

AI-driven ADM Services

Evaluating application service providers' AI-enabled offerings, capabilities and differentiators

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A disruptive year for application services

This ISG Provider Lens® study, AI-driven ADM Services, evaluates the competitive landscape for providers in Brazil in 2026. The research covers the following quadrants: Application Development Outsourcing; Application Development Projects; Application Managed Services — GSIs; Application Managed Services — SIs; Application Quality Assurance; and Continuous Testing Specialists, assessing providers' capabilities, market positioning, and execution across advisory, implementation, and managed services within the defined scope of the study.

Market Context

Brazil's ADM market is being reshaped by the rapid operationalization of agentic AI across build and run, but adoption is bounded by local governance, data protection and procurement realities. This report shows multi-agent automation moving into the

software development lifecycle (SDLC) and application management with approval gates, audit trails and token-level FinOps. This is happening as inflation pressures ease relative to 2024–2025, and CIOs reallocate savings from automation to fund modernization rather than expand headcount.

Regulatory guardrails elevate governance-

by-design: The General Data Protection Law (LGPD) drives stricter controls over training data, prompt content and AI output logging, especially in financial services and the public sector. Enterprises require traceability for all AI-assisted artifacts and prefer private or sovereign model execution when sensitive data is involved.

Procurement and contracting inertia affect

deal models: Public entities and many large private enterprises remain tethered to hours- or squad-based contracts due to auditability requirements and legacy approval workflows. This slows the transition to output-based pricing, even when AI materially increases productivity.

Brazil ADM shifts
from **labor to
governed
AI agents and
outcome metrics**
as DORA rises.



Cloud and data platform standardization accelerates AI industrialization: This research finds stronger adoption of secure CI/CD, internal developer platforms and unified observability. This creates preconditions for agent orchestration with human-in-the-loop controls, enabling safe rollback and explainability in production.

Quality moves from stage to system: Continuous testing evolves into continuous verification, including AI-output validation, with synthetic data aligned with the LGPD. The DevOps Research and Assessment (DORA) framework becomes the standard for measuring software delivery performance, aligning speed and stability and reframing release decisions in Brazilian enterprises.

Interpreting the quadrant results requires assessing providers' ability to: enforce auditable AI governance in Portuguese-language environments; integrate with prevalent toolchains; run on private/sovereign footprints where needed; and accommodate Brazil-specific contracting and compliance constraints without stalling modernization.

Enterprise Priorities

Brazilian buyers translate these conditions into practical, risk-aware priorities that emphasize auditable automation and measurable throughput. While enthusiasm for AI is high, decision criteria converge on governance maturity, cost transparency and integration with existing engineering platforms.

Governance-first AI industrialization: Enterprises demand policy-as-code, human approval checkpoints, explainable agent behavior, and immutable logs linking commits, tests and releases. LGPD compliance and model-cost controls must be native to platforms, not bolt-ons.

DORA provides the operating scores: DORA metrics guide the management of release cadence and stability targets; leaders are standardizing small-batch changes and adopting single-pane dashboards that tie squad activity to quality and recovery performance across portfolios.

Shift to outcome economics: Innovators pilot output- or outcome-based constructs, including a rebirth of function-point, story-

point estimation, cycle-time SLAs, and quality gates, while many buyers still procure by hours/squads. Where contracts cannot change, clients still expect providers to pass through AI productivity as lower unit costs and higher delivery volume within fixed budgets.

Verification for AI-enabled applications: Quality assurance (QA) now includes evaluation of AI-generated code and LLM-influenced features. Buyers require test-data privacy controls, non-deterministic validation methods, and production telemetry feeding back into quality gates.

Architecture and platform consistency: Buyers prioritize providers that integrate with their CI/CD, SDLC and FinOps stacks; support multilingual prompts and artifacts in Portuguese; and can deploy agents in private VPCs or sovereign environments for regulated workloads.

What rises in importance now:

- Evidence of auditable agent orchestration with LGPD-aligned logs and approval trails.

- DORA-anchored delivery with clear autonomy thresholds and rollback-tested pipelines.
- Unit-economics transparency: token governance, digital labor attribution and cost caps.
- Integration proof: plug-ins to Jira/GitHub/Azure DevOps, observability, ITSM and CI/CD.

Provider Dynamics

Brazil providers are converging on governed, platform-centric models. Differences emerge in orchestration depth, verification rigor and commercial flexibility. The following summarizes adaptation patterns by quadrant, mapped to buyer priorities in this market.

Application Development Outsourcing

Providers embed multi-agent workflows for requirements, code, tests and documentation under human-in-the-loop control. A single service intelligence layer correlates DORA, quality and cost signals across many squads, with autonomy bounded by policy. Legacy



modernization couples deterministic analysis with agent-assisted refactoring. Differentiation comes from explainability (tracking decision logs to commits), Portuguese language performance, and the ability to deploy agents in private clouds. Buyers value rollbacks tested in non-production environments and provider-enabled GenAI consumption control to cap spending (token-FinOp).

Application Development Projects

In project-based engagements, the leading pattern is AI-first solution design and agentic execution with outcome evidence. Providers run discovery-to-release blueprints that standardize context engineering, generate tests alongside code, and enforce cross-model validation to reduce hallucination and security drift. Governance manifests through gated pipelines and auditable artifacts mapped to user stories. Competitive edge hinges on artifacts' traceability, speed-to-quality ratios and willingness to structure fixed-fee with value levers when clients' procurement and internal audit permit.

Application Managed Services — GSIs

Global system integrators (GSIs) increased the use of software reliability engineering (SRE) guardrails with AIOps and agentic remediation. Digital twins of applications ground agents; autonomy escalates from enrich-to-fix under approvals, with XLA overlays in regulated accounts. Transition methods standardize reverse engineering and knowledge capture, while CI/CD-native change control binds run and change. Leaders expose persona-based dashboards, joining ITSM, observability and DORA. Buyers scrutinize autonomy thresholds, data locality, and whether modernization accelerators are embedded in AMS, not sold separately.

Application Managed Services — SIs

Specialists emphasize domain depth, such as ERP, CRM and payments, and pragmatic automation over scale. Patterns include policy-aware triage, documentation upkeep, and targeted code-level fixes routed through client CI/CD. Competitive differentiation is the blend of industry playbooks, explainable agents tuned to specific stacks, and flexible hosting

of AI components on-premises or in private clouds to ensure sovereignty. Clients require proof of LGPD-aligned test data, integration with incumbent platforms, and outcome-based constructs for defined scopes where contracting permits.

Application Quality Assurance

The providers of QA services shifted from test execution to quality engineering orchestration. Agentic platforms generate and maintain test suites, synthesize data, and apply LLM-judge techniques for AI features, with portfolio dashboards linking risk to release readiness. Strong players integrate quality gates directly into CI/CD and incorporate shift-right signals (logs, traces) to tune regression packs. Buyers prioritize evidence management for audit, privacy-safe data pipelines and resilience of automation (self-healing, chaos tests) in high-throughput sectors such as finance.

Continuous Testing Specialists

Specialists focus on CI/CD-native continuous verification. Mechanisms include autonomous script generation from user stories/OpenAPI,

self-healing UI flows, and predictive coverage focused on high-risk change sets. They run in private environments when data sovereignty demands it, integrate with Jira/Azure DevOps/GitHub, and present traceable evidence for each run. Differentiation rests on throughput at scale, latency of feedback loops, and the ability to validate AI-assisted outputs without inflating false positives—all with Portuguese-localized reporting.

Outlook

Over the next 12–24 months, Brazil's ADM market will tilt decisively toward governed AI-centered delivery, with DORA as the operating contract language and auditable autonomy as the gating factor for scale. The transition from labor pricing to output or outcome constructs will be uneven: innovators will standardize baselines and value metrics; the public sector and conservative enterprises will retain hours-based contracts but demand the same productivity and quality improvements within fixed budgets.



Trajectory

Agent orchestration moves from embedded pilots to portfolio-wide control planes with token budgets, role-based access, and immutable logs. Private/sovereign LLM deployment will expand in regulated workloads.

Continuous verification becomes mandatory for AI-influenced features. Production telemetry will increasingly drive test selection and release decisioning.

Risk Management

Enterprise risks to manage

- **Contract-model stagnation:** hours-based deals can mask or trap AI productivity. Without DORA/XLA overlays or unit-cost transparency, benefits will be diluted.
- **Compliance drift:** insufficient data governance around prompts, training context and AI outputs can breach LGPD and jeopardize audits.

Provider risks to mitigate

- **Automation without explainability:** opaque agent behavior will stall approvals and limit autonomy.
- **Token cost volatility:** weak AI-FinOps can erode margins in fixed-fee or output deals.

What to do now

- **Enterprises:** mandate DORA and autonomy thresholds in all ADM/AMS scopes; require audit-ready logs for all AI-assisted artifacts; specify data locality and model-governance rules; pilot function-point or outcome constructs with escape hatches for controllers.
- **Providers:** invest in Portuguese-localized agent catalogs, AI-FinOps with real-time caps and showback, and CI/CD-native quality gates. Build commercial templates that bridge hours to outcomes using DORA and verified deliverables, enabling gradual procurement evolution.

Leadership will accrue to those who make AI safe-to-scale—economically, operationally and regulatorily—within Brazil's contracting and compliance constraints, while sustaining speed, quality and cost visibility.

Procurement rigidity is the chief brake on value-based deals in Brazil. Where hours-based contracts persist, high-confidence alternatives are gaining traction: DORA-led service levels, auditable function-point baselines (assisted by GenAI), and token-FinOps with consumption caps. These provide controllers with evidence while enabling CIOs to monetize AI productivity.





Provider Positioning

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	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Agile Inc	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
AI/R	Leader	Not In	Leader	Not In	Leader	Not In
Auditeste	Not In	Not In	Not In	Not In	Not In	Contender
Base2	Not In	Not In	Not In	Not In	Not In	Leader
BRQ	Not In	Leader	Not In	Leader	Not In	Not In
Bugkillers	Not In	Not In	Not In	Not In	Not In	Contender
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In
CAST	Not In	Leader	Not In	Leader	Not In	Product Challenger
CI&T	Leader	Not In	Not In	Not In	Not In	Not In





Provider Positioning

Page 2 of 7

	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
Cognizant	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
CWI	Not In	Contender	Not In	Not In	Not In	Not In
Datum	Not In	Contender	Not In	Not In	Not In	Not In
DBC	Not In	Contender	Not In	Not In	Not In	Not In
Deal	Product Challenger	Not In	Not In	Leader	Product Challenger	Not In
Deloitte	Product Challenger	Not In	Product Challenger	Not In	Contender	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Leader	Not In
e-Core	Not In	Product Challenger	Not In	Not In	Not In	Not In
ED	Not In	Contender	Not In	Contender	Not In	Not In
FCamara	Not In	Leader	Not In	Contender	Not In	Not In





Provider Positioning

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	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
GFT	Not In	Leader	Rising Star ★	Not In	Leader	Leader
Globant	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IBM	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
iLAB	Not In	Not In	Not In	Not In	Contender	Product Challenger
ilegra	Not In	Contender	Not In	Not In	Not In	Not In
ília	Not In	Product Challenger	Not In	Contender	Not In	Not In
Infosys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Inmetrics	Not In	Product Challenger	Not In	Not In	Product Challenger	Leader
Insi	Not In	Leader	Not In	Leader	Not In	Product Challenger
ioasys	Not In	Contender	Not In	Not In	Not In	Not In





Provider Positioning

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	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
Keeggo	Not In	Not In	Not In	Not In	Not In	Product Challenger
Kyndryl	Not In	Not In	Contender	Not In	Not In	Not In
Ievva	Not In	Contender	Not In	Not In	Not In	Not In
Marlabs	Not In	Product Challenger	Not In	Contender	Not In	Contender
Minsait	Contender	Not In	Contender	Not In	Not In	Not In
MTP	Not In	Not In	Not In	Not In	Not In	Contender
Nava	Not In	Leader	Not In	Product Challenger	Not In	Not In
NTT DATA	Leader	Not In	Product Challenger	Not In	Contender	Not In
Objective	Not In	Leader	Not In	Not In	Not In	Not In
Orange Testing	Not In	Not In	Not In	Not In	Not In	Contender





Provider Positioning

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	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
Prime Control	Not In	Not In	Not In	Not In	Not In	Leader
Semantix	Contender	Not In	Contender	Not In	Not In	Not In
Sempre IT	Not In	Not In	Not In	Not In	Not In	Leader
Sofist	Not In	Not In	Not In	Not In	Not In	Product Challenger
SoftDesign	Not In	Contender	Not In	Contender	Not In	Not In
Softtek	Product Challenger	Not In	Leader	Not In	Product Challenger	Not In
SONDA	Not In	Not In	Not In	Product Challenger	Not In	Not In
Spassu	Leader	Not In	Not In	Leader	Not In	Not In
Squadra	Not In	Contender	Not In	Product Challenger	Not In	Not In
Stefanini	Leader	Not In	Leader	Not In	Not In	Not In





Provider Positioning

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	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
Taking	Not In	Rising Star ★	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Product Challenger	Not In	Not In	Not In
Tech Mahindra	Contender	Not In	Leader	Not In	Leader	Not In
Testing Company	Not In	Not In	Not In	Not In	Not In	Contender
ThoughtWorks	Not In	Product Challenger	Not In	Not In	Not In	Not In
TIVIT	Not In	Leader	Not In	Leader	Not In	Product Challenger
TQI	Not In	Leader	Not In	Product Challenger	Not In	Product Challenger
T-Systems	Not In	Leader	Contender	Not In	Not In	Not In
Unisys	Rising Star ★	Not In	Product Challenger	Not In	Product Challenger	Not In





	Application Development Outsourcing	Application Development Projects	Application Managed Services — GSIs	Application Managed Services — SIs	Application Quality Assurance	Continuous Testing Specialists
V8.Tech	Not In	Product Challenger	Not In	Not In	Not In	Not In
Vericode	Not In	Not In	Not In	Not In	Product Challenger	Leader
Wipro	Product Challenger	Not In	Leader	Not In	Leader	Not In
Yaman	Not In	Not In	Not In	Not In	Not In	Leader



The study covers providers' **AI-enabled capabilities** across ADM, managed services and quality assurance.

Simplified Illustration Source: ISG 2026

Application Development Outsourcing

Application Development Projects

Application Managed Services — GSIs

Application Managed Services — SIs

Application Quality Assurance

Continuous Testing Specialists

Definition

Application development and maintenance (ADM) services are evolving as enterprises integrate AI and GenAI deeply into software delivery. The selective adoption of AI-enabled tools has shifted to a broad use of AI in development, testing and application operations, shaping the way software is designed, built and maintained. Enterprises expect providers to apply AI to improve efficiency and embed it into scalable, governed delivery models to ensure consistent outcomes. Providers increasingly use AI for requirement analysis, architecture design, coding, testing and optimization. Agent-assisted development, predictive analytics and automation reduce manual efforts and accelerate delivery cycles. Enterprises recognize that tools alone cannot create value; success would depend on delivery discipline, a strong engineering foundation, platform consistency and controlled use of AI in established processes. As AI adoption matures, governance, security and quality assurance will become critical, requiring transparency, traceability and control over AI-assisted outputs for risk management and reliability across

application landscapes. Managed services have also evolved with providers applying AI to monitoring, diagnostics and remediation to improve stability and responsiveness without compromising on accountability. This ISG Provider Lens® AI-driven ADM Services 2026 study evaluates the way providers respond to enterprise expectations and highlights differences in delivery maturity, AI integration and the ability to translate AI adoption into measurable improvements. It would help enterprises identify partners aligned with their software engineering priorities.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following six quadrants for services/solutions: Application Development Outsourcing, Application Development Projects, Application Managed Services — GSIs, Application Managed Services — SIs, Application Quality Assurance and Continuous Testing Specialists.

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 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 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.

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.

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.





Application Development Outsourcing

Who Should Read This Section

This report is valuable for service providers offering **application development outsourcing** 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.

Strategy and consulting professionals

Should read this report to identify and compare providers that can offer services such as developing strategic roadmaps, delivering consulting expertise and adapting methodologies and frameworks to address application dependencies and enforce best practices across various technologies.

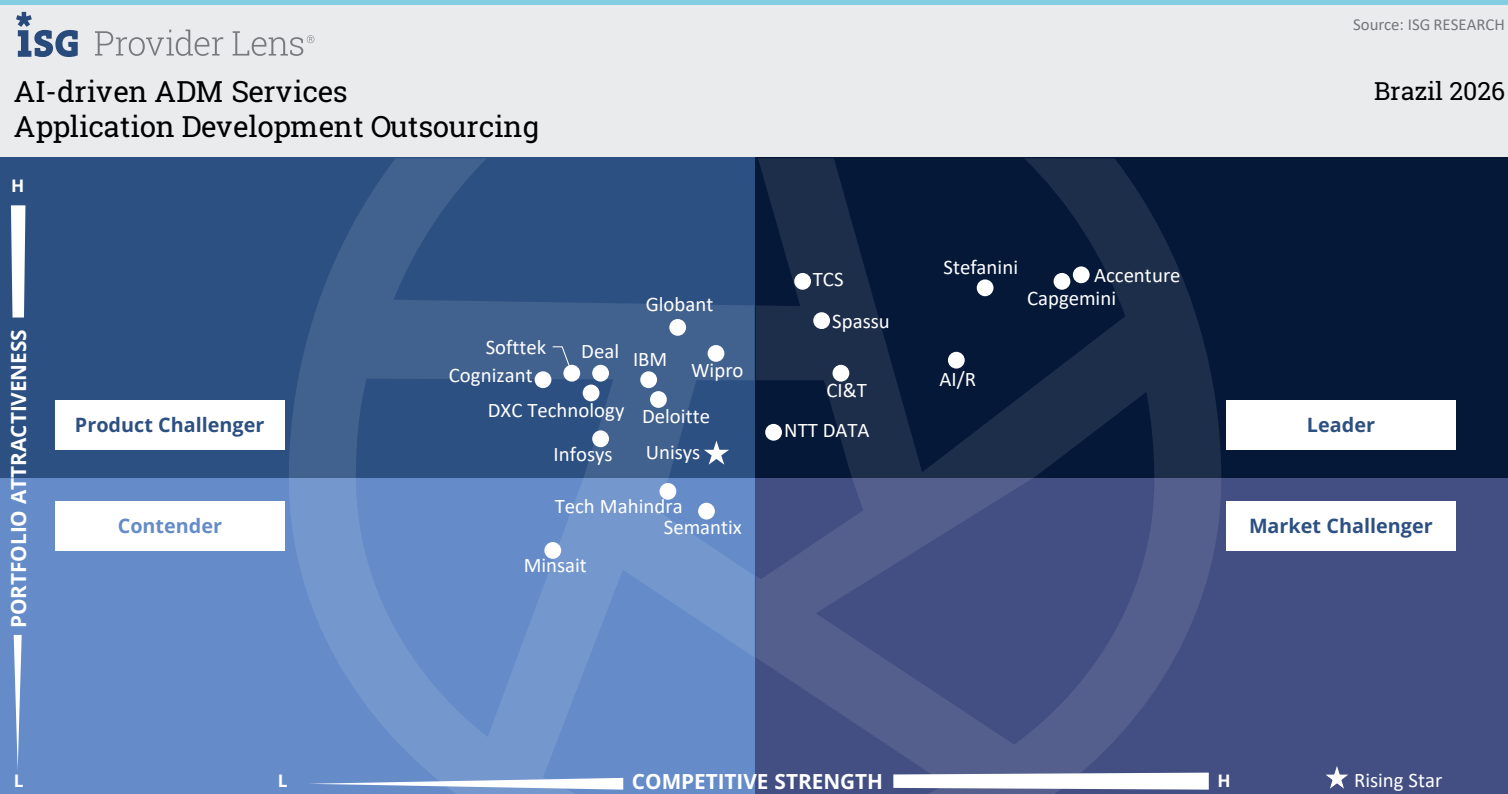
Procurement and vendor management specialists

Should read this report to evaluate vendors' expertise, partnerships and methodologies to select the best fit for managing complex application landscapes. They can use the insights to negotiate and manage contracts with AI-driven ADM service providers, ensuring alignment with business goals and delivery capabilities.

Chief information officers (CIOs) and IT directors

Should read this report to assess vendors' capabilities in CI/CD pipelines, DevOps and AI tools to select partners that can manage complex scenarios. The report can help them coordinate with vendors to ensure alignment with enterprise technology goals and infrastructure requirements.





This quadrant evaluates service providers skilled in scaled Agile methodologies and **in using GenAI to manage development, while taking on responsibility for both the outcomes and risks associated with fully outsourcing clients' application services.**

Pedro L. Bicudo Maschio



Application Development Outsourcing

Definition

This quadrant evaluates providers delivering large-scale application development outsourcing services, where they apply AI across the software development lifecycle (SDLC) through disciplined delivery models. They support multi-year engagements, covering development, enhancement and modernization of complex application landscapes. Provider differentiation depends on the way they embed AI into engineering operating models, including agent-assisted development, automated code analysis, documentation and intelligent backlog management. Leading providers combine delivery governance with platform engineering foundations, secure CI/CD pipelines and AI-ready development frameworks. They modernize legacy applications using GenAI-assisted analysis and refactoring, while enforcing security, compliance and quality controls in AI-enabled delivery. This quadrant is aimed at enterprises seeking strategic partners that can scale product engineering, improve productivity and mitigate delivery risks.

Eligibility Criteria

1. Have the ability to manage **large-scale outsourced delivery** with over 20 squads or more than 1,000 developers
2. **Rapidly scale delivery capacity** to meet fluctuating demands
3. Offer a comprehensive **application development framework** covering Agile delivery, integration and modernization
4. Use **AI and GenAI across SDLC**
5. Demonstrate **agent-assisted development capabilities** to improve engineering productivity
6. Have **platform engineering or internal developer platform capabilities** to support standardized delivery
7. **Show AI governance and secure SDLC controls** for all artifacts
8. **Employ certified experts** in Scrum, Kanban, Lean development or other Agile methodologies



Application Development Outsourcing

Observations

The past year saw rapid adoption of policy-aware, agentic AI embedded across the SDLC, with multi-agent control planes, audit trails and explainability becoming standard delivery components. Innovations include AI-native CI/CD with autonomous rollback, AI-assisted reverse engineering and application refactoring, automated test generation with self-healing and digital-twin constructs that ground agents in code, pipelines, CMDB and telemetry. Several providers introduced 90-day SDLC acceleration programs tied to DORA targets, token-level FinOps and outcome-linked pricing.

Common themes include a single operational view across squads and value streams, standardized platform engineering and governed automation that connects engineering telemetry to business measures. Portfolios blend legacy modernization with AI-native builds on secure, cloud-native foundations. Providers develop talent formation systematically through academies, role-based curricula and certification pathways.

Key trends include industrialization of agent orchestration with explainable guardrails, unified observability that consolidates flow, quality and reliability metrics and the expansion of standardized engineering platforms that integrate with mainstream developer tools and multicloud services.

When assessing providers, clients should validate governance maturity, including policy-as-code, approval gates, auditability, depth in legacy stacks and cloud patterns, integration with existing SDLC and FinOps tooling, agent catalogs and language capabilities, outcome-linked pricing and token controls and evidence of local capacity, industry expertise and repeatable outcomes.

From the 63 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture applies grounded agentic AI and a 90-day SDLC framework to run agile development at scale, using a single service intelligence dashboard to monitor squads and outcomes.



AI/R industrializes outsourced development through policy-aware agent orchestration, trained talent, major cloud accreditations and a single metrics dashboard that monitors quality and throughput.



Capgemini delivers agent-orchestrated application development, coupling a governed AI-enabled SDLC with a single observability and control plane to manage squads, quality and modernization initiatives.

CI&T

CI&T offers an AI-first outsourcing model that coordinates agents and human teams through one platform, CI&T Flow, with measurable delivery metrics, standardized governance and multi-cloud partnerships.



NTT DATA offers governed agent orchestration through an AI-first outsourcing model that integrates with standardized engineering platforms for development and modernization.



Spassu offers agentic AI, embedded across the SDLC, a governed platform, unified observability and role-based training that support standardized, compliant agile delivery at scale.



Application Development Outsourcing

Stefanini

Stefanini applies an AI-first, policy-governed platform, SAI App 3.0, to orchestrate agentic automation across development and application managed services (AMS), with a unified observability layer that tracks engineering and service KPIs.



TCS leverages agentic AI embedded in MasterCraft™ modules, with nearshore governance that enables Brazil-based squads to deliver large-scale modernization and testing automation under centralized control.



Unisys (Rising Star) applies agentic AI across multiple clients in Brazil through governed multi-agent orchestration, AI-native pipelines and portfolio dashboards that support modernization and runtime quality.



Spassu



“Spassu’s governed agentic AI pipeline, unified control framework and structured enablement through training and certification support consistent engineering quality and predictable throughput in application development.”

Pedro L. Bicudo Maschio

Overview

Spassu is headquartered in Vitória, Brazil. It has more than 2,500 employees across 22 Brazilian states, serving clients in financial services, oil and gas, energy and the public sector. The company has rapidly advanced its market positioning in Brazil, expanding its ecosystem of specialized technology professionals across more than 210 concurrent agile squads. Its portfolio centers on Spassu Code, an internal developer platform, the Frontier seven-stage agentic pipeline, governed by Imagine Labs and the Imagine AI framework, and a Control Plane that supports observability and compliance.

Strengths

Standardized engineering workflows:

Spassu applies agentic AI across design, specification, coding, testing and release through a policy-aware framework. Spassu Code standardizes workflows, while Frontier orchestrates multiple AI models under a single Control Plane that enforces security policies, auditability and recovery procedures. Skill Vault signing and output scanners add guardrails and compliance support.

Explainable and traceable AI: Spassu emphasizes engineering quality with measurable indicators spanning velocity, throughput, test coverage and proactive security. Governance controls, with a single management view to oversee squads, costs and flow metrics, enable portfolio-level decisions and the consistent adoption of

golden paths. Proprietary accelerators, including the 14-step Imagine AI method, help compress discovery-to-prototype time and keep documentation synchronized with code and tests.

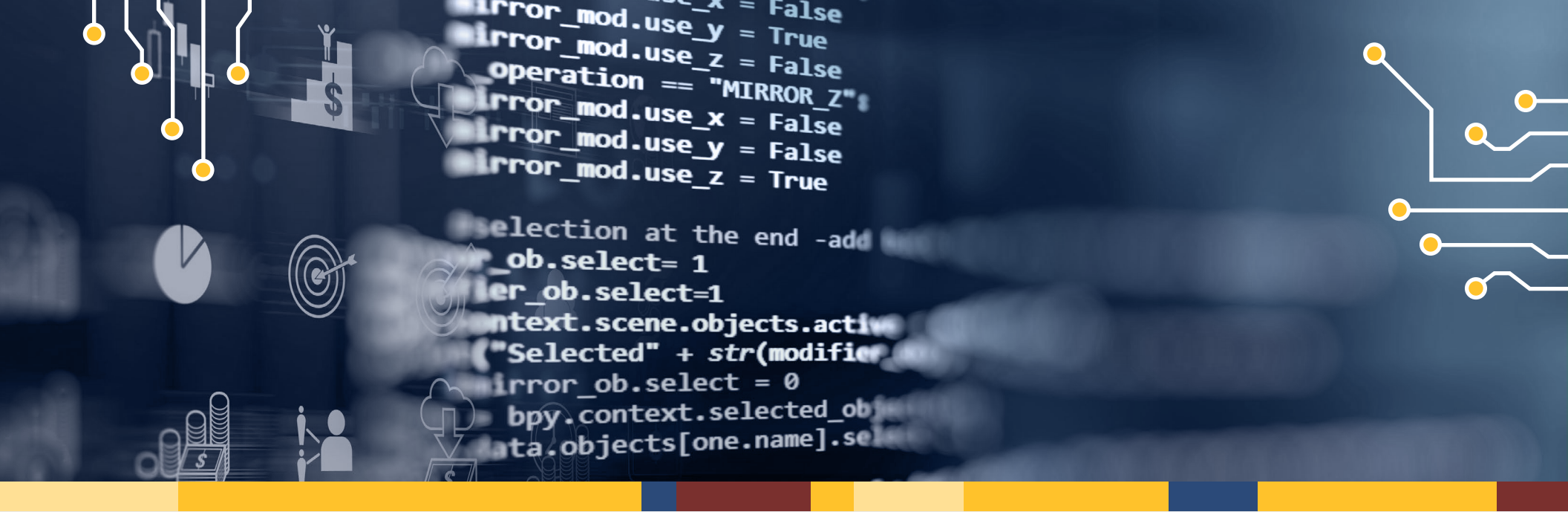
Scale through workforce enablement:

Spassu offers role-based curricula for developers, AI engineers and managers, including mentoring and certification pathways across major cloud and AI platforms. Partnerships with leading model providers strengthen multi-specialization skills, helping scale regulated development programs while maintaining governance over artifacts, prompts, data and infrastructure.

Caution

Spassu continues to develop its proprietary orchestration platform to support a growing number of AI agents. The orchestration platform is not yet complete, and clients should review adoption metrics, implementation maturity and the accelerator’s functionality during their deal negotiations.





Application Development Projects

Who Should Read This Section

This report is valuable for service providers offering **application development projects** 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.

Innovation managers

Should read this report to explore new business models enabled by AI-driven application development and to partner with providers to incorporate innovative solutions into projects. They can leverage provider expertise to identify opportunities for rapid time-to-market and operational efficiency gains.

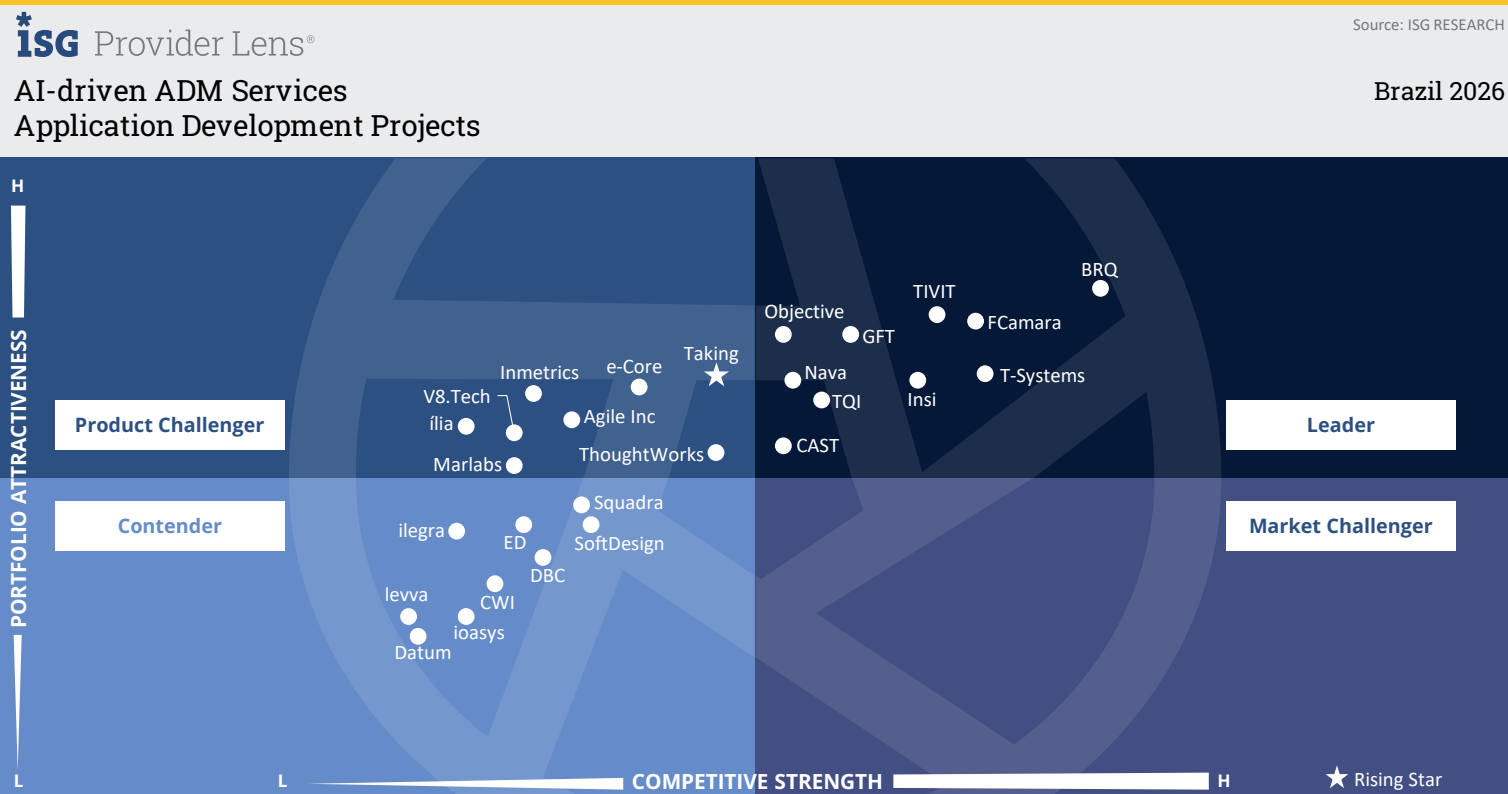
Procurement and vendor management specialists

Should read this report to evaluate vendors' expertise, partnerships and methodologies to select the best fit for managing complex application scenarios. The report can help these specialists negotiate and manage contracts with ADM service providers, ensuring alignment with company goals and delivery capabilities.

CIOs and IT directors

Should read this report to evaluate the adoption of AI-based application development services to drive digital transformation and align projects with business objectives. They can assess vendors' capabilities in industry-specific solutions and ensure integration with existing systems using vendor tools and accelerators.





This quadrant evaluates consulting firms and software development companies that undertake **Agile projects incorporating GenAI**. These companies use top-tier tools and collaborate with technology vendors to **deliver applications and digital products**.

Pedro L. Bicudo Maschio



Application Development Projects

Definition

This quadrant evaluates providers delivering project-based application development and modernization services, where they use AI to accelerate delivery and improve outcomes. Engagements typically focus on building new applications, making major enhancements or undertaking transformation initiatives with defined scope and timelines. Providers are distinguishing themselves through AI-first solution design, including GenAI-assisted requirement analysis, architecture definition, code generation and documentation.

Competent providers apply AI to modernization programs such as application decomposition, refactoring and technology migration, while maintaining project governance, security and quality discipline. Beyond speed, enterprises increasingly expect clear impact on time-to-market, costs and business outcomes. This quadrant is aimed at enterprises seeking partners that combine delivery execution with modern AI-based engineering practices in discrete transformation initiatives.

Eligibility Criteria

1. Have experience in **project-based application development or modernization engagements**
2. Use **AI or GenAI to accelerate project delivery** and not just as tools for pilots
3. Can design applications and solutions where **AI is foundational** to the architecture
4. Show clear **project governance, security and quality assurance** practices in line with Agile methodologies
5. Demonstrate **measurable project outcomes** such as cycle time or quality improvement
6. Offer **industry- or platform-specific accelerators**
7. Ensure ongoing **AI training and talent development** for project teams
8. **Have certifications** in Agile methodologies such as Scrum, Kanban or Lean development; cloud-native data analytics; AI application development; low-code/no-code development; system architecture; and CX design
9. Can show certifications in **software specialties and niche development** areas such as security, legacy modernization, AI, ML or dedicated industry expertise
10. **Have business expertise** or offer development accelerators for CRM, e-commerce, ERP or industry-specific technologies



Application Development Projects

Observations

In the last year, agile application development project outsourcing in Brazil moved from team augmentation toward AI-assisted software delivery. Innovation centered on agentic workflows supporting backlog analysis, code generation, documentation, testing, defect correction and legacy modernization. Providers also invested in data readiness, cloud-native architecture, secure automation and upskilling programs, enabling agile squads to increase delivery velocity while maintaining governance. Common themes include legacy application modernization, migration to scalable cloud and data platforms, stronger quality engineering, measurable delivery outcomes, security and compliance for regulated industries and closer integration between product design, engineering and operations. Capacity remains dependent on the availability of trained multidisciplinary squads, while provider competencies are increasingly shown through disciplined agile practices, architecture expertise, automation maturity and the ability to convert AI tools into reliable delivery metrics.

The top three trends are the adoption of autonomous or semiautonomous agents within agile teams, the shift from headcount-based contracting to outcome and productivity-based models and the growing importance of data, cloud and security foundations before advanced AI adoption. Differentiation depends less on scale alone and more on how consistently providers combine engineering quality, governance, domain knowledge and delivery transparency.

Clients assessing providers should review evidence of squad performance, defect reduction, automation maturity, architectural standards, talent development and pricing models aligned with business value. Clients should also verify how providers protect data, manage AI risks, integrate with existing tools and sustain delivery quality as projects transition from pilot phases to production environments.

From the 63 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

BRQ

BRQ offers a modern delivery model with deterministic agents, centralized squad governance via Team Care and certified cloud expertise, positioning it to execute agile development at scale.

CAST group

CAST group delivers agile projects with agentic AI, combining LUME AI orchestration, AutomaCAST AI testing and internal frameworks to enforce governance, policy curation and measurable engineering outcomes.

FCamara

FCamara has a centralized AI orchestration approach, with telemetry-driven agile squads supporting consistent delivery and quality across complex, multi-domain builds.

GFT

GFT blends agentic AI automation, governed operating models and multicloud engineering to deliver agile development at scale with unified oversight through its Wynxx platform.

Insi

Insi delivers agentic AI-orchestrated agile projects with governed human oversight, unified observability and a discovery-to-modernization method that links intent, architecture and continuous testing.

Nava

Nava uses an agent-orchestrated platform with governance, dashboards and cloud-native templates for project delivery, applying AI from discovery to run with measurable quality and productivity controls.

objective

Objective combines an agentic AI platform with a governance framework and a single performance dashboard to run agile development as a measurable, policy-aware software factory.



Application Development Projects



TIVIT provides policy-aware orchestration, unified DevSecOps and ITSM telemetry, enabling integrated observability across development and operations, supplemented by a structured GenAI talent program.

TQI

TQI delivers agile projects with agentic AI by orchestrating agents across development and operations, enforcing architecture and quality through cross-model checks, and supporting assisted deployments with rollback and release/change impact control.

T Systems

T-Systems toolset includes Agentic Hub, AIFS and STRIVE to support governed, policy-aware automation, combining local sovereign hosting with a central console for delivery, observability and cost control.

Taking

Taking (Rising Star) supports requirements-to-release delivery, with proprietary frameworks, governed automation and a unified dashboard that connects squads' work to real-time project health.





Application Managed Services — GSIs

Who Should Read This Section

This report is valuable for service providers offering **application managed services — GSIs 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.

CIOs and IT directors

Should read this report to understand how they can strategically adopt application managed services, ensuring that application portfolio management aligns with business objectives, such as operational efficiency. They can assess the expertise of global system integrators in AI automation tools for monitoring, version management and defect resolution.

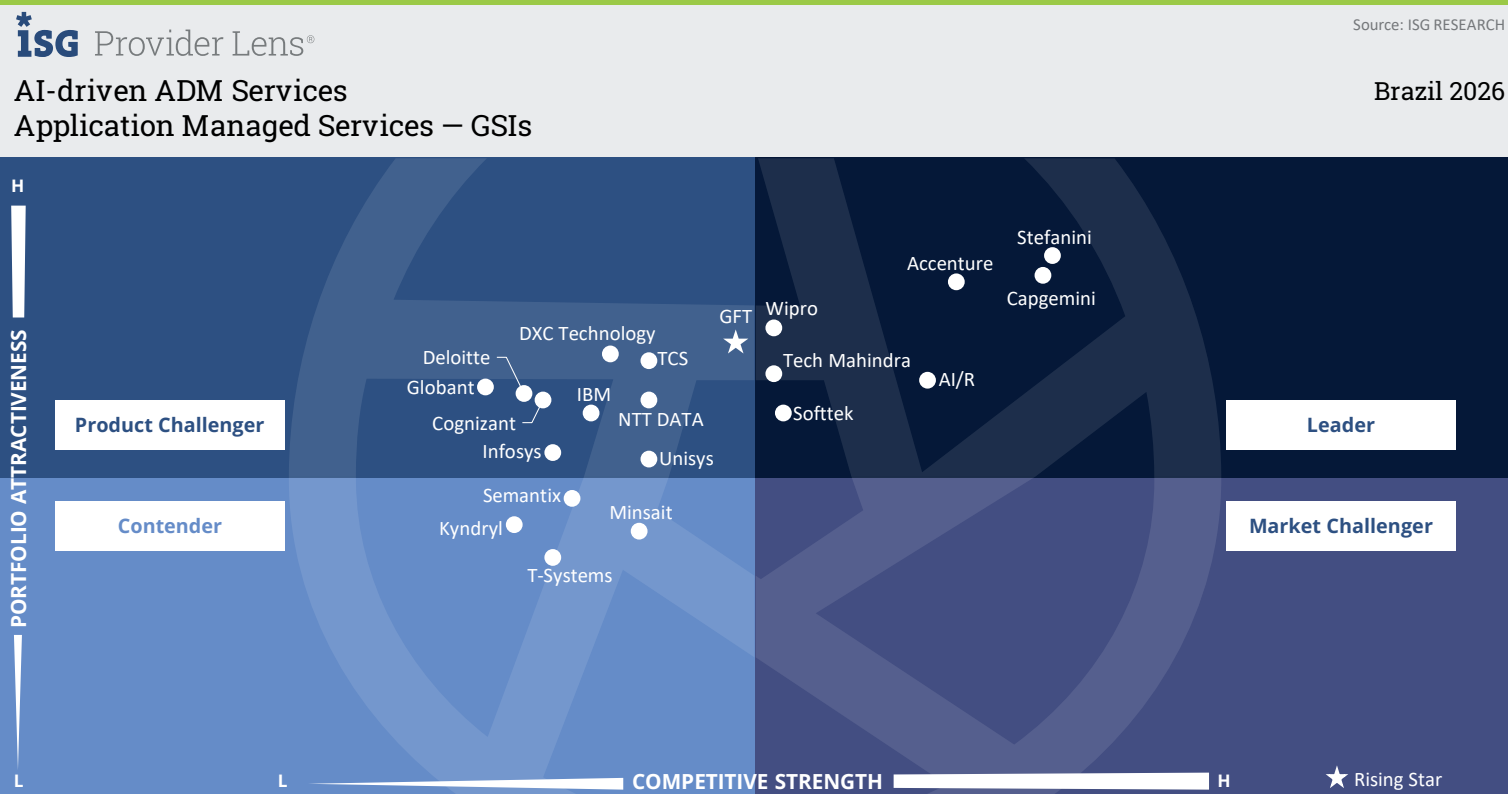
Operations professionals

Should read this report to evaluate vendors' capabilities for seamlessly deploying and managing AI-based applications within their organizations and to coordinate with vendors on productivity goals and delivery schedules. They can assess vendors' tools to optimize costs and improve operational efficiency.

IT professionals

Should read this report to determine vendors' strengths and weaknesses in managing company interactions with global system integrators, overseeing application support and managing security. They can collaborate with vendors on automation to improve performance, integrate development backlogs with Agile methodologies and ensure operational success.





This quadrant evaluates **global system integrators (GSIs)** providing application managed services (AMS), managing legacy and modern technology platforms and offering application **enhancement**, code **correction**, incident management and **user support** to ensure uninterrupted business operations.

Pedro L. Bicudo Maschio



Application Managed Services — GSIs

Definition

This quadrant evaluates global system integrators (GSIs) delivering application managed services for large, complex application portfolios. Their services include support, enhancements, upgrades and lifecycle optimization in production environments. Managed services now go beyond reactive support for AI-driven and increasingly autonomous operations. Leading providers use AI for predictive monitoring, intelligent ticket handling, impact analysis and remediation, while maintaining stringent operational governance. They embed AI into release management, change control and modernization planning, without compromising on stability, security or compliance. Provider differentiation is in the ability to industrialize AI-enabled operations at scale and deliver outcomes beyond cost reduction to include, among others, benefits such as improved resilience, high service quality and improved application performance.

Eligibility Criteria

1. Offer **service platforms** for performance and defect management, including troubleshooting, application tickets and service requests
2. **Employ certified experts** in packaged e-commerce, ERP or CRM (at least one of these commercial applications)
3. Offer strong support for **Microsoft and Oracle technologies**, Java programming and relational databases; mainframes; and other technologies
4. **Can integrate more than two service platforms**, such as Atlassian Jira, SAP Solution Manager and ServiceNow, as well as application platforms, such as AWS, Google Anthos, IBM Rational and Azure
5. Offer broad **application managed services coverage** for large and complex application portfolios
6. Use **AI-driven automation beyond incident and alert management**
7. Demonstrate capabilities in **AI-assisted remediation, diagnostics and impact analysis**
8. **Use AI or GenAI** to maintain applications and deliver substantial benefits
9. Offer strong **operational governance and change control** for AI-enabled managed services
10. Can integrate **multiple service management and application platforms**
11. Show proof of **continuous optimization and modernization** as a part of managed services delivery
12. Demonstrate **global capacity** and clientele to qualify as a GSI



Observations

Over the past year, AMS in Brazil shifted toward policy-aware agentic automation embedded across run and change initiatives. Innovations include digital twin context graphs that ground agents in code, pipelines and telemetry, explainable multi-agent control planes with audit trails and token-level FinOps, AI-native CI/CD with autonomous rollback and AIOps capabilities that correlate logs, traces and ITSM data to trigger self-healing actions. Providers also introduced transition frameworks that systematize discovery and documentation, along with accelerators for reverse engineering, code hygiene and large scale refactoring within AMS.

Common themes are a single operational view that unifies observability, ITSM and engineering metrics, SRE guardrails with human-in-the-loop approvals, standardized platform engineering integrated with client toolchains and structured talent programs that scale GenAI and cloud skills. Most portfolios blend steady-state operations with controlled enhancement and modernization under the same governance.

The top three trends include predictive, self-healing operations tied to experience and reliability measures, governed multi-agent orchestration with explainability and approval gates and the convergence of AMS with modernization through code-level remediation and testing inside service workflows.

When assessing providers, clients should verify autonomy thresholds, auditability and data-handling rules; integration with existing observability, ITSM and CI/CD; depth in legacy and cloud stacks relevant to their estate; transition methods and knowledge capture; local capacity for 24/7 support; and commercial constructs that align outcomes, DORA/XLA metrics and token/digital-labor cost controls.

From the 63 companies assessed for this study, 21 qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture offers AMS grounded on agentic AI automations, SRE governance and a single service dashboard that ties application reliability, change and cost to experience-level measures.

AI/R

AI/R industrializes AMS with policy-governed agent workflows for documentation, triage and remediation, backed by trained talent, major cloud accreditations and a unified metrics dashboard for portfolio oversight.

Capgemini

Capgemini operates in Brazil with a governed agentic control plane, consolidated observability and a reusable automation fabric, enabling predictive operations and portfolio-level modernization oversight.

Softtek

Softtek provides an AI-augmented AMS that combines agentic orchestration, observability and SRE with mature platforms and processes for change control, security and compliance, supported by strong partnerships.

Stefanini

Stefanini runs AMS with a policy-governed agentic platform (SAI App 3.0), unifying observability, ITSM and DevSecOps to automate monitoring, triage and remediation while providing portfolio-level KPIs in a single dashboard.

TECH mahindra

Tech Mahindra uses a robust AI platform that combines security, AIOps, modernization accelerators and governed change control, supported by broad partner integrations and a trained local-plus-global talent base.

wipro

Wipro uses agentic AIOps and governed change to manage large AMS portfolios, combining WINGS orchestration, observability frameworks and partner tooling with planned talent development.



Application Managed Services — GSIs

GFT ■

GFT (Rising Star) uses a governed, agentic AI platform to correlate telemetry and tickets, automate documentation and tests, and guide controlled remediation across multi-cloud and enterprise stacks.





Application Managed Services — SIs

Who Should Read This Section

This report is valuable for service providers offering **application managed services — SIs** 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.

CIOs and IT directors

Should read this report to understand how they can strategically adopt application managed services, ensuring that the management of production application portfolios aligns with business objectives, such as operational efficiency. They can evaluate system integrators' expertise in AI automation tools for monitoring, version management and defect resolution.

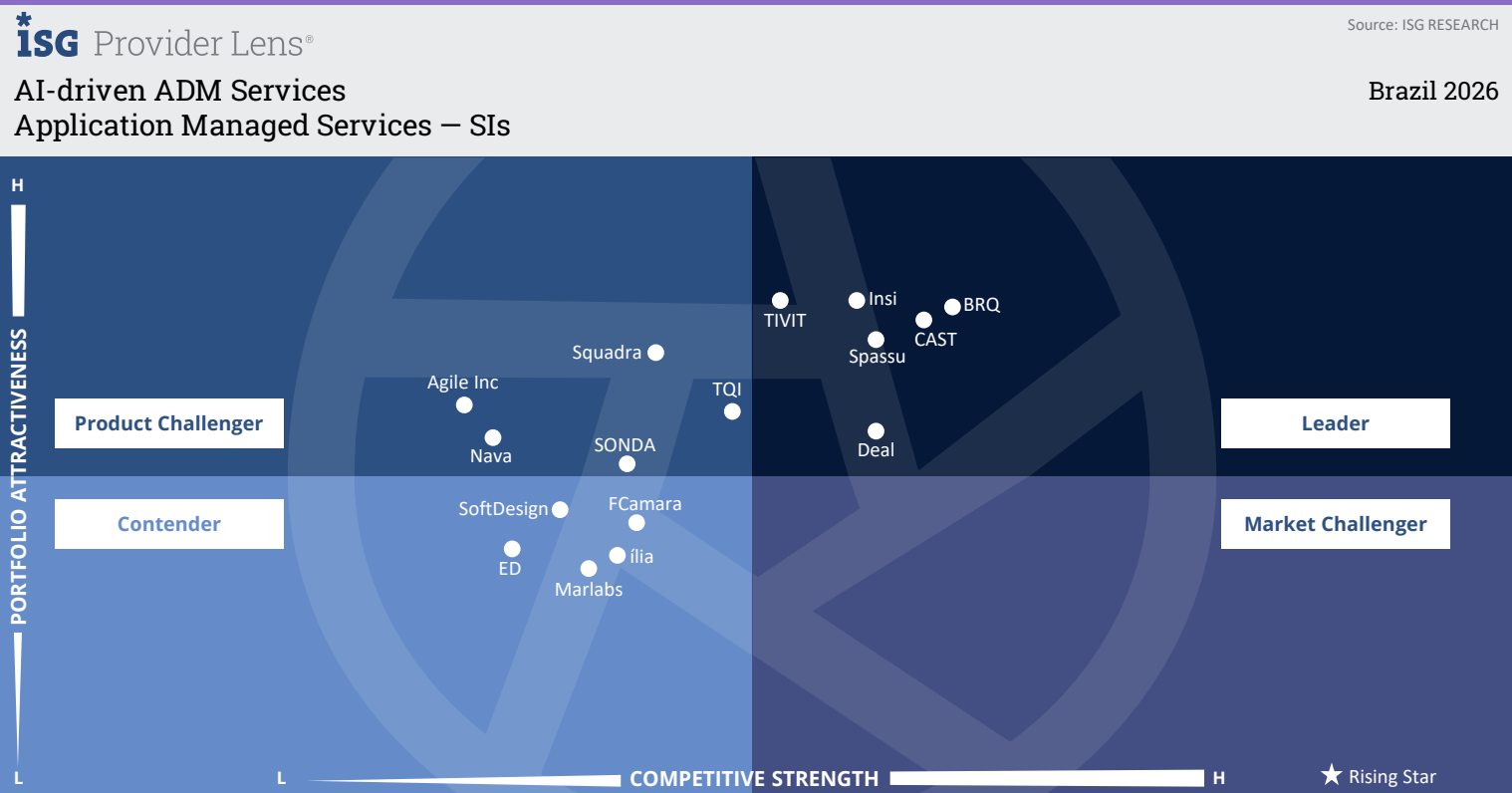
Operations professionals

Should read this report to assess vendors' capabilities for seamlessly deploying and managing AI-based applications within their organizations and to coordinate with vendors to meet productivity goals and delivery schedules. They can evaluate vendors' tools to optimize costs and improve operational efficiency.

Cybersecurity professionals

Should read this report to assess how application managed services providers contribute to network and data protection. They can evaluate the comprehensiveness of providers' offerings, determine the effectiveness of their defense mechanisms, identify potential vulnerabilities and implement robust protective measures in their infrastructures.





This quadrant evaluates Brazil-based **system integrators (SIs)** that **provide AMS**, managing clients' applications and delivering application **enhancements**, code **corrections**, incident management and **user support**, to ensure uninterrupted business operations.

Pedro L. Bicudo Maschio



Application Managed Services — SIs

Definition

This quadrant evaluates specialists delivering application managed services with deep expertise in specific technologies, platforms, regions or industry domains. These providers manage application portfolios in production, delivering support, enhancements, upgrades and operational optimization, tailored to client requirements. Provider differentiation depends on the effective use of AI to improve service responsiveness, diagnostics and operational efficiency, without relying on scale-driven industrialization. Leading providers use AI-based automation, domain knowledge assets and targeted accelerators to enhance incident resolution and change management and foster continuous improvement. Their services focus on clear accountability, industry-aligned processes and compliance awareness. This quadrant is aimed at enterprises seeking focused managed services partners that combine technical depth with practical AI-enabled operations and measurable service outcomes.

Eligibility Criteria

1. Have expertise in a **specific technology or industry** and proven cases to demonstrate service depth
2. **Deploy and operate service platforms** for performance and defect management, including troubleshooting, application tickets and service requests
3. **Employ certified experts** in packaged e-commerce, ERP, HCM, SCM or CRM (at least one of these commercial applications)
4. **Have knowledge of service platforms** such as Atlassian Jira, SAP Solution Manager and ServiceNow, as well as application platforms such as AWS, Google Anthos, IBM Rational and Azure
5. **Offer AI-based automation** tools to cover a client's entire application landscape and extend beyond incident and alert management (the ability to use GenAI tools with proven benefits is an advantageous qualification)
6. Show contracts based on **fixed service fee or outcomes**, providing clients with options as well as innovative pricing models to deliver benefits for clients
7. Offer continuous and effective **cost optimization** and control mechanisms that cover end-to-end application management
8. Have the ability to meet **compliance requirements**



Application Managed Services — SIs

Observations

Brazil's AMS market is shifting toward agentic AI embedded across the application lifecycle. Over the past year, providers have introduced multi-agent orchestration with human-in-the-loop controls, automated documentation and test generation, and observability that correlates telemetry with incidents and changes. Several platforms now add policy guardrails, audit trails and explainable decision paths, while some outcome-based contracts align squads to DORA and flow metrics.

Common themes include governed automation replacing manual tasks, CI/CD-driven change control, integration of ITSM with AIOps and runbooks, and continuous talent upskilling through academies and CoEs. Many portfolios emphasize support for commercial enterprise applications alongside cloud migrations and mainframe or legacy modernization.

Top trends include the shift from reactive support to proactive, measurable operations via agentic AI; the unification of DevSecOps, ITSM and observability to link detection, remediation

and documentation; and squad-based, remote delivery models with outcome and quality metrics that define value.

Clients should assess how well a provider enforces governance, traceability and auditable agent behavior; the maturity of DORA/flow metrics in production; AI FinOps capabilities for token and model cost control; and the depth of certifications aligned to regulatory needs. They should also plan for predominantly remote operating models and validate localization for language and Brazilian regulatory frameworks when proprietary AI stacks are used.

From the 63 companies assessed for this study, 16 qualified for this quadrant, with six being Leaders.

BRQ

BRQ has a large AMS organization supported by disciplined DevOps governance, agentic AI, DORA-driven quality controls and extensive credentials with hyperscalers, Salesforce and SAP.

CAST group

CAST group combines agent orchestration, supervised automation and reusable QA tooling to move from reactive fixes to governed, measurable run operations with knowledge base and documentation updates.

Deal

Deal offers an AI assistant (Alicia), an agentic AI platform (euGenIA) and observability (Donna AI) through governance dashboards to drive automation, reliability and controlled scale.

Insi

Insi delivers AMS with policy-governed agentic automation, unified observability, CI/CD-driven change control and AI-assisted modernization across multi-platform, SAP and Salesforce environments.



Spassu offers governed agentic AI with a single control layer for observability and policy enforcement, standardized golden paths and role-based enablement across regulated application portfolios.



TIVIT offers an integrated stack that unifies DevSecOps, ITSM and observability with agentic AI, backed by CoE governance, AI models and structured GenAI training.





Leader

“Spassu provides governed agents under a unified Control Plane, supporting traceable change, reliable remediation and synchronized documentation.”

Pedro L. Bicudo Maschio

Spassu

Overview

Spassu is headquartered in Vitória, Brazil. It has more than 2,500 employees across 22 Brazilian states, serving clients in financial services, oil and gas, energy and the public sector. The company has rapidly advanced its market positioning in Brazil, expanding its ecosystem of specialized technology professionals across more than 210 concurrent agile squads. The company embeds agentic AI in day-to-day operations. Its AMS portfolio centers on Spassu Code and the Frontier agentic pipeline, governed by Imagine Labs and the Imagine AI framework, operated through a unified Control Plane for observability, recovery, auditing and policy enforcement.

Strengths

Explainable agents: Spassu uses AI agents to maintain applications, generate and align documentation, and automate user support flows through explainable orchestration. The Control Plane provides an operational view of applications and change requests, enforcing guardrails via a security layer, output scanning and signed skills, while compliance templates address ISO 27001 and LGPD. This setup helps teams trace agent decisions, assess change impact, and keep configuration, code and documentation synchronized during continuous operations.

Modernization and reliability approach:

The Imagine AI approach and Spassu Code standardize golden paths for incident analysis, remediation and release management, while Backstage.io underpins

the internal developer portal for AMS automation and knowledge reuse. Telemetry and observability are integrated with value stream and DevSecOps practices to support diagnostics, preventive testing and controlled rollouts.

People supporting agents: Spassu’s Lean approach drives ongoing optimization and differentiation. Its FAST curricula provide role-based GenAI enablement, reinforced by mentoring and certification pathways. Partnerships deepen capabilities, including a tier 1 AWS alliance, accreditations from major cloud and data vendors, and access to leading AI model providers.

Caution

Spassu provides AMS to complement its agile development work and does not aim to displace incumbent providers in standalone deals. Clients can negotiate modernization- and transformation-focused engagements to leverage its Lean IT expertise.





Application Quality Assurance

Who Should Read This Section

This report is valuable for service providers offering **application quality assurance** 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.

Chief technology officers (CTOs)

Should read this report to understand how providers integrate AI-driven predictive analytics to improve application quality across client portfolios. They can develop methodologies to optimize business processes and project planning that align with client needs.

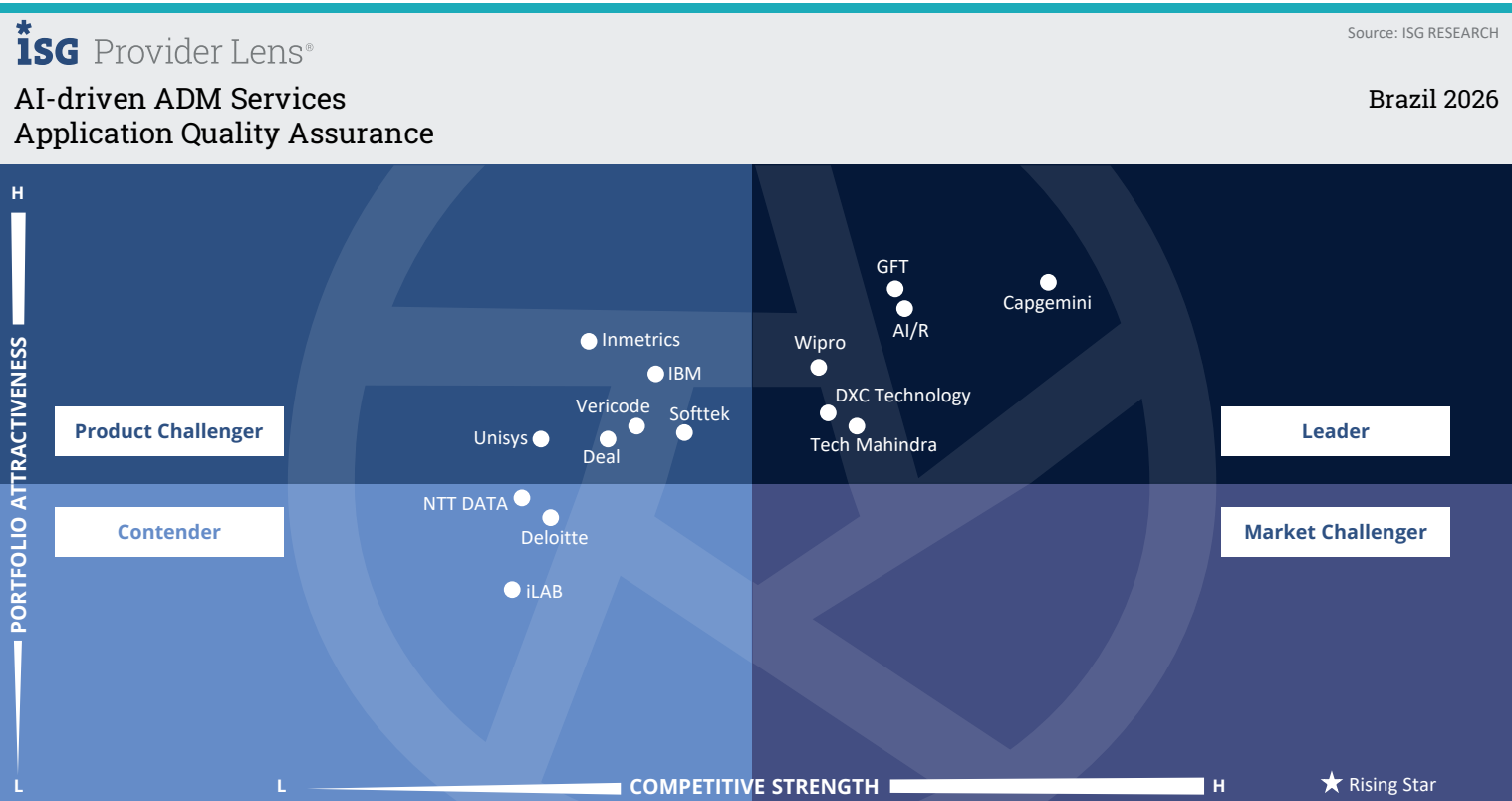
Technology operations professionals

Should read this report to understand how vendors operate QA services and use AI tools to monitor application performance and optimize business processes. The report highlights the importance of high-quality deliverables for improving operational efficiency and stakeholder value.

IT professionals

Should read this report to implement QA services using conventional and AI-driven testing strategies to ensure infrastructure resilience. They can support customers with tailored processes and digital testing, delivering business benefits such as reduced downtime, increased product reliability and rapid market delivery.





This quadrant assesses providers offering software **quality assurance (QA)** services, including the design, integration and operation of tools, to ensure **compliance with software quality standards**.

Pedro L. Bicudo Maschio



Application Quality Assurance

Definition

This quadrant evaluates providers delivering quality assurance and quality engineering services across an application lifecycle, covering quality strategy, test design, execution, analytics and managed quality services. The market is increasingly leaning toward AI-driven quality engineering, with predictive analytics, AI-generated test design and automated defect detection complementing the established practices. Providers also address quality challenges in AI-enabled applications, including validation of development outputs, where leading players integrate quality controls directly into engineering pipelines and use production data to continuously improve reliability, performance and security. The quadrant is aimed at enterprises seeking application release confidence and engineering quality in environments increasingly seeing AI integration.

Eligibility Criteria

1. Have **centralized quality engineering** or quality assurance capabilities with a defined framework, covering standards, governance, planning, execution, monitoring and continuous improvement
2. Use **AI-driven testing and analytics** for the purpose of defect prediction and quality assurance in AI-based applications and outputs
3. Have a **consulting team** focused on analyzing business demands and ensuring development and delivery as per business requirements
4. Ability to apply **log analytics and AI** to monitor results and continuously improve quality
5. Offer **differentiation with proprietary tools**, vendor partnerships for quality monitoring, application performance and testing tools
6. Enable **training and education programs** for developers, testing personnel and operators to develop a quality excellence mindset and ensure that overall products or services meet the desired quality



Application Quality Assurance

Observations

Brazil's QA market is moving to agent-orchestrated quality embedded across the lifecycle. Innovations in the last year include multi-agent control planes with policy guardrails; portfolio dashboards that map CI/CD signals to risk and release readiness; and evaluation frameworks that apply LLM-judge techniques to validate intent, safety and bias in AI-infused features. Providers have advanced self-healing automation for UI tests, performance-as-code, chaos engineering and telemetry that links defects to production reliability. Synthetic test data generation aligned to LGPD/GDPR and explainable, human-in-the-loop checkpoints now define autonomy levels.

Common themes include centralized quality engineering CoEs, TMMi/ISTQB-aligned methods, shift-left and shift-right practices and unified toolchains spanning web, mobile, API, mainframe and cloud. Continuous training through academies and hyperscaler partnerships sustains capacity, while follow-the-sun models combine local Portuguese-speaking teams with global benches.

Top trends include governed agentic AI for test design, data and documentation, portfolio-level quality management with risk-based prioritization integrated into CI/CD, and explicit validation of AI applications alongside observability-driven production quality.

Clients should assess platform integration with existing pipelines and toolchains, the clarity of policy controls and human-in-the-loop attribution, and evidence management for traceability and audit. They should also confirm test data privacy controls, language and localization support, and the balance of local versus offshore delivery and specialization.

From the 63 companies assessed for this study, 15 qualified for this quadrant, with six being Leaders.



AI/R supports QA with a central quality engineering CoE, ensuring safe use of agentic AI across requirements, code, tests and production analytics, governed by AI Cockpit Metrics and broad partnerships.



Capgemini runs QA in Brazil with a robust organization, standardized frameworks and unified dashboards that connect risk, automation and engineering signals across the application portfolio.



DXC Technology applies QA from requirements to execution with governed frameworks and integrated dashboards, supported locally by Portuguese-speaking QA teams and global toolchains.



GFT operates a CoE-governed QA program that applies agentic AI to design, automate and monitor testing end-to-end, using quality-gate dashboards and self-healing frameworks across multicloud CI/CD pipelines.



Tech Mahindra provides a pipeline-native continuous testing portfolio that combines GenAI-driven test and data generation with mature automation frameworks and dashboards for traceability.



Wipro integrates governed agentic AI with mature quality engineering frameworks, a portfolio-wide quality dashboard and shift-left/shift-right practices to manage quality from user story to production.





Continuous Testing Specialists

Who Should Read This Section

This report is valuable for service providers offering **continuous testing specialists** 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 professionals

Should read this report to evaluate vendors in the ADM space and learn how to integrate advanced technologies for a competitive advantage. They can leverage these technologies to define robust testing strategies, methods and scripts for continuous testing processes and help clients implement testing tools.

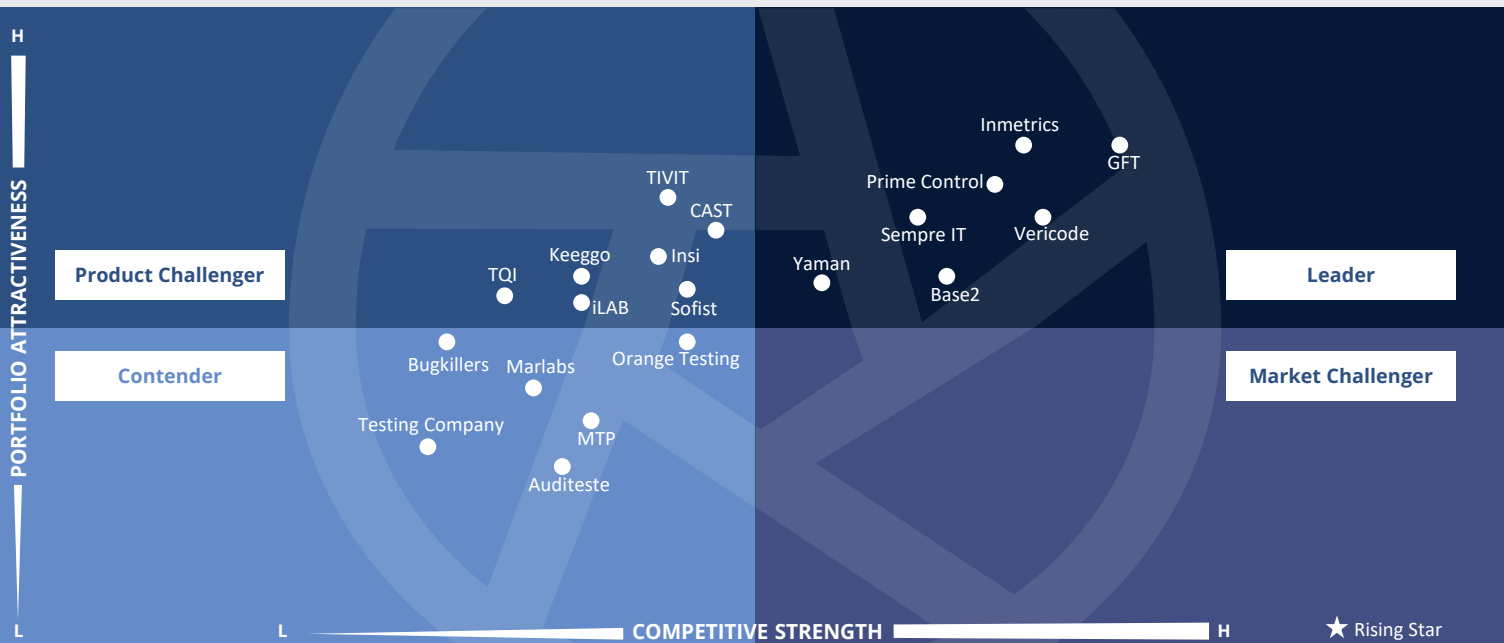
Chief Technology Officers (CTOs)

Should read this report to gain insights into market dynamics regarding the adoption of AI-based applications for continuous testing strategies to improve software quality and delivery speed. They can leverage the insights to align testing practices with organizational goals and technology roadmaps.

Technology operations professionals

Should read this report to understand vendors' capabilities in managing the operational aspects of continuous testing services and overseeing the implementation of AI-driven strategies. They can optimize workflows and support comprehensive testing to ensure customer success and high-quality deliveries, thereby improving operational efficiency and stakeholder value.





This quadrant evaluates providers with strong capabilities in **test coverage identification**, automation **design**, test script writing and test **execution**. These providers **harness GenAI** to enhance productivity, **improve testing accuracy** and ensure quality.

Pedro L. Bicudo Maschio



Continuous Testing Specialists

Definition

This quadrant evaluates providers specializing in continuous testing services for modern CI/CD environments. These providers ensure that frequent code changes do not introduce regressions or functional, performance or compliance risks for enterprises. Continuous testing has evolved into continuous verification, going beyond functional testing to include the validation of AI-assisted development outputs. Leading specialists use AI to optimize test coverage, generate and maintain test cases, and detect risks early in the delivery pipeline. They support a broad range of tests and enable close collaborations between development and testing teams. Providers assessed in this quadrant improve application release confidence, shorten testing cycles and help enterprises sustain quality in high-velocity and increasingly AI-enabled software delivery environments.

Eligibility Criteria

1. Have the ability to **improve collaboration** between quality assurance and development teams, ensuring they are responsive to changes and focused on feature-driven testing
2. **Employ qualified professionals** for test-driven development (TDD), behavior-driven development (BDD) and other approaches
3. Have the capability to **handle large-scale testing** and continuous integration demands of complex systems, such as ERP and e-commerce, with many test cases
4. **Offer a portfolio of consulting services** that include automated testing, which can be integrated with clients' development and DevOps tools and help optimize continuous testing performance to reduce overall testing time
5. **Have a portfolio of ongoing services**, including testing data and test coverage assessments, enabling automated testing across many continuous integration pipelines
6. Use **AI-driven test automation and optimization**
7. Have the ability to support **verification of AI-assisted development outputs**
8. **Replicate and reuse testing artifacts** in multiple projects



Continuous Testing Specialists

Observations

Continuous testing in Brazil has shifted from prompt-based generative tools to agentic AI that autonomously plans, executes and documents tests across unit, integration and user acceptance testing (UAT) layers. Over the past year, adoption has expanded for multi-agent architectures running on private clouds, self-healing automation, predictive models for risk-based coverage, and tighter integration with observability, chaos engineering and telemetry. Modernization programs are the primary catalyst, with heavy regression and integration testing validating large backend changes and data flows required for real-time AI. High-throughput scenarios, such as open banking and instant payments, are pushing performance engineering into the core of quality practices.

Common themes include embedding continuous testing into CI/CD; sovereign data requirements that favor on-premises or private-cloud execution; and measurable digital efficiency, where QA tracks product and business outcomes, not just defects. Capacity

is scaling via global capability centers, while specialized boutiques focus on niche domains and proprietary no-code/low-code tooling.

Top trends include the move to agentic AI for autonomous execution, legacy-to-digital modernization as the primary test workload, and the convergence of QA with SRE and real-time observability.

Clients should assess whether providers can operate secure, agentic automation in private environments; deliver end-to-end coverage with shift-left integration; sustain volume through mature factories and CI/CD; validate high-transaction, regulated systems; and report outcome metrics that link quality to delivery speed, stability and cost.

From the 63 companies assessed for this study, 20 qualified for this quadrant, with seven being Leaders.

Base2

Base2 and its proprietary platforms support CI/CD-integrated continuous testing with AI agents, providing traceability, self-healing automation, and hybrid human-AI toolchains.

GFT ■

GFT uses an AI-enabled platform, standardized frameworks and CI/CD integrations to design, prioritize and execute continuous tests, with portfolio-level dashboards and auditable evidence.

Inmetrics

Inmetrics' continuous testing is anchored by an agentic AI platform (Liev) and CoE governance, with dashboards, traceability and CI/CD integration supporting high automation across unit, integration, security and regression tests.

Prime Control

Prime Control combines governed agentic AI, a reusable automation framework and evidence-rich dashboards to deliver continuous testing from data and script generation to execution and traceability.

Sempre IT

Sempre IT agentic AI orchestrates test creation, prioritization and execution with traceability from requirements to results, reinforced by frameworks, dashboards and partner-backed toolchains.

vericode

Vericode combines agentic AI, governance and observability to run continuous testing with traceability and CI/CD quality gates, backed by partner ecosystem integrations.

Yaman

Yaman combines agentic AI-driven automation with standardized processes to deliver continuous testing across functional, performance and security domains for both legacy and cloud-native applications.





Appendix

Methodology & Team

The ISG Provider Lens® 2026 – AI-driven ADM 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.

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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 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 August 2026 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 AI-driven ADM 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 and Editor Biographies

Lead Author



Pedro L. Bicudo Maschio
Distinguished Lead Author

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.

Research Analyst



Kellem Azevedo
Research Analyst

Kellem Azevedo is a research analyst at ISG, based in São Paulo, where he directly supports the lead author in the research process on IT service providers, contributing to several strategic studies focused on the Latin American region, such as the AWS Ecosystem, Future of Work Services, Healthcare Digital Services and SAP Ecosystems. Kellem holds a bachelor's degree in Mining Engineering and specializes in data analysis, applying

this knowledge extensively throughout her professional career. Through her previous experience, she has developed considerable skills in qualitative and quantitative data collection, analysis, and generation of data-driven insights for decision-making, problem-solving, and the creation of innovative solutions.



Author and Editor Biographies



Study Sponsor

Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

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.



Provider Lens®

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