



AI Platform on Microsoft Azure Specialization (previously AI and Machine Learning on Microsoft Azure Specialization)

Program guide, audit checklist, and FAQ

V1.7 active July 10-Dec 31 2025

Program updates and announcements

Module A – June 30, 2024

Azure Essentials Cloud Foundation, formerly Azure Cloud Foundation, is introduced with significant changes. Once audited, a Module A Pass result is good for two years.

- **Control 1.0:** Strategy and FinOps is renamed Readiness and Foundation, Control 1.1: Cloud & AI Business Strategy and now requires two (2) specific assessments to be demonstrated for two (2) unique customers within the last twelve (12) months to demonstrate both customer Business and FinOps (Financial) outcomes, using the specified assessments. The FinOps Review is required for all partners and specializations. Partners auditing for AI Applications on Azure and AI Platform on Azure specializations are required to complete the TAGA assessment. Control 1.2 Cloud & AI Adoption now requires two of three reports (or output documents) as evidence for each customer project. Cost management reports with pricing calculator output and a DevOps capability assessment are required for each customer project, AI COE is optional.
- **Control 2.0:** Formerly Plan, is now Design and Govern. Control 2.1: Security and Governance tooling requires the demonstration of a Security baseline with the use of Microsoft Defender for Cloud or a third-party solution using the Cloud Adoption Security Review Assessment. Control 2.2 has added the Well Architected review to Module A using either the Go Live or the Standard Well Architected Review. The review is required **before** deployment for two (2) customer examples.
- **Control 3.0:** Environment Readiness and Azure Landing is now Manage and Optimize. Control 3.1: Repeatable Deployment requires ALZ Design including Identity, Networking and Resource Organization for two (2) Customers with a demonstration of the approach. Required evidence now includes an alignment to the ALZ conceptual architecture that includes an assessment to ensure that either a multi-regional or multi zone redundancy policy is configured. Control 3.2 Skilling Plan has added a new required Report out for AI Applications and AI Platform specializations on Azure specialization, the Technical Assessment for Generative AI in Azure (TAGA) is required to determine necessary skills for building AI skilling plans. Control 3.3 Operations Management Tooling requires demonstration of compliance environments with documented deployment for two (2) unique customers, with an automated security and compliance check export) using GitHub, Azure DevOps or a third-party tool.

Module B - June 10, 2025

V1.7 is ready for partner preview. This checklist will be required June 10 – Dec 31, 2025. Changes made to Module B include Cloud Migration Factory engagements qualify as evidence as long as they demonstrate the controls.

- In **Control 1.1** Azure AI Solution Assessment under component for Azure AI Solution Identification, Machine Learning has been replaced with required AI use cases and model requirements.
- **Controls 1.0 Assessment, 2.3 POC, 3.1 Deployment** must provide **two (2)** evidence artifacts at minimum
- **Control 2.1 Solution Design** has updated the ingestion engine options. Data Storage has updated the native Azure products to include Fabric, Blob, and Databases. The Data Preparation evidence required has been updated to include AI Foundry, Microsoft Fabric, and Azure Databases. For Automation and Dev Ops: Design now includes DevOps, AI Ops replacing ML. Building and fine tuning of AI Models now include new competency demonstration options including an option to use Agents with AI Foundry SDK.
- **Control 2.2 WAR** can now utilize the AI Assessment workload to demonstrate evidence.
- **Control 3.1 Deployment** must include AI Foundry

Module B - Apr 2, 2025

Control 1.1 Portfolio Assessment includes further clarification for partners that only one (1) practice specialty, either AI or ML, is required in this control.

Module B – Feb 3, 2025

V1.65 AI Platform on Microsoft Azure Specialization has been updated and released for use. This is required as of Feb 3, 2025

- Controls 1.1 Portfolio Assessment, 2.1 Solution Design, 2.3 Proof of Concept, 3.1 Deployment, 4.1 Review and Release for Operations, and 4.2 Post Deployment Documentation can utilize greenfield projects as evidence as long as the controls are demonstrated
- Control 2.2, The Well Architected Review, has been updated to reflect AI workload options in the assessment. Two pillar outputs are required in evidence for three (3) workloads using Azure AI services, within the last twelve months.

Module B – Dec 2, 2024

V1.6 has a name change from AI and Machine Learning on Microsoft Azure Specialization to AI Platform on Microsoft Azure Specialization effective Jan 1, 2025. No changes to the Module B checklist controls have been made. This checklist is in force from Aug 12, 2024 – June 30, 2025

Module B – Sept 9, 2024

V1.5 Control 2.3 has added a clarification note for the Proof-of-Concept Design timeline

Module B – Aug 12, 2024

Update to Control 1.1 Assessment: A greenfield option has been added in the AZURE AI Solution Identification architecture workload

Module A – new checklist required Aug 12, 2024

The new Module A checklist is required August 12, 2024. These are the changes in the Module A controls:

- Control 1.1 Cloud Adoption Business Strategy now refers to FinOps rather than Economics and has provided an updated template link for a FinOps Assessment
- Control 2.1 Cloud Adoption Plan has provided updated evidence clarification
- Control 3.1 Repeatable Deployment has provided updated control clarification and provided updated links to templates mentioned
- Control 3.1 Repeatable Deployment – A special Evidence Note for Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only. If no Identity or Networking components are deployed in the Azure Landing Zone, a documented focus on Resource organization attributes is sufficient to pass this control
- Control 4.1 Governance Tooling has provided an updated link to current Governance tools
- Control 5.1 Operations Management Tooling for Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only: If no Operations Management Tooling is deployed, this control may be skipped for both specializations

Please note audit price increases July 1, 2024

Module B – Jan 1, 2024

V1.5 AI Platform on Microsoft Azure Specialization is published. This checklist is required until Dec 31, 2024. Changes include: The Azure AI portfolio in controls (Assessment), control 2.1 (Solution Design), control 2.3 (Proof of Concept) and control 3.1 (Deployment) have been updated to current portfolio product names:

- AI Cognitive Services has been renamed Azure AI Services; Azure Cognitive Search has been renamed Azure AI Search, Azure Data Warehouse has been renamed Azure Synapse Analytics

Module B - Dec 1, 2023

The PREVIEW for V1.5 AI Platform on Microsoft Azure Specialization was made available for partners

Oct 1, 2023

Azure Active Directory has been renamed Microsoft Entra ID

Aug 28, 2023

The Microsoft Cloud Partner Program has changed its name to the Microsoft AI Cloud Partner Program effective immediately

Jul 5, 2023

V1.4 AI and ML on Microsoft Azure Specialization checklist is published. This checklist version is required for audits July 5, 2023 – Jan 2, 2024

Updates to Control 1.1: Under the AI Powered App option, Azure AI Services have been called out. For Azure AI Search the ability to price is added in the control option. For Azure AI Search advanced features, vector search is now an optional choice for evidence

Azure Innovate has been added for this specialization's program benefits – see the Partner FAQ

Jan 2, 2023

V1.3 AI and ML on Microsoft Azure Specialization audit checklist is published. This checklist version is required Jan 2, 2023- June 30, 2023

Dec 5, 2022

The PREVIEW for V1.3 AI Platform on Microsoft Azure Specialization was made available for partners. There are no new Module A or B Control updates

- FAQ updates include the clarification that a "No Pass" results when a partner fails or withdraws from the audit. This status resets from "Audit Failed" within one week to "Not Enrolled," for partners to reapply.

Oct 3, 2022

Microsoft retired Gold Cloud partner competency, Solutions partner designation required. Gold & Silver competencies are retired and replaced with [Solutions Partner](#) designations. For this specialization, your organization must have an active Solutions Partner for Data & AI (Azure) designation.

Module A - Jul 1, 2022

Checklist updates published May 2, 2022, in preview for the Module A audit checklist are now required. In Control 2.2, a new required Skilling Plan has been added to the checklist.

Module B - Jul 1, 2022

Checklist updates published May 2, 2022, in preview for the Module B workload, AI Platform on Microsoft Azure specialization V1.0.1 had changes now required in V1.1 Changes include:

- **Solution Design Control 2.1** has added best practices for Responsible AI. This includes a "read and review" acknowledgement of Microsoft's RAI Standards and a new Impact Assessment Template for any AI system being created. This is required July 1, 2022

May 2, 2022

- Guidance for the definition of Proof of Concept and Pilots added to the FAQ
- Preview updates to Module A were made available, these are required July 1, 2022

Feb 25, 2022

Clarification for Module B1.1 Portfolio Assessment evidence

Jan 1, 2022

Guidance and FAQ Updates

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AI Platform on Microsoft Azure Specialization Program Overview

This document defines the requirements to earn the AI Platform on Microsoft Azure specialization. It also provides further requirements, guidelines, and audit checklists for the associated audits required to earn this Azure specialization.

The AI Platform on Microsoft Azure specialization is designed for partners to demonstrate their deep knowledge, extensive experience, and proven success in planning and deploying AI Platform on Microsoft Azure cloud for their customers. Such partners empower their customers to deploy Azure AI services and machine learning solutions, from the assessment phase to design, pilot, implementation, and post-implementation phases to realize the full breadth of these transformative, secure solutions at enterprise scale. Greenfield projects are currently accepted.

The AI Platform on Microsoft Azure specialization allows partners with an active [Solution Partner](#) designation to further differentiate their organizations, demonstrate their capabilities, and build stronger connections with customers.

Partners who meet the comprehensive requirements to earn an Azure specialization, receive a customer-facing label they can display and a business profile in [Microsoft AppSource partner gallery](#). In AppSource, access to specific Microsoft go-to-market programs is prioritized in customer searches to help drive new business. Partners can also generate a certified letter from Microsoft that verifies the Azure specialization that they have earned. For these reasons, this opportunity is available only to partners that meet additional, stringent requirements.

How to apply

Partners with the appropriate role and access permissions can apply. To do so, they [sign into their PartnerCenter account](#).

On the left pane, select Azure under the **Specialization section**. Toggle to the specialization that you wish to apply for by using the drop-down menu at the top of the page.

Important: Take note of the effective dates audit and access the most current version from Partner Center. (Audit checklists are updated twice a year). Partners audit on the version that is live on their audit date, not the application date.

Partners may apply for the audit only after all other program requirements have been fully met. Partners must complete the audit within thirty (30) calendar days of the audit application, and they must complete it against the then-current program requirements.

NDA for the audit

Auditors comply with requests from partners to sign a direct NDA. All ISSI auditors are under a nondisclosure agreement (NDA) with Microsoft. If a partner would like an NDA to be signed directly between ISSI and the partner organization for purposes of the audit, one can be provided by the partner during the audit scheduling process to ISSI. ISSI will sign and return it.

Payment terms and conditions

Pricing schedule July 1, 2024

Module B Audit: \$2,400 USD

Module A+B Audits: \$3,600 USD

A Gap Review Meeting is included with each Module audit.

Payment terms

The cost of the audit is payable in full to the audit company and must be settled before the audit begins. Failure to pay will result in cancellation of the audit.

Program status term

When a partner meets all prerequisite requirements shown in Partner Center and Microsoft receives a valid Pass Report from the third-party audit company, the partner will be awarded the AI Platform on Microsoft Azure specialization for one (1) calendar year.

The status and the AI Platform on Microsoft Azure specialization label can be used only by the organization (determined by Partner Center MPN PGA ID account) and any associated locations (determined by MPN PLA ID) that met all requirements and passed the audit. Any subsidiary or affiliated organizations represented by separate Partner Center accounts (MPN PGA ID) may not advertise the status or display the associated label.

Audit blueprint

Audits are evidence-based. During the audit, partners will be expected to present evidence they have met the specific requirements on the checklist. This involves providing the auditor with access to live demonstrations, documents, and SME personnel to demonstrate compliance with checklist requirements. The audit checklist will be updated to stay current with technology and market changes, and the audit is conducted by an independent, third-party auditor.

The following is included in the audit blueprint:

1. Audit Roles
2. Audit Process: High-level overview
3. Audit Process: Details
4. Audit Best practices and resources

Audit roles

Role of the auditor

The auditor reviews submitted evidence and objectively assesses whether the evidence provided by the partner satisfies the audit checklist requirements.

The auditor selects and evaluates evidence, based on samples of the information available from live systems. The appropriate use of such sampling is closely related to the confidence that can be placed in the audit conclusions. All ISSI auditors are under a non-disclosure agreement (NDA) with Microsoft. Auditors will also comply with requests from partners to sign a direct NDA.

Role of the partner

The partner must provide objective evidence that satisfies the auditor for all checklist items. It is the responsibility of the partner to have reviewed all check-list items prior to the audit, to have collected all necessary documentation and evidence, and to have ensured that the right subject matter experts are available to discuss and show systems, as appropriate. All audit evidence must be reproducible and verifiable.

Role of the Microsoft Partner Development Manager

For partners that have an assigned Microsoft Partner Development Manager (PDM), the PDM is responsible for ensuring that the partner fully understands the requirements prior to applying for the audit. The PDM may attend the optional consulting engagements that ISSI offers, but the PDM and other Microsoft FTEs may not attend the audit.

Audit Process: High-level overview

Step	Action	Responsibility
1	Review: Specialization requirements in Partner Center. Review audit checklist in the specialization and begin to prepare needed evidence with personnel for an evidence-based audit. <u>Recommended:</u> Before you apply, review the specific audit checklist thoroughly and confirm SME personnel.	Partner
2	Meet the prerequisites and apply for the audit: In the initial application phase, applications are submitted in two (2) stages: 1. Prerequisite requirements (see Partner Center for details) 2. Audit <u>Do not start the application process unless you are ready to undertake the audit.</u> Assess your firm's ability to complete the audit, including considerations for readiness, employee availability, and holidays.	Partner
3	Validate: The partner meets all requirements prior to audit.	Microsoft
4	Confirmed by Microsoft: Microsoft confirms to the third-party audit company that the partner is eligible for audit.	Microsoft
5	Schedule with partner: The auditor will schedule within two (2) business days.	Auditor (with partner)
6	Conduct the audit: Within thirty (30) calendar days of the approval for audit.	Auditor
7	Provide a Gap Report: If applicable, to the partner within two (2) business days of the completed audit, listing any Open Action Items.*	Auditor
8	Acknowledge Gap Report receipt and schedule meeting: Within two (2) business days of receiving the Gap Report, the partner acknowledges receipt of the report and schedules a Gap Review Meeting. Partners can begin immediate remediation of open items.	Partner
9	Complete the meeting: Within fifteen (15) calendar days of receiving the Gap Report, the partner schedules and completes the Gap Review Meeting with the auditor to provide evidence and address any Open Action Items. *	Auditor (with partner)
10	Issue Final Report: To the partner within five (5) business days. Notify Microsoft of audit Pass or No Pass result.	Auditor
11	Notify the partner: About program status within two (2) business days.	Microsoft

*These steps will be skipped if the partner has no Open Action Items after the audit.

Audit Process: Details

Microsoft uses an independent third-party audit company, Information Security Systems International, LLC (ISSI), to schedule and conduct Azure specialization audits. After the audit date has been confirmed, ISSI will provide an agenda to the partner. The duration of an audit is four (4) hours for Module B workloads and eight (8) hours for Module A+B audits combined, depending upon the scope of the audit.

During the audit, the partner must provide access to the appropriate personnel who can discuss and disclose evidence that demonstrates compliance with program requirements. We highly recommend that subject matter experts for each section attend as well as a person who is familiar with the entire audit.

On the day of the audit, the partner must be prepared to provide the auditor with access to live demonstrations, documents, and personnel, as necessary to demonstrate compliance with the requirements. During the audit, the auditor will seek to verify that the partner's evidence has addressed all required audit checklist items satisfactorily.

A note on audit checklist effective dates: Partners are audited against the checklist items that are active on the date of their remote audit, not the date they apply. Audits are updated twice annually. The partner application or renewal date has no bearing on the version of the checklist that is used for the audit.

The audit can produce either of two (2) outcomes:

1. The partner passes the audit.
 - The auditor will present a brief synopsis of the audit. This will include identifying observed strengths and opportunities for improvement.
 - The auditor will provide a Final Report to the partner.
 - The auditor will notify Microsoft.
2. The partner does not satisfy all checklist items during the audit.
 - The auditor will present a brief synopsis of the audit at the end of the day, including observed strengths and Open Action Items, as outlined in the Gap Report, within two (2) business days.
 - The partner will acknowledge receipt of the Gap Report within two (2) business days.
 - The partner will move into the Gap Review phase and schedule their Gap Review Meeting within fifteen (15) calendar days.

The Gap Review

If the partner does not, to the auditor's satisfaction, provide evidence that meets the required scores across all audit categories during the audit, the partner will move into a Gap Review. A Gap Review is part of the audit and completes the process.

Within two (2) business days after the audit, the partner will receive a Gap Report, which details any Open Action Items and the outstanding required evidence. It is suggested to begin remediation of any open action items as soon as possible following the audit.

The partner then has two (2) business days to acknowledge receipt of the Gap Report and schedule a Gap Review Meeting. The Gap Review Meeting is conducted with the auditor over the partner's virtual conference platform of choice. The meeting must take place within fifteen (15) calendar days of when the Gap Report was sent, and it may last no longer than one (1) hour. During the Gap Review Meeting the partner must present evidence that addresses any and all Open Action Items.

The Gap Review Meeting can produce either of two (2) outcomes:

1. The partner resolves all Open Action Items.
 - The auditor confirms that the partner has provided the required evidence.
 - The auditor provides a Final Report to the partner.
 - The auditor notifies Microsoft about the outcome (subject to Auditor Terms and Conditions).
2. The partner does not resolve all Open Action Items.
 - The auditor presents a brief summary of the audit, including missed items.
 - The partner receives a Final Report that details the missed items.
 - The auditor notifies Microsoft about the outcome (subject to Auditor Terms and Conditions).

If the partner is still unable to provide satisfactory evidence to the auditor during their Gap Review Meeting, the partner will be deemed to have failed the audit. Partners that still want to earn this Azure specialization will need to begin the application process again.

Completion of the audit

The audit process concludes when ISSI issues the Final Report after the audit or after the Gap Review. Partners will be awarded a Pass or No Pass result upon completion of the audit process, including if they withdraw from the audit process.

Audit preparation best practices and resources

Partners should ensure that the audit checklist has been thoroughly read in advance of the audit

- Partners should ensure that all partner stakeholders involved have a copy of the audit checklist and that a stakeholder who knows the entire process is available for the duration of the audit
- Partners should confirm that they have live access granted, and files and tools are readily available during the audit exhibits

Stakeholder SME attendance in the audit

Stakeholders who can best address the relevant sections should be available for the audit. However, please make sure that a stakeholder who knows the entire process is available for the duration of the audit.

Auditors often probe for more information

The auditor probes for more information to ensure that mature and repeatable processes are in place with the partner and that they are established, effective, and efficient.

The auditor is looking to see how a document was created, where it is located, and what source materials were used to create the document. By probing for more information, the auditor evaluates and validates that the partner is operating at an advanced level. This can only be done by questioning during the audit. This approach is explained to the partner during the opening meeting.

Acceptable evidence: Excerpts, exhibit file formats and use of PowerPoints

PowerPoints are a common and accepted format for presenting a high-level overview of a partner's systems. However, please also be prepared to present live demonstrations from source files so that the auditor may confirm that the systems in place are mature and effective. Excerpts can be used to communicate the high-level overview but are not acceptable evidence, source documents must be presented.

Additional resources: Two optional audit preparation offers from the auditing firm*

To ensure objectivity, consulting auditors and auditors conducting the actual audits are different ISSI auditors.

1. Partners can participate in an optional, one (1)-hour, live Audit Process & Controls Overview session provided by ISSI. This session provides a high-level overview of key aspects of the Azure specialization audit process. The session includes a discussion of the checklist requirements along with best practices to help partners prepare for the audit. Partners work directly with ISSI to schedule this remote session (via online web conference). For more information about this session, see [Azure Specialization - Audit Process and Controls Overview](#).
2. ISSI also provides optional extensive, in-depth consulting engagements to help partners prepare for their Azure specialization audit. Partners work directly with ISSI to schedule this remote session (via online web conference). For more information about this type of in-depth engagement, see Azure Specialization Consulting Offer <https://www.issi-inc.com/services/audit-readiness-preparation>.

** Please note that there is a cost associated with the consulting and audit preparations services. See Payment Terms and Conditions.*

Audit checklists

The AI Platform on Microsoft Azure specialization audit checklist contains two (2) modules, **Module A:** Azure Essentials Cloud Foundation and **Module B:** AI Platform on Microsoft Azure workload.

Module A: Azure Essentials Cloud Foundation evaluates the use of a consistent methodology and process for Azure adoption that is aligned with customers' expected outcomes, spanning the entire cloud adoption lifecycle. Module A is part of the Module B specialization audit package, and as a requirement must be renewed by audit for all Azure specializations.

To complete or renew Module A, the partner needs to pass all controls in Module A by providing the specified evidence or providing evidence of a recent (within two years) Module A+B Pass result. The relevant date for each partner is the Module B Anniversary Date (AD) shown in Partner Center.

To waiver out of Module A, the partner must provide evidence of a recent (within two years) Pass result for an applicable A+B audit or a Pass result for the AEMSP Control 3.A within the last year.

Module A waivers:

All Azure Specializations: When applying to renew subsequent Azure specializations, a previous Module A +B audit Pass result will satisfy the requirements for Module A if the result has been within two (2) years. Partners who have passed an A+B Azure specialization audit within the last two years have satisfied the requirements for Module A in all Module A+B Azure specialization audits, unless otherwise noted. The relevant Module B Anniversary Date (AD) is shown in Partner Center.

AEMSP: Partners who have passed Azure Expert MSP V1.9 and later Module 3.0 (in Full and Progress audits) have satisfied the requirements for Module A in all Module A+B Azure specialization audits, unless otherwise noted. AEMSP Partners audit yearly to stay enrolled, and Module 3.A Cloud Adoption Framework is a yearly control requirement.

Special note: Partners who sequentially waiver out of Module A in multiple Module A+B audits and then subsequently waiver out of AEMSP Module 3.A within a two-year timeline will likely be required to take a Module A audit at Module A+B renewal.

If there are questions regarding a potential waiver for Module A, reach out to the Azure Partner Specializations <azureAS@microsoft.com>

Module B, AI Platform on Microsoft Azure workload. Each control has **one (1)** or more requirements with required evidence the partner must provide for the auditor. The requirements and the required evidence are defined in the following tables. For some controls, a reference customer or customer evidence of acceptance is the documentation requested. The partner can use the same customer across audit checklist controls, or they can use a different customer as long as it demonstrates the control evidence. The same or different customers can be used for Modules A & B if they demonstrate requirements.

Module A: Azure Essentials Cloud Foundation

1. Readiness and Foundation
2. Design and Govern
3. Manage and Optimize

Module B: AI Platform on Microsoft Azure

1. Assess
2. Design & POC/Pilot
3. Deployment
4. Review and release for operations

To pass the audit, the partner must complete all audit checklist items.

Module A, Azure Essentials Cloud Foundation is required for multiple Azure specializations. To complete Module A: Azure Essentials Cloud Foundation, the partner needs to pass all controls in Module A by providing the specified evidence.

Alternatively, the partner may present evidence of a previous pass result from Module A or from another Azure specialization audit conducted within the last two (2) years.

Module B, AI Platform on Microsoft Azure workload. Each control has one (1) or more requirements and required evidence the partner must provide for the auditor. Both the requirements and the required evidence are defined in the following tables.

For some controls, a reference customer or customer evidence is the documentation requested. Unless otherwise stated, the partner must show at least **three (3)** unique customers with deployments completed within the last **twelve (12)** months.

For customer examples, the partner can use the same customer across audit checklist controls, or they can use a different customer. For audit evidence relating to customer engagements, the partner can use a customer case study and reference it multiple times. The same or different customers can be used for Modules A & B if they demonstrate requirements.

Module A: Azure Essentials Cloud Foundation

1.0 Readiness and Foundation	
The partner must have a defined approach for helping their customer evaluate and define a cloud adoption strategy beyond an individual asset (app, VM, or data).	
Requirement	
1.1	<p>Cloud & AI Adoption Business Strategy</p> <p>The partner must have a defined process that captures the data-driven business strategies for cloud & AI being used to guide customer decisions. The process should include, at minimum, the following:</p> <ol style="list-style-type: none">1. A strategy review that captures the customer's business needs and the problems the customer is trying to solve.2. Personalized recommendations from the partner for the customers' business strategies.3. Recommendations for maximizing cloud business value. <p>Required evidence:</p> <p>A Report, Presentation, or Documented Plan that captures strategic inputs and decisions for two (2) unique customers, using two (2) assessments tools below to demonstrate the Azure Cloud & AI Adoption Business decisions for the customer's organization. Partners must use the following assessments to build their plan. The FinOps Review is required for all partners and specializations. Partners auditing for AI Applications on Azure and AI Platform on Azure specializations are required to complete the TAGA assessment.</p> <ul style="list-style-type: none">• Required: the FinOps Review• Either the Cloud Adoption Strategy Evaluator (CASE) assessment output <p>OR</p> <ul style="list-style-type: none">• The Technical Assessment for Generative AI in Azure (TAGA) <p>These projects should have been completed in the past twelve (12) months. The projects must be aligned with the above-described processes 1, 2 and 3, and highlight both customer Business and FinOps (Financial) outcomes. For examples, see the Cloud Adoption Strategy Evaluator, Technical Assessment for Generative AI in Azure (TAGA) and the FinOps Review best practices in Build.</p>

1.2	<p>Cloud & AI Adoption Plan</p> <p>The partner must have a strategy for planning and tracking the completion of cloud & AI adoption projects.</p> <p>Required evidence:</p> <p>The partner must provide plan evidence for Cloud and AI adoption planning and completion with examples of two (2) unique customer projects that were completed in the past twelve (12) months. Cost management reports with pricing calculator output and a DevOps capability assessment are required for each customer project, AI COE is optional.</p> <p>Accepted documentation will include at least two (2) of the below document outputs for each customer:</p> <ul style="list-style-type: none"> • Required: Cost management Report with outputs from the pricing calculator. • Required: Report from the DevOps Capability Assessment or similar tools used by the partner for project planning & tracking • Optional: Presentation or documentation demonstrating an approach presented to the customer that helped to establish an AI Center of Excellence (AI COE) based on the AI COE guidance in CAF.
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2.0 Design and Govern

The partner must have a consistent design approach to planning for cloud adoption that is based on the strategies outlined in the preceding section. The partner must be able to demonstrate that the design areas are addressed through their use of reference architectures. The partner must also demonstrate their customer's role in governing cloud-based solutions and the Azure tools they use to facilitate any governance requirements their customer might have today or in the future.

Requirement

2.1	<p>Security & Governance Tooling</p> <p>The partner must demonstrate the ability to deploy the required governance tools for compliance and security for two (2) unique customer projects.</p> <p>Required evidence:</p> <p>The partner must demonstrate they have established a security baseline with the use of Microsoft Defender for Cloud or 3rd party solution and complete a Cloud Adoption Security Review using the assessment for two (2) unique customers with Azure projects that were completed in the past twelve (12) months. See governance tools for templates.</p>
2.2	<p>Well-Architected Workloads</p> <p>The partner is required to design workloads that are well-architected and ensure that these workloads are prepared for production. The partner must use the following guidance and assessments:</p> <ul style="list-style-type: none">• Reference architectures in Architecture Center.• One (1) of the two (2) assessments: Well-Architected Review or Go-Live Well-Architected Review, completed for workloads about to be deployed. <p>Required evidence:</p> <p>The partner must provide evidence of their capability for aligning to architectures in Architecture Center and review the designed architecture using one of the two assessments: Either Well-Architected Review or Go-Live Well-Architected Review for workloads that are about to be deployed. This will ensure that all production-oriented considerations are taken into account. Examples much include two (2) unique customer projects that were completed in the past twelve (12) months.</p>

3.0 Manage and Optimize

The partner must demonstrate that they have set up their customers for operational success to deploy compliant environments with built-in policies and controls, including ALZ. All partners have a role in setting up operations management, even if they do not provide long-term managed services.

Requirement

3.1

Repeatable Deployment

The partner must demonstrate adherence to Azure landing zone (ALZ) design areas through a repeatable deployment. **ALZ applies to all sizes of deployments.** The deployment should configure, at minimum, the following identity, network, and resource organization attributes:

- Identity
 - Adoption of identity management solutions, such as Microsoft Entra ID (formerly Azure Active Directory) or equivalent
- Networking architecture design (topology)
 - [Define an Azure network topology - Cloud Adoption Framework | Microsoft Docs](#)
 - Application of hybrid architectures that use Azure ExpressRoute, VPN Gateway, or equivalent services for connecting local datacenters to Azure
- Resource organization
 - Implementation of tagging and naming standards during the project

The partner must demonstrate which of the following [approaches](#) they used when they deployed Azure landing zones for **two (2)** unique customers:

1. Start small and expand: Azure landing zone does not deploy governance or operations configurations, which are addressed later in the implementation.
2. Full Azure landing zone (ALZ) conceptual architecture: Azure landing zones implement standard approach to the configuration of governance and operations tools prior to implementation.
3. Alternative approach: If the partner follows a proprietary approach or a mixture of the **two (2)** approaches above, the partner must clearly articulate their approach to environment configuration.
4. Brownfield scenario: The partner's customer has a landing zone that does not follow best practices, and an update is required to follow best practices in the Cloud Adoption Framework.

Required evidence:

The partner must provide documented evidence of a repeatable deployment they used to create landing zones, aligned to the [Azure landing zone \(ALZ\) conceptual architecture](#), deployed to **two (2)** unique customer environments using [Bicep or Terraform](#) modules, and ARM (AZURE Resource Manager) templates, to automatically deploy the environment configuration, and must use the [Azure Landing Zone Review](#) assessment to ensure that a multi-regional or multi zone redundancy policy is configured.

3.1 con't	<p>If a customer deviates from the specified architecture, the Partner must demonstrate the customer requirements to justify the deviation.</p> <p>The provided template can be pulled directly from the Cloud Adoption Framework Landing zone implementation options, or it can be based on the partner's own IP (Intellectual Property).</p> <p>In either case, the output evidence must demonstrate the configuration of the identity, network, and resource organization and that the Azure Landing Zone Review was completed, as described earlier above.</p> <p>Special Evidence Note:</p> <p>For Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only: If no Identity or Networking components are deployed in the Azure Landing Zone, a documented focus on Resource organization attributes is sufficient to pass this control. Identity and Networking repeatable deployment attributes only are waived. Demonstration of the approach type for ALZ is required for two (2) unique customers for Analytics on Azure and Data Warehouse Migration to Azure specializations.</p>
3.2	<p>Plan for Skilling</p> <p>When customers adopt the cloud, their existing technical staff will need a variety of new skills to aid in making technical decisions and to support new cloud implementations. To ensure the long-term success of the customer, the partner must document a skilling plan to prepare the customer's technical staff.</p> <p>The documentation must include:</p> <ol style="list-style-type: none"> 1. A description of the new skills for the technical roles the customer will need to achieve to successfully manage the new environment. The Partner must document key customer technical roles and the plan for the customer to obtain skills required such as, but not limited to, IT Admins, IT Governance, IT Operations, and IT Security. 2. For AI Applications and AI Platform on Azure specializations, a Report of the Technical Assessment for Generative AI in Azure (TAGA) for determining necessary skills for building AI skilling plans is required. 3. Knowledge transfer resources the customer can leverage when training their own technical employees such as Microsoft learning paths, technical certifications, or other comparable resources. <p>Required evidence: For guidance, review Microsoft How to Build a Skilling Readiness Plan. The partner must provide a skilling plan for at least two (2) unique customer engagements completed within the last twelve (12) months. The two (2) skilling plans must include a customer-facing presentation, OR planning documents, OR post deployment documentation OR similar plan documentation that demonstrates evidence of this control.</p>

3.3

Operations Management Tooling

The partner must demonstrate the use of Azure products or equivalent to help their customer and/or managed service provider operate the environment after they have deployed compliant environments with built-in policies and controls.

Required evidence:

The partner must demonstrate the documented deployment of at least **one (1)** of the following Azure products or third-party equivalents: Azure Monitor, **OR** Azure Automation, **OR** Azure Backup/Site Recovery, for **two (2)** unique customers with projects that were completed in the past **twelve (12)** months.

- After running automated security and compliance checks using GitHub Actions or Azure DevOps, or a third-party tool integrated with Microsoft Security DevOps or a third-party tool, partners should provide **any one** of the following sanitized artifacts as evidence:
- A security scan report (e.g., from static analysis or secret scanning)
- A monitoring dashboard export (e.g., from Azure Monitor or Log Analytics)
- An audit-ready YAML pipeline file showing integrated security tasks, and code scanning logs (e.g., from CodeQL or push protection)
- A Software Bill of Materials (SBOM)
- A snapshot of policy-as-code compliance (e.g., Azure Policy results).

These artifacts must be free of personally identifiable information (PII) and customer intellectual property (IP), timestamped, and traceable to specific pipeline runs to ensure they are audit-ready and demonstrate secure development practices. While these reports are required, partners have the flexibility to generate and submit them using third-party tools, as long as they meet the necessary criteria and provide equivalent evidence.

For detailed guidance on configuring GitHub Advanced Security for Azure DevOps and exporting relevant outputs, refer to [Microsoft Learn](#). This documentation covers export performance, availability, and security data of a monitoring dashboard that provides visibility into the customer's solution, using either [Azure Log Analytics](#) or a third-party monitoring tool. Partners can also use [Azure Advisor Resiliency Reviews](#) to identify and remediate recommendations.

Special Evidence Note:

For Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments **only**: If no Operations Management Tooling is deployed, this control may be skipped.

Module B: AI Platform on Microsoft Azure specialization workload

1.0 Assess	
Partners must have a consistent approach for assessing customer requirements for AI solution.	
Requirement	
1.1	<p>Portfolio Assessment</p> <p>The partner must demonstrate how they assess current state and customer requirements to ensure that adequate pre-deployment planning and sizing are performed. Greenfield projects are accepted. The Assessment must include:</p> <ul style="list-style-type: none">• Requirements needed analysis: Partners must have a demonstrated approach for helping customers understand the clear AI requirements in relation to their business goals. For example:<ul style="list-style-type: none">○ Is the challenge suitable to use AI or rules to resolve? If the challenge has enough features and weak certainty, is it suitable to use AI to resolve?• Business need identification: Partner must <u>document</u> the following:<ul style="list-style-type: none">○ Current pain points, challenges, expected ROI, and end user needs○ Product fit and gaps, to identify which product will best serve the customer's needs○ Data governance and compliance requirements○ Security requirements○ Budget requirements○ Ethics, responsible use, and other requirements around AI• Azure AI Solution Identification: The partner must <u>document</u> the following:<ul style="list-style-type: none">○ Primary AI use cases○ Current infrastructure or greenfield physical infrastructure○ Logical architecture and requirements○ Data storage needs from a business standpoint– volume, type, location, current state vs. future state○ AI Operation process and key KPIs to measure (data drift, audit etc.)○ AI Model requirements and success metrics○ Solution performance requirements and data requirements.○ User roles, security requirements and how each will use and access the data○ Existing infrastructure/networking components that will connect to Azure

- **Data needs:** At the workload level, the partner must document which data needs must be fulfilled to meet stated business requirements around data:
 - Classification and risk of data involved – explain if any masking techniques was applied
 - Identify data sources (on-premises, AWS, Google, etc.) and destination (data storage on Azure)
 - Identify who or what services should consume the data
- **Security and Compliance needs:** Partner must document the following customer needs:
 - Identity and access management, role-based access control, encryption, industry, and geography-centric compliance requirements, if applicable.

In addition, the partner must demonstrate assessment capability across at least **one (1)** of the below practice specialties in **either** Machine Learning **OR** AI Powered Applications.

All controls under each specialty must be demonstrated in evidence for one (1) of these specialties.

The Machine Learning Lifecycle specialty (competency in building custom machine learning). Assessment and documentation for the ML Lifecycle and ML Ops roles and processes.

The Machine Learning Assessment must include:

- Data drift, training, and retraining scenarios
- Inference requirements (real time and / or batch)
- Data sets available, data dictionary, data set profiles

OR

The AI-Powered Apps specialty (competency in applying Azure AI services such as Azure Open AI Service, Azure AI Vision, Azure AI Speech, Azure AI Language, Azure AI Search or other Azure AI services with applications in the Azure AI portfolio) or customizing existing algorithms in cloud native Apps.

The AI-Powered Apps Assessment must include:

- Success criteria for Azure AI services use cases (e.g., accuracy threshold)
- Data requirements and data labelling requirements
- Performance, load, throughput, and transaction requirements
- Usage option (Container vs Azure host)
- Azure AI Search: Ability to appropriately price, size and scale solution to meet storage capacity, query performance and throughput needs
- Azure AI Search: Experience with both Push and Pull data ingestion methods
- Azure AI Search: Usage of advanced search features such as vector search, scoring profiles for search relevancy, synonym mapping and/or custom skill development

Required evidence:

The partner should provide relevant documents showing that the preceding items were reviewed for at least **three (3)** unique customers, with projects that were completed within the last **twelve (12)** months. Greenfield projects are accepted in evidence as long as the control is demonstrated. The evidence must show that all the above assessment details were considered for each customer. Assessments may be done manually or through an industry-accepted assessment tool.

Accepted Documentation:

For both options, provide artifacts for **three (3)** unique customers to include any of the following. A minimum of **two (2)** evidence artifacts must be provided: An Assessment Report, or an Assessment Checklist, Templates or Questionnaires, or the Project Plans, Data Migration Assistant (DMA) Reports, or other Third-party Tooling Reports, as long as the requirements are evidenced.

2.0 Design and Proof of Concept (PoC)	
Partners have robust methodologies for designing the workload.	
Requirement	
2.1	<p>Solution Design</p> <p>The partner must provide solution designs showing a consistent approach that addresses customer requirements captured from the assessment phase. Solution design must show, <u>where applicable</u>, the below customer requirements based on the assessment. Where the approach is not applicable, the partner must state why not. Greenfield projects are accepted as long as the control is demonstrated.</p> <p>User Roles: User roles required to deploy the AI solution (developer, AI Engineers, data scientists, DevOps, AIOps etc.) and establish role-based access</p> <p>Data Source: All data sources and file types to be ingested</p> <p>Ingestion Engine: The use of a data ingestion engine to extract, transform, load, and clean data. Ingestion engines include but are not limited to native products such as Azure AI Foundry, Microsoft Fabric, Azure databases.</p> <p>Data Storage: The storage type for the ingested data. Data storage can include but is not limited to native products such as Microsoft Fabric, Azure Databases and Azure Blob storage.</p> <p>Encryption Method: Data encryption approach. Data encryption methodology can include but is not limited to Transparent Data Encryption (TDE), masking and Azure Key Vault.</p> <p>Data preparation: Can include but is not limited to: AI Foundry, Microsoft Fabric, Azure databases.</p> <p>Microsoft's RAI Standard: Read and review the RAI Standard V2</p> <p>Impact Assessment: Partner will conduct an impact assessment for any AI system being created using the Impact Assessment Template and the Responsible AI Impact Assessment Guide.</p> <p>Security: Appropriate service and index level security implementation (i.e., VNets, private endpoints, RBAC, security filtering, etc.)</p> <p>Sizing and performance: Identify where design is meeting the requirements and considerations identified in the assessment phase.</p> <p>Monitoring: Performance monitoring and diagnostics.</p> <p>Cost control: Identify where design can extract financial insights from available data</p> <p>Model/Algorithm/AI Service Selection: Design incorporates AI model, algorithm, service selection including training method.</p> <p>Inferencing / Deployment: Approach and design (ACI AKS quotas, limits, managed endpoints etc.) The AI considerations are incorporated into the design e.g., Transparency, explainability, bias, disparity etc.</p> <p>Automation and Dev Ops: Design includes DevOps, AI Ops, CI/CD tools and processes required to meet the requirements.</p> <p>AI Architecture: Solution architecture highlights best practices and guidance for the selected AI services.</p> <p><u>In addition</u>, the partner must demonstrate design capability across at least one (1) of the practice specialties below, A or B:</p> <p>A. Building and fine tuning of AI Models:</p> <p>Partner must show competency in the following:</p> <ul style="list-style-type: none"> ○ Model fine tuning ○ Benchmarking ○ Securing models using responsible AI <p>OR</p> <p>B. Competency in building AI-powered Apps and Agents with AI Foundry SDK.</p>

	<ul style="list-style-type: none"> • Design must show: <ul style="list-style-type: none"> ○ Azure AI services transactions, pricing and cost considerations are factored into the design ○ AI Interface and interaction design is factored into the design ○ Container deployment architecture is factored into the design ○ Cloud native App design and development ○ Azure AI Search: Data indexing and data tuning for search relevancy and performance with optional vector search ○ Azure AI Search: Search pipeline <p>Required evidence:</p> <p>The partner must provide relevant solution design documents that address the points above, from at least three (3) unique customers with Azure AI projects completed within the past twelve (12) months.</p> <p>Greenfield projects are accepted, as long as the control is demonstrated.</p> <p>Acceptable Documentation:</p> <p>Partner must show design documents, which include at a minimum two (2) of the following:</p> <ul style="list-style-type: none"> • Project Plan or • Functional Specifications or • Architectural Diagram or • Automated Tooling Reports or • Physical and Logical diagrams or • The partner acknowledgement for review of the RAI Standard V2 as read or • A completed Customer Impact Assessment using the Impact Assessment Template
2.2	<p>Azure Well Architected Review of Workloads</p> <p>The partner must demonstrate usage of the Azure Well-Architected Review or the Azure Well Architected Assessment for AI workload, completing two pillars that apply. The Review is used to evaluate each workload against the pillars of the Azure Well Architected Framework that matters to that workload. Please provide output from a minimum of two (2) pillars.</p> <p>The Azure Well-Architected Review is designed to help partners evaluate your customers' workloads against the latest set of industry best practices. It provides actionable guidance to design and improve your customers' workloads</p> <p>Required evidence:</p> <p>The partner must provide <u>exported results</u> from two pillars in a completed Microsoft Azure Well Architected Review, using the assessments in Well-Architected Review tool, conducted in the last twelve (12) months, for three (3) workloads using Azure AI services <u>indicating the customer's name</u>.</p>

2.3	<p>Proof of Concept or Pilot</p> <p>Partner must provide evidence of a completed proof of concept (PoC) or pilot project. The PoC or pilot project must validate the design decisions, review, and adjust the design as appropriate before production rollout. Greenfield projects are accepted, as long as the control is demonstrated.</p> <p>PoC or pilot project must document the purpose, customer pain points, project success criteria, intended benefits of the project, and results for Azure AI Foundry (including its components like Azure OpenAI Service and Agent Service).</p> <p>Required evidence:</p> <p>Partner must provide relevant <u>documentation</u> for one (1) customer with a completed proof of concept (PoC) or pilot project within the past twelve (12) months that includes at least one (1) of the Azure AI Power Apps Services listed above under control 1.1 Assessment.</p> <p>Greenfield projects are accepted, as long as the control is demonstrated.</p> <p>Note: POCs can be completed in <3 months or go longer. If the POC timeline is > twelve 12 months for design validation, please communicate this to the auditor with proof of timeline and logical reasoning for extended time.</p> <p><u>Accepted Documentation:</u></p> <p>Please provide at minimum two (2) evidence artifacts from this list:</p> <p>PoC/Pilot architecture diagrams OR Reference architectural design blueprints OR Test plans and results; Implementation documentation OR other PoC documents; or a Monitoring Tool report. The evidence must demonstrate the</p>
3.0 Deployment	
Partners have robust methodologies for deploying the workload.	
Requirement	
	<p>Deployment</p> <p>Partners must provide evidence of the partner's capability to implement AI solutions deployed in production environments, based on customer-approved designs. The deployment must include Azure AI Foundry (including its components like Azure OpenAI Service and Agent Service).</p> <p>Required evidence:</p> <p>Partner must provide <u>documentation</u> for any of the above AI services for three (3) unique customers with completed projects within the past twelve (12) months. Greenfield projects are accepted, as long as the control is demonstrated. <u>Documentation</u> provided for each customer must cover the entire sequence of the project (from design to production deployment) and must include at least two (2) of the following items that demonstrate the evidence:</p> <ul style="list-style-type: none"> • SignedSOWsfor all projects or • Solution Design Documentsfor all projects or • Project Plan and Migration/deployment sequence or • Architecture Diagrams or • High-level Design (HLD)andLow-Level Design (LLD) or <p>As-built Documentation</p>

3.1	<p>Deployment</p> <p>Partners must provide evidence of the partner’s capability to implement AI solutions deployed in production environments, based on customer-approved designs. The deployment must include Azure AI Foundry (including its components like Azure OpenAI Service and Agent Service).</p> <p>Required evidence:</p> <p>Partner must provide <u>documentation</u> for any of the above AI services for three (3) unique customers with completed projects within the past twelve (12) months. Greenfield projects are accepted, as long as the control is demonstrated.</p> <p><u>Documentation</u> provided for each customer must cover the entire sequence of the project (from design to production deployment) and must include at least two (2) of the following items that demonstrate the evidence:</p> <ul style="list-style-type: none"> • Signed SOWs for all projects or • Solution Design Documents for all projects or • Project Plan and Migration/with the deployment sequence or • Architecture Diagrams or • High-level Design (HLD) and Low-Level Design (LLD) or • As-built Documentation
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Checklist continues next page

4.0 Review and Release for Operations

Partner has robust methodologies for transitioning the workload.

Requirement

4.1

Service Validation and Testing

Partner must validate the deployment, including:

- Demonstrate the process and approach for testing and evaluating the performance of all solutions against end user expectations and Azure best practices.
- Demonstrate assessment where applicable against the [Cloud Adoption Framework best practices](#) including:
 - Application design
 - Monitoring
 - Application performance management
 - Code deployment
 - Infrastructure provisioning
 - Testing

The partner must demonstrate the process and approach for evaluating and improving architectural best practices to remediate issues with workloads that do not meet performance or cost expectations. Greenfield projects are accepted, as long as this control is demonstrated. These projects can be the same as the projects evidenced earlier in Control 3.1, Deployments.

Required evidence:

Please provide both of these as evidence for each unique customer:

Documentation of testing and performance validation that addresses the above points for the **three (3)** unique customers with projects completed in the last **twelve (12)** months. The documentation for each customer must indicate that the implemented solution met customer expectations with a sign-off from the customer.

Evidence of exported results from a completed Microsoft Well Architected Review (using the **Operational Excellence** pillar in the standard Assessment) [Well-Architected Review](#) or the option of the AI Assessment found here: [Assessments | Azure Well-Architected AI workload](#) conducted post- deployment, indicating the customer's name.

The Well-Architected reviews must have been for projects completed in the last **twelve (12)** months.

4.2	<p>Post-deployment Documentation</p> <p>Partners must provide documentation post-deployment to ensure customers are successful in using the new AI Platform Services in Azure. Greenfield projects are accepted, as long as the control is demonstrated.</p> <ul style="list-style-type: none"> • Demonstrate how the partner documents, decisions, architectural designs, and procedures were implemented. • Demonstrate Standard Operating Procedures for business-as-usual operations team which describe 'how-to' scenarios. <p>Required evidence:</p> <p>Documentation showing the above points, for three (3) unique customers with Azure AI projects completed within the last twelve (12) months.</p> <ul style="list-style-type: none"> • Evidence documentation can include Solution Design Documents for all projects or • Project Plan and Migration/deployment sequence or • Architecture Diagrams with implementation plans or • Operating Procedure documentation or • As-built Documentation with Acceptance documentation <p>These projects can be the same as the projects evidenced in Control 3.1 if they demonstrate requested control evidence.</p>
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Azure Specializations Partner FAQ

Questions regarding the Azure Partner program specializations, the current checklists and pre-qualifications for partners can usually be answered by visiting [Microsoft Azure Partner Specializations](#)

Questions on the audit checklists and program can be sent to the Azure Partner Specializations help alias <<mailto:AzureAS@microsoft.com>>

If you have questions that havenot been answered, please go to [Partner Center support](#) to create a Support ticket (SR) with our Frontline team.