three clouds: Azure, Microsoft 365 and Dynamics 365 Services. It includes providers enhancing generative AI (GenAI) features offered via the Microsoft clouds, such as Microsoft 365 Copilot, Sales Copilot and Microsoft Security Copilot. The quadrant also covers providers helping enterprises build GenAI models and applications using Microsoft's native platforms, including Azure OpenAI Service, Azure AI Services, Azure Machine Learning and Azure AI Infrastructure. These providers also offer related AI services, such as Azure data architectures for AI, security, governance, change management, responsible AI frameworks, training and citizen enablement. Given the importance of ML and automation in AI strategies, this quadrant includes providers focused on designing, deploying and managing ML models while leveraging Microsoft's AI capabilities.

Given the emergent nature of AI, this quadrant assesses providers' strategic vision, investments and development pipelines for Microsoft- and OpenAI-related services, including those in beta or preview stages. Providers should articulate how AI on the Microsoft clouds fosters innovation in employee, consumer and user experiences, ultimately improving business outcomes.

Eligibility Criteria

1. Services and solutions that support enterprises' **adoption, integration and use of Microsoft's GenAI-enabled copilots** – Microsoft 365 Copilot, Microsoft Sales Copilot, Microsoft Security Copilot and GitHub Copilot
2. Services and solutions that support the **building, testing, deploying and managing of GenAI models and AI-enabled applications and processes using the Microsoft clouds and related AI platforms**
3. Knowledge of LLM models (including OpenAI GPT-4/5) and experience in developing **industry-specific and functional use cases**
4. AI governance services and guidance, including an understanding of **regional regulatory and policy compliance** differences in using data and GenAI models
5. **Certifications and training programs** in AI and GenAI, including emerging disciplines such as prompt engineering
6. **Strong partnership with Microsoft, OpenAI,** and relevant third-party ISVs and service providers



Definition

This quadrant evaluates service providers that help enterprises select, integrate, customize and operate Microsoft's cloud-based Dynamics 365, a suite for ERP and CRM software.

These services focus on digitalizing business processes using ERP and CRM software. Providers and system integrators should help organizations analyze processes that have not been digitally mapped and implement these processes using Dynamics 365 solutions.

Beyond providing infrastructure and cloud services, providers in this quadrant should show long-term industry expertise across the entire supply chain — from manufacturing and warehousing to delivery and procurement of various goods and services. Industry-specific approaches are becoming increasingly relevant due to market specialization and emerging trends.

This study considers data integration and migration from legacy systems while examining how providers manage software lifecycle and user support, including escalation handling, change management, optimization and reporting. Providers must understand how their services and Dynamics 365 solutions affect enterprise clients' business outcomes and financial performance.

Eligibility Criteria

1. Scope and depth of service portfolio in **Microsoft Dynamics 365 implementation, customization, provisioning and support**, with special consideration for industry-specific services and capabilities
2. Ability to understand clients' workloads and effectively support their **transformation of ERP- and CRM-related processes**
3. Strong **partnership with Microsoft**, measured by the number and category of relevant **certifications**, the duration of the relationship and evidence of **strategic co-operation**
4. Support organizations' **digital transformation processes** as a part of Dynamics 365 adoption
5. Variety and maturity of **pricing and payment models** that align with the needs of enterprises adopting and using Dynamics 365
6. Robust implementation processes, including the use of **Agile and DevOps methodologies** and relevant automation for service delivery and quality



Definition

This quadrant assesses providers offering services and solutions to help enterprises gain visibility into cloud costs and usage, promoting financial accountability in a variable spending model. As cloud adoption expands, enterprises increasingly embrace FinOps to improve financial performance, control costs, efficiently manage cloud resources and respond more effectively to business needs. Success requires strong collaboration among finance, engineering and business teams to optimize cloud spending and ensure sustainable growth.

Providers typically offer the following services:

- Continuous cost optimization capabilities through cloud rightsizing, reserved instances and other financial strategies
- Forecasting and budgeting services for developing accurate cloud expense models and budgets based on historical data and business plans
- Measurement and accountability services to assess the effectiveness of ongoing cloud spending and hold teams accountable for their budgets
- Implementation of automated processes for cost control, reporting and compliance to ensure ongoing optimization

Eligibility Criteria

1. Scope and depth of service portfolio supporting and augmenting the **Microsoft Cost Management** suite of FinOps tools
2. Proven expertise in the **financial models associated with cloud services**, including variable costs, pricing structures and billing systems
3. Support for real-time visibility into **cloud spending and usage patterns**, including budget management and forecasting models based on historical data and business patterns, cloud cost management, analytics and budgeting
4. **Customizable dashboards** and a clear approach to enable collaboration among different stakeholders, such as the finance, engineering and management units
5. Capabilities to implement **automated processes for alerts, spending limits and optimization recommendations**, including integrations to existing financial and cloud management tools
6. **Expertise in regulatory and compliance matters** to ensure adherence to relevant requirements affecting financial reporting and accountability



Definition

Organizations implement a data fabric to simplify the management of complex data environments via a unified platform. This quadrant assesses providers that offer services and solutions for implementing a unified data architecture on Azure to manage, integrate and analyze data from multiple sources and environments. Success requires a cohesive data layer across on-premises, multicloud and edge environments, ensuring data is accessible and usable for various business applications.

These providers typically offer the following services:

- Unified data integration and access across various environments, including Azure services, on-premises databases, third-party applications and other cloud platforms
- Tools for data modeling, visualization and analytics that support different data types — structured, semi-structured and unstructured — from diverse sources

- Data governance and security capabilities, including robust governance frameworks to ensure data quality, security and compliance
- Experience in implementing real-time data ingestion and processing capabilities, enabling organizations to make timely, data-driven decisions

Eligibility Criteria

1. Proven expertise across all relevant Azure services, including **Azure Data Factory, Azure Synapse Analytics, Azure Databricks and Azure Event Hubs**
2. Capabilities for **integrating diverse data sources** (structured, semi-structured and unstructured) across on-premises and cloud environments, including internal systems, applications and third-party services
3. **Data governance and compliance framework** that ensures data quality, security and adherence to regulations, with support for **Azure Purview** data cataloging, classification and governance capabilities
4. **Data quality management** processes and tools, including metadata management, to enhance data understanding and lineage tracking
5. Implementation services for real-time data processing via **Azure Stream Analytics and Azure Event Hubs**
6. Awareness of relevant industry trends, including AI integrations, ML and big data strategies



Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are evaluating the following seven quadrants on the Microsoft AI and Cloud Ecosystem 2025:

Quadrant	Australia	Brazil	Germany	Switzerland	Mexico	Global
Managed Services for Azure	✓	✓	✓	✓	✓	
Microsoft 365 Services	✓	✓	✓	✓	✓	
Power Platform Services	✓	✓	✓	✓	✓	
AI Services for the Microsoft Clouds	✓	✓	✓	✓	✓	✓
Dynamics 365 Services			✓			
FinOps Services						✓
Data Fabric on Azure						✓



The research phase falls in the period between November and December 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2025.

Milestones	Beginning	End
Survey Launch	November 5, 2024	
Survey Phase	November 6, 2024	December 13, 2024
Sneak Preview	February 2025	March 2025
Press Release & Publication	April 2025	

The collection of client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) as CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Microsoft AI and Cloud Ecosystem IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2025 – Microsoft AI and Cloud Ecosystem research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



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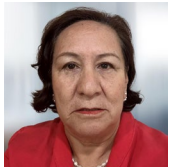
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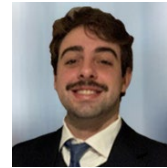
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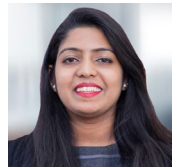
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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Huber

**Partner,
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Nawathe

Director



Susanta
Dey

Director



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

*Rated in previous iteration

7COMm	Axity*	bSide*	Eleflow Big Data
Accenture & Avanade*	Baggenstos*	BT*	Enfrasys*
ACP*	Barhead Solutions*	BTC*	Engage Squared*
adesso*	BDO Digital	Bytes Software*	Equinix
Advania UK*	Bechtle*	CANCOM*	Espire Infolabs*
Agilisys*	Best.Projects*	Capgemini*	Eviden (an Atos Business)*
AlfaPeople*	Beyond Soft	Capita*	EY*
All for One Group*	Birlasoft*	Ceico	Fênix Sistemas*
Allgeier*	BitHawk*	Certsys	FiveP Australia*
Ambit Group*	Bizapp	Convergia	Fujitsu*
ANS*	Blueshift*	Dribion Software	Fusion5*
AppSphere*	Bluetab	DXC Technology*	G&P*
Arvato Systems*	BRQ	Econis*	Generation-E*
Axians*	BS_Team*	ELCA/EveryWare*	glueckkanja*



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GONZALEZ CORTINA GLENDER Y CIA
Grupo Energy Telecom
Grupo Portfolio*
Grupo Scanda
Grupo Sega*
Hanu Software*
HCLTech*
Henson Group*
Hexaware*
Hitachi Digital Services*
HPE*
HSO*
Hyti
IBM*

Indra Sistemas
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KIO Networks
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KUMAVISION*
Kumulus*
Kyndryl*
L3*
L5 Networks
LAB3*
Lan Designers
Lanlink*
Lattine*
Layer 2*
Leega
Logicalis*

Logicworks*
LTI Mindtree*
Macquarie Cloud Services*
Mastek*
Math Group
MDW*
Microware TI
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Mphasis*
NCS*
NEORIS*
Net at Work*
NetApp*
NetPlans*



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*Rated in previous iteration

Nextios	Public Cloud Group*	Skaylink*	Swisscom*
novaCapta*	Publicis Sapien*	SLK Software*	Sycor*
Noventiq*	PwC*	SLMIT	Synoptek*
Npo Torino	q.beyond*	Smart Consulting*	Syntax*
NTT DATA*	Qlik	SmartIT Services*	TCS*
Nubiral	Qualiserve*	SMX*	TD SYNTEX
Objektkultur*	Rackspace Technology*	Softcat*	Tech Mahindra*
ORBIT IT-Solutions*	ReadyMind*	Softtek*	Telefónica Tech*
oXya*	Reply*	SoftwareONE*	Teletex
Persistent Systems*	Rhipe*	Solo Network	Telstra*
Phat Consulting*	Risual*	Somnitec*	Teltec Solutions
Phoenix Software*	Scheer*	Sonata Software*	TIVIT*
Processor*	Seidor*	Sopra Steria*	Trans4mation*
Protiviti*	SGA*	SOU.cloud*	Transparency*



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*Rated in previous iteration

Trianz*	Wipro*
T-Systems*	Wizeline
UMB*	Wolkenwerft*
Unisys*	XalDigital
UPBI*	Your IT Corp*
UST*	
Velrada*	
Venha Pra Nuvem*	
Veritec*	
Vibe Tecnologia	
Vistasys*	
VIVO*	



iSG 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, while 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](#).

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For more information, visit isg-one.com.





NOVEMBER, 2024

BROCHURE: MICROSOFT AI AND CLOUD ECOSYSTEM