ISG Provider Lens®

AWS Ecosystem Partners

A study assessing AWS partners' ability to support evolving business and technology needs



Customized report courtesy of:

BRLink
An INGRAM MICRO Company

QUADRANT REPORT | OCTOBER 2026 | BRAZIL

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Report Author: Adriana Frantz

The convergence of cloud, data and AI is redefining AWS services in Brazil

This ISG Provider Lens® study evaluates providers capable of supporting Brazilian organizations at different stages of AWS environment adoption and evolution. The evaluation ranges from strategy, consulting and migration services to managed operations, application modernization, data, AI and public sector-focused solutions, examining how providers combine technical expertise, industry experience, proprietary assets and AWS resources to accelerate transformation, increase operational efficiency and generate business value.

Market Context

The Brazilian technology market is undergoing a period of transformation marked by a combination of macroeconomic challenges, rapid advances in AI, regulatory developments and the expansion of digital infrastructure.

The economic environment continues to demand a focus on costs, productivity and efficiency, while emerging technologies are increasing the demand for computing power, connectivity and processing infrastructure.

The expansion of cloud computing and AI has increased the need for local processing capacity, while new incentive initiatives aim to boost the country's competitiveness in attracting investments in digital infrastructure. Given the high share of renewables, projects that cut the intensity of large data center operations and scale the country's technology infrastructure are likely to be advantaged.

The regulatory environment has also gained prominence in recent years in Brazil with the consolidation of the LGPD, ongoing discussions on AI regulation and increased requirements related to cybersecurity, digital sovereignty and the responsible use of data. All of these issues are particularly relevant in regulated sectors and the public sector, where requirements for security, data localization, traceability and data control tend to be more stringent.

AI in production will increase the demand for governance, security and operations at scale.

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Another structural factor observed in the country is the shortage of specialized skills. The simultaneous evolution of cloud computing, data, AI and security is increasing the demand for qualified professionals, while new technologies are transforming roles, development and processes and work models, contributing to a growing emphasis on technical training and the development of digital skills.

These forces are contributing to a Brazilian market that is more sophisticated and more complex. The evolution of digital infrastructure, energy availability, the regulatory environment, advances in AI and the supply of specialized skills are collectively influencing the development of the country's technology ecosystem.

Enterprise Priorities

The priorities of Brazilian companies are shifting as cloud, data and AI are increasingly addressed in an integrated manner, combining modernization, operational efficiency, security, governance and ROI. In this context, the adoption of GenAI and agent-based AI heightens the need to review architectures, data, processes and criteria for contracting services.

Scaling AI initiatives to production

Governance, observability, security, cost management and mechanisms for operating models and agents in production become fundamental as companies move beyond PoC and seek to integrate AI into processes, systems and data. The adoption of AI agents for process automation, customer service, software development and operations is also growing, which increases the relevance of practices such as LLMOps and AgentOps.

Modernizing applications and operations with greater control over costs and ROI

Companies are moving away from treating cloud migration as a standalone goal and are now evaluating more carefully which applications should be modernized, refactored, maintained, or replaced. Automation, AIOps and more autonomous operational models are gaining ground, while FinOps is now expanding to include AI workloads as well.

Data ready to support AI and new use cases

Organizations are reviewing data architectures to reduce fragmentation, improve quality, enhance integration and enable more consistent use of information in AI applications. The ability to provide reliable, governed data directly influences the potential to scale AI initiatives.

Strengthening security, resilience, sovereignty and governance

Requirements related to identity, data protection, continuity, recovery and observability are mandatory. The ability to maintain stable operations, respond to incidents and protect information throughout its entire lifecycle is becoming a greater priority in architecture and service decisions. Data sovereignty and residency are also gaining importance in regulated sectors and in the Brazilian public sector. As AI enters production, there is even greater focus on responsible use, traceability, monitoring and controls over models, agents and sensitive information.

Expanding digital transformation in midsize companies:

Midsize companies account for a significant portion of the demand for cloud, data and AI services in Brazil. Many organizations run complex technology estates and are advancing automation, modernizing applications and adopting AI. However, they have smaller internal teams and limited capacity to conduct transformation programs independently. This increases the demand for partners capable of combining guidance, implementation and operation, with delivery models suited to the size, budget and pace of these organizations.

Provider Dynamics

AWS ecosystem providers are adjusting their portfolios, delivery models and capabilities as customers move toward a phase of greater integration between the cloud, data and AI. The key differentiator lies in the ability to combine modernization, automation, governance, industry expertise and continuous operations. In this context, more mature providers are structuring

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more repeatable offerings, incorporating their own assets and taking on greater responsibility for results.

AI is now being integrated into the delivery model

The adoption of AI is gaining prominence, starting with consulting, development, engineering and operations services. Agents, code generation, task automation and LLMOps and AgentOps practices are now supporting project execution. Frameworks, accelerators and reusable components are gaining traction as a way to reduce implementation time and provide greater consistency when transitioning from pilot projects to production environments.

Modernization is evolving toward a combined approach to applications, operations and costs

Offers are moving away from migration-centric models and are now combining application modernization, operational automation, AIOps and FinOps. Managed services also incorporate greater automation, predictive monitoring and continuous optimization mechanisms. The difference between providers now lies in their ability to integrate transformation and operations.

Data takes center stage

The modernization of data platforms is gaining importance as quality, governance, real-time processing, cataloging and metadata management become key factors in AI adoption. The market is beginning to treat databases and AI use cases as parts of the same journey, which favors approaches that connect architecture, governance and data utilization.

Security, governance and sovereignty are now incorporated into the very design of solutions

There remains a strong need to integrate identity controls, data protection, observability, continuity and AI governance into architectures and managed services. In regulated industries and the public sector, data residency, compliance and sovereignty requirements also influence the design of offerings. This increases the importance of capabilities that combine cloud, security, data and regulatory expertise.

Industry expertise and intellectual property are becoming key differentiators

Generic cloud solutions are losing ground to offerings tailored to the specific processes and needs of each industry. Accelerators, frameworks, reference architectures, preconfigured components and domain expertise are now being used to reduce implementation time and improve alignment with use cases. Industry specialization thus influences both the solution design and the delivery model.

Service models are beginning to adapt to the midmarket

Some vendors are expanding standardized offerings, managed services and less complex contracting models to reach midmarket companies. This segment requires a greater integration of consulting, implementation and operations, but with delivery structures distinct from those used in large-scale transformation programs. The ability to modularize services, reuse assets and reduce dependence on large project teams expands the potential to serve this market.

Customer relationships are also becoming more results-oriented

Vendors are revising contracting and governance models to tie part of the delivery to metrics for efficiency, cost, speed and business outcomes. At the same time, there is a growing demand for more collaborative working models, in which the architecture, development, operation and evolution of solutions are addressed on an ongoing basis. Vendors that can combine delivery flexibility with standardization of tools and processes tend to respond better to environments with varying levels of maturity.

Outlook

Over the next 12 to 24 months, the Brazilian AWS services market is expected to be shaped by three major trends. The first will be the transition of AI from experimentation to operations at scale. This is expected to increase demand for production-ready environments, with governance, observability, security and cost control built in from the start. The expansion of AI agents also tends to increase operational complexity

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and require new management, monitoring and automation practices.

The second trend will be the convergence of modernization, data and AI. The ability to move forward with new use cases will increasingly depend on the quality, availability and governance of data and the modernization of applications and architectures. Standalone projects are expected to give way to programs that address these areas in a coordinated manner and with more clearly defined business objectives.

The third trend will be the expansion of demand among midsize companies. This segment is expected to seek simpler, more modular and more predictable transformation models, with less reliance on large teams and greater use of managed services, automation and reusable assets. This could intensify competition among vendors with different scales and delivery models.

The leaders in this market will be those capable of transforming technical capabilities into replicable offerings, backed by industry expertise, intellectual property and greater accountability for results. Scale will remain relevant. However, it is expected to be less of a determining factor when not accompanied by automation, flexibility, business knowledge and the ability to serve different customer profiles.

Industry-specific expertise is becoming increasingly important when selecting AWS partners. Generic cloud solutions are losing ground to offerings that incorporate the processes, regulatory requirements and data specific to each industry. Differentiation will also depend on reusable assets that accelerate implementation and expand the scale of projects.

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Provider Positioning

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	AWS Professional Services	Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS	AWS Brazil Public Sector — Technology Services
A3Data	Not In	Not In	Leader	Leader	Not In
Accenture	Leader	Leader	Leader	Leader	Not In
AI/R Compass UOL	Leader	Leader	Leader	Leader	Leader
BRLink	Leader	Leader	Leader	Leader	Not In
BRQ	Leader	Product Challenger	Leader	Leader	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Product Challenger
CI&T	Leader	Not In	Leader	Leader	Not In
Claranet	Product Challenger	Product Challenger	Product Challenger	Contender	Not In
Claro Empresas	Leader	Leader	Product Challenger	Product Challenger	Leader
CloudDog	Contender	Not In	Contender	Contender	Not In

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Provider Positioning

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	AWS Professional Services	Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS	AWS Brazil Public Sector — Technology Services
Darede	Leader	Leader	Leader	Rising Star ★	Leader
dataRain	Leader	Leader	Leader	Leader	Leader
Dati	Product Challenger	Product Challenger	Contender	Not In	Not In
Dedalus	Leader	Leader	Leader	Leader	Not In
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
e-Core	Product Challenger	Contender	Product Challenger	Product Challenger	Contender
EDS – Extreme Group	Market Challenger	Market Challenger	Not In	Not In	Leader
Flexa Cloud	Not In	Not In	Product Challenger	Not In	Not In
G&P	Contender	Not In	Contender	Contender	Leader
GFT	Leader	Not In	Leader	Product Challenger	Not In

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Provider Positioning

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	AWS Professional Services	Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS	AWS Brazil Public Sector — Technology Services
GotoBiz	Product Challenger	Product Challenger	Contender	Contender	Not In
IBM	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Logicalis	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
MadeinWeb	Contender	Contender	Rising Star ★	Leader	Not In
NTT DATA	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Nuage IT	Rising Star ★	Rising Star ★	Not In	Not In	Not In
SoftwareOne	Market Challenger	Product Challenger	Not In	Not In	Not In
ST IT Cloud	Contender	Not In	Product Challenger	Leader	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In

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Provider Positioning

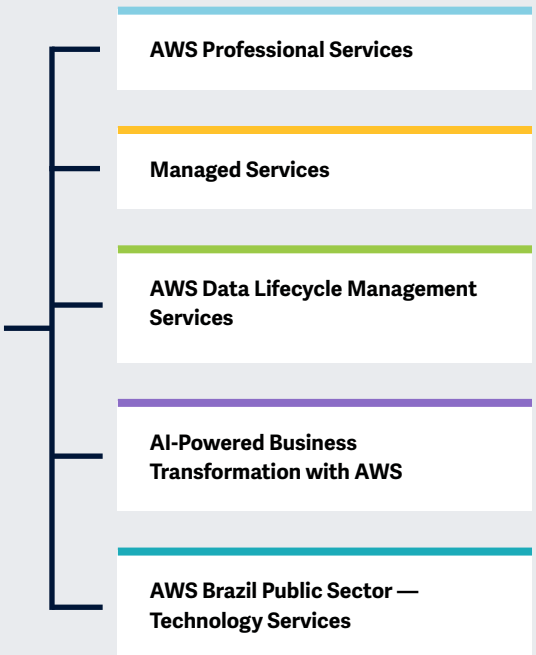
Page 4 of 4

	AWS Professional Services	Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS	AWS Brazil Public Sector — Technology Services
TCS	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
TIVIT	Leader	Leader	Product Challenger	Product Challenger	Not In
T-Systems	Product Challenger	Leader	Product Challenger	Product Challenger	Not In
UDS	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
upd8	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Valcann	Product Challenger	Leader	Not In	Not In	Not In

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Key focus areas of the **AWS Ecosystem Partners 2026** study.

Simplified Illustration Source: ISG 2026



Definition

The AWS Ecosystem – Between Innovation and Sovereignty

In 2026, the AWS partner ecosystem enters a decisive phase of maturity, defined by the operationalization of advanced AI and profound innovation led by partners. AWS has rapidly moved beyond foundational GenAI toward production-grade agentic AI, empowering partners to design, deploy and operate intelligent systems within clearly defined security, compliance and governance frameworks. As a result, partners differentiate themselves not only through innovation but also through their ability to implement, secure and optimize AI-enabled enterprise platforms at scale.

Building on the strong response to re:Invent 2025, AWS has expanded its AI and cloud capabilities through advancements in Amazon Bedrock, Bedrock AgentCore, Nova models, agent-based development services, custom silicon and resilient regional infrastructure. These capabilities expand opportunities for partners in AI modernization, industry and cloud solutions, data platforms, workloads and managed operations. The key shift is from experimentation to governed execution, where transparency, policies, operational control and measurable results are essential for enterprise adoption.

AI governance and digital sovereignty have become priorities and AWS has strengthened its focus on helping customers comply with regulations and data residency requirements. Through sovereign cloud initiatives, AWS helps partners deliver solutions that comply with regional regulations. Providers that combine cloud engineering, AI expertise, security, regulatory insight, industry knowledge and managed services will be best positioned to support customers in building trustworthy, scalable and resilient AI businesses.

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Scope of the Report

This ISG Provider Lens® study covers the following five service and solution quadrants: AWS Professional Services, AWS Managed Services, AWS Data Lifecycle Management Services, AI-powered Business Transformation with AWS and AWS Brazil Public Sector — Technology Services.

The ISG Provider Lens® AWS Ecosystem Partners 2026 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).

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Provider Classifications: Quadrant Key

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

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

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

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

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

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

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AWS Professional Services

Who Should Read This Section

This report is valuable for providers offering **AWS professional services** in **Brazil** to understand their market position and for companies looking to evaluate these providers. In this quadrant, ISG highlights these providers' current market positioning based on the coverage of their portfolios and their market presence. The report also profiles AWS partners in the current market dynamics and competition, enabling companies to evaluate offerings from traditional providers and new options.

IT leaders

Should read the report to understand the technical capabilities of AWS professional services providers in Brazil. It assesses their proficiency in designing, building and modernizing complex cloud environments, including the integration of hybrid and multi-cloud environments, as well as their expertise in AWS security, software development practices, application migration techniques and the deployment of AI and ML workloads.

Sourcing professionals

Should read the report to understand providers' capabilities, AWS certifications, service offerings and track record of delivering value and measurable business results. Understanding partners' strengths will enable procurement teams to effectively compare vendors, evaluate potential partnerships and negotiate contracts based on the market positioning and capabilities of AWS service providers.

Digital transformation professionals

Should read the report to assess how AWS Professional Services Partners can accelerate digital transformation initiatives in Brazil. The report details providers' capabilities for migrating and modernizing applications and data workloads, leveraging DevOps principles, and architecting scalable, resilient cloud-native solutions.

Strategy leaders

Should read this report to understand how AWS professional services providers are positioned to support cloud transformation initiatives in Brazil, including their ability to formulate cloud strategies, develop business cases that demonstrate ROI and provide guidance on ESG requirements and GRC requirements.

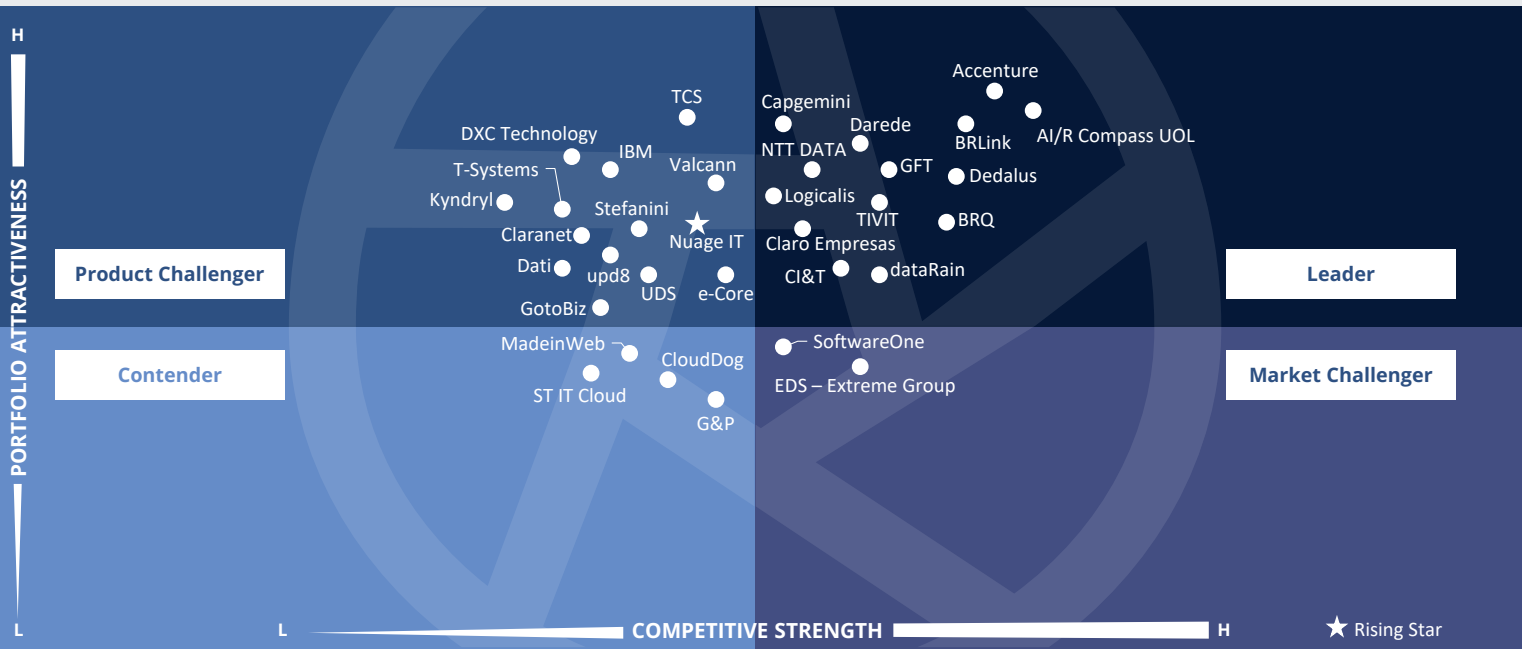
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Professional Services

Brazil 2026



This quadrant evaluates providers that offer **professional services** for **AWS** cloud environments, **combining consulting,** migration and **modernization** to support customers in **transforming their businesses** and achieving **measurable results.**

Adriana Frantz

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Definition

Evaluates providers with robust consulting and migration services to guide and support companies on their AWS cloud journeys. They must offer a wide range of customized services to meet diverse business and IT needs, including business and technology consulting, migration and modernization. Offers include cloud strategy formulation, development of compelling business cases and support for ESG and GRC requirements.

Providers must offer advanced technologies and solutions tailored to specific architectural, security and industry needs. Migration involves automated testing, comprehensive planning, execution, deployment strategies and change management to ensure smooth transitions. AWS partners have expertise in software architecture, software development (using DevOps principles) and application migration and modernization, enabling them to architect, deploy and manage scalable and resilient applications and services in the cloud environment.

Eligibility Criteria

1. Offer a wide range of **AWS competencies**, service delivery offerings and certifications related to consulting and migration expertise
2. Develop AWS-focused **consulting roadmaps and innovations** (current and planned)
3. Demonstrate **value to customers** through tangible business results and other measurable improvements that drive business and technology transformation
4. Migrate customers' **business-critical applications** using AWS
5. Design, build and modernize **integrated cloud architecture** to lead hybrid and multicloud migration and integration
6. Participation in the AWS **Migration Acceleration Program** (MAP) is a plus.
7. Deliver **industry-specific solutions** aligned with AWS Industry Cloud offerings
8. Demonstrate rigorous **AWS security capabilities**, including advanced threat protection and compliance framework implementation
9. Present a strong portfolio of AI- and ML-based innovations, including expertise in **GenAI** deployment **and the modernization of enterprise workloads**
10. Offer **TCO management** for multi-agent business workflows and autonomous solutions geared toward modernization initiatives.
11. Offer support for s**overeign cloud solutions, particularly in Europe**

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Observations

In Brazil, professional services for AWS are keeping pace with a shift in the focus of cloud projects. Migration remains relevant, but it no longer defines, on its own, the scope of transformation. Organizations expect their partners to assess legacy applications and environments, establish modernization priorities and design architectures capable of supporting new uses of data and AI. This requires linking technical decisions to business goals, costs, risks and measurable outcomes, starting from the consulting phase.

Discovery tools and AI capabilities accelerate the mapping of legacy environments, the identification of dependencies and effort estimates. With this information, partners can compare alternatives, prioritize applications and establish a viable execution sequence. Validation by experts remains necessary, especially when decisions affect critical systems and client-specific processes.

The consultative approach adds value when it results in a plan that can guide implementation: a business case, target architecture, projected costs and criteria for deciding when to move forward. The quality of these choices influences the initial investment, business continuity and the ability to evolve applications after migration.

From the 53 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture combines global scale and its AWS Premier Partnership to drive migration and modernization. Its agents accelerate environmental assessment, while reusable architectures and a semantic layer support data and AI initiatives.

AI/R | compass.uol

AI/R Compass UOL combines consulting and implementation for AWS projects, with a focus on measurable results. Its agent-based AI studios and proprietary assets support modernization and delivery in regulated sectors, such as financial services and healthcare.

BRLink

BRLink has expanded its AWS offering with the acquisition of Nextios. It provides consulting, migration and modernization services, with expertise in mission-critical applications and in using DevOps practices to accelerate the delivery of cloud-native environments.

BRQ

BRQ combines expertise in financial services with AWS capabilities in migration, modernization and cloud-native development. Its mainframe modernization practice and results-oriented methodology support complex projects.

Capgemini

Capgemini offers AWS services from strategy to implementation, with global scale for migration, application modernization and SAP environment transformation. Its automation and proprietary accelerators bring predictability to complex projects.

CI&T

CI&T applies its software engineering expertise to modernization on AWS. The CI&T FLOW platform incorporates AI into the development cycle, while its focus on FinOps and automation drives measurable efficiency gains.

Claro Empresas

Claro Empresas combines connectivity, data centers and consulting to support AWS journeys. Its offering structures migration and modernization from assessment through optimization, including FinOps and the design of environments subject to regulatory requirements.

DAREDE à nuvem

Darede leads AWS journeys from assessment through modernization and operations, with 18 competencies and over 500 certifications. Its regional expansion and CoE broaden access to AI, data and cloud architecture capabilities.

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dataRain provides services ranging from environment assessment to migration and modernization on AWS. Its expertise in digital sovereignty strengthens projects that require data residency, jurisdictional control, governance and auditability.

Dedalus has been providing AWS professional services since 2010, with expertise in migration, application modernization, DevOps and business continuity. Its offerings address both one-off requests and complex projects, with contracting models tailored to each client.

GFT brings together AWS expertise in mainframe modernization, migration, DevOps and security. Its experience in financial services and mission-critical environments supports legacy transformation projects with stringent continuity and compliance requirements.

Logicalis integrates cloud, connectivity and security in AWS projects, including hybrid environments and critical workloads. Its consulting services cover cost assessment, migration, modernization and governance, with a focus on operational efficiency.

NTT DATA uses cloud migration and transformation factories to drive large-scale AWS projects. Its expertise in mission-critical applications, SAP, VMware and mainframes combines automation and industry knowledge to modernize legacy systems while ensuring operational continuity.

TIVIT combines AWS migration and modernization with expertise in SAP, Microsoft workloads and hybrid environments. Its approach incorporates security, DevOps, automation and FinOps to transform mission-critical applications and support large-scale operations.

Nuage IT

Nuage IT (Rising Star) focuses its efforts on the AWS ecosystem, from consulting to managed operations. Its migration, modernization and cost-optimization accelerators, combined with security and DevSecOps practices, support standardized delivery in regulated environments.

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Leader

"BRLink integrates expertise, experience with complex migrations and cloud-native practices to deliver end-to-end AWS projects. Its integrated approach helps modernize environments with security, continuity and measurable results."

Adriana Frantz

BRLink

Overview

BRLink is a Brazilian cloud services company and has been part of Ingram Micro since 2021. It has been working with AWS for over 16 years and holds Premier Partner status, with 11 platform competencies. Its portfolio covers consulting, migration and modernization, DevOps, security, data and analytics, AI and ML and managed services. In 2025, BRLink expanded its operations with the acquisition of Nextios' portfolio of cloud contracts and services, incorporating its capabilities, professionals and client base.

Strengths

Expanded capabilities: The 2025 acquisition of Nextios' AWS services portfolio adds expertise, AWS competencies and professionals specialized in consulting, migration and application modernization. This move expands BRLink's delivery capabilities and strengthens its presence in complex projects and among clients in industries where BRLink previously had a limited presence.

Emphasis on consulting: BRLink's consulting-driven approach encompasses cloud strategy, migration assessments, operational model design, workforce readiness and AI-enabled modernization, helping companies reduce complexity while accelerating cloud-native architectures and business transformation initiatives.

Results-driven cloud-native: At a major insurance company, BRLink migrated four critical applications across Amazon EKS clusters and implemented custom CI/CD pipelines using Jenkins, GitLab, SonarQube and Backstage. The transition was completed on time with no impact on users, while automation increased the frequency and security of updates and reduced deployment time by 15 minutes.

Caution

BRLink's robust consulting capabilities have not yet been reflected with equal strength in its market positioning. The company should better communicate its role as a trusted partner, demonstrating how it aligns technology strategy with each client's business challenges.

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Managed Services

Who Should Read This Section

This report is valuable for providers offering **AWS managed services** in **Brazil** to understand their market position and for companies looking to evaluate these providers. In this quadrant, ISG highlights the current market position of providers offering orchestration, provisioning, monitoring and process management services that optimize cloud performance, reduce costs and ensure compliance and security.

IT professionals

Should read the report to understand the technical capabilities of AWS service providers, including expertise in autonomous orchestration and ML-driven management, proficiency in designing and managing secure public cloud and multi-cloud architectures and the scope and availability of their security resources and services.

Sourcing professionals

Should read the report to understand how suppliers offer services on AWS and utilize automation. It also highlights how these suppliers integrate DataOps, MLOps and AIOps into their operational practices to compare service offerings, evaluate value propositions and negotiate service level agreements for effective cloud operations management.

Cybersecurity professionals

Should read this report to evaluate MSPs specializing in the orchestration and management of AWS and multi-cloud environments and to understand how these providers aim to deliver performance optimization, cost reduction, compliance and security assurance. The report aims to help understand practices that integrate approaches such as DataOps, MLOps and FinOps, and how providers create cloud environments designed to protect data and assets against cyber risks.

Digital transformation professionals

Should read this report to assess how AWS service providers can support and enhance their digital transformation initiatives. Evaluating the use of advanced cloud management platforms (CMPs), automation tools and expertise in areas such as MLOps and DataOps is crucial to ensuring that managed infrastructure effectively supports the development, deployment and scalability of digital services and applications.

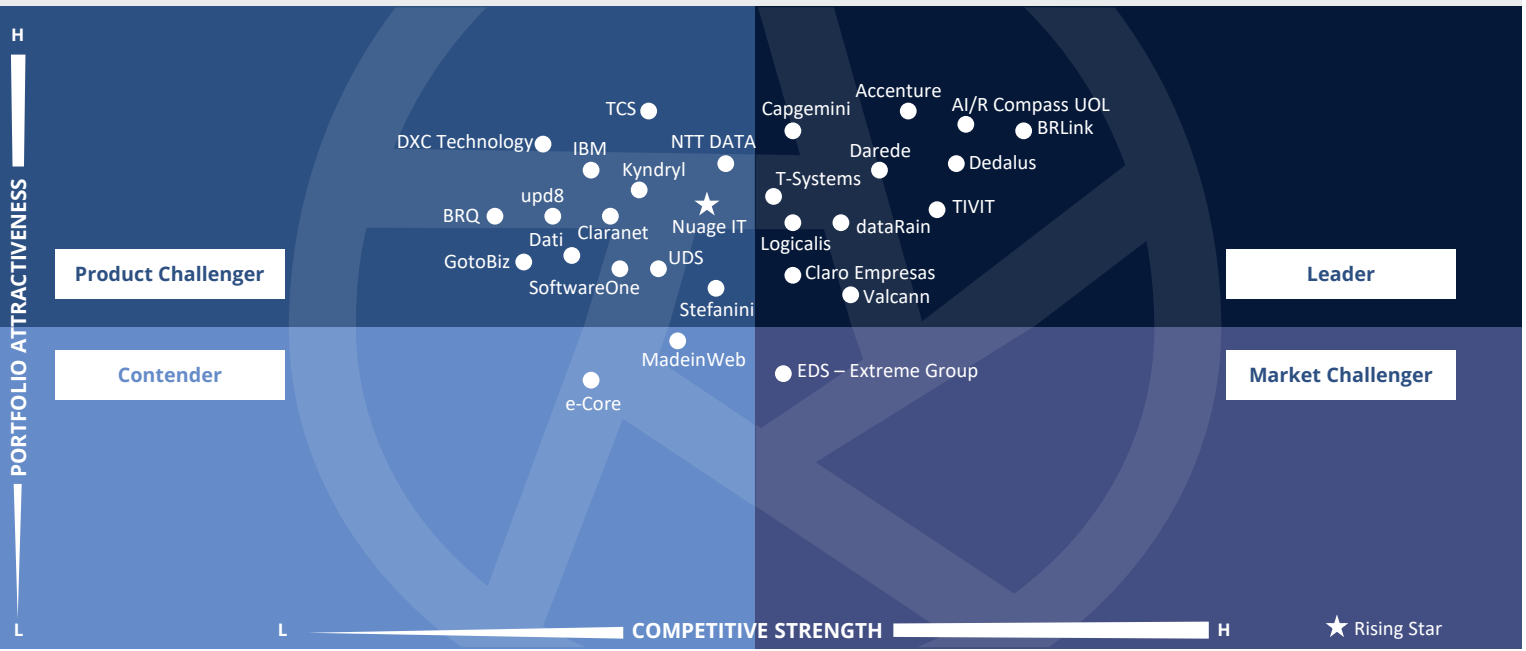
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Managed Services

Brazil 2026



This quadrant evaluates **managed service** providers for AWS environments, considering their ability to **operate, optimize** and **secure** infrastructure and applications through automation, cost control and operational continuity.

Adriana Frantz

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Definition

Evaluates managed service providers that operate, secure and optimize AWS-based public cloud and multicloud environments for enterprise customers. It focuses on managed IaaS and PaaS services on public cloud platforms, delivered by third-party providers, with an emphasis on performance optimization, cost reduction and ensuring security and compliance. Providers use CMPs and tools they have developed or licensed to offer the highest level of automation and the necessary transparency regarding the pool of managed cloud resources in terms of capacity utilization, costs and independent management.

Providers integrate DataOps, MLOps, AIOps and platform reliability engineering (PRE) with FinOps methodologies and automated security frameworks to build resilient, compliant and well-governed cloud environments. Differentiation is increasingly driven by autonomous operations, AI-assisted remediation, readiness for AgentOps and LLMOps, AI workloads, cost governance and operational models based on Site Reliability Engineering (SRE).

Eligibility Criteria

1. Hold AWS Managed Service Program **certification**
2. Demonstrate expertise in **AI-driven autonomous orchestration, configuration and management** of platforms and systems, including AgentOps and LLMOps.
3. Demonstrate **maturity in FinOps for AI, including the governance and optimization of runtime costs for AI and agent-based systems,** supported by proven delivery best practices
4. Use AIOps, automation, self-healing, SRE practices and platform engineering methods to improve reliability, productivity and operational consistency.
5. Design, **build and manage** public and multicloud environments
6. Support big data and multiple database solutions and analytics
7. Develop **DevOps and platform engineering solutions,** incorporating CI/CD and PRE practices
8. Provide **security** resources and services with the appropriate scope and availability
9. **Measure and optimize cloud-related carbon emissions;** experience with sustainability reporting and GreenOps capabilities for AWS is a plus
10. Apply AWS operational best practices, including those aligned with **SRE principles**
11. Experience in **solution architecture** and cost **optimization (FinOps)**
12. **Migrate servers** and manage resource availability

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Observations

The AWS Managed Services market is evolving from support-centric models toward increasingly intelligent, automated and results-oriented operations. The combination of observability, AIOps, automation, FinOps and governance practices is beginning to form integrated models capable of reducing manual interventions, anticipating incidents and continuously improving performance, availability and costs.

AI is accelerating this transformation. Agents now support RCA, remediation, incident management and resource optimization, while new AI workloads place greater demands on infrastructure, security and financial control. As a result, providers must operate more complex environments, including hybrid and multicloud architectures, without sacrificing predictability, resilience and compliance.

FinOps also ceases to be a separate activity and becomes part of ongoing operations, providing greater visibility into consumption, anomalies and opportunities for optimization. At the same time, sovereignty, data protection, auditability and regulatory requirements are becoming increasingly important in service design.

Supplier differentiation tends to depend less on the ability to monitor and support environments and more on the ability to combine automation, AI, governance, security and financial management into an integrated operation. The leaders will be those capable of transforming Managed Services into a continuous platform for efficiency, resilience and evolution within the AWS environment.

From the 53 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture combines managed operations on AWS with agent-driven automation, governance and FinOps. Its global scale, use of native AWS services and expertise in complex environments support resilient, efficient and autonomous operations.

AI/R | compass.uol

AI/R Compass UOL offers managed services on AWS with a focus on FinOps, intelligent automation and governance. The combination of monitoring, GenAI, security and structured cost management enhances operational efficiency and control over environments.

BRLink

BRLink brings more than 15 years of experience in the AWS ecosystem, Premier status and expertise as an MSP. Its portfolio integrates operations, security, automation, modernization and FinOps, supporting the continuous evolution of complex environments and cost optimization.

Capgemini

Capgemini combines global scale, experience as an AWS MSP and a strong track record in complex environments. Its offering integrates resilience, security, compliance, FinOps and automation to support multicloud operations, SAP workloads and highly regulated clients.

Claro Empresas

Claro Empresas combines scale in telecommunications and infrastructure with AWS managed services. Its offering integrates cloud operations, FinOps, proprietary automation and management of complex environments, supporting efficiency, security and continuous evolution.

DAREDE à nuvem

Darede stands out for its expertise in AWS, broad skill set and expertise in FinOps, security and governance. Its flexible business models and multi-disciplinary operations support regulated environments, cost efficiency and end-to-end management.

dataRain

dataRain combines 24/7 operations, proactive incident management and FinOps with its own governance platform. Its AWS skills and certifications support automation, configuration and continuous management of environments, with a focus on efficiency and predictability.

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Dedalus

Dedalus offers full-stack managed services on AWS, combining 24/7 operations, automation, FinOps, security and business continuity. Its extensive experience and expertise in critical and regulated environments strengthen the management of complex, multicloud infrastructures.

LOGICALIS
Architects of Change

Logicalis integrates operational maturity as an AWS MSP with expertise in DevOps, migration, modernization, security and financial services. Its integrated approach enhances visibility, reliability and efficiency in environmental management.

TIVIT
ALMAVIVA GROUP

TIVIT integrates operational scale in Latin America with end-to-end management and AI-powered automation. As an AWS MSP, it integrates operations, security, FinOps, resilience and optimization to support critical and complex environments.

T Systems

T-Systems integrates expertise in regulated environments with security, digital sovereignty and multicloud governance. Its offering integrates automation, FinOps, DevSecOps and AI-driven operations to support critical workloads with efficiency and resilience.

Valcann

Valcann combines 24/7 operations, proprietary automation and FinOps in an end-to-end AWS offering. Its expertise in operations, reliability and modernization supports critical environments with greater stability, financial control and efficiency.

Nuage IT

Nuage IT (Rising Star) combines 24/7 operations with intelligent automation, FinOps and autonomous agents. Its Eloo platform enhances RCA, governance and cost optimization, supporting regulated environments and AI workloads with greater efficiency.

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Leader

"BRLink's maturity within the AWS ecosystem supports a managed services offering that combines continuous operation, automation, security and FinOps. The company goes beyond basic support to promote efficiency, technological advancement and cost control."

Adriana Frantz

BRLink

Overview

BRLink is a Brazilian company specializing in managed cloud services, acquired by Ingram Micro in 2021 and maintained as a standalone business unit under its own brand. An AWS Premier Partner since 2010, it is part of the AWS Managed Service Provider program and holds the AWS Cloud Operations competency, credentials that validate its ability to operate and enhance environments on the platform. Its offerings include monitoring, support, automation, security, governance, continuity and cost optimization, supporting customers from the transition to operation to the management and evolution of their environments.

Strengths

Mature AWS partnership: With over 15 years of experience in the ecosystem, BRLink has achieved Premier Tier status and holds 11 competencies on the platform. This combination of experience and certifications enables the company to manage complex AWS environments from transition through ongoing operations, with monitoring, support, automation, security and governance focused on availability, performance and operational efficiency.

Integrated portfolio for continuous evolution: BRLink connects the operation of AWS environments with security, financial optimization, application modernization, data and AI. This comprehensive approach allows the company to go beyond infrastructure support, identifying opportunities for automation, architectural improvements and the continuous generation of business value.

Cloud cost optimization: BRLink offers a well-developed set of AI-driven FinOps capabilities that simplify cost management and resource optimization. As a result, companies can make smarter, data-driven decisions while fostering a culture of awareness and control over cloud and AI costs.

Caution

Although BRLink has a robust track record, many of its most detailed public references date from before 2024. Expanding the sharing of customer case studies would reinforce the perception of the portfolio's evolution and innovation.

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AWS Data Lifecycle Management Services

Who Should Read This Section

This report is valuable for providers offering **AWS data lifecycle management services** in **Brazil** to understand their market position and for companies looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the coverage of their service offerings and their market presence, as well as how they address the challenges enterprises face in this region.

Data professionals

Should read this report to understand how service providers shape data-driven strategies, drive innovation and empower organizations to unlock the full potential of their data assets. It also highlights key trends, best practices and emerging technologies, preparing analytics professionals to lead successful data initiatives and deliver business insights.

Digital transformation professionals

Should read this report to understand how data lifecycle management services on AWS support process modernization, technology integration and the creation of new data-driven business models. The report highlights trends, practices and innovative approaches from providers of these services within the AWS ecosystem, generating valuable insights for these professionals.

IT professionals

Should read this report to understand how AWS data lifecycle management service providers support data governance, storage, protection and optimization in scalable, secure environments. The report presents relevant trends, best practices and technological solutions that support operational efficiency, enabling IT teams to implement robust architectures, reduce costs and ensure data availability and integrity throughout the entire lifecycle.

C-level executives

Should read this report to gain strategic insights into how data lifecycle management on AWS can drive competitive advantage, innovation and data-driven decision-making. The report highlights market trends, best practices and emerging opportunities, offering valuable insights to align data initiatives with business objectives, maximize ROI and strengthen governance and the value of data assets within organizations.

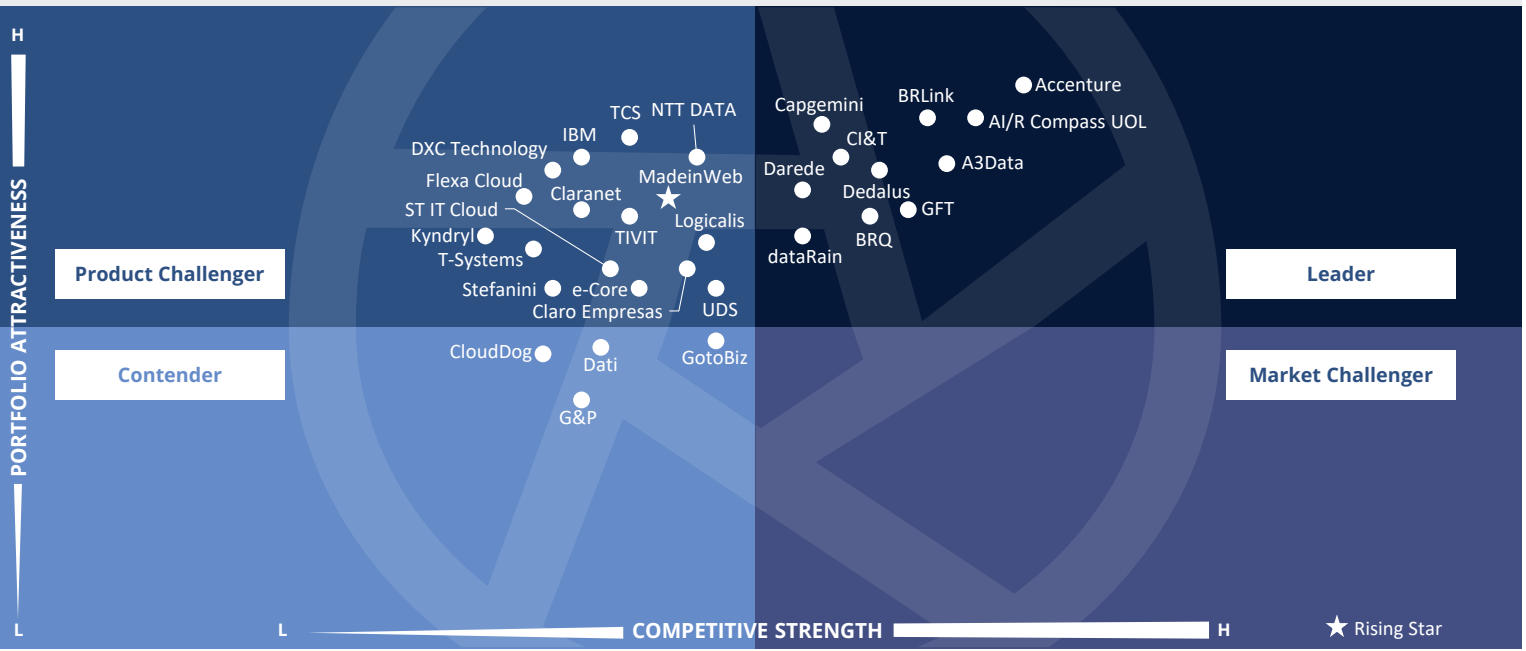
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Data Lifecycle Management Services

Brazil 2026



This quadrant analyzes providers of **data lifecycle management services** on AWS, considering **integration, storage, processing** and **governance** capabilities to make reliable data available for analytics and AI.

Adriana Frantz

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Definition

Evaluates AWS Ecosystem Partners that deliver end-to-end data governance and lifecycle services, enabling organizations to integrate, store, process, govern and derive value from data throughout its entire lifecycle on AWS. Vendors support data sovereignty and governance through capabilities such as geographic data residency, regulatory compliance and data quality management (DQM) with lineage tracking, ensuring compliant data operations across regions and industries.

Vendors enable a scalable enterprise data ecosystem by leveraging AWS-native data management, integration and orchestration capabilities to support the ingestion, processing and governance of structured and unstructured data workloads. Differentiation is driven by AI-ready data pipelines, real-time processing, domain-specific data products, governance aligned with responsible AI and measurable business outcomes. They provide insights and decision-making capabilities through advanced analytics, predictive and prescriptive models and real-time dashboards.

Eligibility Criteria

1. Demonstrate **end-to-end data lifecycle capabilities**, covering ingestion, storage, processing, governance and archiving on AWS.
2. Provide **data sovereignty and compliance solutions**
3. Enable **reliable and well-governed data** through capabilities such as metadata management, data cataloging, lineage visibility, data observability and enterprise governance frameworks.
4. Design and implement scalable data platforms using **native AWS services** such as Redshift, RDS and AWS Glue.
5. Implement scalable solutions that **optimize data performance for handling high-volume workloads**
6. Deliver **advanced analytics capabilities,** including predictive and prescriptive insights
7. Provide **real-time dashboards and intelligence solutions for decision-making**
8. Support lifecycle management for **distributed or *edge-to-cloud* data environments, including IoT,** where applicable
9. Demonstrate measurable business results through data-driven transformation initiatives
10. Maintain **relevant AWS DLM competencies** (e.g., Data and Analytics Consulting Competency) and certifications (e.g., Big Data, Data Engineering).
11. Demonstrate **data** governance **aligned with responsible AI,** ensuring transparency, auditability and compliance across all enterprise data pipelines that support AI and analytics use cases

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Observations

The AWS Data Lifecycle Management Services market is evolving from an approach centered on data storage and management toward comprehensive models of governance, automation and AI readiness. The quality of the data foundation now determines organizations' ability to reliably scale analytics and AI, heightening the importance of modernization, observability and real-time processing.

Fragmented data environments are giving way to more unified, AWS-native platforms. At the same time, policy-driven automation reduces manual activities in the data lifecycle, enabling the consistent and auditable application of rules for retention, tiering, archiving and deletion.

Governance, sovereignty and resilience are becoming central components of these architectures. The LGPD, data classification, encryption, immutable retention, recovery and traceability must be incorporated from the very design phase of solutions, especially in regulated and distributed environments.

Cost optimization also gains importance, enabling a balance between cost, performance and availability in accordance with access policies and business requirements. Leaders are those capable of transforming lifecycle management into a continuous foundation for reliable, governed, resilient and AI-ready data.

From the 53 companies assessed for this study, 31 qualified for this quadrant, with 11 being Leaders and one Rising Star.

A3Data

A3Data combines expertise in data and AI with its own platform that automates quality, metadata and controls. Its *Governance by Design* approach and strategic partnership with AWS enhance security, sovereignty and deployment speed.

accenture

Accenture combines global scale, industrialized assets and agents to modernize data platforms on AWS. Its approach accelerates consolidation, automation and AI readiness, with strong capabilities to address complex and regulated environments.

AI/R | compass.uol

AI/R Compass UOL combines a proprietary platform, AWS-native services and automation to modernize data environments. Its offering unifies assets, pipelines and controls, creating a scalable foundation for analytics, AI applications and the modernization of fragmented environments.

BRLink

BRLink offers an end-to-end approach to the data lifecycle on AWS, from strategy to visualization. Its expertise in data lakes, lakehouses, governance and DataOps supports scalable, secure and integrated environments, with a focus on performance and compliance.

BRQ

BRQ combines data engineering, modernization and AI in AWS-centric architectures. Its offering integrates data lakes, pipeline automation, governance and analytics, supporting clients in evolving from legacy environments to scalable, AI-ready platforms.

Capgemini

Capgemini combines global scale, industry expertise and proprietary assets to modernize data environments on AWS. Its offering integrates architecture, engineering, governance, analytics and AI readiness, supporting complex, large-scale projects.

CI&T

CI&T combines comprehensive data lifecycle modernization with AI-native automation. Its assets accelerate migration, integration, cataloging and governance, reducing time to market and preparing legacy environments for analytics and AI applications.

DAREDE à nuvem

Darede combines digital sovereignty, governance and AWS-native architectures to prepare data environments for AI. Its offering integrates QA, analytics, GenAI and Retrieval-Augmented Generation (RAG) and optical character recognition (OCR), transforming structured and unstructured data into actionable insights.

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dataRain combines platform modernization, data engineering and AI into an end-to-end offering. Its services include migration of legacy databases, data lakes, streaming and application development, supporting complex projects with greater openness and efficiency.

Dedalus covers the end-to-end data lifecycle, from ingestion to AI preparation. Its offering integrates governance, security, lineage, observability and continuous operations, supporting platforms and pipelines with greater reliability, compliance and cost control.

GFT combines end-to-end services for the data lifecycle on AWS with deep expertise in financial services. Its offering integrates lakehouses, streaming, governance, FinOps and AI preparation, supporting secure, regulated and results-driven environments.

MadeinWeb

MadeinWeb (Rising Star) covers the entire data lifecycle on AWS with DataOps squads, native architectures and strong integration between governance, analytics and AI. Its approach combines lakehouses, streaming, security and business results-oriented use cases.

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Leader

"BRLink combines a comprehensive offering for the entire data lifecycle with expertise in platform modernization on AWS. Its ability to integrate strategy, engineering and governance supports continuously evolving environments."

Adriana Frantz

BRLink

Overview

BRLink is a Brazilian cloud services and digital transformation company headquartered in Barueri, São Paulo, acquired by Ingram Micro in 2021. Its portfolio includes data, analytics, AI and ML, with a strong alignment with the AWS ecosystem. In data lifecycle management, the company provides services ranging from strategy definition and infrastructure modernization to ingestion, integration, storage, processing, QA, governance, analysis and visualization. The company serves organizations across various industries, supporting them from strategy and architecture definition to the implementation and evolution of AWS environments.

Strengths

End-to-end portfolio: BRLink provides services ranging from defining strategy and business objectives to ingestion, integration, storage, transformation, QA, governance, analysis and visualization. The offering utilizes services such as AWS DMS, Amazon S3, AWS Glue, Amazon EMR, Athena, Redshift and QuickSight, enabling the creation of integrated data journeys.

Experience with modern data architectures: BRLink has a proven track record in building data lakes and lakehouses and modernizing platforms handling large volumes of data. Its solutions incorporate layered architectures, reusable frameworks, validation routines and security and compliance controls, delivering scalability, improved analytical performance and cost optimization.

Integrated management: BRLink offers a comprehensive approach to the data lifecycle, combining expertise in architecture, platforms, engineering and DataOps. The company designs modern environments integrated into the client's technology ecosystem, while incorporating governance and compliance requirements such as LGPD, GDPR and Bacen regulations.

Caution

The incorporation of Nextios' cloud services portfolio expands BRLink's scale and capacity. However, its impact on the data offering still needs to be demonstrated more clearly. The company should explain how teams, assets and expertise were integrated to deliver greater benefits to customers.

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AI-Powered Business Transformation with AWS

Who Should Read This Section

This report is valuable for providers offering **AI-powered business transformation services with AWS** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG defines the providers' current market positioning in Brazil based on the depth of their service offerings and their market presence.

IT leaders

IT leaders should read the report to better understand the relative strengths and weaknesses of AWS data analytics and AI service providers, to drive their digital transformation initiatives, optimizing cloud investments and strategically selecting the right tools and partners to modernize infrastructure, improve data-driven decision-making and accelerate the adoption of AI technologies, agentic and GenAI.

Sourcing professionals

Sourcing professionals should read this report to understand providers' methodologies, accelerators, industry expertise and case studies demonstrating business results, as well as their experience with AWS GenAI services and AWS-focused innovation programs. It enables a structured comparison of these providers based on qualifications, experience and potential for value delivery, facilitating better contract negotiations and partner selection.

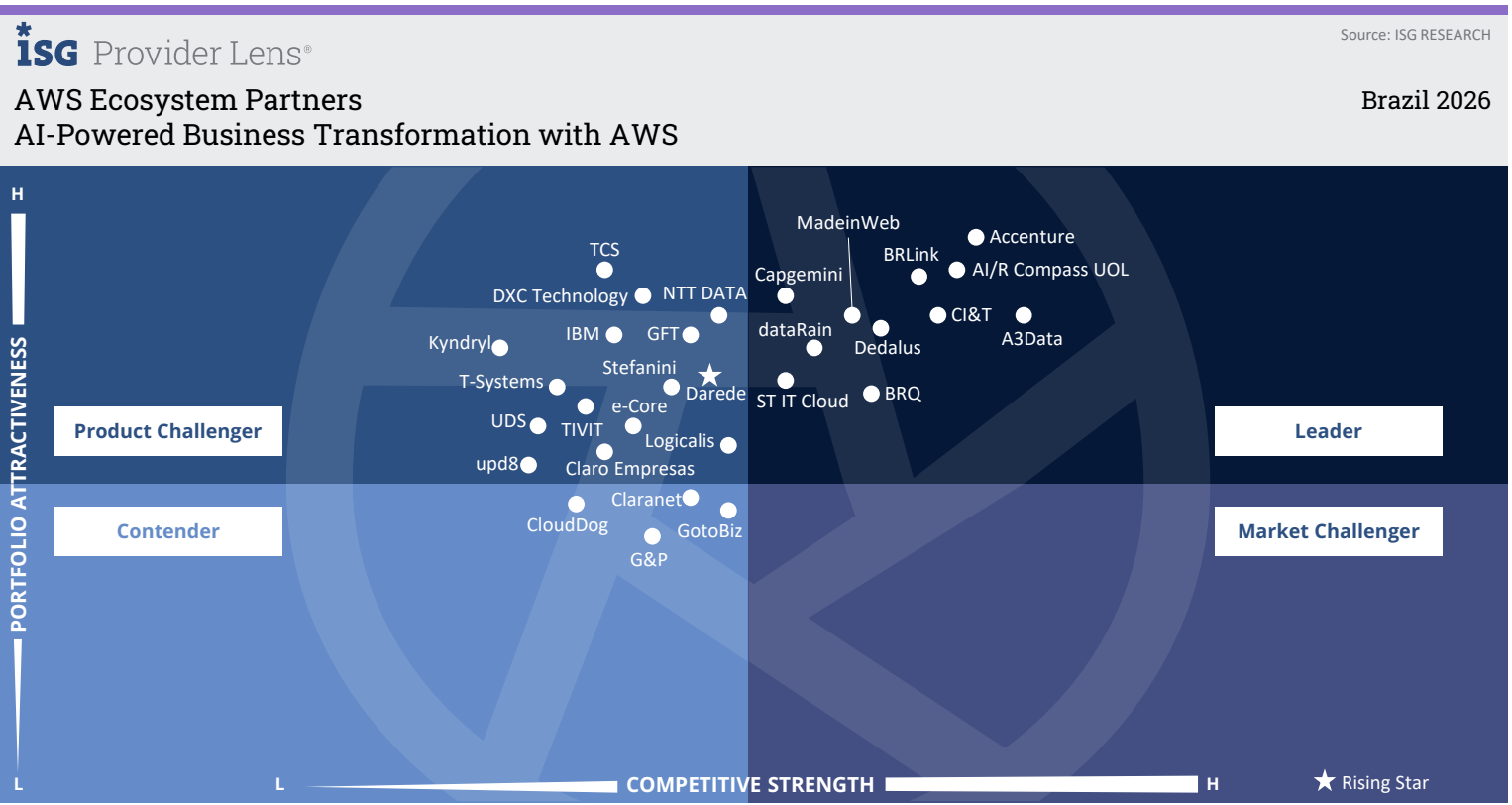
Strategy leaders

Should read this report to understand how providers of enterprise data modernization and AI services on AWS can empower them to achieve their strategic goals. The report also provides insight into how these technologies can drive innovation and create revenue streams. Thus, leaders can make decisions about technology investments, understand the potential impact of these technologies on their businesses and formulate effective strategies.

Data professionals

Should read this report to understand how service providers shape data-driven strategies, drive innovation and empower organizations to unlock the full potential of their data assets. The report highlights key trends, best practices and emerging technologies, preparing analytics professionals to lead successful data initiatives and deliver business insights.

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This quadrant highlights **AI service** providers on AWS, considering their ability to **design, develop** and **operate GenAI and agent-based AI solutions,** with governance and integration into processes to generate measurable results.

Adriana Frantz

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Definition

Evaluates AWS Ecosystem Partners that enable AI-driven business transformation by combining advanced GenAI, agent-based systems and purpose-built infrastructure. These providers offer end-to-end services, covering strategy, design, development, deployment and lifecycle management of AI solutions using AWS-native agent-based frameworks and the suite of AI services, such as Amazon Bedrock and SageMaker AI, to operationalize intelligent business workflows.

Providers demonstrate strong capabilities in building and managing agent-based systems, developing custom ML models and optimizing performance using AWS custom silicon, such as Graviton and Inferentia. Their offerings also extend to co-innovation programs, AI factories and enterprise-scale AI platforms tailored to the specific needs of each industry. There is a strong emphasis on responsible AI practices, ensuring the secure, ethical and compliant deployment of AI solutions aligned with organizational and regulatory requirements.

Eligibility Criteria

1. Demonstrate **end-to-end AI transformation capabilities, encompassing strategy, use case design, solution development, deployment, governance and lifecycle management** on AWS.
2. Use AWS-native **AI services**, including Amazon Bedrock, Amazon SageMaker, Amazon Q, agent-based AI capabilities, or equivalent AWS AI and ML services
3. Demonstrate expertise in AWS custom silicon for optimizing performance and cost efficiency
4. Deliver **customized enterprise ML and LLM** solutions tailored to specific industry use cases
5. Establish A**I Centers of Excellence (CoEs), co-innovation labs and AI factories** to accelerate the adoption of enterprise AI
6. Deliver measurable **business results** driven by AI-led transformation initiatives
7. Integrate **responsible AI frameworks** that encompass governance, explainability, security and compliance
8. Provide **pre-configured accelerators, reusable assets and agent models** to accelerate time-to-value
9. Demonstrate **specialized** expertise **in the market segment** with documented case studies highlighting measurable business results achieved through AWS AI implementations.
10. Demonstrate **relevant AWS certifications, competencies and partnerships** in the field of AI and ML
11. Demonstrate **ongoing investment in AI innovation, including** roadmaps, Centers of Excellence (CoEs) and talent development.

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Observations

The market is moving beyond isolated GenAI initiatives and advancing toward production-ready solutions integrated into business processes. The priority is now shifting toward transforming AI into a recurring capability, with agents, assistants and applications embedded in daily work, decision-making and end-to-end process execution.

This evolution is driving the platformization of AI, as organizations seek to reduce their reliance on custom projects through reusable agents, templates, standardized components and accelerators that shorten the time between conception and value creation. Industry-specific models and agents are also gaining prominence, combining services such as Amazon Bedrock with business expertise to address specific business contexts.

At the same time, adoption at scale requires a shift in how value is measured. The focus shifts from technical demonstrations to productivity gains, workflow automation, reduced cycle times, increased revenue and improved CX and EX. AI governance, security and cost control become requirements for implementation and acquisition, rather than elements added later.

In this scenario, the most competitive vendors will be those capable of combining business acumen, AI engineering and reusable assets to bring use cases into production quickly and demonstrate measurable results.

From the 53 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one Rising Star.

A3Data

A3Data combines data, AI and proprietary assets to transform business challenges into scalable solutions on AWS. Its approach prioritizes use cases with measurable returns and integrates governance and security into initiatives.

accenture

Accenture combines global scale, industry assets and deep AWS expertise to industrialize AI in enterprise environments. Its offering integrates agents, responsible governance and industry-specific solutions to accelerate adoption at scale.

AI/R | compass.uol

AI/R Compass UOL combines strategy, process redesign and AI engineering to bring use cases into production. Its Agentic AI Studios, reusable assets and multi-agent architecture support secure, governed and results-oriented automation.

BRLink

BRLink structures AI initiatives based on business value and drives projects from ideation to operation. Its multi-disciplinary team and AWS expertise support the evolution of experiments into productive, secure and scalable solutions.

BRQ

BRQ combines business transformation, GenAI and agent-based AI with strong alignment with AWS. Its capabilities include development, governance and financial control, supporting responsible and scalable adoption in enterprise environments.

Capgemini

Capgemini combines global scale, reusable assets and a strategic alliance with AWS to accelerate GenAI. Its approach prioritizes secure industrialization, dynamic model management and use cases with measurable returns and sustainable adoption.

CI&T

CI&T combines Agentic SDLC, software engineering and responsible AI to accelerate development and modernization. Its approach integrates agents, automation and governance controls, with a focus on measurable gains and industry-specific applications.

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dataRain combines data engineering, AI and software development to transform use cases into operational solutions. Its expertise in regulated environments and integration with AWS services supports secure, scalable and business-oriented projects.

Dedalus combines GenAI accelerators, agentic AI and LLMOps to take initiatives from PoC to production. Its approach integrates governance, human oversight and cost control, with a focus on security and measurable operational gains.

MadeinWeb

MadeinWeb combines a focus on value, agent-based AI engineering and reusable assets to accelerate solutions into production. Its approach incorporates governance, human-in-the-loop controls and security, supporting scale with provable business returns.

ST IT Cloud

ST IT Cloud combines strategy, maturity assessment and AI engineering to bring use cases into production. Its approach integrates agent-based AI, reusable assets and AWS services, with a focus on productivity, cost reduction and measurable results.

Darede (Rising Star) combines GenAI, agent-based AI and reusable architectures to automate processes at scale. Its offering integrates Amazon Bedrock, SageMaker, agents, RAG and security controls, supporting production with governance and regulatory compliance.

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Leader

"With a business-value-driven approach, proven expertise in AI and ML and multi-disciplinary capabilities, BRLink manages end-to-end AWS projects and transforms use cases into productive, secure and scalable solutions."

Adriana Frantz

BRLink

Overview

BRLink is a Brazilian cloud services and digital transformation company headquartered in Barueri, São Paulo, acquired by Ingram Micro in 2021. As an AWS Premier Tier Partner, it holds 11 competencies, including AI Services and ML. Its AI offering begins with the ideation and prioritization of use cases and progresses through the design, development, integration, security and operation of solutions. Use cases developed by the company span customer service, financial services, education, entertainment and compliance, with a focus on operational efficiency and improving the consumer experience.

Strengths

Business-value-driven approach: BRLink uses a structured ideation and prioritization process to assess the potential benefits and effort required for each AI initiative. This approach helps clients select the most relevant use cases, direct investments and reduce the risk of projects that are disconnected from business objectives.

Multi-disciplinary capabilities and end-to-end delivery: BRLink combines data scientists, developers and AWS experts to manage projects from use case definition through development, deployment and solution management. This integration facilitates the transition from experiments to secure, scalable production environments aligned with the client's cloud architecture.

Proven experience in AI and ML applications: BRLink showcases public case studies covering automated content moderation, intelligent information matching, accessibility through automatic captioning, identity recognition and process optimization. This diversity demonstrates the company's ability to adapt AWS AI services to different business needs and industries.

Caution

BRLink still has limited visibility into recent cases of GenAI implemented at scale. The company should increase the dissemination of case studies that demonstrate adoption in production, measurable results and impact on business transformation.

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AWS Brazil Public Sector — Technology Services

Who Should Read This Section

This report is valuable for **AWS service providers serving the public sector** in **Brazil** to understand their market position and for companies seeking 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 their market presence, as well as how each provider addresses the challenges enterprises face in the region.

IT leaders

Should read this report to identify AWS service providers with the capabilities to meet the requirements of public sector entities in Brazil. The report examines how these providers can help government organizations address challenges such as improving operations, reducing costs and increasing service capacity, while taking into account the public sector's unique characteristics.

Public sector professionals

Should read this report to understand how AWS partner service providers can meet their needs, modernize their environments and help them achieve their strategic objectives. Providers' expertise in consulting, development and managed services, combined with their knowledge of the public sector business, helps government agencies address the specific challenges they face in Brazil.

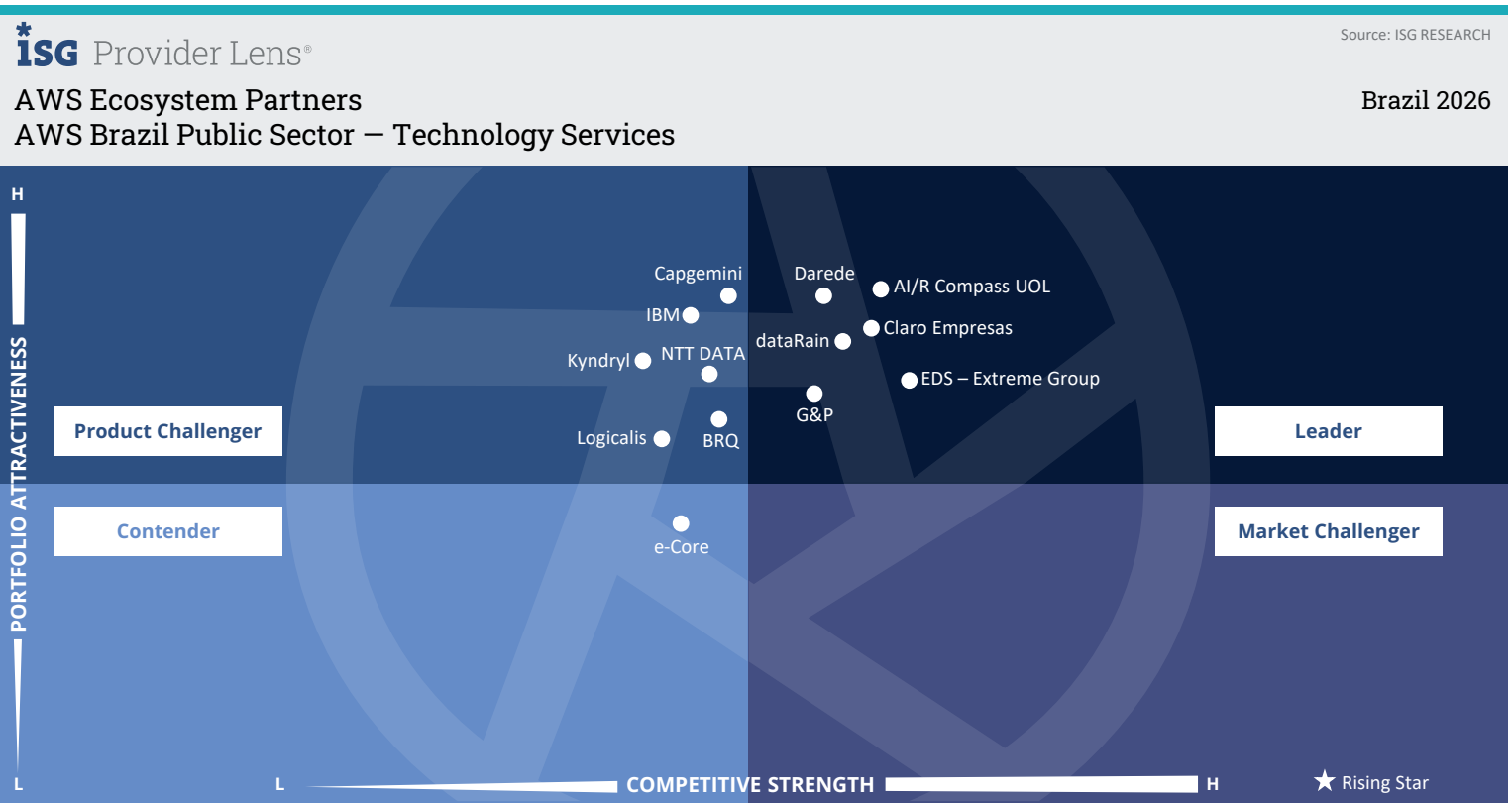
Development leaders

Should read this report to understand how AWS service providers can accelerate the implementation of innovative and efficient solutions in the Brazilian public sector. The report offers insights into service providers' capabilities and assists decision-making by identifying strategic partnerships, industry best practices and ways to maximize the value of your development initiatives.

Operational and financial leaders

Should read this report to assess how AWS service providers can help the public sector in Brazil optimize operations, reduce costs and increase service efficiency. With this report, leaders can make strategic technology investment decisions and select partners that meet their specific needs and enhance the modernization and effectiveness of financial and operational processes in the public sector.

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This quadrant evaluates vendors with **strong expertise in AWS** and **knowledge of the Brazilian public sector's needs,** capable of supporting **modernization, security, operational efficiency** and **innovation** in public agencies and institutions.

Adriana Frantz

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Definition

Evaluates AWS Ecosystem Partners that provide services to Brazilian public sector clients. The scope includes federal, state and municipal government entities, as well as institutions in education, healthcare and public finance. These partners help public organizations modernize legacy systems, migrate and manage workloads on AWS, improve digital channels for citizens and strengthen resilience, security and data governance.

Rather than evaluating isolated capabilities, the assessment focuses on how providers enable public sector modernization on AWS. It considers their ability to combine cloud expertise, data and AI knowledge, managed operations and delivery experience in regulated and mission-critical environments. Vendors must demonstrate an understanding of Brazilian public sector requirements, including public procurement rules and bidding processes, data residency, privacy, auditability, business continuity, secure hybrid architectures, government references and experience with AWS programs for the public sector.

Eligibility Criteria

1. Offer comprehensive **AWS transformation** services to **Brazilian public sector customers**
2. Demonstrate experience with public **procurement, regulatory** requirements, **security** and **compliance**
3. Deliver **data governance, analytics** and decision **intelligence** solutions using native AWS services
4. Support **AI, GenAI** and **agent-based AI** use cases aligned with responsible AI, privacy and auditability
5. Demonstrate expertise in **citizen services, public finance, education, healthcare** and other mission-critical use cases
6. Maintain **certifications**, competencies and participation in relevant **AWS** programs
7. Provide **references** from the Brazilian public sector and **measurable results**
8. Support requirements for **data residency, sovereignty, resilience** and **continuity**
9. Offer **pricing** and **delivery models that are** adaptable and tailored to the public sector

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Observations

The Brazilian public sector is accelerating the modernization of legacy environments and the adoption of cloud architectures to enhance operational efficiency, security and the quality of digital services offered to citizens. Initiatives across agencies at different levels are advancing as application modernization, automation and scalable platforms increasingly underpin broader transformation programs.

At the same time, security, compliance, sovereignty and data residency are taking on greater importance in architectural decisions, especially in environments that process sensitive information or support essential services. This scenario increases the demand for partners capable of combining technical expertise in AWS with knowledge of regulatory requirements, governance and the specific characteristics of the Brazilian public sector.

The adoption of GenAI and agent-based AI is also beginning to evolve from experiments to applications focused on productivity, citizen services and the automation of high-volume processes. Healthcare, education, justice and public safety are among the areas with the potential to expand the use of these technologies. In the coming years, the most significant projects are expected to combine system modernization, data, security and AI, with a growing focus on governance, interoperability and the delivery of measurable results for society.

From the 53 companies assessed for this study, 13 qualified for this quadrant, with six being Leaders.

AI/R | compass.uol

AI/R Compass UOL combines extensive experience in the public sector with the modernization of critical environments, security and responsible AI, supporting government agencies and regulated institutions in the evolution of systems, data and digital services on AWS.

Claro Empresas

Claro Empresas stands out for its integrated offering of AWS, connectivity, security and managed services and its scale and expertise in the public sector to support critical, regulated and high-availability environments.

DAREDE à nuvem

Darede combines deep expertise in AWS, experience in public procurement and a broad portfolio of modernization, security and managed services, with capabilities also focused on data sovereignty and protection.

dataRain

dataRain combines expertise in government, modernization and data engineering with AI applications for public missions, supporting complex initiatives in regulated environments with governance, security and continuous operations.

EDS – Extreme Group

EDS – Extreme Group stands out for its experience with federal agencies and its expertise in AWS migration and modernization, transforming cloud-first initiatives into efficiency gains, infrastructure rationalization and cost reductions.

G&P

G&P combines extensive experience in the public sector, security for critical environments and the development of digital services, including AI applications focused on education, process automation and citizen services.

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Appendix

The ISG Provider Lens® 2026 – AWS Ecosystem Partners study analyzes the relevant software vendors and service providers in the Brazilian market, based on a multi-phased research and analysis process and positions these providers according to 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 September 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 AWS Ecosystem Partners 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

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Adriana Frantz has over 20 years of professional experience in finance and technology, project and processes, team management, and research management. She is a senior partner at TGT Consulting, a management and technology firm, specializing in projects involving digital transformation, and business risks. She works as an analyst and author at ISG, where she is responsible in Brazil for studies on the Google Cloud Ecosystem, Customer Experienced, Digital Banking and ESG. Adriana also teaches several undergraduate courses. She is currently pursuing her Ph.D. in Business at the University of São Paulo, with a focus on ESG and and holds a master's degree in the same field. In addition, she holds a postgraduate degree from FGV and holds a bachelor's degree in from UNESP.

Research Analyst



Rafael Rigotti
Research Analyst

Rafael Rigotti joined the company as a Market Research Analyst in May 2024. Rafael is based in São Paulo, Brazil and holds a bachelor's degree in International Relations and an MBA in International Business. He is currently specializing in Data Science and Artificial Intelligence as part of his graduate studies. Rafael is responsible for IPL's research in the Latin America region, working alongside the team of Research Analysts and has four years of experience in the Information Technology market in Brazil.

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Study Sponsor



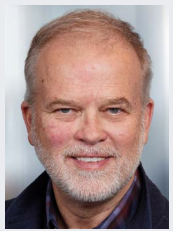
Heiko Henkes

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

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REPORT: AWS ECOSYSTEM PARTNERS

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