

Multi Public Cloud Services

A research report comparing provider strengths,
challenges and competitive differentiators

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The cloud continues to expand in Brazil, helping enterprises thrive in tough economic times

Service providers reported a reduced demand in the first quarter of 2023. The change in the federal government in 2022 and global economic uncertainties in 2023 have pushed enterprises to reconsider their investments in innovation to prioritize projects that can bring higher efficiencies and business process optimizations.

Public cloud has the economies of scale to provide clients with a highly efficient computing platform. Enterprises consider cloud services, such as the use of AI-based analytics, new ML models and generative AI (GenAI), as opportunities to rethink business processes and further improve efficiencies.

Such optimization opportunities exist even for companies already running on the public cloud. A fast cloud migration without deploying robust

cloud governance can lead to the overuse of resources. With infrastructure as code (IaC), agile teams can deploy applications with one click, easily provisioning cloud resources. Users can set up new environments for testing, validating applications, developing PoCs or other reasons but might overlook the need to deprovision this environment afterward, leading to increased cloud costs. Clients have asked ISG's advice on how to handle this challenge for better control in terms of cloud spending. To this end, this year, ISG has included FinOps Services and Cloud Optimization as a separate quadrant to identify service providers and highlight their offerings to enable companies to get the complete benefit of the cloud.

The following major trends can be seen in Brazil:

- Significant attention to cloud cost management
- Client expectation to extend AIOps to automate FinOps and cloud governance
- Increased multicloud adoption using a best-of-bread approach
- Demand for application modernization to better consume cloud-native technologies

Clients demanding
cost reduction
prefer **multicloud**
to use the most
efficient solution.



A multicloud environment is more common among large accounts than in the midmarket. A large account usually has many business units with diverse applications and requirements. Each business unit can have its own ERP, CRM, e-commerce and particular requirements. Midmarket companies usually consolidate applications to achieve economies of scale. In all cases, clients choose the cloud platform that best handles a specific workload. Some applications are replaced with a SaaS platform, while others can run better on specific clouds. Most cloud data centers in Brazil have direct links connecting clouds, without the need for custom network configurations. Multicloud offers low latency and high security. Clients see no reason to consolidate all workloads on a single cloud.

The service providers featured in the **Consulting and Transformation Services for Large Accounts** quadrant expect major cloud growth in the banking and financial services industries. Traditional banks are using the cloud to host and operate instant payment systems and open-banking platforms, but still lag behind digital banks that completely operate

in the cloud. However, cost implications and legacy applications are slowing down cloud adoption. Clients are demanding application modernization, including refactoring application code to run on the public cloud while adding APIs to consume cloud-native technologies such as IaC, serverless computing, AI services and GenAI. Most service providers are working with hyperscalers to accelerate application modernization with automated tools. New COBOL migrations to the public cloud have been reported, although the volume is still low and not impacting providers' position in the quadrant. The major hyperscalers pushing mainframe migrations to the cloud are AWS, Google, Microsoft and IBM.

The participants in the **Consulting and Transformation Services for Midmarket** quadrant reported the same trends. However, the reduced demand for innovation was offset by an increasing demand for moving workloads from one cloud to another. For the first time, ISG observes a notable number of such cases, including among hyperscalers, without a clear indication of which one is losing or gaining clients. The cause is the same – increasing

cloud cost – because rightsizing cloud resources can reduce a client's monthly bill by from 20 to 40 percent. Although savings can be achieved without changing hyperscalers, clients that open competitive bids can get cloud credits and reduce their spending in the short-term. Cloud credits allow clients to achieve their goals for a year, knowing the cost will go up when credits expire in the following year. The catch is that some deals force clients to commit to a minimum consumption of three years.

The demand for application modernization in the midmarket is different from the requirements of large accounts. Most companies in this market do not have mainframes, with most of their applications running on x86 servers, and are thus aligned with cloud offerings. Many clients use client/server applications, including ERPs that require refactoring to use cloud-native technologies. Not all service providers can execute refactoring, but all providers included in this quadrant can guide clients to undertake refactoring on their own or through application service partners.

In the **Managed Services for Large Accounts** quadrant, service providers align cloud operations with security and governance practices. Advanced service platforms offer automated self-service with approval workflows, mandating adherence to compliance and security policies in each cloud deployment. Some service platforms have broader functionalities than others, indicating clients need to compare their requirements with the platform functionality. Top providers configure IaC according to specific client policies and each service request is checked, enabling AIOps to automate security and compliance and FinOps tools to read resource policies, automate cost audits and use analytics for rightsizing resources.

Clients in the **Managed Services for Midmarket** quadrant are more focused on consultative services and expect the service provider to propose and implement security and cost management controls. Top providers are using advanced analytics to anticipate cloud spending and advise clients on optimizing and avoiding surprise costs in the cloud bill. Providers can use the same



tools for large accounts and midmarket, with different complexities and in keeping with industry regulations. Also, public companies and organizations in the public sector have governance requirements that do not apply to privately owned companies. This market also demands AIOps and FinOps services but puts more responsibility on the provider to optimize operations. In the last year, many clients have replaced incumbent providers with more proficient ones.

The new quadrant covering **FinOps Services and Cloud Optimization** shows that providers can use the same tools to offer different results. Top providers can automate resource tagging with standards and client-specific indicators and use advanced analytics to demonstrate cloud utilization in four areas:

- Financial – managing cloud budgets
- Governance – spending authority and accountability
- Security – user access to financial information and access audit trail
- Sustainability – carbon consumption versus sustainability targets

Approval workflows cross-check cloud budgets, real-time spending and individual authorization levers to deploy new cloud services and resources. Each cloud asset has identification tags to map utilization and logging access to enable an audit trail. Real-time dashboards can link spending to projects, activities and individuals, enabling managers to see total spending and dig down to asset levels. Not all providers can deliver this level of detail today and some can go further and guide clients with comprehensive frameworks for approval levels, service tagging, approval workflows and industry-specific templates to handle regulations, privacy and confidentiality related requirements. The top providers include weekly and monthly meetings in their engagements to proactively optimize client infrastructure and avoid overspending or justify, in business terms, the value of spending more in particular cases.

Advanced FinOps solutions use ML to understand utilization patterns and use data analytics to predict cloud spending, guiding clients to negotiate cloud budgets, set optimization goals and meet sustainability targets. In this space, clients believe that GenAI


will work wonders, automating client advice and proposing new ways of optimizing cloud costs. But it might be a while before GenAI is able to meet these expectations. Most providers are only experimenting with GenAI and just only one is already using it for a few clients to scan applications' code and map dependencies to propose changes that reduce database calls and cloud service utilization.

The **Hyperscale Infrastructure and Platform Services** quadrant assesses nine cloud providers. The market is becoming increasingly competitive every year, with all providers expanding their partner networks. In Brazil, multicloud is a reality and clients prioritize costs when selecting IaaS. AWS has responded to market changes rapidly and continues to lead, with Google, Microsoft, Oracle and the new entrants, Huawei and Tencent, pushing market competitiveness. With more options, hyperscalers' differentiation resides in their partner ecosystem; the ability to reach out to an increasing number of clients; and their unique services such as cognitive AI, GenAI and ML capacity.

The **SAP HANA Infrastructure Services** quadrant is characterized by the entry of a large number of partners to support clients' demands. SAP has been very successful in Brazil, using the RISE with SAP program to accelerate clients' migrations to the cloud. Upgrading or adopting SAP S/4HANA is the major growth driver affecting this market segment. The top hyperscalers offer automated tools to accelerate RISE with SAP migrations, providing a safe path for hesitating customers. When choosing their cloud platform, enterprises should check partner credentials and migration automation tools to achieve the desired results.


Multicloud offers myriad options to clients, covering cost to performance, driving the demand for FinOps services that consolidate spending and enabling the use of analytics to support management decisions.



 Provider Positioning


	Consulting and Transformation Services Large Accounts	Consulting and Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Ativy	Not In	Contender	Not In	Contender	Not In	Not In	Contender
Atos	Product Challenger	Not In	Leader	Not In	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Brasoftware	Not In	Contender	Not In	Product Challenger	Contender	Not In	Not In
BRLink	Not In	Leader	Not In	Leader	Contender	Not In	Not In
BRQ	Contender	Not In	Not In	Not In	Not In	Not In	Not In



 Provider Positioning


	Consulting and Transformation Services Large Accounts	Consulting and Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Capgemini	Leader	Not In	Rising Star ★	Not In	Leader	Not In	Not In
Claranet	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Contender
Compass UOL	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Dedalus	Leader	Leader	Leader	Leader	Leader	Not In	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Embratel	Contender	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Essence	Not In	Product Challenger	Not In	Contender	Not In	Not In	Not In
Extreme Group	Rising Star ★	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
FCamara	Not In	Contender	Not In	Contender	Not In	Not In	Not In



 Provider Positioning


	Consulting and Transformation Services Large Accounts	Consulting and Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Google	Not In	Not In	Not In	Not In	Not In	Leader	Product Challenger
Huawei	Not In	Not In	Not In	Not In	Not In	Contender	Contender
IBM	Product Challenger	Not In	Not In	Not In	Not In	Contender	Product Challenger
Inmetrics	Not In	Product Challenger	Not In	Product Challenger	Rising Star ★	Not In	Not In
Kyndryl	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Logicalis	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Nextios	Not In	Leader	Not In	Leader	Contender	Not In	Not In
NTT DATA	Contender	Not In	Contender	Not In	Not In	Not In	Not In



 Provider Positioning

	Consulting and Transformation Services Large Accounts	Consulting and Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Oracle	Not In	Not In	Not In	Not In	Not In	Rising Star ★	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Sky.One	Not In	Leader	Not In	Leader	Product Challenger	Not In	Not In
SoftwareOne	Not In	Rising Star ★	Not In	Product Challenger	Not In	Not In	Not In
Sonda	Contender	Not In	Contender	Not In	Not In	Not In	Not In
SOU.cloud	Not In	Contender	Not In	Contender	Not In	Not In	Not In
ST IT Cloud	Not In	Contender	Not In	Not In	Not In	Not In	Not In
Stefanini	Product Challenger	Not In	Product Challenger	Not In	Contender	Not In	Not In
TCS	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In



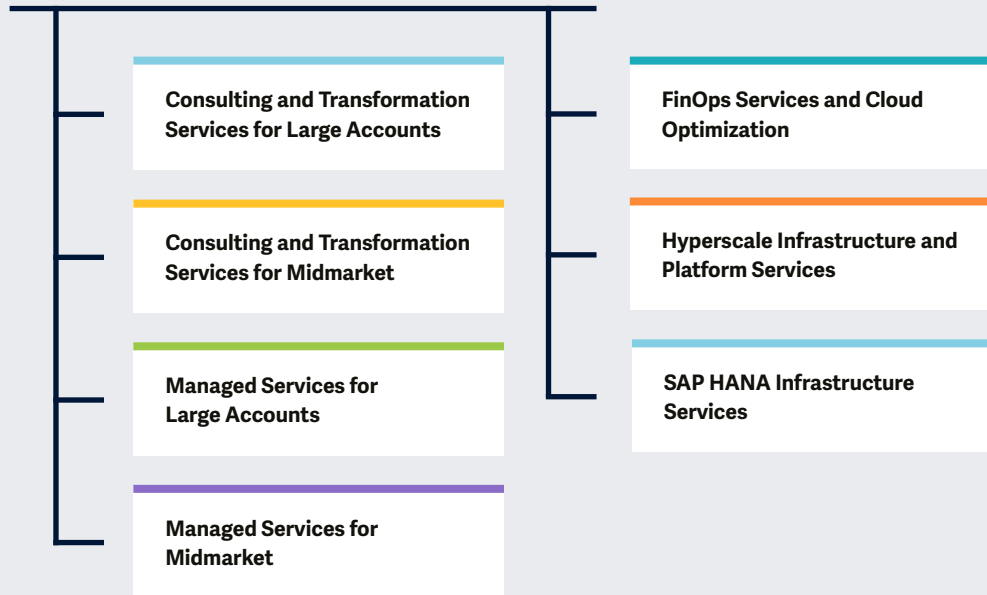
 Provider Positioning

	Consulting and Transformation Services Large Accounts	Consulting and Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Tech Mahindra	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Teltec	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Tencent Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
TIVIT	Leader	Not In	Leader	Not In	Leader	Not In	Not In
T-Systems	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Contender
Unisys	Product Challenger	Not In	Product Challenger	Not In	Leader	Not In	Not In
V8.Tech	Leader	Not In	Leader	Not In	Contender	Not In	Not In
Venha Pra Nuvem	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In



This study focuses on what ISG perceives as most critical in 2023 for **Multi Public Cloud Services**.

Simplified Illustration; Source: ISG 2023



Definition

This study assesses providers offering public cloud services, including consulting and transformation, managed services, public cloud infrastructure, FinOps and other services. Providers in scope leverage automation tools to effectively manage, secure and optimize public cloud infrastructure.

In recent years, there has been rapid growth in public cloud adoption as part of digital transformation engagements. The many benefits of the public cloud surpass on-premises infrastructure in several ways, making it the preferred choice for greenfield infrastructure operations and application development in most cases. Other key reasons for this preference stem from a heightened focus on cybersecurity, a greater push toward IT cost optimization and operational efficiency, and the increased deployment of automation tools for efficient data management, along with driving sustainability initiatives by leveraging cloud infrastructure.



Enterprises continue to seek strategic providers that facilitate cloud transformation engagements on major hyperscalers such as AWS, Microsoft Azure and Google Cloud. The service providers will not only continue to manage the workloads on an ongoing basis but also assist enterprises in controlling, optimizing and managing cloud expenses through FinOps strategies.

With enterprises realizing that the lift and shift migration strategy does not provide the benefits expected from public cloud, they are on the lookout for providers that can help accrue the complete potential of cloud technology. With this, we will be seeing an increased demand for re-architecting workloads and leverage cloud-native technologies for their migration engagements. Also, in the coming years, enterprises are likely to take a conservative approach to spending on public cloud infrastructure. The increasing adoption of FinOps strategy will support this approach and enable the optimization of cloud resources and, consequently, reduce cloud consumption and cloud bills.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following seven quadrants for services/solutions: Consulting and Transformation Services for Large Accounts, Consulting and Transformation Services for Midmarket, Managed Services for Large Accounts, Managed Services for Midmarket, FinOps Services and Cloud Optimization, Hyperscale Infrastructure and Platform Services and SAP HANA Infrastructure Services.

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

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

ISG studies serve as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market

considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Consulting and Transformation Services for Large Accounts

Consulting and Transformation Services for Large Accounts

Who Should Read This Section

This quadrant is relevant for large enterprises in Brazil evaluating multi public cloud consulting and transformation service providers. ISG highlights the positioning of providers in the region and how they address local challenges. Through the report, providers can understand market dynamics and competition, while enterprises can assess innovations from traditional providers or new players.

In 2023, cost management, security and agility took precedence over innovation and new product development in Brazil. The adoption of the public cloud has been advantageous. Multicloud strategies to reduce security vulnerabilities, avoid application failures and deal with compliance concerns have been a priority. The available platforms offer a range of pricing, performance, operational efficiency and resource options to the enterprises.

Large enterprises are actively embracing multicloud strategies to optimize IT infrastructure and opting for public clouds for their competitive pricing and ability to handle specific workloads. Migration challenges

are associated with cost management and modernization of legacy applications and systems — highly complex tasks that require knowledge of vendor offerings, automation, Agile methodologies and advanced technologies such as generative AI (GenAI), ML, data analytics and mobile applications.

To meet the demand for cost efficiency, scalability, compliance and security, providers offer robust multicloud governance tools structured under FinOps and offered with the help of strong vendor relationships. Their key selling points include partner diversity, industry-specific solutions, application transformation abilities, automation expertise and cloud-native technology offerings.



IT leaders should read this report to understand the relative strengths and weaknesses of consulting and transformation service providers that can assist digital transformation in their enterprises.



Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of consulting and transformation service providers in Brazil.



Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers and discover the benefits of moving to the cloud.

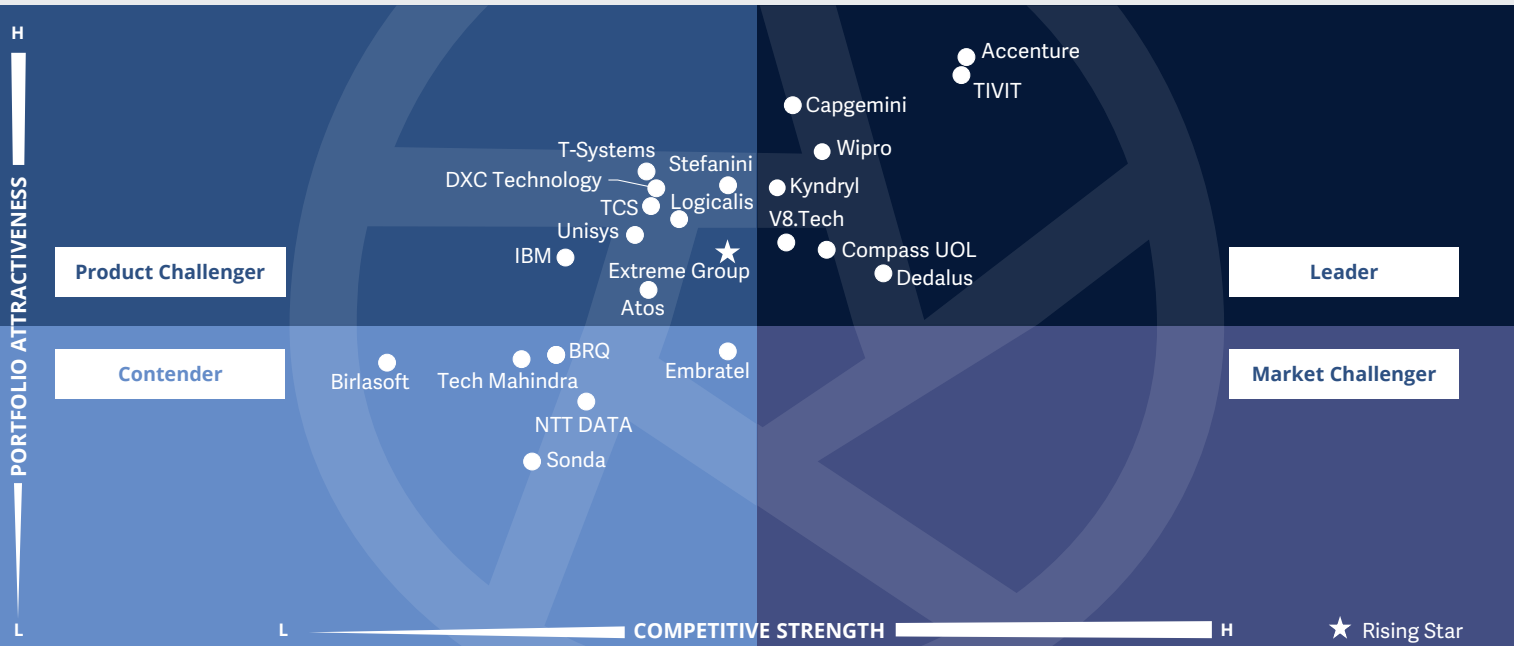


Digital transformation professionals should read the report to understand how the adoption of the public cloud can impact digital transformation initiatives and to compare the service providers.



Multi Public Cloud Services
Consulting and Transformation Services for Large Accounts

Brazil 2023



This quadrant assesses consulting service providers that **migrate** applications to public clouds and modernize **large account** infrastructures to become modern digital platforms.

Pedro L. Bicudo Maschio



Consulting and Transformation Services for Large Accounts

Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services. These service providers partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions and manage customer-specific complexities in adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects that use design thinking and short work cycles to meet customer demands. This quadrant evaluates providers that help enterprises modernize, optimize and transform their IT operations to enhance efficiency, agility and security. Provider services typically comprise:

- **Consulting services** include business case design for multicloud environments and workload migration assessments. Service providers offer transformation roadmaps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.
- **Transformation services** include cloud architects and engineers designing, building and configuring multicloud environments. They also support migrating and integrating applications to harness cloud computing security. They introduce AIOps and FinOps to enable an advanced infrastructure that facilitates cloud-native application development and operations.
- **Compliance services** include environmental, sustainability and governance (ESG) and security requirements. Providers use best practices and frameworks to design cloud policies, processes and functions, ensuring healthy, sustainable, secure and compliant environments regardless of location. From a CXO perspective, ESG has become a mainstream requirement, making it an integral part of every transformation engagement.

Eligibility Criteria

1. Capable of **assessing and designing application modernization** strategies to adopt cloud-native services and API libraries for service integration, including **DevOps automation, AIOps** and infrastructure as code (IaC) deployments, and cross-cloud integration
2. **Methods and frameworks** to analyze clients' IT landscape, optimize IT spending and prevent additional technical debts
3. Experience in **planning and implementing multicloud** services for major industry verticals
4. Experience in **application migration** (templates, automation engines and other techniques) and cloud-native application development
5. **Certified competence** in at least two hyperscalers (preferably AWS, Azure and Google Cloud)
6. **Ability to address ESG** in large transformation programs, helping clients in drafting carbon-neutral strategies and understanding the benefits of adopting a green strategy



Consulting and Transformation Services for Large Accounts

Observations

MSPs continued to report growth in large accounts in 2023. The financial services industry pushed for modernization by increasing offerings around digital banking, instant payment solutions and improved integration with open banking.

An increasing number of enterprises are seeking application modernization to better consume cloud-native technologies such as IaC, serverless computing, data lakes, APIs, AI and ML. The demand for mainframe application modernization and migration to the cloud has increased but with few completed cases. GenAI dominated conversations in 2023. Most MSPs are experimenting with GenAI to improve AIOps to predict incidents and determine solutions for both cloud experts and programmers and end-users accessing cloud services.

From the 46 companies assessed for this study, 23 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture continues to enhance its cloud-first approach and make advances in application modernization. It has a large application services footprint, which eases its access to cloud migration opportunities.

Capgemini

Capgemini uses a global cloud migration methodology supported by a robust automation platform. It offers application modernization and has made considerable advances in Brazil in migrating SAP workloads to public clouds.

Compass UOL

Compass UOL focuses on cloud-native agile development, which pushes its growth in consulting and transformation. Its strong partnership with AWS allows prime access to large accounts.

dedalus

Dedalus has extensive experience in cloud migrations, where it uses a robust framework to handle complexity. It specializes in AWS and Azure and is growing rapidly with Oracle Cloud.

Kyndryl

Kyndryl has a large footprint in data center and managed services, providing it with a large client base seeking migration to the cloud. It has accelerated the attainment of cloud certifications, including enhanced cloud migration skills and capacity.

TIVIT

TIVIT is a pioneer in migrating large accounts to public clouds. It operates a large private cloud, which gives it the opportunity to support clients' migrations to public clouds. It has an advanced automation platform.

V8.TECH

V8.Tech is nimble in finding new deals in migrating large workloads. The company has partnerships with top vendors and uses cloud-native development as the primary strategy to engage with clients in cloud migrations.

wipro

Wipro leverages a global service platform to automate cloud migrations, offering security and application modernization while deploying streamlined multicloud solutions.

EXTREMEGROUP

Extreme Group (Rising Star) integrates multicloud environments, comprising all the hyperscalers operating in Brazil. It manages many federal government deals, which enables it to offer best practices to support cloud-migration decisions.



“Unisys uses a comprehensive cloud architecture framework to design secure cloud solutions and plan detailed migrations, including application modernization. It offers complete services to address the most complex client demands.”

Pedro L. Bicudo Maschio

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22, the company generated \$2 billion in revenue. Unisys designs, deploys and manages customized cloud solutions and builds applications to address clients' needs. Its portfolio comprises advisory, digital platforms and applications, hybrid cloud and multicloud management, industry solutions, cybersecurity, application modernization, cloud-native application development, data analytics and insights, and infrastructure services. In Brazil, it has a central office in São Paulo. It also has offices in Campinas, Rio de Janeiro and Campo Grande.

Strengths

Precisely planned migrations: Unisys accumulates many years of experience in working with complex clients that require sophisticated solutions to address their needs. It adapts to clients' cloud migration pace, offering detailed assessments to understand the requirements and design an application-centric architecture and cloud solution. This encompasses migration strategy, governance and organization change management, DevSecOps, security, and solution lifecycle planning.

Security design: Unisys uses comprehensive frameworks to enable flexible cloud configurations while applying the most advanced security measures. The company offers ultra-secure and automated solutions for highly regulated commercial clients

and the public sector, allowing every client access to the best security tools, secure cloud configuration, and advanced cloud governance and access control.

Automated governance and control: Unisys offers application modernization services to better use cloud resources. It automates everything from resource provisioning to operations and governance. It helps clients review their policies to automate controls with FinOps functionality, setting access controls, service approval levels and real-time monitoring. AIOps and FinOps functionality are embedded in CloudForte™, a proven multicloud management platform.

Caution

Unisys works with large accounts in Brazil, enabling it to handle large-scale operations. However, the company needs to acquire more clients to improve its competitive strength. An opportunity would be exploring global hyperscalers' partnerships in joint go-to-market efforts.





Consulting and Transformation Services for Midmarket

Consulting and Transformation Services for Midmarket

Who Should Read This Section

This quadrant is relevant for midsize companies in Brazil evaluating multi public cloud consulting and transformation service providers. ISG highlights the positioning of the providers in the region and how they address local challenges. Through the report, providers can understand market dynamics and competition, while enterprises can assess innovations from traditional providers or new players.

The effects of the unstable Brazilian economy in 2023 are more pronounced in the technology services offered to SMBs. Cost control and reduction are top priorities, and agility and security are essential, given the risk vulnerability of these businesses and eventual losses. In this scenario, it is common for SMBs to seek public cloud services to save on IT infrastructure costs, remain competitive and stay apace with Brazil's digital transformation.

SMBs are looking to centralize their operations in the cloud to maximize benefits, but doing so requires careful planning, application refactoring and attention to aspects such as scalability, security, governance and operational efficiency. Service providers rely on in-house frameworks and templates developed with the support of partners to facilitate cloud migration and develop their own solutions.

Leaders in this quadrant offer comprehensive end-to-end IT suites of services that leverage agile development practices and advanced technologies such as AI, ML and data analytics. These are supported by experience, skilled experts, automation tools, accelerators and scripts to streamline data and application migrations, with a strong focus on cloud-native solutions, security and compliance.



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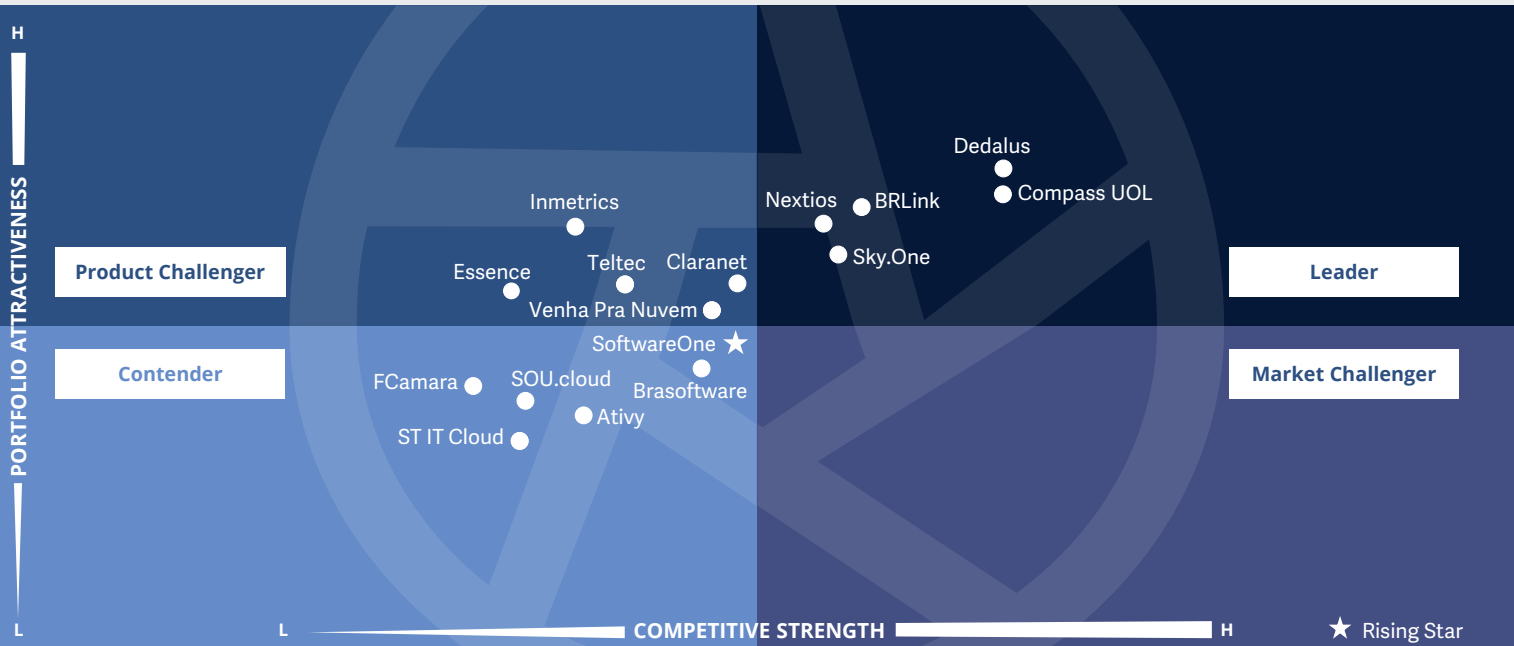


Digital transformation professionals should read the report to understand how the adoption of the public cloud can impact digital transformation initiatives and to compare the service providers.



**Multi Public Cloud Services
Consulting and Transformation Services for Midmarket**

Brazil 2023



This quadrant assesses **consulting service providers** offering application and data migrations **to public clouds** and transforming legacy data center hosting into modern digital platforms for **midmarket clients**.

Pedro L. Bicudo Maschio



Consulting and Transformation Services for Midmarket

Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services. These service providers partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions and manage customer-specific complexities in adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects that use design thinking and short work cycles to meet customer demands. This quadrant evaluates providers that help enterprises modernize, optimize and transform their IT operations to enhance efficiency, agility and security. Provider services typically comprise:

- **Consulting services** include business case design for multicloud environments and workload migration assessments. Service providers offer transformation roadmaps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.
- **Transformation services** include cloud architects and engineers designing, building and configuring multicloud environments. They also support migrating and integrating applications to harness cloud computing security. They introduce AIOps and FinOps to enable an advanced infrastructure that facilitates cloud-native application development and operations.
- **Compliance services** include environmental, sustainability and governance (ESG) and security requirements. Providers use best practices and frameworks to design cloud policies, processes and functions, ensuring healthy, sustainable, secure and compliant environments regardless of location. From a CXO perspective, ESG has become a mainstream requirement, making it an integral part of every transformation engagement.

Eligibility Criteria

1. Capable of **assessing and designing application modernization** strategies to adopt cloud-native services and API libraries for service integration, including **DevOps automation, AIOps** and **infrastructure as code (IaC)** deployments, and cross-cloud integration
2. **Methods and frameworks** to analyze clients' IT landscape, optimize IT spending and prevent additional technical debts
3. Experience in **planning and implementing multicloud** services for major industry verticals
4. Experience in **application migration** (templates, automation engines and other techniques) and cloud-native application development
5. **Certified competence** in at least two hyperscalers (preferably AWS, Azure and Google Cloud)
6. **Ability to address ESG** in large transformation programs, helping clients in drafting carbon-neutral strategies and understanding the benefits of adopting a green strategy



Consulting and Transformation Services for Midmarket

Observations

In the midmarket, just a few service providers have an MSP accreditation because of their operation scale, process robustness and the number of certified practitioners.

Many providers refer to hyperscalers' frameworks and guidance. The AWS Cloud Adoption Framework (CAF) provides a comprehensive cloud structure guide. Microsoft Cloud Adoption Framework for Azure and Google Cloud Adoption Framework are similar to AWS' CAF. All these frameworks cover aspects such as strategy, governance, architecture, security and operations. For a more comprehensive view, clients can refer to the National Institute of Standards and Technology (NIST) Cloud Computing Reference Architecture.

Clients should also understand cloud-native technologies prior to cloud migration. These include cloud services such as IaC, APIs, serverless computing, data lakes, low-cost storage, AI, ML and GenAI. Enterprises today prefer to modernize applications, using cloud-native technologies to improve business value.

MSPs are keen on helping clients by offering guidance on deploying advanced DevOps processes and automating their CI/CD pipelines. They can also help clients in using AI and ML services, including data services such as data cleaning, data preparation, data extraction and load, using AI-based services to extract data from text, videos and images. Top MSPs provide clients full modernization services, accelerating their digital business dexterity.

From the 46 companies assessed for this study, 16 qualified for this quadrant, with five being Leaders and one a Rising Star.



BRLink has a strong position as an AWS MSP and is expanding its capabilities in Azure and IBM Cloud. It is an Ingram Micro company, which gives it access to a large and expanding client base.

Compass UOL

Compass UOL has a long-standing experience in the midmarket, providing full-scope IT services. It offers innovation and cloud-native agile development while migrating clients to the cloud.



Dedalus is a pioneer in cloud services in Brazil and has been supporting cloud migrations since 2012. It specializes in AWS, Azure and Oracle Cloud, with experienced personnel delivering the cloud services.

NEXTIOS

Nextios is a Locaweb company, which gives it the financial strength to expand and invest in leading technologies. It supports migrations to AWS and Azure, including offering security and compliance services.



Sky.One has a robust service platform to enable any workload migration to the cloud, including legacy client/server applications. It specializes in ERP, including TOTVS, SAP and 300 other local ERP solutions.

SoftwareOne

SoftwareOne (Rising Star) has strong partnerships with AWS, Microsoft and Google. It has a team of certified experts with the required skills to use hyperscalers' guidelines for cost-efficient cloud migrations.





Managed Services for Large Accounts

Managed Services for Large Accounts

Who Should Read This Section

This quadrant is relevant for large enterprises in Brazil evaluating multi public cloud MSPs. ISG highlights the positioning of the providers in the region and how they address the local challenges. Through the report, service providers can understand the current market dynamics and competition, while enterprises can assess innovations from traditional providers or new players.

Public cloud providers are constantly updating their services, aiming to attract large accounts seeking cost savings and adopting multicloud environments. Although migration has its benefits, it also involves complexities in end-to-end cloud management. The number of resources and applications available can easily result in uncontrolled platform sprawl and unnecessary expenses, counteracting IT infrastructure optimization goals.

Therefore, effective cloud governance in large enterprises requires MSPs to manage assets across different environments, selecting the most suitable technologies for each operation to ensure service quality and success. They must meet security and compliance standards in activities such as monitoring, optimization and migration while also supporting ongoing modernization to boost productivity and application performance.

Service providers are widening partner networks, customizing industry-specific solutions, improving management platforms and fortifying security features to preserve the integrity and ensure visibility and control of customer operations. Leaders in this quadrant are focused on automation, integrated with AIOps and FinOps, to optimize workload allocation and investment distribution through the use of advanced technologies such as generative AI (GenAI).



IT leaders should read this report to understand the positioning of MSPs and how their approach to the market can impact enterprise public cloud strategies, improve business agility and reduce TCO.



Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of MSPs in Brazil.



Software development and technology leaders should read this report to understand the positioning of public cloud MSPs and learn how their services can impact the development of software.

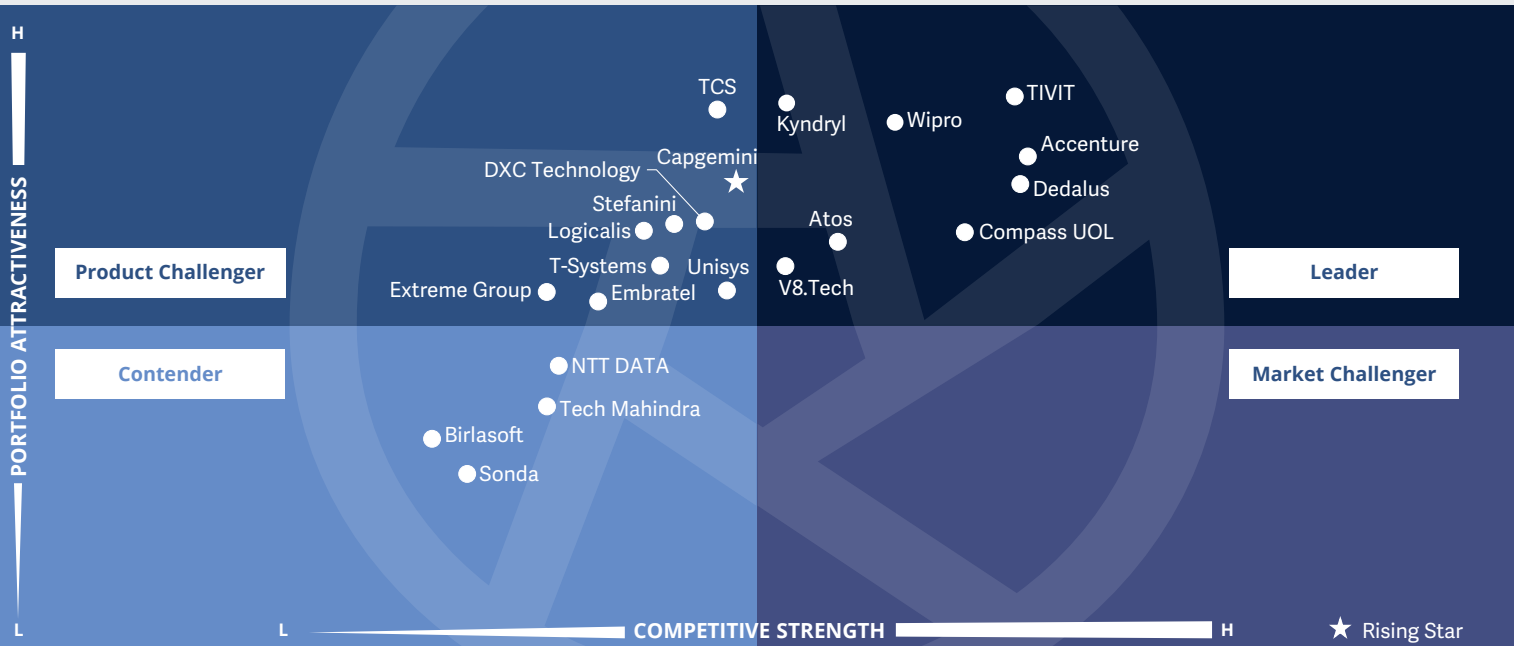


Digital transformation professionals should read the report to understand how public cloud MSPs can contribute to ongoing digital transformation initiatives and to compare the service providers.



**Multi Public Cloud Services
Managed Services for Large Accounts**

Brazil 2023



This quadrant assesses **MSPs** that can support the complexity, security and compliance requirements of **large enterprises** operating in the public cloud, including monitoring, cloud configuration, **operations and optimization** services.

Pedro L. Bicudo Maschio



Managed Services for Large Accounts

Definition

This quadrant assesses managed service providers specializing in multicloud environments, comprising AWS, Microsoft Azure, Google Cloud and other hyperscalers. These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

Typical managed services offered by these providers include cloud infrastructure lifecycle management and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and ensure compliance and security. Service providers use AIOps and FinOps tools to automate processes and provide transparency on cloud resources, capacity utilization and costs. Typical service platforms include service catalogs, approval workflows, self-service and self-heal capabilities. Provider services comprise:

- Management and monitoring of virtual machine CPU utilization, memory, database performance, storage, microservices, containers, logs and service agents
- Upgrade services for the operating system, middleware and applications on public cloud infrastructure
- Multicloud management, including patching and upgrading for the operating system, middleware and applications, plus security patching, access control and identity management
- ITSM, including incident management, problem management and release management and configuration management database (CMDB) management
- FinOps monitoring and reporting, covering resource utilization, multicloud billing aggregation, invoice management, chargeback and showback
- ML and predictive analytics to improve performance and security.
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation
- Governance and compliance management, along with a robust cybersecurity framework to safeguard client data in multiple geographic locations

Eligibility Criteria

1. **Operational excellence** and well-defined professional services
2. Experience in building and **managing public and multicloud** environments
3. Expertise in managing **platform configuration, integration, systems and containers**
4. Financial dashboards and cost analysis tools for enhanced **visibility of variable costs** associated with cloud providers through the FinOps ecosystem
5. Support for software code development and **cloud-native and legacy system integration** by leveraging DevOps, API-enabled automation and cloud analytics services
6. **Robust security posture and cloud governance** services
7. **Partnerships with leading public cloud providers** and relevant managed service provider certificates for AWS, Microsoft Azure, Google Cloud, and others
8. Industry-specific solutions and **practice knowledge** for managing workloads on public cloud infrastructure



Managed Services for Large Accounts

Observations

This year, for the first time in Brazil, ISG noted a trend of providers moving clients' workloads across clouds to reduce costs. It is a sign the market is maturing, with all the clouds providing comparable services. Quality and performance might not be the same across hyperscalers, but the functionality is converging to create cloud standards, impacting both the large accounts market and the midmarket.

Automation is a critical success factor for every MSP, and many are experimenting with GenAI to improve their AIOps and FinOps platforms. With an increasing number of organizations preferring to run their workloads on public clouds, controlling costs is emerging as a mandate, with GenAI promising to become relevant in assessing spending to propose corrections in the context of cloud configuration and solution architecture. However, no real case using GenAI has, so far, come to ISG's notice.

Automation and equivalent cloud services and functions make it easy for MSPs to move workloads across clouds. Cloud-native technologies, such as serverless computing, data lakes and IaC exist in every cloud infrastructure, enabling MSPs to normalize APIs and integrate all clouds in one service dashboard. Standardization is triggering market competitiveness, pushing service prices down.

From the 46 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture uses end-to-end automation and service delivery offshoring to stay price-competitive in offering managed services. It launched the cloud continuum concept, proposing continuous cloud modernization cycles.

Atos

Atos is working with AWS, Microsoft, Google and Oracle to improve its cloud management practice. It uses a global service platform to automate AIOps and FinOps.

Compass UOL

Compass UOL is gradually advancing into the large accounts market with robust automation, strong partnerships, client references and a vast portfolio that encompasses security, analytics and application modernization.



Dedalus combines years of experience and automation to deliver efficient managed services. It has consolidated partnerships with AWS and Azure and, in 2023, it added Oracle Cloud certifications to provide clients with more options.

Kyndryl

Kyndryl has a large footprint in managed services in Brazil. It has increased the number of cloud certifications. It leverages a robust platform that integrates AWS, Azure, Google Cloud, IBM Cloud and Oracle Cloud.

TIVIT

TIVIT is a top AWS, Azure and Google Cloud partner and is rapidly developing its Oracle Cloud expertise. Its proprietary automation platform uses leading edge AI tools across hybrid clouds.



V8.Tech has partnerships with top vendors to integrate cloud, security and cloud operations under managed services. Cloud-native technologies and application modernization enhance its portfolio.



Managed Services for Large Accounts



Wipro offers advanced AIOps and FinOps functionalities from a global service platform. It merges proprietary and vendor partner solutions to provide an expansive portfolio and efficient managed services.



Capgemini (Rising Star) is a notable player because of its increasing cloud footprint in Brazil. SAP cloud migrations, Salesforce implementations with cloud integration and agile cloud-native development are driving its growth in the market in Brazil.



“Unisys offers multicloud services with a robust automation platform and advanced FinOps reporting, replacing infrastructure complexity with reliable services, including self-service catalogs, mature governance and top security.”

Pedro L. Bicudo Maschio

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22, the company generated \$2 billion in revenue. Unisys designs, deploys and manages customized cloud solutions and builds applications to address clients' needs. Its portfolio comprises advisory, digital platforms and applications, hybrid cloud and multicloud management, industry solutions, cybersecurity, application modernization, cloud-native application development, data analytics and insights, and infrastructure services. In Brazil, it has a central office in São Paulo. It also has offices in Campinas, Rio de Janeiro and Campo Grande.

Strengths

Advanced automation: Unisys' CloudForte™ is a robust service automation platform that integrates AIOps, FinOps, advanced security and governance controls. The company manages large multicloud infrastructures and shows high customer satisfaction. CloudForte™ uses AI, ML and automation to address clients' complex infrastructures and simplify operations with self-service and self-heal, aiming for effortless operations.

Mature solution design: Unisys' ZerOps approach with hyperautomation combines cloud architecture design and recursive reviews addressing security, policies, governance, compliance, FinOps and analytics. The company's continuous innovation and transformation approach helps clients manage complexity and stay

current in regulated environments. Its FinOps reporting includes cloud spending and security checks to help clients better manage their IT services.

Security-first approach: Unisys includes security in all managed service processes, from access controls to zero-trust technology. It has deep industry expertise to find and deploy best practices, enabling consistently secure and compliant operations. Unisys' approach goes beyond infrastructure security to include application code security, data security and DevSecOps automation.

Caution

Unisys delivers security at all levels. However, some advanced security services are not default and might need to be negotiated separately, such as zero-trust operations. Clients using commercial security tools should assess their replacement costs accordingly.





Managed Services for Midmarket

Who Should Read This Section

This quadrant is relevant for midsize enterprises in Brazil evaluating multi public cloud MSPs. ISG highlights the positioning of the providers in the region and how they address the local challenges. Through the report, service providers can understand the current market dynamics and competition, while companies can assess innovations from traditional providers or new players.

The Brazilian midmarket is more impacted by changes in the economy and presents unique dynamics of competition and price regulation. In 2023, the competition among public cloud providers favored businesses that received more incentives for migration, including that from one public cloud to another. The market is maturing and does not compromise on the aspects of availability, and operational and cost optimization, leveling the standard of offerings.

Enterprises are capitalizing on this opportunity to cut costs and raise their demands from MSPs. Streamlined architectures, strong security measures, efficient data tools and effective cost management practices, notably FinOps, agility, certifications and proficiency with various public clouds, Agile methodologies and deployment of cutting-edge technologies are critical in provider selection. The competition in the market makes requirements less negotiable and emphasizes quality deliverables.

MSPs need to get innovative to establish cost-effective environments and offer comprehensive solutions to sustain quality and performance. This requires staying updated on vendor offerings and innovation strategies for time and budgeted contracts. The key parameters in this market include diverse partnerships, automation tools, AIOps and FinOps, and support offerings.



IT leaders should read this report to understand the positioning of MSPs and how their approach to the market can impact enterprise public cloud strategies, improve business agility and reduce TCO.



Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of MSPs in Brazil.



Software development and technology leaders should read this report to understand the positioning of public cloud MSPs and learn how their services can impact the development of software.

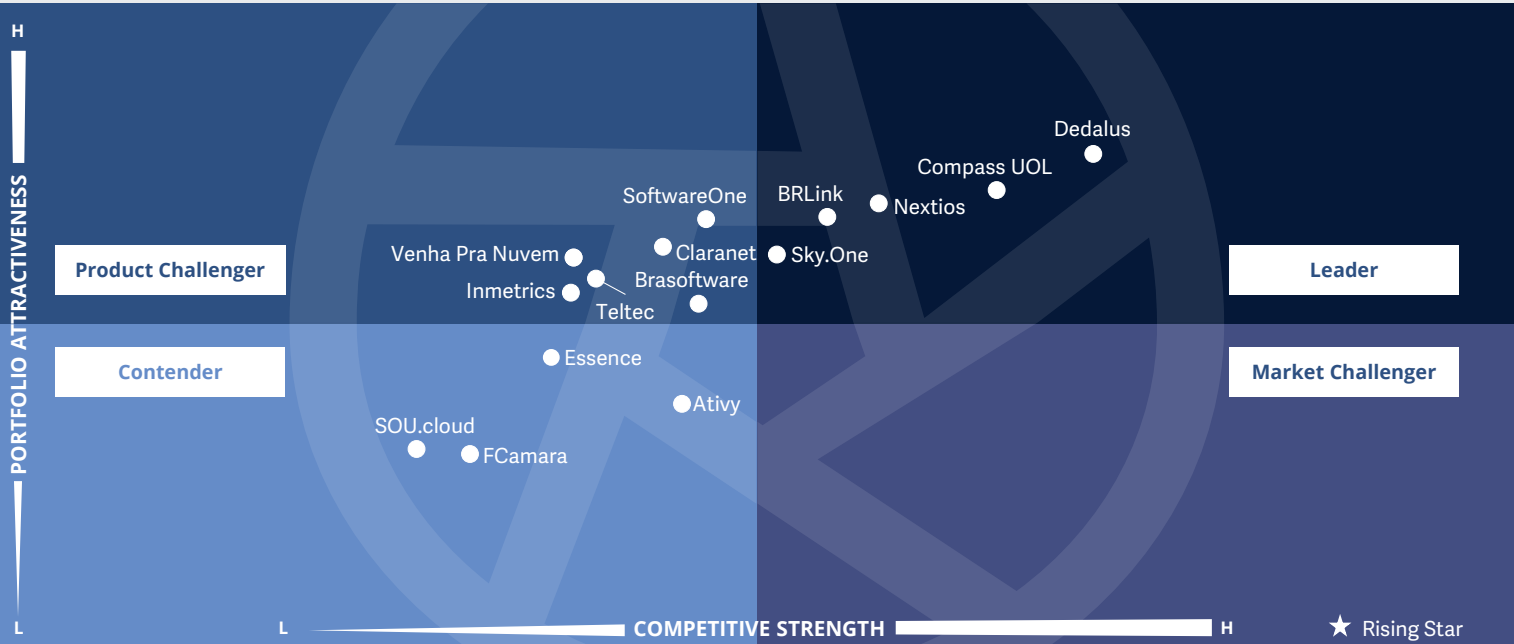


Digital transformation professionals should read the report to understand how public cloud MSPs can contribute to ongoing digital transformation initiatives and to compare the service providers.



**Multi Public Cloud Services
Managed Services for Midmarket**

Brazil 2023



This quadrant assesses **MSPs** that support two or more public clouds, offering automation and value-added services for enterprise **clients in the midmarket**, including **monitoring, operations and optimization** services.

Pedro L. Bicudo Maschio



Managed Services for Midmarket

Definition

This quadrant assesses managed service providers specializing in multicloud environments, comprising AWS, Microsoft Azure, Google Cloud and other hyperscalers. These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

Typical managed services offered by these providers include cloud infrastructure lifecycle management and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and ensure compliance and security. Service providers use AIOps and FinOps tools to automate processes and provide transparency on cloud resources, capacity utilization and costs. Typical service platforms include service catalogs, approval workflows, self-service and self-heal capabilities. Provider services comprise:

- Management and monitoring of virtual machine CPU utilization, memory, database performance, storage, microservices, containers, logs and service agents
- Upgrade services for the operating system, middleware and applications on public cloud infrastructure
- Multicloud management, including patching and upgrading for the operating system, middleware and applications, plus security patching, access control and identity management
- ITSM, including incident management, problem management and release management and configuration management database (CMDB) management
- FinOps monitoring and reporting, covering resource utilization, multicloud billing aggregation, invoice management, chargeback and showback
- ML and predictive analytics to improve performance and security.
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation
- Governance and compliance management, along with a robust cybersecurity framework to safeguard client data in multiple geographic locations

Eligibility Criteria

1. **Operational excellence** and well-defined professional services
2. Experience in building and **managing public and multicloud environments**
3. Expertise in managing **platform configuration, integration, systems and containers**
4. Financial dashboards and cost analysis tools for enhanced **visibility of variable costs** associated with cloud providers through the FinOps ecosystem
5. Support for software code development and **cloud-native and legacy system integration** by leveraging DevOps, API-enabled automation and cloud analytics services
6. **Robust security posture and cloud governance services**
7. **Partnerships with leading public cloud providers** and relevant managed service provider certificates for AWS, Microsoft Azure, Google Cloud, and others
8. Industry-specific solutions and **practice knowledge** for managing workloads on public cloud infrastructure



Managed Services for Midmarket

Observations

The majority of the providers that shared their sales results with ISG reported a slowdown in Q1 2023 and a slight recovery in Q2 2023. These companies, however, believe they will meet or surpass their sales targets for the year, confident that the Brazilian economy will recover before year-end.

The economic slowdown has pushed the market to become more competitive in pricing, thus reducing the margins of MSPs. For clients, it is the ideal time to anticipate cloud migrations and benefit from low prices.

Many MSPs highlighted that their clients were more interested in FinOps to find cost savings. This year, for the first time, ISG identified a trend of providers moving clients' workloads across clouds to reduce costs. Observing this trend, the hyperscalers in Brazil are offering discounts or incentives to accelerate cloud migrations, winning over clients from their competitors.

The intense market competitiveness is also a sign of market maturity. At present, all clouds offer comparable services. Quality and performance might vary, but the functionality is converging to standards around cost management practices, cloud architecture design, security measures, cloud configuration, basic AIOps functions and FinOps reporting. Clients will find differentiation in time to respond to a request, service expertise and certifications, consulting capabilities and capacity to follow technology innovation. From the 46 companies assessed for this study, 15 qualified for this quadrant, with five being Leaders.



BRLink had a solid AWS partnership before it was acquired by Ingram Micro in 2021. It now offers Azure and IBM Cloud and is investing in further expanding its portfolio.

Compass UOL

Compass UOL has many clients in the midmarket. It uses robust automation to streamline services. The company has partnerships with AWS, Azure, Google Cloud and Oracle Cloud.



Dedalus has one of the largest footprints in the midmarket. It offers optimized managed services, covering AWS, Azure and Oracle Cloud, with advanced AIOps and FinOps functionalities.

NEXTIOS

Nextios offers sales and service support across Brazil. It complements its managed services with security and provisioning for self-service. The company has partnerships with AWS and Azure.



Sky.One offers a comprehensive automation platform to operate both legacy client/server applications and cloud-native solutions. It has partnerships with AWS, Azure, Google Cloud and Oracle Cloud.





FinOps Services and Cloud Optimization

Who Should Read This Section

This quadrant is relevant to enterprises in Brazil evaluating cloud FinOps service providers. ISG highlights the positioning of the providers in the region and how they address the local challenges. Through the report, service providers can understand the current market dynamics and competition, while companies can assess innovations from traditional providers or new players.

Although global economic conditions may not be ideal, public cloud consumption in Brazil continues to increase, given the limitless benefits of this IT infrastructure. However, cloud migration has as many financial challenges as benefits, and consumption management is as important as cloud adoption and modernization. Unexpected expenses, resource wastage and lack of clarity regarding service use and planning are common issues reported by enterprises of all sizes across sectors.

This places cloud service providers with the mission of educating and structuring cloud usage optimization for their clients, who are increasingly demanding FinOps as a service. The trend of the adoption of multicloud and cloud-native technologies complicates the scenario, making expenses complex and requiring a wide range of support. Providers are pushed to diversify and strengthen partnerships with vendors and commit to the business objectives of clients.

The leaders in this quadrant offer FinOps services to optimize budget management, governance, reporting, security and sustainability. They develop solutions specific to industries or objectives, using automation with AI and ML that can predict, monitor, catalog, correct and compare services in real time. Additionally, they provide insights with the application of data analytics.



IT leaders should read this report to understand the relative strengths and weaknesses of cloud FinOps service providers and how their offerings contribute to cloud technology adoption and management.



Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of cloud FinOps service providers in Brazil.

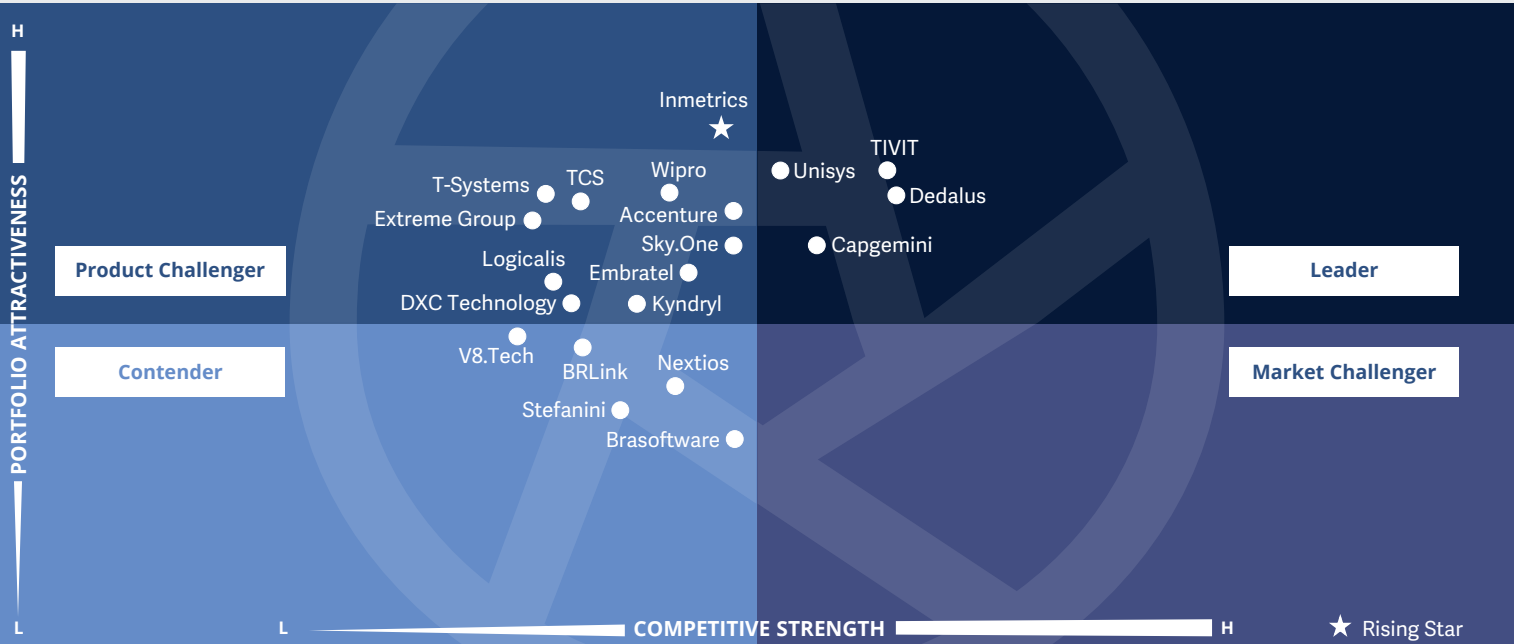


Software development and technology leaders should read this report to understand the positioning of cloud FinOps service providers and the benefits of their services for software development.



**Multi Public Cloud Services
FinOps Services and Cloud Optimization**

Brazil 2023



This quadrant assesses service providers that offer comprehensive **FinOps services**, enabling more than **cost controls** to enable clients' effective **budget management** and continuous cloud resources **rightsizing**.

Pedro L. Bicudo Maschio



FinOps Services and Cloud Optimization

Definition

This quadrant assesses service providers that offer consulting and managed services around multicloud architecture with a best-of-breed approach for cloud infrastructure cost optimization for AWS, Microsoft Azure, Google Cloud and other cloud platforms. These providers undertake projects that include workload assessments to analyze and reduce cloud expenses and maximize cost efficiency. These providers offer cloud governance advisory services for various activities such as user rights, service approval workflows, audit tracking (setting of logs/agents/reports) and defining compliance check methods, configuration policies, data access policies and service reporting configurations that include tagging, chargeback, and show back functionalities.

Leaders in this quadrant demonstrate the ability to predict clients' consumption patterns and cloud price changes using AI- and ML-based analytics. They use FinOps frameworks, comprising proprietary and third-party tools, to analyze and forecast usage, pricing and

financial impacts. Providers also use data analytics to identify underutilized resources and optimization opportunities.

Clients expect providers to actively manage FinOps tools to maximize cloud resource utilization and improve automation and autoscaling capabilities. Contractual terms enable providers to operate on behalf of clients to facilitate activities such as buying and selling reserved instances, upscaling and downscaling resources and enabling dynamic cost allocation changes. Alternatively, streamlined approval workflows enable fast decision-making to optimize infrastructure costs and maintain budget adherence.

Eligibility Criteria

1. FinOps-certified FTEs in **at least three hyperscalers** among the popular ones like AWS, Microsoft Azure, Google Cloud or Oracle Cloud (FinOps-certified staff improves ratings, but it is not a prerequisite)
2. To offer **FinOps framework strategy and implementation** roadmap within the client's organization, including the three major FinOps framework elements – inform, optimize and operate
3. FinOps services must be regulated by **cost-saving targets** centered on **budget control** SLAs
4. **Enable clients** to develop their internal FinOps teams from various organizations within the enterprise
5. Empower clients with organizational change management (OCM) for **sustainable FinOps** practices
6. **Demonstrate optimization expertise**. FinOps reporting is not enough for qualification



FinOps Services and Cloud Optimization

Observations

ISG identified many FinOps service options in Brazil, but not all providers qualified for inclusion in this quadrant. FinOps vendors and implementation service partners that do not operate FinOps as a service have been excluded.

Basic FinOps involves using hyperscalers' dashboards to monitor and export billing information to an Excel or Microsoft Power BI to create spending reports. Such cost assessment projects find underutilized resources and identify optimization opportunities for future cost savings.

Many service providers can use APIs to connect FinOps tools and identify daily consumption to highlight monthly expenses. New service provisioning goes through approval workflows with resource tagging to track and trace expenses.

Leading providers can guide clients to set approval rules and spending budgets, providing real-time consumption monitoring

through APIs and logs. Automation ensures that configurations follow client-specific policies (security, access control, tagging and logs) and can block non-compliant services (including containers), providing clients with audit trails. These providers can automatically identify underutilized resources and disconnect unused instances, reporting actions and budget execution.

Providers with advanced capabilities use ML and are experimenting with GenAI to predict spending. Tools such as Spot by NetApp can operate and buy/sell reserved instances to optimize costs even further. These providers can monitor application and database performance to optimize infrastructure accordingly and use data analytics to deliver architecture optimization insights.

From the 46 companies assessed for this study, 20 qualified for this quadrant, with four being Leaders and one a Rising Star.



Capgemini has clearly defined FinOps service scope with robust governance abilities to allow clients full budget control with total accountability and traceability.



Dedalus leverages best practices and its consulting expertise to identify areas of overspending and rapidly apply corrective actions. It uses real-time spending analytics for effective cost control.



TIVIT uses automated self-service catalogs (AIOps) that tag resources automatically to enable FinOps tools to track and trace utilization and spending. Clients can simulate spending by comparing the same workload on four hyperscalers.



Unisys integrates AIOps (CloudForte™), ServiceNow and Morpheus to ensure clients' resources comply with security and policy requirements. It dynamically reports on non-compliance and provides track and trace online dashboards.

Inmetrics

Inmetrics (Rising Star) has a strong portfolio because of its advanced tooling for cost avoidance and expertise in identifying data and application optimization. ISG believes its portfolio will attract many clients in the near future.



Unisys



“Unisys uses advanced analytics and automation to deliver predictive FinOps, along with a robust governance framework to elevate clients’ maturity for better budget management compliance and cloud resources optimization.”

Pedro L. Bicudo Maschio

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22, the company generated \$2 billion in revenue. Unisys designs, deploys and manages customized cloud solutions and builds applications to address clients’ needs. Its portfolio comprises advisory, digital platforms and applications, hybrid and multicloud management, industry solutions, cybersecurity, application modernization, cloud-native application development, data analytics and insights, and infrastructure services. In Brazil, it has a central office in São Paulo. It also has offices in Campinas, Rio de Janeiro and Campo Grande.

Strengths

Automation integrated with compliance: Unisys has FinOps pre-configured templates to automate tasks and optimize governance across application design, solution architecture and multicloud choices for ongoing management. Its CloudForte™ automation platform integrates with ServiceNow, Morpheus and multiple FinOps tooling vendors to orchestrate FinOps from application design to deployment and operations, automatically applying security and compliance rules.

Comprehensive FinOps framework: Unisys uses advanced AIOps with analytics engines for data-driven insights, automated IaC catalog with approval, tagging and reporting policies, including DevSecOps and containers. It provides integration and

full visibility across AWS, Azure, Google Cloud and Oracle Cloud. Its FinOps solution understands seasonality and includes anomaly detection.

Spend management and predictability: Unisys helps clients set their cloud budgets to enable policies and spend tracking, thereby avoiding overuse and overspending. It uses production data analytics to break down costs and usage by business unit or group, hyperscaler, tenant, cloud type and cloud region, allowing clients to dig down spending to individual levels. Unisys provides month-to-date costs and can predict monthly spending in time for proactive corrections, besides offering predictive mid-term capacity management considering seasonality.

Caution

Unisys delivers FinOps as part of managed service deals in Brazil. The company could expand its market presence by improving its communication around FinOps engagement models, enabling new clients to understand and adopt its FinOps services.





Hyperscale Infrastructure and Platform Services

Hyperscale Infrastructure and Platform Services

Who Should Read This Section

This quadrant is relevant to enterprises across industries in Brazil for evaluating providers of hyperscale infrastructure and platform services. ISG highlights the positioning of the providers in the region and how they address local challenges. Through the report, service providers can understand the current market dynamics and competition, while companies can assess innovations from traditional providers or new players.

In 2023, the volatile economy in Brazil contributed to companies becoming circumspect about cost-saving, leading to two key shifts in the public cloud market. On the one hand, it stimulated the demand for cloud services due to cost benefits and technological availability of its IT infrastructure, driven by the growing interest in multicloud solutions and customers looking for increasingly competitive and innovative offerings. On the other hand, it

had a direct impact on cloud pricing and service options across vendors and providers, as cost and coverage became the main factors in attracting customers and securing contracts.

The current conditions of the public cloud market in Brazil encourage innovation and the availability of an array of cloud provider options. However, cost as the determinant limits the adoption of new technologies and rules in favor of the ones with cost-saving purposes. Many applications can run across different clouds, offering flexibility. Yet, quick cloud-to-cloud migration for short-term savings might overshadow performance, quality and the use of advanced technologies such as AI, ML, data lakes and data analytics.

Providers are expanding their partner ecosystem and are also modifying incentive programs to reach more customers, which may reorganize market share in the coming years.



IT leaders should read this report to better understand how provider's market approaches impact enterprise public cloud strategies, reduce TCO and improve agility, scalability and flexibility.



Software development and technology leaders should read this report to understand the relative positioning and capabilities of hyperscalers, which can help them with workload migrations to the public cloud.

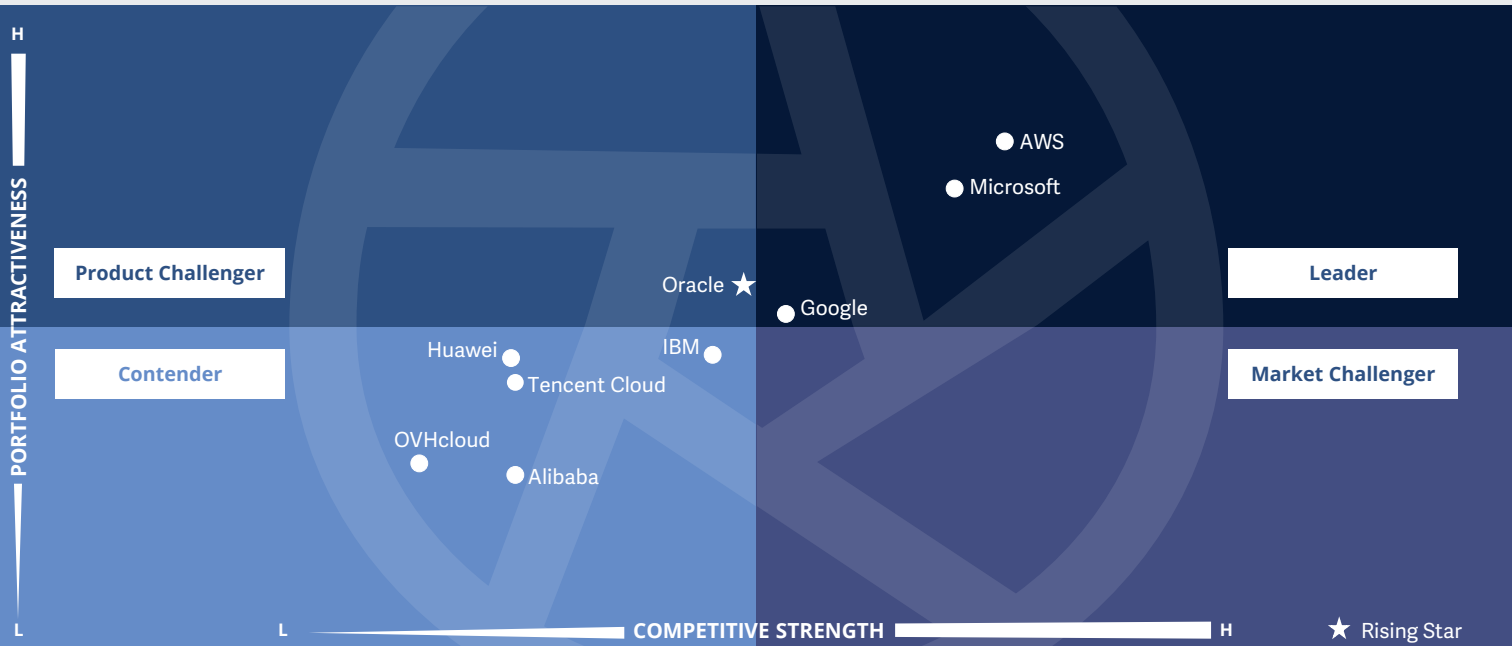


Sourcing, procurement and vendor management professionals should read the report to have a better understanding of the landscape of hyperscale infrastructure and platform service providers in Brazil.



**Multi Public Cloud Services
Hyperscale Infrastructure and Platform Services**

Brazil 2023



This quadrant assesses **global-scale IaaS and PaaS** infrastructure platforms for enterprises. These platforms distinguish themselves through their **large number of service partners** and **leading-edge technology portfolios**.

Pedro L. Bicudo Maschio



Hyperscale Infrastructure and Platform Services

Definition

This quadrant assesses suppliers that provide virtual compute resources, middleware and software in a highly scalable public cloud environment. Clients consume infrastructure and platform functionality as on-demand and web-centric services. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided as virtual or containerized software-defined offerings and complemented by serverless architectures. The hyperscaler PaaS segment offers multiple microservices and runtime engines for predefined cloud-based application development that typically addresses the complete lifecycle needs of developers building or modernizing applications. Offerings include middleware, business process management, collaboration networks, databases, analytics and ML capabilities.

Internal and external (third-party) services are accessible through marketplaces. In addition, IaaS or PaaS vendors support and manage ISVs in their go-to-market activities.

Eligibility Criteria

1. Infrastructure portfolio with **computing power**, memory, storage, network, backup and container management functions. The self-service catalog includes high performance computing (**HPC**) and **ML instances**
2. **Price transparency** with consumption-based and reserved billing models
3. Recognized **quality standards** and **service certifications**, including data center and facilities certification
4. Support for **data location** according to local regulations for sovereignty, data access control, encryption and privacy. Strong focus on **data protection** and sophisticated **cybersecurity solutions**
5. Support for IaC and **serverless computing** in combination with **automated provisioning**, event triggering and failover
6. APIs to **connect multiple clouds**, SaaS and web services
7. **Partner program** with a vast partner ecosystem



Hyperscale Infrastructure and Platform Services

Observations

Cloud services are converging to specific standards. AWS is the market benchmark with all other hyperscalers delivering similar functionalities, with price, performance and service availability varying for the functional equivalent, such as IaC, serverless computing, AI and ML, cognitive computing, GenAI, data lakes, virtual servers and analytics tools.

Cloud service standardization is a sign of market maturity and is driving competition. In 2023, clients in Brazil are more focused on cost because of the economic slowdown and future uncertainties. A high focus on cost has had a substantial impact on the market. In competitive bids, hyperscalers offer discounts and incentives to accelerate decision-making. For the first time, ISG observed many instances of clients shifting from one provider to another. Automation has reduced the cost of change, where cost has offset performance and reliability parameters that could have otherwise raised questions on such decisions.

All service providers are focused on persuading clients away from AWS, which is the leader in terms of market share. Oracle has surprisingly been more attractive in terms of cost because it designs data centers to be more efficient. Google attracts customers requiring data services and analytics. Microsoft is competitive when bundling licensing discounts with Azure utilization. These nuances drive the market but are not consistent across deals – each negotiation is different.

In general terms, clients need to focus on overall spending rather than virtual machine and database instance pricing. A smart architecture design can optimize costs and produce better results than simply benchmarking price lists.

From the 46 companies assessed for this study, nine qualified for this quadrant, with three being Leaders and one a Rising Star.

AWS

AWS continues to lead the market with constant innovation, the broadest portfolio and the largest market share. Its loyal partner network ensures its continued success.

Google

Google offers flexible IaaS and PaaS services that easily integrate with other clouds. Its differentiation with AI-based analytics contributes to its success.

Microsoft

Microsoft has advanced significantly with its GenAI. It has the largest software portfolio for enterprises, from business applications to collaboration, helping it extend cloud IaaS and PaaS business value.

Oracle

Oracle (Rising Star) has achieved tremendous sales success in 2023. It has successfully expanded its partner network, which is enabling it to win over clients in Brazil.





SAP HANA Infrastructure Services

Who Should Read This Section

This quadrant is relevant to enterprises across industries in Brazil to evaluate providers of SAP HANA infrastructure services for SAP S/4HANA workloads and large-scale HANA databases. ISG highlights the positioning of the providers in the region based on the depth of their offerings and market presence. Through the report, service providers can understand the current market dynamics and competition, while companies can assess innovations from traditional providers or new players.

The hosting of SAP workloads in the public cloud has become common in Brazil due to cost reduction possibilities with the RISE with SAP model and the growing adoption of S/4HANA. Leading cloud providers are offering specific tools for system migration, attracting traditional SAP customers (large enterprises) that have come to rely on their recommendations to migrate their workloads with lowered risks.

The selection of partners for assessing, planning and migrating SAP workloads to the cloud depends on the service provider's experience, certification level and cloud technologies employed. These factors help ensure agility, flexibility and scalability in delivery. Notably, automation resources and tools to improve cloud operations' performance, a flexible architecture and integrated security measures across the infrastructure are key differentiators.



IT leaders should read this report to better understand capabilities of SAP HANA infrastructure service providers and how their approaches to the market can impact enterprise public cloud strategies.



Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of SAP HANA infrastructure service providers in Brazil.

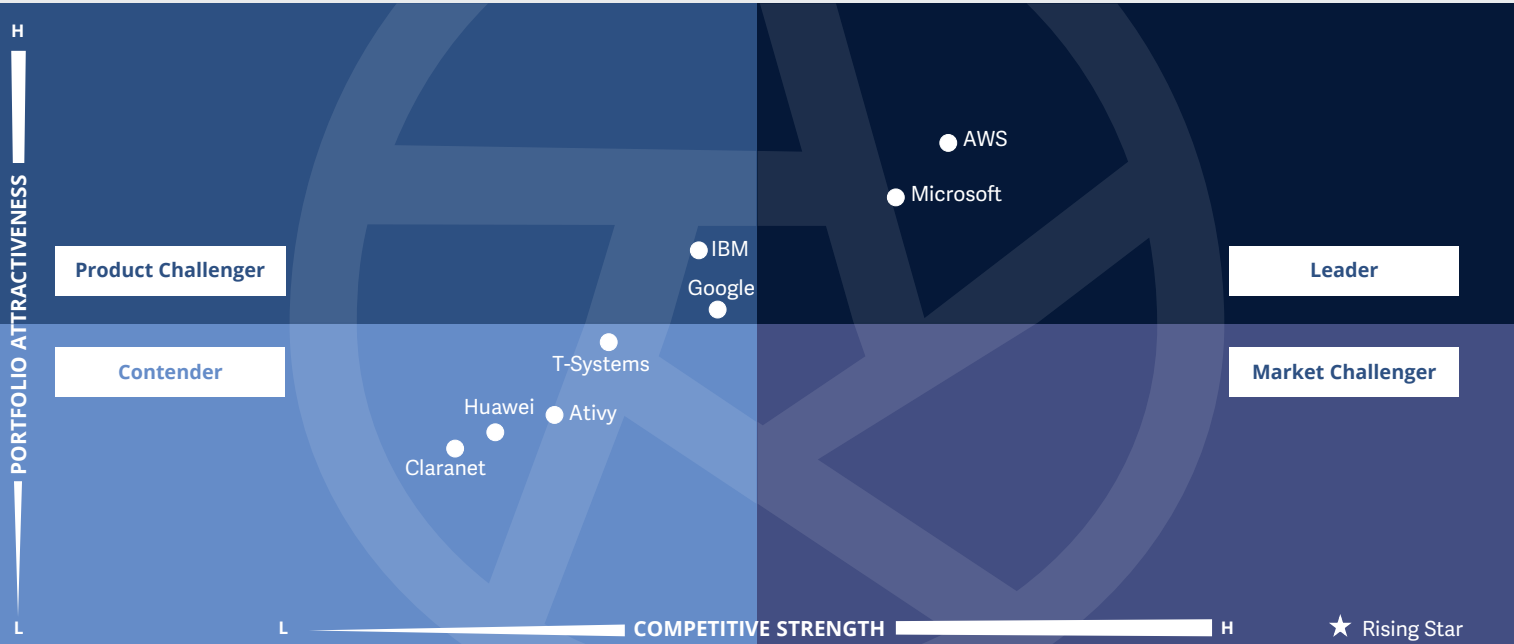


Software development and technology leaders should read this report to understand the relative positioning and workload migration capabilities of SAP HANA infrastructure service providers.



Multi Public Cloud Services
SAP HANA Infrastructure Services

Brazil 2023



This quadrant assesses the hyperscalers offering **SAP hosting**, with a major focus on SAP HANA instances in **public cloud** for SAP S/4HANA private edition and **RISE with SAP**. Services include security, automation and monitoring tools.

Pedro L. Bicudo Maschio



SAP HANA Infrastructure Services

Definition

This quadrant assesses cloud infrastructures best suited to host SAP's software portfolio, emphasizing SAP S/4HANA workloads and large-scale HANA databases. Participating providers offer IaaS, including infrastructure operations, facilities, provisioning and scaling capacity for SAP workloads.

Key criteria for assessment include the IaaS providers' offering of data migration tools, technical support, system imaging, backup and restore capabilities, disaster recovery solutions, resource usage monitoring and dashboard management solutions. These tools required can be a part of the standard IaaS offerings or provided by partners in a marketplace.

Infrastructure providers that participate in the RISE with SAP program receive a higher rating. However, RISE participation is not a mandatory requirement for inclusion in this quadrant. Ideally, the infrastructure provider should have a broad ecosystem, including SAP partners, enabling them to support clients in automating and operating their SAP instances in the cloud.

The cloud infrastructure provider should also offer pre-sales support to help clients with migration planning, cloud architecture design, sizing and performance optimization, licensing considerations, system and database configuration, virtual private network configuration and third-party vendor solutions (toolsets). The support analysis focuses on the vendor's service partner ecosystem and their expertise in conducting related migrations and operations.

Eligibility Criteria

1. IaaS to include **SAP-certified servers** with storage and connectivity for SAP products. Availability of SAP HANA instances in multiple memory sizes, enabling **on-demand upscaling** to accommodate instance growth and upgrades with minimum service interruptions
2. Memory capacity exceeding **6 TBs per virtual machine**
3. Easy access, **transparent prices**, consumption-based, reserved instance and dedicated instance billing models
4. Recognized **quality standards** and **service certifications**, with a strong focus on **data protection** and cybersecurity
5. **Low-cost storage** for backups and archiving
6. **Multi-region** disaster recovery capabilities
7. Automated **backup and restore functionality** (platform-based, proprietary or partner solutions)
8. Frameworks and **tools for application and data migration**
9. An ecosystem of **certified partners** with SAP specialization



SAP HANA Infrastructure Services

Observations

The SAP market is of high importance for hyperscalers. Typical SAP clients also migrate other workloads to the cloud. SAP pushes RISE with SAP deals, accelerating cloud migrations. However, typical SAP clients have more than SAP S/4HANA, simultaneously using legacy ERPs, analytic tools, data warehouses, sales and service automation, customer relationship management (CRM), e-commerce, human capital management (HCM) and other SAP or competitors' products.

As observed in 2022, large enterprises typically deal directly with hyperscalers to migrate their SAP workloads to the cloud and use one of their specialized partners to plan and execute these migrations. When choosing their preferred cloud, clients should consider their requirements for integration, network latency, data location and service partners; selecting the right service partners can be as important as choosing the hyperscaler.

The market in Brazil is concentrated on AWS and Microsoft. Google Cloud offers price-competitive deals, but with few cases, including large instances or complex environments.

From the 46 companies assessed for this study, eight qualified for this quadrant, with two being Leaders.

AWS

AWS offers a large number of automation tools for HANA migrations and SAP S/4HANA operations in the cloud. It also has a significant number of virtual machine options, with clients reporting superior performance when hosting SAP S/4HANA on AWS.

Microsoft

Microsoft offers flexible infrastructure configurations to host SAP workloads, with integrated security and collaboration tools. Clients usually integrate the Microsoft Power platform to enrich SAP S/4HANA analytics.





Appendix

The ISG Provider Lens™ 2023 – Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the Brazilian 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 report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



Author



Pedro L. Bicudo Maschio
Lead Analyst

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.

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Kelly Ribeiro is a research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on IoT, Google Cloud Ecosystem, Next-Gen ADM Services, MarTech, AWS Ecosystem, Public Multi Cloud and Analytics. She contributes to the research process and the development of content related to the business context, trends and insights of the Brazilian market.

Kelly joined ISG in January 2023. Prior to this role, she worked as a researcher, gaining experience and technical skills to collect, analyze and present quantitative and qualitative data. Her expertise covers market research, technology, trends and behavior.





IPL Product Owner

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

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



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.

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