

AI-driven ADM Services

Application Development Outsourcing

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

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	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.

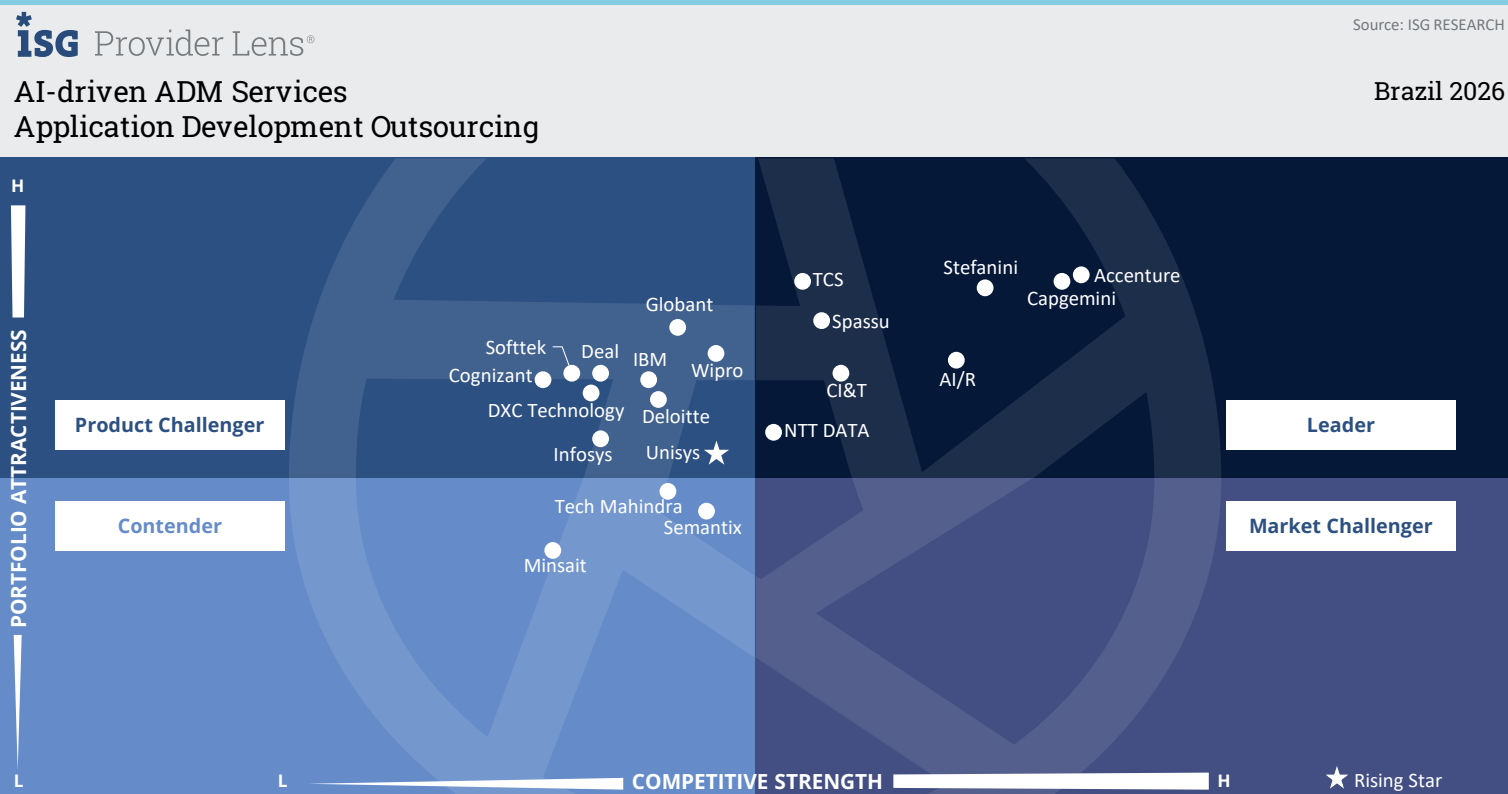
Procurement and vendor management specialists

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.





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.



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