ISG Provider Lens®

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: unisys

QUADRANT REPORT | DECEMBER 2025 | BRAZIL

Report Author: Pedro L. Bicudo Maschio

Enterprises adopting GenAI gain productivity and drive cloud market expansion in Brazil

Generative AI (GenAI) continues to gain attention in all sectors, particularly in the public cloud market. Hyperscalers are at the center of promoting and selling GenAI. According to ISG's **State of Applied Generative AI Market** report, 85 percent of enterprises consider GenAI investments over the next 24 months critical, and 82 percent of the surveyed IT service providers cited active investments in GenAI as one of their highest strategic investment priorities. Industries that have shown broad adoption include healthcare, legal, financial services and manufacturing. These industries use GenAI's capabilities to handle complex tasks, enhance efficiencies and drive innovation through domain-specific models and applications.

Companies in Brazil are witnessing significant benefits from integrating AI into their operations. The study titled *Unlocking the Potential of AI in Brazil*, commissioned by AWS, reveals that 40 percent of these companies actively use AI. This adoption rate surpasses that in Mexico and Chile and is comparable to European levels. Among these companies, a noteworthy 95 percent have reported revenue growth, with an average increase of 31 percent, and 96 percent have observed productivity gains. These advancements enable businesses to improve customer service, invest in employee training and develop new products and services.

Expanding the use of cloud services contributes to an increase in spending, thereby raising the IT budget. FinOps has become fundamental to balance innovation, spending and compliance. FinOps assessments typically reduce cloud spend by 25 to 30 percent, with exceptions reaching up to 40 percent, depending on the organization's size and cloud adoption maturity. Mature enterprises have a continuous FinOps service, allowing them to avoid overspending. Initial savings efforts often focus on easier wins, such as license optimization and eliminating wasted resources, followed by complex activities, such as architectural

GenAI **reshapes cloud** services by enhancing **automation** and operational **efficiency**.

changes. Expectations for using GenAI include developing conversational chatbots as FinOps agents to provide stakeholders with concise responses and deep insights, leveraging advanced AI for smart recommendations and engaging with FinOps personnel to simulate and forecast workloads through natural language queries.

Cloud service trends reflect the influence of GenAI on application modernization, emphasizing reduced time and risk. Application decoupling enables the integration of APIs and microservices with cloud-native services, enhancing business value from cloud utilization. The use of GenAI varies across cloud consulting and managed services, with providers differentiating themselves based on their ability to maximize these technologies for optimized and efficient service delivery.

The cloud market continues to expand, and migrations from private to public cloud remain prevalent. However, transitions between public cloud providers have become increasingly commonplace, though the repatriation trend to private cloud has diminished.

Consulting and Transformation Services — Large Accounts: In this quadrant, cloud adoption and migration are increasingly guided by strategies prioritizing business value and outcomes. Providers align their cloud strategies closely with clients' overarching business objectives, ensuring innovations integrate new technology into existing environments and drive measurable benefits and process efficiencies to maximize ROI. This market considers incorporating advanced analytics, AI and ML as critical elements, providing predictive insights and enabling organizations to enhance customer interactions and optimize operations. Application modernization emerged as a central part of these strategies, using AI agents to automate legacy systems refactoring into agile, cloud-native applications to improve functionality and maintain compatibility with modern infrastructures.

Consulting and Transformation Services — Midmarket: In this quadrant, providers focus on digital transformation and attaining operational efficiency and scalability. They offer end-to-end services that facilitate the entire migration journey, including strategy formulation and operational continuity in multicloud settings. The shift from traditional infrastructures to cloud solutions has increased the demand for expertise in managing hybrid and multicloud environments, thereby enhancing flexibility and reducing vendor dependency. Security remains a priority, with providers using automation to ensure robust compliance. A select group of forward-thinking providers use GenAI to modernize applications, contributing to enhanced performance and agility.

Managed Services — Large Accounts: In this quadrant, providers offer automated, intelligent service delivery with GenAI applied to innovation and efficiency. GenAI automates operations, enhances incident management and enables predictive analytics across multicloud environments. This automation fosters autonomous operations, which include self-configuring, self-monitoring and self-optimizing capabilities. This trend supports rapid scalability and swift adaptation to changing workloads, adopting advanced AI frameworks that significantly reduce resolution times and enhance system resilience. The focus on GenAI also aligns with the demand for real-time compliance, where policy-as-code frameworks and AI flows ensure automated and robust compliance. Such GenAI integration is reshaping the managed services market by pushing the boundaries in automation, security and innovation, helping providers meet current and future IT infrastructure demands.

Managed Services — Midmarket: In this quadrant, providers increasingly enhance AIOps to manage cloud resources efficiently. The complex task of multicloud management requires service integration, and providers are equipping themselves with tools that unify diverse cloud environments through APIs and infrastructure as code (IaC). Every provider offers basic FinOps functionality bundled in managed services, which provide strategies for cost optimization. Nevertheless, despite its differentiation potential, sustainability is an underrepresented element in the service offerings. Meanwhile, the growing adoption of GenAI showcases an emerging focus on innovative, intelligent service deliverables.

FinOps Services and AI-driven Optimization: This quadrant showcases the convergence of data analytics with cloud operations, highlighting advanced AI and automation integration across major service providers. This trend facilitates precise cost management and operational efficiency through real-time insights, anomaly detection, predictive forecasting and automation. Such capabilities empower organizations to maintain financial control while optimizing resource use. Providers are embedding governance and compliance frameworks, ensuring cost savings while maintaining risk management and data integrity. Although not prevalent among all providers, sustainability monitoring within FinOps is gaining traction, incorporating sustainability principles to decrease environmental impacts through GreenOps. While comprehensive GenAI solutions to support FinOps decisions with real-time insights are emerging, they rely on robust knowledge bases and historical spending data that many enterprises lack today.

Hyperscale Infrastructure and Platform Services: In this quadrant, AI is a key driver of automation, security and analytics. Multicloud and hybrid cloud environments are widespread, enabling enterprises to avoid vendor lock-in while leveraging optimal services from multiple providers. Low-latency real-time analytics drive the adoption of edge computing, integrated with major public cloud data centers, to offer enhanced, serverless, cloud-native services that streamline operations and reduce costs. In Brazil, sustainability and cloud sovereignty are considerations, prompting data centers to use renewable energy and strive for zero carbon emissions. Security continues to receive attention, with enhanced encryption, identity management and zero-trust models enabling compliance with complex regulations. The popularity of serverless computing is rising as it enables agile function execution on the cloud without traditional server management, thus increasing efficiency and agility.

SAP HANA Infrastructure Services: In this quadrant, the urgency for SAP ECC clients to upgrade to SAP S/4HANA in the cloud is increasing, with approximately half yet to begin their upgrade process. Hyperscalers are eager to support these transitions, recognizing that clients are unlikely to switch providers once they embark on upgrades. The complexity and duration of such upgrades, coupled with SAP ERP's crucial role in enterprise operations, mean that SAP clients will continue to consume various other cloud services. Hyperscalers are thus eager and strategic in capitalizing on this opportunity to secure long-term customer relationships.

> Sustainability is a key trend in cloud services, with cloud providers' data centers incorporating renewable energy and striving for zero carbon emissions. However, sustainability remains underrepresented in consulting and managed services. This gap provides an opportunity for the providers to differentiate themselves by embedding sustainable practices into their offerings and catering to an increasingly eco-conscious market.

Provider Positioning

Page 1 of 5

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
AI/R	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Alibaba Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Atos	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	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
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Claranet	Not In	Leader	Not In	Leader	Contender	Not In	Contender

Provider Positioning

Page 2 of 5

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Claro Empresas	Product Challenger	Leader	Leader	Leader	Contender	Not In	Not In
Deal	Not In	Rising Star ★	Not In	Rising Star ★	Not In	Not In	Not In
Dedalus	Leader	Leader	Leader	Leader	Leader	Not In	Not In
Dell Technologies	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In
Deloitte	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Extreme Group	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
FCamara	Not In	Product Challenger	Not In	Rising Star ★	Product Challenger	Not In	Not In

Provider Positioning

Page 3 of 5

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Google	Not In	Not In	Not In	Not In	Not In	Product Challenger	Product Challenger
GWCloud	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Huawei	Not In	Not In	Not In	Not In	Not In	Contender	Contender
IBM	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger	Product Challenger
Inmetrics	Not In	Contender	Not In	Product Challenger	Product Challenger	Not In	Not In
Kyndryl	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Lanlink	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Logicalis	Contender	Not In	Contender	Not In	Product Challenger	Not In	Not In

Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
NTT DATA	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Leader	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Skyone	Not In	Leader	Not In	Leader	Leader	Not In	Not In
SoftwareOne	Not In	Contender	Not In	Contender	Contender	Not In	Not In
Stefanini	Product Challenger	Not In	Product Challenger	Not In	Rising Star ★	Not In	Not In
TCS	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In

Provider Positioning

Page 5 of 5

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Tech Mahindra	Contender	Not In	Product Challenger	Not In	Not In	Not In	Not In
Tencent Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Think IT	Not In	Contender	Not In	Contender	Product Challenger	Not In	Not In
TIVIT	Leader	Not In	Leader	Not In	Leader	Not In	Not In
T-Systems	Product Challenger	Product Challenger	Leader	Product Challenger	Product Challenger	Not In	Contender
Unisys	Product Challenger	Not In	Product Challenger	Not In	Leader	Not In	Not In
V8.TECH	Not In	Leader	Not In	Leader	Contender	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 2025 for **multi public cloud services**.

Simplified Illustration Source: ISG 2025

- **Consulting and Transformation Services — Large Accounts**
- **Consulting and Transformation Services — Midmarket**
- **Managed Services — Large Accounts**
- **Managed Services — Midmarket**
- **FinOps Services and AI-driven Optimization**
- **Hyperscale Infrastructure and Platform Services**
- **SAP HANA Infrastructure Services**

Definition

This study evaluates providers within the public cloud and AI value chain, offering consulting and transformation solutions, managed services, FinOps, sovereign infrastructure, cloud-native platforms, and SAP-focused solutions. These providers enable enterprises to modernize, secure, manage and scale multicloud and AI-native environments using automation, GenAI and advanced optimization frameworks.

Cloud adoption is accelerating not only for scalability or cost efficiency but also for fostering AI innovation, driving sustainability and ensuring regulatory compliance. Enterprises demand dynamic, composable cloud solutions that integrate intelligent operations, FinOps governance and AI orchestration across public and sovereign infrastructures. The widespread adoption of intelligent automation tools further streamlines data management processes and allows businesses to prioritize innovation over mundane tasks, driving demand for rearchitecting strategies and cloud-native solution expertise.

Providers that support agentic AI, hybrid FinOps-AIOps models and transformation road maps tailored to cloud-native development are well positioned to lead. Sovereignty, sustainability and interoperability are no longer optional; enterprises expect secure, jurisdiction-compliant infrastructure, workload portability and customer-controlled encryption models such as Hold Your Own Key (HYOK).

Enterprises aim to leverage agentic AI and GenAI to enhance productivity, streamline operations and foster innovation. To stay relevant, providers must demonstrate technical expertise, regulatory awareness and the ability to embed AI technologies into their service architectures. This study highlights those shaping the future of the public cloud through next-generation platforms and transformation services.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following seven quadrants for services/solutions: Consulting and Transformation Services — Large Accounts, Consulting and Transformation Services — Midmarket, Managed Services — Large Accounts, Managed Services — Midmarket, FinOps Services and AI-driven Optimization, Hyperscale Infrastructure and Platform Services, 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

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

Provider Classifications

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

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

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

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

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.

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.

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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 — Large Accounts

This report is valuable for service providers offering **Consulting and Transformation Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and Infrastructure leaders

Should read this report to analyze consulting and transformation service providers' modernization and service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

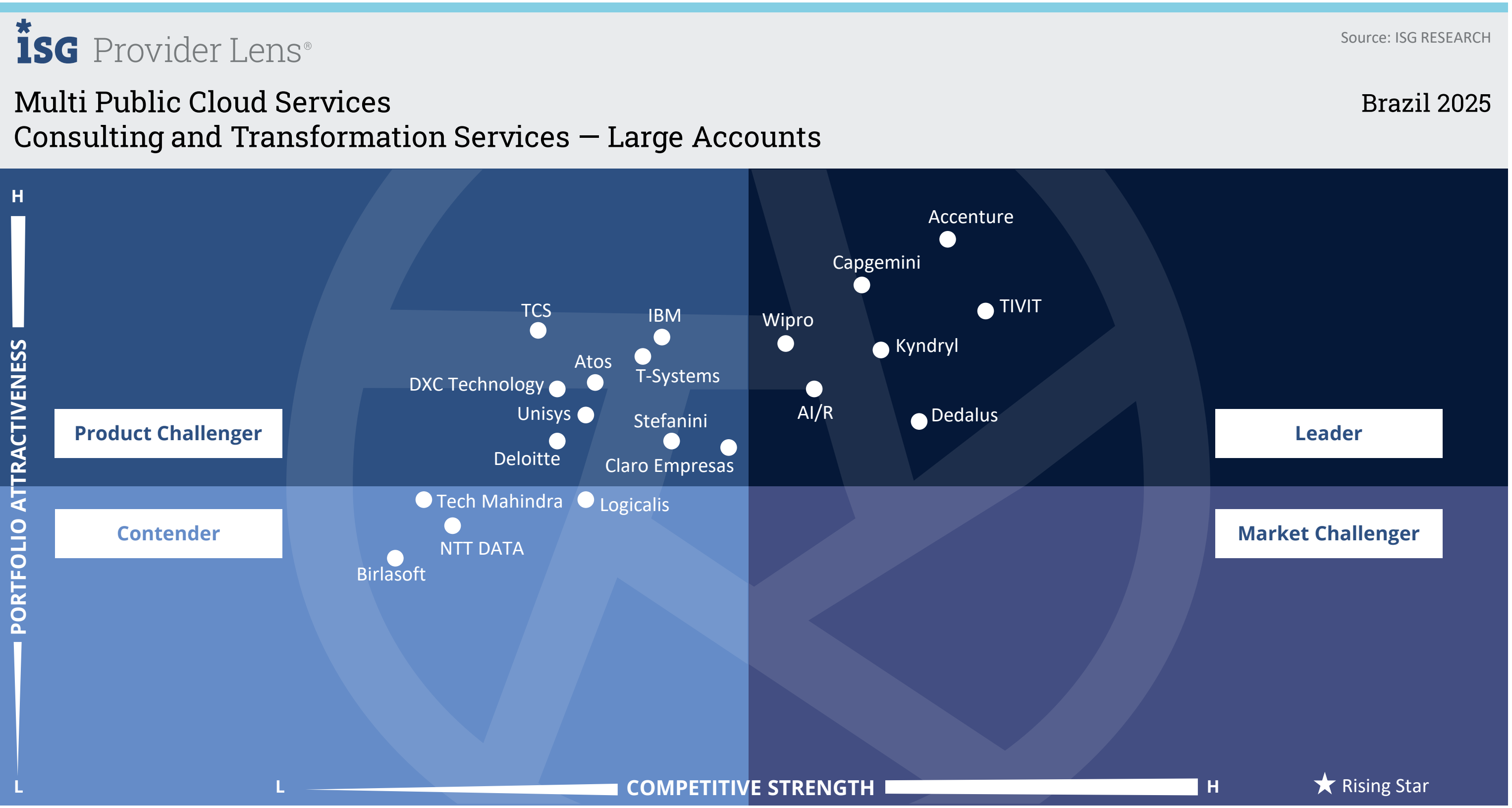
Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand Brazil's current landscape and partner ecosystem of consulting and transformation services. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

Digital transformation professionals

Should read the report to understand how adopting the public cloud can impact digital transformation initiatives. By aligning cloud initiatives with business objectives and employing the best practices in governance, security and management, organizations can successfully navigate their digital transformation journey.



This quadrant assesses **consulting service providers** that offer application modernization and data migrations **to public clouds,** transforming legacy data centers into modern digital platforms for **large accounts**.

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates providers that offer consulting and technical support services to modernize, optimize and transform enterprise IT environments through cloud adoption. These providers help clients navigate multicloud complexity, industry-specific demands and AI integration to achieve agility, resilience and scalability.

Top providers deliver the following.

- **Consulting services** such as:
  - Transformation road maps, business case development and workload modernization
  - Cloud-native strategy design (including APIs, containers and serverless computing)
  - Governance and financial planning aligned with FinOps and hybrid cloud models
- **Transformation services** such as:
  - Design, migration and configuration of cloud-native and AI-native architectures
  - Integration of DevSecOps, AIOps, GenAI and FinOps capabilities
- **Compliance and governance services** include:
  - Establishing policy frameworks and ensuring alignment with ESG standards
  - Creating essential guardrails to implement GenAI solutions by adhering to aligning with sovereignty and security requirements

Providers are assessed based on their ability to drive scalable, intelligent and sustainable cloud transformations through proprietary frameworks, AI-powered toolsets and vendor-agnostic architectures.

Eligibility Criteria

1. Have experience in multicloud transformation across **major industries**, including regulated sectors such as finance, healthcare and manufacturing
2. Design and implement cloud transformation strategies that integrate **cloud-native services** (for example, containers, serverless computing and APIs), **AIOps, FinOps and GenAI services**
3. Demonstrate **proven methodologies** for analyzing and optimizing complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation, documentation, knowledge retrieval, chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilize **AI assets, pre-trained models, ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

In cloud adoption and migration, a prevailing trend is the emphasis on business value and outcome-driven approaches. Organizations prioritize aligning their cloud strategies with overarching business goals, seeking innovations that deliver tangible benefits and streamline processes. This focus underscores the critical need to effectively integrate new technologies within existing business environments to maximize ROI.

Analytics, AI and ML are driving forces in realizing business value from cloud transformations. By incorporating predictive analytics, intelligent automation and enhanced customer interaction capabilities, these technologies enable providers to unlock new business opportunities within cloud environments. AI-driven insights allow organizations to optimize their operations, make informed decisions and deliver superior CX.

Automation and orchestration also play pivotal roles. Providers use advanced platforms to efficiently manage complex workloads, minimize human errors and achieve quicker deployment times.

Many providers prioritize application modernization as part of their cloud migration strategies. Transforming legacy systems into agile, cloud-native applications is key to enhancing functionality and ensuring compatibility with modern cloud infrastructures.

GenAI is emerging as a vital component of cloud strategies for some providers, particularly in automating complex tasks and modernizing applications. However, its adoption remains in the early stages across the industry, highlighting its potential and the ongoing evaluation of its applications in cloud transformations.

From the 40 companies assessed for this study, 20 qualified for this quadrant, with seven being Leaders.

accenture

Accenture offers end-to-end cloud migration services, focusing on business-driven strategies and leveraging partnerships to modernize applications and infrastructure, ensuring transformative results with innovative methodologies and minimal risk.

AI/R

AI/R offers a comprehensive transformation framework that automates processes, coupled with robust governance and compliance practices, while facilitating application modernization with AI-driven tools.

Capgemini

Capgemini's differentiation lies in its comprehensive multicloud strategies, which combine deep industry expertise with strategic hyperscaler partnerships to deliver tailored cloud migrations and modernizations.

dedalus

Dedalus distinguishes itself in the consulting and transformation space by offering large enterprises tailored, multicloud strategies that emphasize security, scalability and seamless integration across diverse IT environments.

kyndryl

Kyndryl sets its consulting and transformation services apart by incorporating Kyndryl Vital innovation workshops to codevelop unique solutions for client-specific needs. It leverages advanced automation to integrate public and private clouds.

TIVIT ALMAVIVA GROUP

TIVIT offers tailored strategies, supported by deep technical expertise and robust platforms to ensure secure and scalable transitions across public, private and hybrid cloud environments.

wipro

Wipro offers consulting and transformation services supported by its Cloud Studio platform, which features automated assessments and a digital repository of reusable assets, thereby enhancing time to market and cost efficiency

Consulting and Transformation Services — Midmarket

This report is valuable for service providers offering **Consulting and Transformation Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to analyze consulting and transformation service providers' modernization and service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

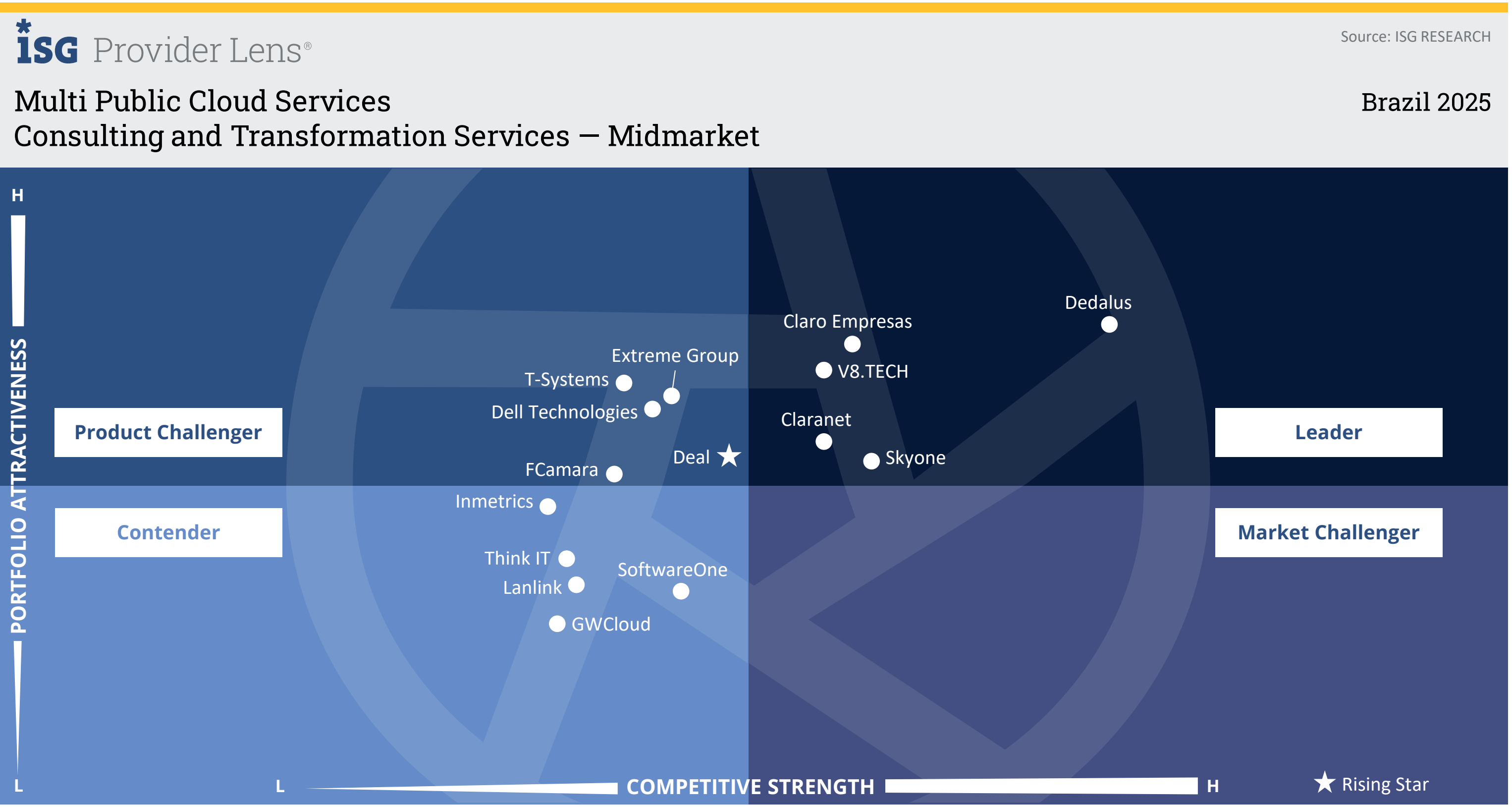
Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand Brazil's current landscape and partner ecosystem of consulting and transformation services. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

Digital transformation professionals

Should read the report to understand how adopting the public cloud can impact digital transformation initiatives. By aligning cloud initiatives with business objectives and employing the best practices in governance, security, and management, organizations can successfully navigate their digital transformation journey.



This quadrant assesses **consulting service providers** that offer platform modernization and data migrations **to public clouds**, transforming legacy data centers into modern digital platforms for **midmarket clients**.

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates providers that offer consulting and technical support services to modernize, optimize and transform enterprise IT environments through cloud adoption. These providers help clients navigate multicloud complexity, industry-specific demands and AI integration to achieve agility, resilience and scalability.

Top providers deliver the following.

- **Consulting services** such as:
  - Transformation road maps, business case development and workload modernization
  - Cloud-native strategy design (including APIs, containers and serverless computing)
  - Governance and financial planning aligned with FinOps and hybrid cloud models
- **Transformation services** such as:
  - Design, migration and configuration of cloud-native and AI-native architectures
  - Integration of DevSecOps, AIOps, GenAI and FinOps capabilities
- **Compliance and governance services** include:
  - Establishing policy frameworks and ensuring alignment with ESG standards
  - Creating essential guardrails to implement GenAI solutions by adhering to aligning with sovereignty and security requirements

Providers are assessed based on their ability to drive scalable, intelligent and sustainable cloud transformations through proprietary frameworks, AI-powered toolsets and vendor-agnostic architectures.

Eligibility Criteria

1. Have experience in multicloud transformation across **major industries**, including regulated sectors such as finance, healthcare and manufacturing
2. Design and implement cloud transformation strategies that integrate **cloud-native services** (for example, containers, serverless computing and APIs), **AIOps, FinOps and GenAI** services
3. Demonstrate **proven methodologies** for analyzing and optimizing complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation, documentation, knowledge retrieval, chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilize **AI assets, pre-trained models, ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

Cloud consulting and transformation service providers emphasize digital transformation, pursuing efficiency, scalability and the ability to harness advanced technology to remain competitive. Providers focus on comprehensive cloud transformation services covering the entire migration journey, from initial strategy formulation to continuous operations in multicloud environments. As firms shift from traditional IT infrastructures to cloud-based solutions, the demand for expertise in handling hybrid and multicloud setups has surged, reflecting a need for flexibility and avoiding vendor lock-in.

Security remains at the forefront of cloud adoption strategies. Firms are leveraging sophisticated automation tools to enhance cloud infrastructure while ensuring robust security measures are in place to comply with regulatory standards. Automation is also central to achieving operational excellence, with providers employing IaC and DevOps practices to optimize processes and reduce deployment times. Incorporation of AI and ML to enhance cloud operations, predictive analytics and threat protection is also a clear trend in the market.

A few forward-thinking providers integrate GenAI to modernize applications and create innovative cloud-native solutions, providing businesses with enhanced performance, reliability and agility. This GenAI integration reflects an industry shift toward leveraging AI for operational efficiency and offering cutting-edge, value-added services. As the landscape continues to evolve, service providers are differentiating themselves by specializing in application modernization, security operations and AI-driven analytics, catering to the nuanced needs of their clients.

From the 40 companies assessed for this study, 15 qualified for this quadrant, with five being Leaders and one Rising Star.

claranet

Claranet offers extensive expertise in multicloud and hybrid cloud, a structured migration methodology and a robust global certification set that ensures secure and efficient digital transitions.

Claro Empresas

Claro Empresas uses a well-structured migration framework and a cloud-agnostic strategy, providing clients with flexibility. It provides tailored solutions and continuous optimization post-migration.

dedalus

Dedalus stands out in consulting and transformation for midmarket clients by delivering personalized multicloud strategies that focus on flexibility, cost efficiency and improved integration within existing IT environments.

sky.one

Skyone offers a comprehensive cloud platform and managed services for modernizing and migrating legacy applications to cloud environments. Its unique solution enables client/server applications to run on any cloud infrastructure.

V8.TECH

V8.TECH focuses on innovative multicloud solutions, providing application modernization and intelligent automation to deliver robust transformations that enhance agility, compliance and operational efficiency.

Deal

Deal (Rising Star) focuses on automated application refactoring with GenAI. It acquired O2B in 2024, expanding its capabilities in automating cloud migrations, including data and applications.

Managed Services — Large Accounts

This report is valuable for service providers offering **Managed Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to analyze managed service providers' modernization and service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

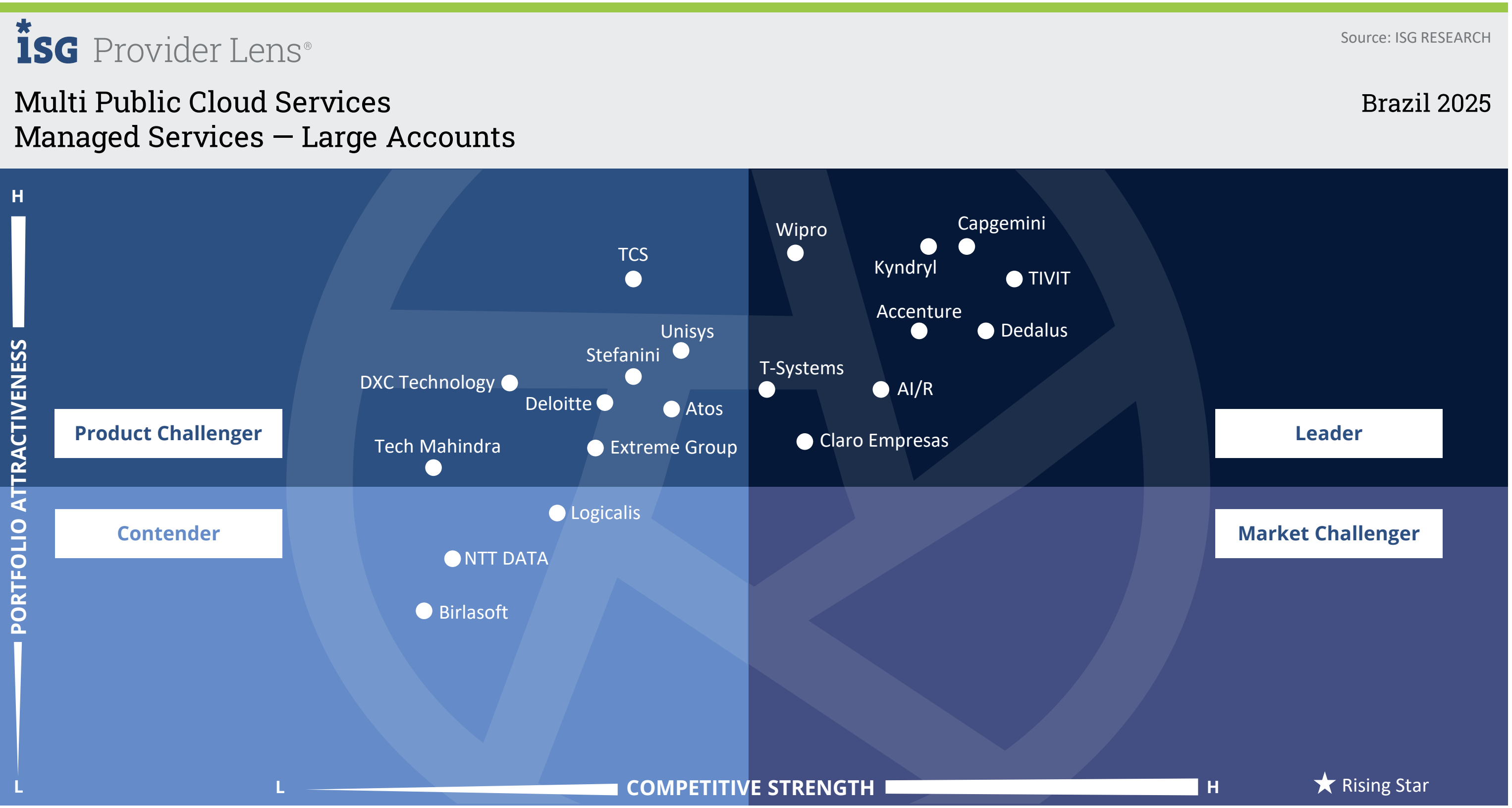
Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of managed services in Brazil. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

Digital transformation professionals

Should read the report to understand how public cloud MSPs can contribute to ongoing digital transformation initiatives by offering specialized expertise, streamlined operations and scalable solutions that enable organizations to leverage cloud technologies effectively, enhance agility, reduce operational costs and drive innovation, while providing support in areas such as security, compliance and performance management.



This quadrant assesses **MSPs** that support two or more public clouds, offering automation and value-added services, including **monitoring, AIOps**, operations **and optimization** services, for **large accounts**.

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates providers delivering AI-native and automation-first managed services for complex, hybrid and multiple public cloud environments. These providers focus beyond routine cloud operations to orchestrate cost-efficient, secure and compliant cloud ecosystems integrated with GenAI, agentic automation and FinOps-as-code capabilities.

Services typically include the following:

- AI-native management platforms supporting GenAI workloads and AI-driven observability
- Advanced FinOps integration, including dynamic workload placement, autonomous rightsizing and outcome-linked financial optimization
- Real-time multicloud monitoring, cloud sovereignty control and predictive analytics to ensure compliance, performance and sustainability
- Automated provisioning, DevOps pipeline implementation, container and serverless orchestration, and cloud-native security integration
- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in **agentic AI, SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognized **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualized** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate** FinOps and incident response (preferred)

Observations

In the evolving landscape of IT outsourcing and managed services, a prevailing market trend is the use of GenAI to drive innovation and operational efficiency. Providers are increasingly adopting GenAI to enhance their service portfolios, enabling seamless automation, improved incident management and predictive analytics within multicloud environments. By embedding GenAI, companies foster autonomous operations that are self-configuring, self-monitoring, self-healing and self-optimizing. This trend allows for rapid adaptation to dynamic workloads and the implementation of advanced AI frameworks, significantly reducing resolution times and enhancing overall system resilience.

Providers utilize GenAI to automate operational processes and create sophisticated AI-driven applications that enable clients to optimize performance and achieve bespoke solutions tailored to their business needs. AI agents can write APIs and automation scripts, while GenAI assistants help support analysts in reducing resolution time, optimizing architecture design and configuring cloud resources rapidly.

The emphasis on GenAI also aligns with the growing demand for real-time compliance. Providers leverage policy-as-code frameworks and AI flows to ensure automated configuration and security audits, facilitating robust compliance.

Overall, the integration of GenAI within managed services is reshaping the market, pushing boundaries in automation, security and innovation. Providers are capitalizing on this trend to build scalable, adaptable and secure IT infrastructures that meet current needs and prepare for future demands.

From the 40 companies assessed for this study, 20 qualified for this quadrant, with nine being Leaders.

accenture

Accenture integrates advanced AIOps frameworks with strategic cloud partnerships, cocreating tailored solutions that leverage GenAI and ML for automation and operational analytics for complex IT environments.

AI/R

AI/R uses agentic AI and AIOps for automated, real-time compliance and optimization. It uses a robust AI platform and hybrid tooling to enforce policy-as-code frameworks, ensuring efficient, proactive and scalable resource management.

Capgemini

Capgemini differentiates its cloud managed services by integrating robust security protocols with intelligent operations, leveraging AI and ML to optimize processes while ensuring compliance and flexibility across diverse business models.

Claro Empresas

Claro Empresas integrates robust network connectivity and cloud services with comprehensive management, augmented by cybersecurity measures, IoT support and emerging GenAI solutions.

dedalus

Dedalus has a mature multicloud strategy, integrating automation and advanced monitoring to deliver scalable solutions across four clouds: AWS, Microsoft Azure, Google Cloud and OCI. It offers more cloud options than most competitors.

kyndryl

Kyndryl emphasizes automation, full-stack observability and robust cloud governance, enabling clients to optimize performance, cost and scalability effectively across diverse multicloud environments.

TIVIT provides a comprehensive managed service portfolio with security measures and dedicated expert teams, ensuring effective management that emphasizes flexibility, scalability and robust incident response capabilities.

T-Systems uses advanced automation across AWS, Microsoft Azure and Google Cloud. It integrates comprehensive governance, AI and GenAI to provide secure, efficient and compliant cloud management.

Wipro leverages a robust fabric approach that integrates advanced AI, automation and industry-specific solutions, promoting rapid innovation, resilient operations and tailored solutions.

Managed Services — Midmarket

This report is valuable for service providers offering **Managed Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to analyze managed service providers' modernization and service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

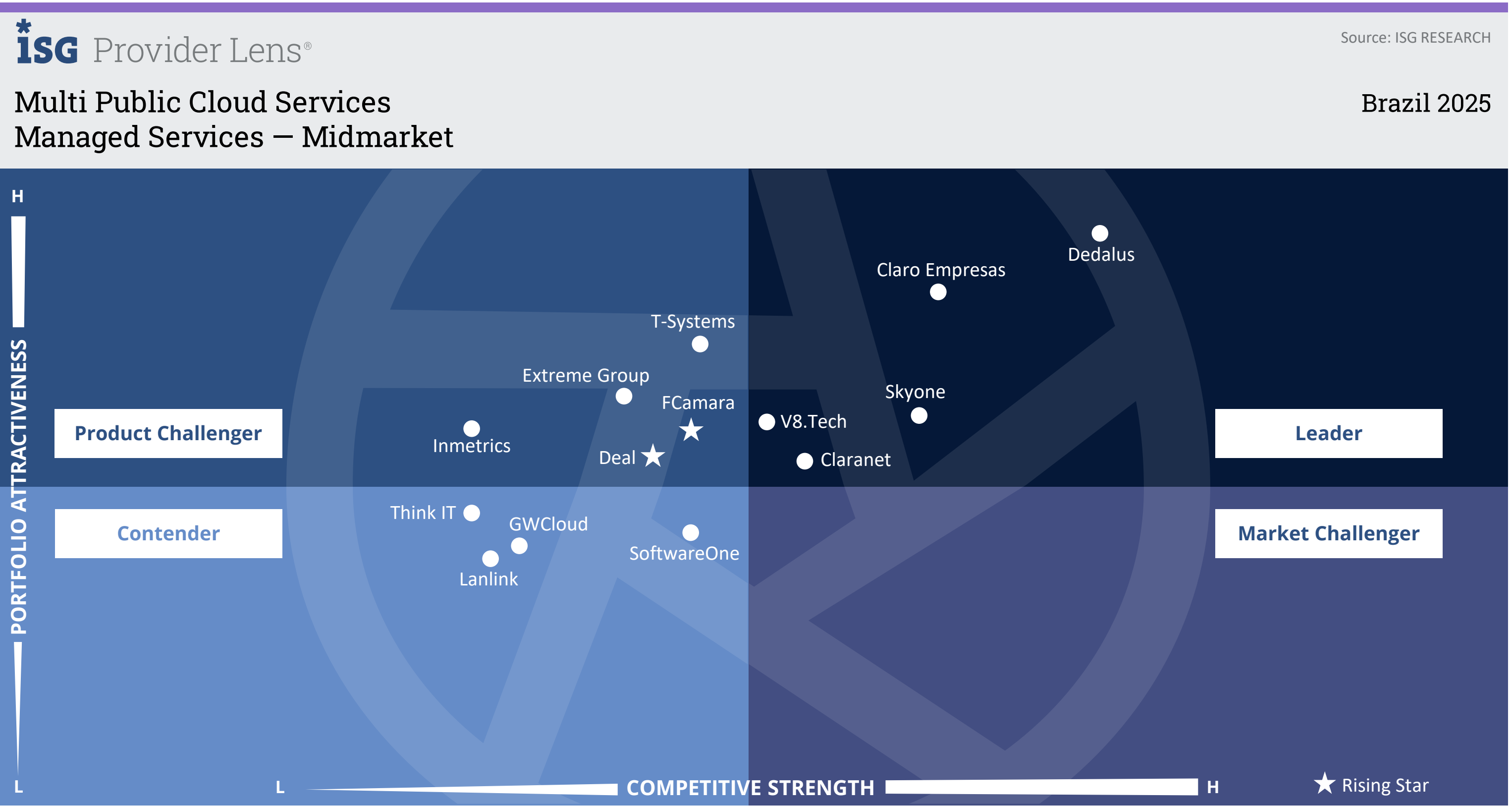
Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of managed services in Brazil. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

Digital transformation professionals

Should read the report to understand how public cloud MSPs can contribute to ongoing digital transformation initiatives by offering specialized expertise, streamlined operations and scalable solutions that enable organizations to leverage cloud technologies effectively, enhance agility, reduce operational costs and drive innovation, while providing support in areas such as security, compliance and performance management.



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

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates providers delivering AI-native and automation-first managed services for complex, hybrid and multiple public cloud environments. These providers focus beyond routine cloud operations to orchestrate cost-efficient, secure and compliant cloud ecosystems integrated with GenAI, agentic automation and FinOps-as-code capabilities.

Services typically include the following:

- AI-native management platforms supporting GenAI workloads and AI-driven observability
- Advanced FinOps integration, including dynamic workload placement, autonomous rightsizing and outcome-linked financial optimization
- Real-time multicloud monitoring, cloud sovereignty control and predictive analytics to ensure compliance, performance and sustainability
- Automated provisioning, DevOps pipeline implementation, container and serverless orchestration, and cloud-native security integration
- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in a**gentic AI, SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognized **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualized** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate** FinOps and incident response (preferred)

Observations

In the rapidly evolving cloud services market, automation emerges as a central pillar, driving operational efficiency enhancements across managed service providers. AIOps is a common theme that supports the seamless management of cloud resources.

Multicloud management requires service integration. Providers offer sophisticated tools and services that unify diverse clouds with APIs and IaC. This integration ensures seamless operations across different platforms, enhancing scalability, flexibility and adaptability. By promoting interoperability among various cloud ecosystems, providers help clients harness the benefits of multiple cloud platforms, thus driving technological advancements and reducing dependence on single vendors. FinOps has become essential in multicloud. Providers focus on detailed financial insights and cost optimization strategies, assisting clients in managing expenditures with transparency and precision.

While automation, multicloud integration and FinOps dominate the narrative, sustainability lacks focus among service providers. Few providers explicitly integrate sustainability into their service offerings, indicating an opportunity for specialization.

The increasing adoption of GenAI by a select number of providers highlights an emerging trend toward more innovative and intelligent service delivery. As these trends unfold, providers that integrate sustainability and GenAI into their offerings will likely stand out in an increasingly competitive market.

From the 40 companies assessed for this study, 14 qualified for this quadrant, with five being Leaders and two Rising Stars.

claranet

Claranet integrates security, FinOps and AIOps in managed services, following its CloudOps methodology. It uses automation extensively to support thousands of clients in the midmarket.

Claro Empresas

Claro Empresas offers comprehensive expertise in cloud architecture, security, IoT and data services, providing a unified management platform with AI-driven automation.

dedalus

Dedalus is experienced in offering multicloud services, integrating automation and advanced monitoring to deliver tailored, scalable solutions with security, AIOps, FinOps, data services and performance management.

sky.one

Skyone provides advanced automation with Autosky and integration with Studio to manage cloud environments efficiently, enhance operational workflows and ensure robust data security and compliance.

V8.TECH

V8.TECH manages cloud environments through intelligent automation and observability, enhancing resource optimization, security and regulatory compliance across public and private cloud platforms.

Deal

Deal (Rising Star) has long-standing experience in application services. In 2024, it acquired O2B to extend its capacity in cloud managed services. It uses AIOps for incident management and GenAI for user support, offering a complete cloud portfolio.

FCamara

FCamara (Rising Star) provides comprehensive cloud management solutions with integrated automation and AI capabilities, leveraging IBM technology to differentiate in FinOps, GenAI and analytics.

FinOps Services and AI-driven Optimization

Who Should Read This Section

This report is valuable for service providers offering **FinOps Services and AI-Driven Optimization** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

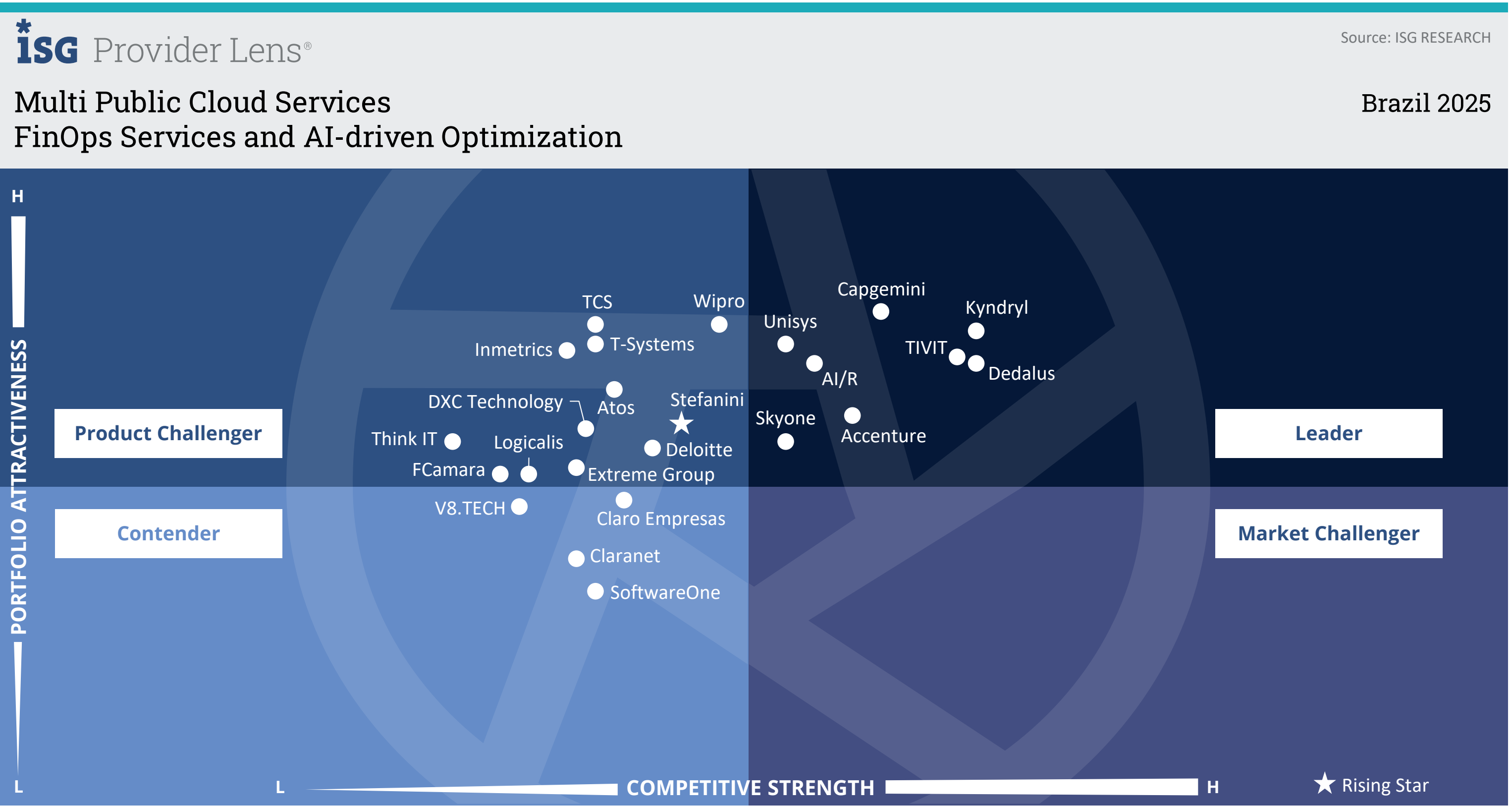
Should read this report to analyze FinOps services and AI-driven optimization service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of FinOps services and AI-driven optimization in Brazil. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant assesses service providers that offer comprehensive **FinOps services**, which extend beyond **cost control**, to enable effective **budget management** with continuous cloud resource **rightsizing and waste reduction** for clients.

Pedro L. Bicudo Maschio

Definition

This quadrant assesses providers that specialize in enabling intelligent, automated and predictive cost optimization and governance across multiple public cloud environments by leveraging FinOps frameworks and principles, along with AI technologies. These providers use LLMs, AI agents and predictive analytics to orchestrate cloud financial optimization in real time, delivering tangible business value beyond simple cost savings.

Leading providers deliver FinOps services through the following:

- AI-native FinOps portals that integrate usage and pricing telemetry, GenAI-based cost forecasting and business-aligned reporting
- LLM-orchestrated automation for budget enforcement, anomaly detection, policy-based approvals and dynamic allocation
- Predictive optimization engines to forecast cloud usage trends, rightsize resource portfolios and simulate cost impacts of workload scaling
- Autonomous remediation of inefficiencies through prompt-based spend insights, explainability frameworks and bias detection in optimization decisions
- Integrated chargeback/showback strategies that empower business units with cost transparency and accountability
- FinOps policy governance, covering tagging compliance, approval workflows, access policies and sustainability-aware budget recommendations
- Organizational change management (OCM), including FinOps capability building, federated governance models and cross-functional operating models to sustain financial discipline

Eligibility Criteria

1. Showcase measurable outcomes from **AI-enhanced FinOps** optimization across at least three major hyperscalers (AWS, Microsoft Azure, Google Cloud and OCI)
2. Have **FinOps-certified practitioners** with experience deploying and operating across all three pillars of the FinOps framework — inform, optimize and operate
3. Possess expertise in **agentic AI** or **LLM-based orchestration** to drive near real-time cost governance actions, not limited to dashboarding
4. Support **prompt-based spend insights** with contextual explainability and policy-driven financial controls
5. Support **SLA-backed cost-saving targets, dynamic budgeting** and **adaptive financial operations**
6. Integrate FinOps practices within client organizations through **training, change management and internal cloud center of Excellence (CoE)**
7. Demonstrate **case-based evidence** of **financial outcomes** and optimization beyond traditional reporting capabilities
8. Empower clients with OCM for **sustainable FinOps** practices (preferred)

Observations

The FinOps market is experiencing significant evolution, marked by a convergence of data analytics, LLMs and cloud operations. A predominant trend is the integration of advanced AI and automation, a staple across all major service providers. This move toward AI-driven solutions supports precise cost management and operational efficiency by offering real-time insights, detecting cost anomalies, providing predictive spend forecasting and implementing automated corrective measures. Such capabilities empower organizations to maintain financial control while optimizing resource utilization.

There is a noticeable shift toward establishing comprehensive governance and compliance frameworks in the FinOps domain. Providers are embedding compliance as an integral part of their frameworks, ensuring a balance of cost savings and risk management. This holistic approach integrates continuous monitoring and regular security assessments to safeguard data integrity.

While not universally adopted across all providers, sustainability monitoring is emerging as a consideration within the FinOps framework. Some providers incorporate sustainability principles to reduce environmental impact through intelligent cloud operations.

GenAI is emerging to support FinOps decisions with real-time, predictive insights. However, creating a robust GenAI solution requires an equally robust knowledge base and historical cloud spending data, which few enterprises possess today.

From the 40 companies assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture employs a holistic framework that integrates people, processes and technology to promote financial accountability, foster proactive governance and leverage a multicloud dashboard with AI-driven insights for comprehensive cloud cost and resource optimization.

AI/R

AI/R sets itself apart in FinOps services by harmonizing financial accountability with operational workflows through a GenAI-assisted governance framework, real-time analytics and strategic technology integration.

Capgemini

Capgemini approaches FinOps services by integrating AI-driven cost optimization and sustainability principles, providing comprehensive financial visibility and compliance while minimizing environmental footprint.

dedalus

Dedalus leverages the Midas and Argos platforms to offer sophisticated cost governance, real-time insights and proactive carbon footprint management, ensuring optimized cloud resource utilization.

kyndryl

Kyndryl integrates AI and ML technologies to generate detailed cost insights and optimization strategies while fostering financial accountability across hybrid and multicloud environments.

sky.one

Skyone provides comprehensive cloud cost management through its Autosky platform, utilizing AI analytics to deliver actionable recommendations, visibility into spending and proactive cost optimization.

TIVIT ALMAVIVA GROUP

TIVIT provides FinOps services and compliance monitoring with Cloud Sensor, a proprietary platform. It offers local billing solutions and detailed financial insights within multicloud environments.

Unisys demonstrates robust FinOps capabilities by optimizing cloud financial management, ensuring accountability and effective resource utilization. It shows a strong commitment to compliance and security.

Stefanini (Rising Star) offers a robust FinOps service portfolio with advanced AI integration, tailored client solutions and a focus on sustainability, providing metrics and traceability for ESG compliance.

Leader

“Unisys instills a disciplined approach to cloud finances, enabling organizations to use automation and analytics to make informed decisions that align with their strategic goals.”

Pedro L. Bicudo Maschio

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has a significant presence in Brazil, one of the company’s largest markets in Latin America. Its offerings include cloud, applications, data, AI, enterprise computing, digital workplace and cybersecurity. Its Cloud Financial Analysis and Optimization service provides a structured, data-driven framework to maximize business value by fostering financial accountability and collaboration between engineering, finance and business teams.

Strengths

Increased visibility and control: Unisys begins with a comprehensive cloud assessment to evaluate a client’s maturity in its existing financial operations. This assessment drives the development of strategic road maps tailored to enhance the organization’s cloud ecosystem. FinOps helps pinpoint inefficiencies and curtail unnecessary spending across multiple cloud service providers by delivering clarity in resource allocation and employing automated cost optimization strategies. The company also has a strong commitment to compliance and security.

Real-time insights into cloud expenditures: Unisys provides tailored recommendations and automated corrective measures to rightsizing cloud resources, ensuring clients pay for only what they need. The automation extends to cost forecasting and budget management, empowering businesses to plan with precision and foresight.

End-to-end integration: Unisys integrates governance principles, security tools and service platforms such as ServiceNow into its operations. Its customizable FinOps solution identifies underutilized resources, automatically initiates requests for their removal and executes these changes without human intervention while adhering to an organization’s change management protocols, significantly reducing the time and effort required to manage cloud resources manually.

Caution

Unisys could enhance its FinOps solution scope by incorporating industry and peer cloud spending benchmarks, implementing spending controls for software as a service (SaaS) and optimizing software licensing optimization through software asset management process.

Hyperscale Infrastructure and Platform Services

This report is valuable for service providers offering **Hyperscale Infrastructure and Platform Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

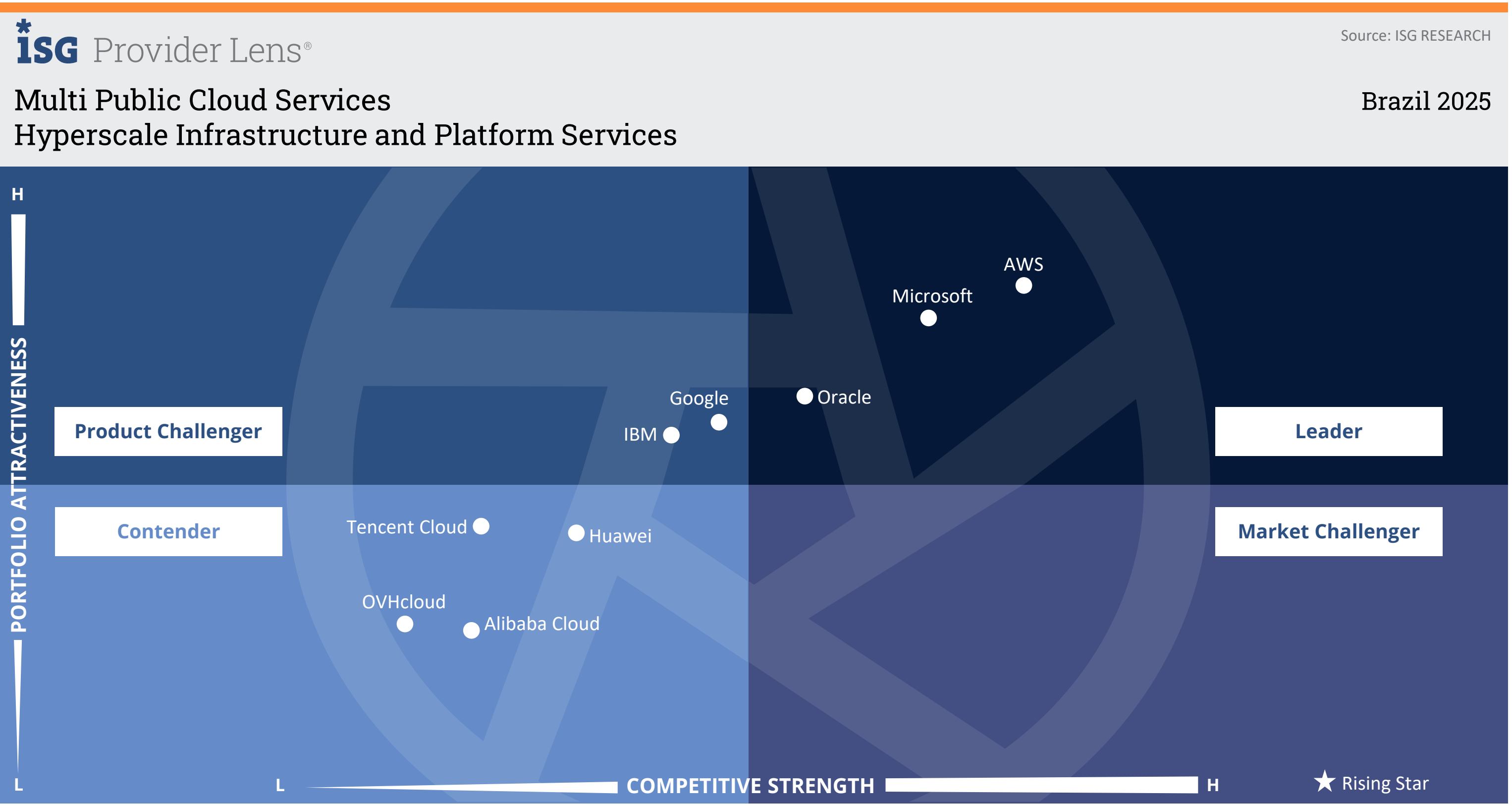
Should read this report to analyze hyperscale infrastructure and platform service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand Brazil's current landscape and partner ecosystem of hyperscale infrastructure and platform services. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



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

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates hyperscale cloud providers that deliver enterprise-grade IaaS and PaaS capabilities through scalable, resilient and AI-native cloud platforms. These providers are foundational enablers of digital transformation and modern application development, offering infrastructure and platform services designed to support high-performance computing, GenAI workloads and multiagent system orchestration at a global scale.

Leading hyperscalers deliver extensive cloud capabilities through the following:

- Self-service IaaS platforms for compute, memory, storage, networking and high-throughput processing, including HPC clusters, ML-optimized instances and GPU/TPU acceleration
- Modern PaaS environments supporting containerization, event-driven functions, databases, DevOps pipelines, backup and DR automation, and orchestration of AI and ML tools and microservices
- AI-native cloud platforms with integrated access to foundational models, fine-tuning pipelines, multimodal GenAI tools and open model registries (LLMs, vector DBs and RAG frameworks)
- Runtime environments and SDKs for creating cloud-native, edge-aware and agent-centric applications, including support for infrastructure-as-code (IaC) practices, serverless computing and autonomous software agents across hybrid/multicloud deployment.
- Integrated marketplaces with curated third-party applications, GenAI agents, data services and industry-specific blueprints
- Sovereign-by-design architecture, providing granular data access control, encryption and compliance with local data residency laws, along with support for regulated industries
- Sustainable cloud infrastructure, backed by clean energy commitments and carbon-reduction targets
- Global scalability, featuring high-bandwidth connectivity and extensive availability zones

Eligibility Criteria

1. Offer a comprehensive IaaS portfolio, including **ML-** and **HPC-optimized** compute instances, container services, serverless platforms, backup solutions, storage tiering and network orchestration
2. Showcase **dedicated infrastructure for AI and ML**, including specialized silicon, GPU/TPU clusters, access to foundational LLMs and managed AI infrastructure services
3. Have expertise in orchestrating **agent-based computing** across cloud regions, supporting real-time, autonomous workloads
4. Offer **low-latency, high-bandwidth** and **sovereign** environments to orchestrate agents across public cloud environments
5. Offer transparent and flexible **billing models**, including on-demand, reserved, spot and sustainable pricing tiers with public pricing disclosures
6. Ensure compliance with global and regional **certification standards** such as ISO, SOC, GDPR and C5 and implement advanced cloud security controls
7. Have **an extensive partner ecosystem**, offering training, developer enablement, certification programs and coinnovation initiatives to accelerate cloud adoption and enhance maturity
8. Offer **clean energy** and **carbon-reduction** programs
9. Provide support for IaC and **serverless computing** in combination with **automated provisioning**, event triggering and failover

Observations

AI is deeply embedded in the fabric of cloud computing, moving beyond a simple service to become the core driver of automated operations, enhanced security and predictive analytics. A widespread adoption of multicloud and hybrid cloud enables enterprises to avoid vendor lock-in and leverage the best services from various providers, including GenAI from many sources.

Real-time analytics require low latency, driving the adoption of edge computing, which is integrated with major cloud data centers. Edge computing on-premises is an extension of cloud infrastructures, utilizing the same tools and software, including serverless computing, block storage, database as a service, AI and LLMs.

Ensuring sustainability and cloud sovereignty is a growing concern in Brazil. All cloud data centers use clean and renewable energy from hydroelectric, solar and wind sources. Still, the push for zero carbon emissions drives cloud data centers to use biodiesel for emergency power generators (no-breaks).

Serverless computing is gaining popularity, enabling companies to execute functions in the cloud without managing traditional server infrastructure. This advancement streamlines operations and reduces costs by automatically scaling resources up or down based on demand, offering significant advantages in efficiency and agility.

Security remains a central focus, with enhanced measures to protect sensitive data and ensure compliance with stringent regulations. Cloud providers are adopting more advanced encryption, identity management solutions and zero-trust security models to defend against sophisticated cyber threats.

From the 40 companies assessed for this study, nine qualified for this quadrant, with three being Leaders.

aws

AWS offers the broadest portfolio and operates three availability zones in São Paulo State and a local zone in Rio de Janeiro. It hosts several digital banks and shows robust growth.

Microsoft

Microsoft Azure is the preferred platform for heavy Microsoft technology users such as enterprises using .NET applications, SQL Server databases, Teams and Microsoft 365.

Oracle

Oracle benefits from its loyal client base that can upgrade legacy databases to Oracle Exadata on OCI. It has enhanced its AI portfolio, offering a more efficient choice.

SAP HANA Infrastructure Services

This report is valuable for service providers offering **SAP HANA Infrastructure Services** in **Brazil** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

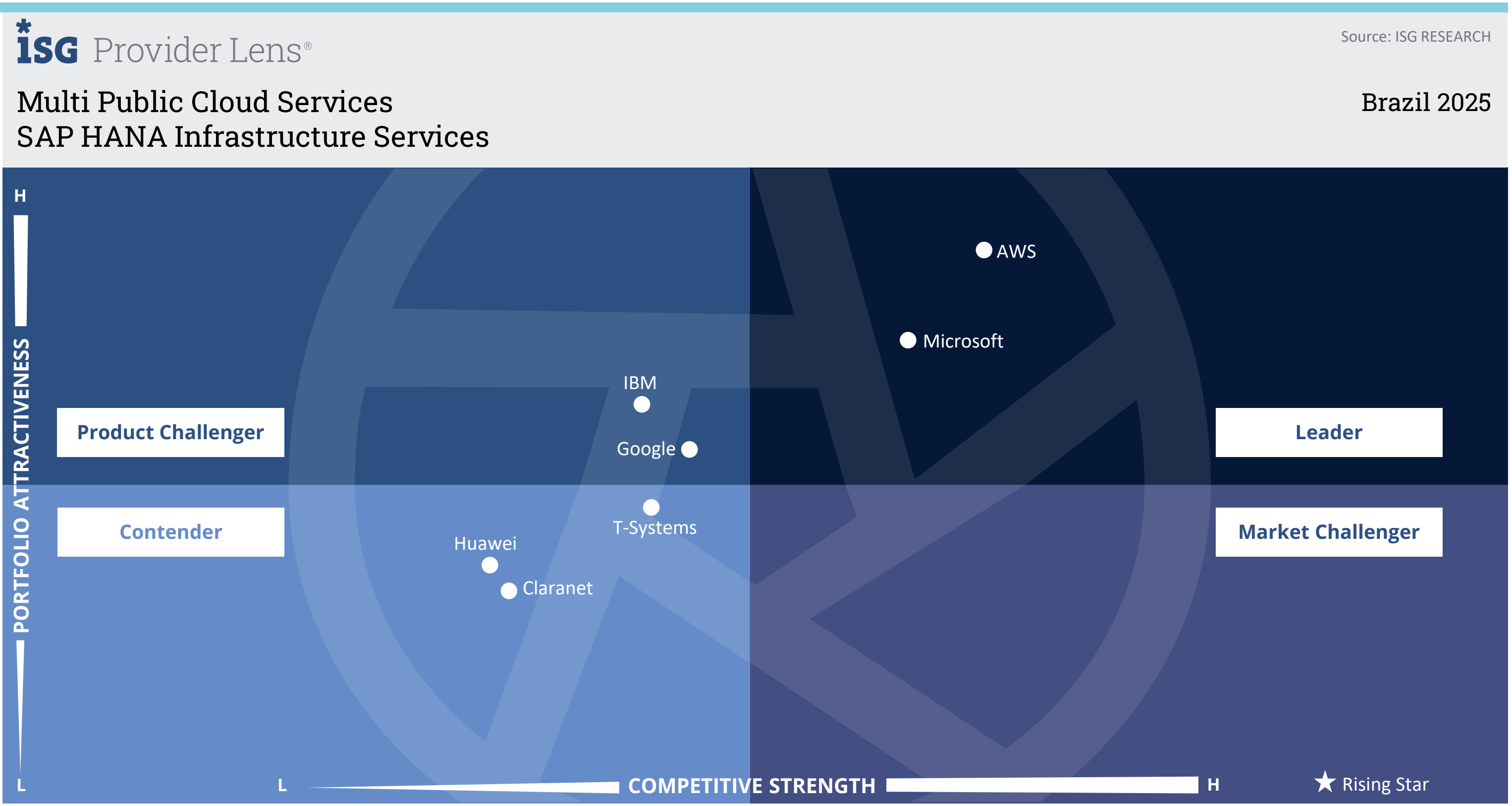
Should read this report to analyze SAP HANA infrastructure service capabilities, assessing which providers in Brazil offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise, and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of SAP HANA infrastructure services in Brazil. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



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

Pedro L. Bicudo Maschio

Definition

This quadrant evaluates public cloud IaaS providers — both global hyperscalers and regional infrastructure specialists — that offer certified, scalable and SAP-optimized platforms for hosting SAP S/4HANA, SAP HANA database and related workloads. These providers offer robust infrastructure services aligned with SAP's performance, scalability and compliance standards, while increasingly integrating AI-driven tools to accelerate migration, streamline operations and enhance lifecycle management.

Key service capabilities include the following:

- SAP-certified infrastructure components, encompassing memory-intensive VMs with over 6 TB of capacity, flexible storage tiers, high-throughput networking and disaster recovery architectures across multiple regions or availability zones
- AI-powered assistants for SAP landscape sizing, architecture design, cost simulation, migration planning and dynamic configuration recommendations
- Automated operations, including provisioning, service orchestration, backup/restore, patching and performance optimization
- Integration with SAP-native tooling, including SAP LaMa, SAP Data Hub and certified third-party automation tools
- Support for both RISE with SAP and custom SAP hosting models, including advisory services for coexistence, hybrid cloud strategies and SAP licensing optimization
- Partner ecosystems, encompassing certified SAP service providers, enabling end-to-end transformation, including migration, application modernization and platform operation

Eligibility Criteria

1. Offer **SAP-certified compute and memory-optimized VMs**, with scalability to support high-growth workloads and SAP HANA instances in various configurations
2. Have regional **data center presence** that ensures data locality and compliance with local regulations and certifications specific to industries such as finance, healthcare and the public sector
3. Support diverse **commercial models**, including on-demand, reserved and dedicated capacity options, along with transparent and competitive pricing
4. Have automated **backup** and **restore capabilities** integrated with SAP application consistency
5. Provide low-cost, long-term **storage** tiers for backup, archives and system copies
6. Actively participate in or ensure alignment with the **RISE with SAP program** and support migration to or from RISE architectures
7. Demonstrate structured **SAP migration methodologies** and **certified frameworks** to ensure a seamless transition from on-premises or legacy environments
8. Enable **AI-driven monitoring**, resource **optimization** and operational **analytics**

Observations

The mainstream maintenance for SAP ECC 6.0 ends in 2027, although the older enhancements, such as the EHP 0-5 package, end this year. The market expects an acceleration of upgrades to SAP S/4HANA on the cloud to avoid running SAP ECC without vendor support. ISG estimates that about half of the SAP ECC clients have not started their upgrade process. SAP offers an extended maintenance option at a cost, but the company aims to migrate all of its ERP clients to the S/4HANA platform on the cloud as soon as possible.

Hyperscalers aim to capitalize on clients' rush to upgrade to S/4HANA. Upgrades are complex and take months to complete, and moving from one cloud to another is cumbersome. Hyperscalers aim to capture this opportunity early, when enterprises initiate upgrades, as such clients will exhibit high retention. SAP ERP is a core business application that interfaces with all other applications within an enterprise; therefore, SAP clients often consume other cloud services at large.

From the 40 companies assessed for this study, seven qualified for this quadrant, with two being Leaders.

aws

AWS offers automation and tools that differentiate it from the competition. It reduces the risk in complex cloud migrations, helping clients achieve benefits rapidly.

Microsoft

Microsoft Azure offers seamless integration with Microsoft products. Enterprises benefit from enhanced collaboration using Teams and easy-to-use analytics with the Power Platform.

Appendix

The ISG Provider Lens® 2025 – Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the Brazil market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Heiko Henkes

Lead Author:
Pedro L. Bicudo Maschio

Editor:
Upasana Hembram

Research Analyst:
Gabriel Sobanski

Data Analysts:
Sachitha Kamath and Lakshmi Kavya Bandaru

Project Manager:
Manikanta Shankaran

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

The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of November 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

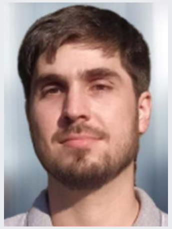
1. Definition of Multi Public Cloud Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience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

Author

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.



Enterprise Context and Overview Analyst

Gabriel Sobanski
Research Analyst

Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on ServiceNow Ecosystem, Salesforce Ecosystem, Microsoft Ecosystem, Cybersecurity Solutions and Services, SAP Ecosystem, Public Cloud, Private Hybrid Cloud Data Center Services, Future of Work, AWS Ecosystem and Oracle Ecosystem. He supports the lead analysts in the research process and co-authors the global summary report with market trends and insights.

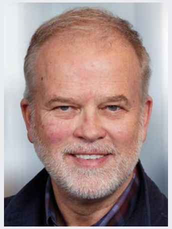
Gabriel also develops content from an enterprise perspective. Gabriel has helmed his current role since 2021. Prior to this role, he has worked as an IT consultant, where he acquired experience and technical capabilities in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise includes industry, logistics and market research.

Study Sponsor

Heiko Henkes
Director and Principal Analyst

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.



IPL Product Owner

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

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

Now as a 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. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

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

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

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

ISG

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

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

For more information, visit isg-one.com.

ISG Provider Lens®

DECEMBER, 2025

REPORT: MULTI PUBLIC CLOUD SERVICES