

SPOTLIGHT

The Partner Opportunity For Microsoft AI Business Solutions: Spotlight On AI Solution Plays

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Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential business opportunity partners may realize by building and scaling Microsoft AI Business Solutions practices.¹

To better understand the revenue streams, investments, and risks associated with AI Business Solutions practices, Forrester interviewed representatives from 37 partners and surveyed 24 respondents from organizations with AI Business Solutions practices. The case study builds on interviews from the past 12 years with more than 250 Microsoft partners and more than 200 organizations that buy their services.

AI Business Solutions covers three solutions area groups including Microsoft AI, core Microsoft 365, and core Dynamics 365. This abstract focuses on recent changes for Microsoft partners as it relates to the AI solutions plays and the fiscal year (FY) 2027 outlook — including market trends and how partners make money.

The Microsoft AI solution area includes:

- **Microsoft 365 Copilot and Copilot Chat.** The services partners offer for Microsoft 365 Copilot and Copilot Chat (“Microsoft 365 Copilot” is shorthand for both offerings).
- **Agents.** The services partners offer for Copilot Studio and Microsoft Foundry. This case study refers to AI agents as “agents.”
- **Low Code (Power Platform).** The services partners offer for Power Apps, Power Automate, and Power Pages.

Many of the interviewees’ organizations had Microsoft AI practices in addition to broader AI Business Solutions practices. In these discussions with Forrester, interviewees shared their views on the high-level trends driving growth today and those expected to become even more important in FY 2027.

To summarize, they said that enterprise demand for Microsoft’s AI and low-code solutions and services was strong. Other key factors driving opportunities and growth included cost optimization, solution area interconnectedness, product evolution, low-code adoption, and Microsoft partner support. Directly, AI fueled customer demand for individual productivity gains, business process improvements and automation, and new revenue opportunities. Interviewees described how customers’ AI maturity was shifting from exploration and experimentation to full deployment, building, and adoption, resulting in new and greater services opportunities. Customers also saw AI and low-code as an opportunity to consolidate technology vendors and eliminate costs as they transformed. Furthermore, the increasing interconnectedness and ongoing product evolutions led to growing opportunities for extending services across AI Business Solutions. Given these trends and new solutions like Agent 365, partners not only succeeded in FY 2026 but also anticipated continued opportunities and growth in FY 2027.

\$16.45 per user per month

Expected revenue opportunity (with attach rates applied) for AI²

The Partner Opportunity For Microsoft AI

The trends discussed in the previous section have increased revenues across AI in terms of total revenue potential (i.e., what partners are offering) and the expected revenue associated with the likely bundles of services that customers are buying (attach

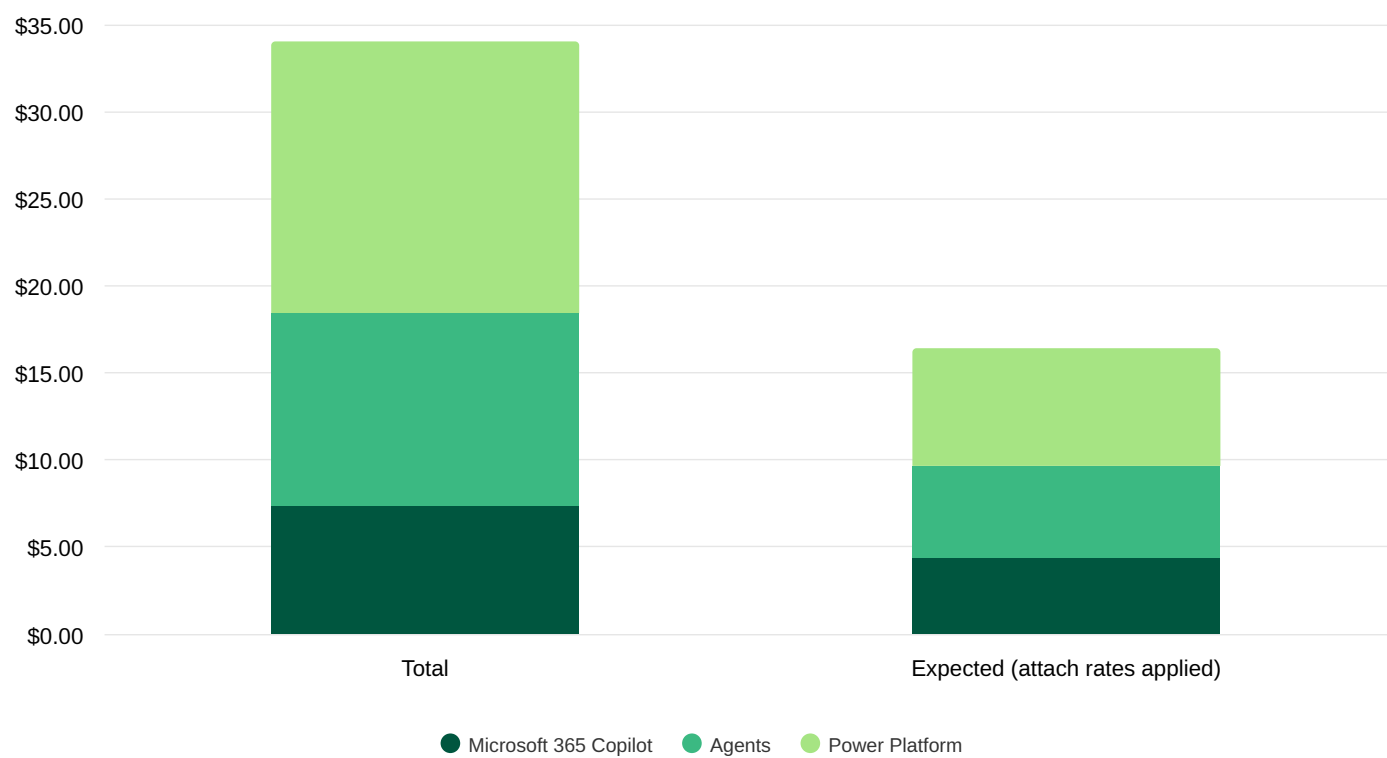
rates applied).

In terms of those services, deployment opportunities for Microsoft 365 Copilot and Copilot Chat, Copilot Studio setup, and Power Platform were increasing. Advisory services were increasingly important and valuable to customers, resulting in higher attach rates and larger deal sizes. Customers needed strategy support to leverage AI and low-code, adopt these solutions, enable their employees, and govern the apps, automations, pages, and agents. Partners were building more of these solutions too, especially agents. Finally, with AI, customers increasingly needed ongoing advisory and solutions development services, resulting in higher attach rates. Partners that offered these services also benefited from Microsoft 365 and Dynamics 365 engagements driven by AI, for which AI and low-code were natural extensions. These services could drive Azure and Security opportunities, too.

Accounting for attach rates, Forrester found that the expected AI revenue opportunity for a new enterprise customer on a three-year journey is \$16.45 per user per month. This is up 53% year over year and up 509% since FY 2024.³

For details on the partner opportunity for smaller customers, please reference the accompanying CSP case study.⁴

Microsoft AI Total And Expected Revenue Opportunity



Revenue By Solution Area				
Solution area	Total revenue per user per month	Blended attach rate	Expected revenue per user per month	Expected YOY revenue growth
Microsoft 365 Copilot	\$7.35	59%	\$4.35	16%
Agents	\$11.10	48%	\$5.30	152%
Low Code (Power Platform)	\$15.65	43%	\$6.80	
Total	\$34.10	48%	\$16.45	53%

Revenue By Partner Service				
Partner service	Total revenue per user per month	Blended attach rate	Expected revenue per user per month	Expected YOY revenue growth
Deployment	\$3.25	68%	\$2.20	22%
Advisory	\$5.05	61%	\$3.10	11%
Solutions development	\$10.40	50%	\$5.20	49%
Managed services	\$15.40	39%	\$5.95	125%
Total	\$34.10	48%	\$16.45	53%

Forrester makes adjustments each year to add, recategorize, and remove solution areas. Forrester's FY 2026 analysis includes Low Code (Power Platform) as a new solution area, so it does not have year-over-year growth calculations.

Microsoft 365 Copilot. Partners help enterprise customers deploy, adopt, and measure their use of Microsoft 365 Copilot, including Copilot Chat. These services include:

- **Deployment services, which enterprise AI maturity influences.** Microsoft 365 Copilot engagements typically begin with a workshop, followed by a proof of concept and deployment. Enterprise customers are also willing to pay for data security and data platform work to maximize their AI investments. Partners said that enterprises focused more on experimentation last year. This year, customers are ready to move to full deployment and adoption, driving higher attach rates.
- **Advisory services that attach more frequently.** Advisory services for Microsoft 365 Copilot include strategy and planning, data compliance and governance, adoption, and change management. As enterprise customers adopt the solution and focus on realizing value, advisory services grow and attach more frequently. Compared to other solution areas, Microsoft 365 Copilot requires more training and change management and often leads to ongoing engagements as it evolves. Deal sizes varied based on client budgets and Microsoft funding, but partners remained flexible in sizing advisory services to meet client needs. Looking ahead, one interviewee said: "Our Copilot revenue grew about 40% last year. I would expect the same this year, if not more. Most of it was adoption work."
- **Solutions development services.** Enterprise customers may require custom development and integration work to connect solutions with Microsoft 365 Copilot. However, most solutions development work related to AI is agentic and is therefore categorized under the Agents solution area.
- **Ongoing AI adoption services.** While still early, managed services offerings include usage dashboarding, ongoing adoption services, and user support. Enterprises need to measure how they leverage AI. Adoption is an ongoing effort due to phased deployments and the evolving technology. One interviewee said: "We are grateful for the constant pipeline that comes from

working with Microsoft. There is typically at least a new feature, if not a new suite or tool coming out, so there is a lot of change to manage.”

“Last year, we did a lot of short value-measurement engagements. Now, we are doing much more deployment and building. We are rolling out licenses rather than trying to help Microsoft sell them.”

Executive partner, Microsoft partner

Agents. Partners in the agentic AI solution area help enterprise customers build, adopt, run, and manage AI agents with Copilot Studio and Microsoft Foundry. These services include:

- **Deployment services bolstered by increasing enterprise readiness for agents.** Deployment services for Agents include workshops, proofs of concept, and Copilot Studio setup. Last year, enterprise customers focused on investigating agentic AI. Partners reported that customers are now ready to build and adopt agents, driving higher attach rates for this upfront deployment work.
- **Essential advisory services for agents.** Advisory services for Agents are similar to those for Microsoft 365 Copilot, including building centers of excellence, running training, and setting up governance. Currently, customers rely on advisory services to help employees learn how to use, build, and manage agents. Looking ahead, partners said they expect to do more business process optimization with agents and reported growing demand for agent identity and access management (IAM) and governance. In particular, partners said they are optimistic about Agent 365 and the advisory opportunities it will create.
- **Agent building, which is quickly growing.** The majority of the agent opportunity comes from building agents. Partners build agents using Copilot Studio or Microsoft Foundry, depending on the scenario. They reported increased enterprise investment in building agents and expect this trend to continue. Partners shared examples of charging anywhere from thousands of dollars to more than \$1 million per agent, with pricing variances based on complexity, required integrations, global deployment, and compliance requirements.
- **Managed services that will grow for ongoing agent development and governance.** Partners are beginning to provide ongoing advisory and solutions development services for agents. These services help clients design, build, and run agents over time. This often includes factory-style approaches, where partners continuously build agents to meet enterprise use cases. This work has increased year over year, in line with solutions development services growth. Partners anticipate that governance as a service for agents will grow in FY 2027 as customers deploy more agents and require stronger management capabilities.

“Most of our services are for agent builds and adoption. Next year, it will be for governance and Agent 365 management.”

Executive partner, Microsoft partner

Low Code (Power Platform). The Power Platform revenue opportunity includes all low-code partner work related to Power Apps, Power Automate, and Power Pages (Copilot Studio is in the Agents solution area). These services include:

- **Increasing deployment services opportunities.** Power Platform engagements often begin with envisioning workshops and discovery sessions to identify challenges and pain points. This information leads to proofs of concept followed by deployment. Microsoft supports its partners in this early work with resources such as the Copilot and Power Jumpstart initiative.
- **Advisory services that have risen in importance.** Partners said advisory services have steadily become more important, and customers today are more willing to pay for them than in years past. To recognize the benefits of low-code platforms, customers must plan, establish governance foundations and best practices, and train their teams. Advisory services include COE setup, governance, and adoption and enablement (e.g., training, building with clients). Partners also deliver advisory services flexibly, including supporting customers that previously undertook low-code work and now need help adding governance, activating citizen developers, or rebooting their efforts.
- **Growing core low-code solutions development services.** Building apps, automations, and pages with Power Platform is the core revenue opportunity for partners, and demand is increasing. Deal scope varied significantly based on complexity, number, and scale of use cases, not simply the number of employees. Another factor partners said they had to consider was the specific customer and whether they would complete any development internally, particularly for less complex use cases or parts of development with AI assistance. Partners emphasized that while agent-related work is expanding, apps, pages, and automation remain in strong demand. With Power Platform's evolution, partners are infusing AI into the apps and automations they build for customers.
- **Significant managed services, including factory approaches.** These services include support and enhancement for developed solutions, as well as ongoing advisory (e.g., governance, COE management, adoption and enablement) and continued solutions development such as factory approaches. Partners described factory models where they work with customers to identify and prioritize use cases and then iteratively build solutions. Deal sizes varied depending on the number and complexity of use cases. Factories typically lasted multiple months, and partners shared that they did renew over multiple years, depending on the customer.

“Power Platform is the glue that brings Dynamics, Modern Work, and a host of other solutions together.”

Microsoft partner

TOTAL ECONOMIC IMPACT ANALYSIS

For more information on the enterprise customer opportunity, download the full study: ["The Total Economic Impact™ Of Microsoft AI Business Solutions,"](#) a commissioned study conducted by Forrester Consulting on behalf of Microsoft, July 2026.

For more information on the CSP opportunity, download the full study: ["The Total Economic Impact™ Of Microsoft AI Business Solutions,"](#) a commissioned study conducted by Forrester Consulting on behalf of Microsoft, July 2026.

Study Findings

While the value story above is based on the Microsoft AI solution area, Forrester also examined the potential business opportunity for Microsoft 365 and Dynamics 365. Forrester created a partner opportunity model for customers based on what leading partners have recently achieved and, to a lesser extent, what they expect to achieve in FY 2027. This model quantifies the opportunities for deployment, advisory services, solutions development, and managed services. Accounting for attach rates, Forrester found that the expected revenue opportunity for a new enterprise customer across all of AI Business Solutions is \$124.85 per user per month.

\$124.85 per user per month

Expected revenue opportunity (with attach rates applied) for AI Business Solutions

Appendixes

APPENDIX A

Endnotes

¹ Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

² The total opportunity represents the typical portfolio of offerings a partner is selling to customers.

The expected opportunity has attach rates applied to the total opportunity. The expected opportunity equals the total opportunity multiplied by the attach rate.

An attach rate is the likelihood of a customer buying a given service/solution. Forrester applies attach rates to solution areas (e.g., ERP) and services (e.g., deployment, advisory, solutions development, managed services). In other words, attach rates apply to the typical mix of solutions and services a customer buys. This will vary based on how a partner has entered AI Business Solutions. For example, a Dynamics 365-focused partner will attach more ERP services, while a Microsoft 365-focused partner will attach more Secure AI Productivity services. Use this calculation: total opportunity x attach rate = expected opportunity.

³ Forrester has added, recategorized, and removed solution areas which affect the year-over-year growth numbers. Forrester's FY 2026 analysis includes Low Code (Power Platform), Sales, and Service as new solution areas. The FY 2025 analysis included a CRM solution area, but Forrester is not making year-over-year comparisons with Sales and Service solution areas due to the differing approaches for interviews and financial modeling.

⁴ Source: The Partner Opportunity For Microsoft AI Business Solutions, a commissioned study conducted by Forrester Consulting on behalf of Microsoft, July 2026.

Disclosures

Readers should be aware of the following:

This study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in AI Business Solutions.

Microsoft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Microsoft provided the partner names for the interviews but did not participate in the interviews.

Survey respondents were Microsoft partners provided by Microsoft.