AI-Driven Development Platforms Emerging Providers Buyers Guide

Software Provider and Product Assessment

ISG Research

Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements.**

The 2026 ISG Buyers Guides™ for AI-Driven Development Platforms Emerging Providers, covering AI-Driven AppDev Platforms Emerging Providers and AI-Driven DevOps Platforms Emerging Providers, are the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for AI-driven development platforms. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience in its capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of AI-driven development platform can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of AI-driven development platform software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating AI-driven development platforms and offer these Buyers Guides as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to assess existing approaches and software providers or establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes in the most efficient manner.

1. Define the business case and goals.
   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business and IT needs.
   Defining the business and IT requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
   Utilize the product experience: capability and platform, with support for adaptability, manageability, reliability and usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the software provider and products properly.
   Apply a weighting to the evaluation categories in the evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

Using the ISG Buyers Guide and process provides enterprises a clear, structured approach to making smarter software and business investment decisions. It ensures alignment between strategy, people, processes and technology while reducing risk, saving time and improving outcomes. The ISG approach promotes data-driven decision-making and collaboration, helping choose the right software providers for maximum value and return on investment.

AI-Driven AppDev Platforms Emerging Providers

Over the next 12 to 24 months, CIOs and IT leaders will face increasing pressure to deliver more software at greater speed and quality while maintaining governance across hybrid and multicloud environments. Generative and agentic artificial intelligence (AI) are improving developer productivity, test coverage, documentation quality and lifecycle visibility, while talent scarcity, escalating security obligations and regulatory scrutiny heighten the need for automated guardrails and traceability. Enterprises are consolidating fragmented toolchains and elevating platform engineering to standardize software development lifecycle (SDLC) practices, reducing integration overhead and shifting from siloed tools to unified, AI-augmented app development platforms that embed governance directly into delivery workflows.

ISG Research defines AI-Driven AppDev platforms as integrated, enterprise-grade software platforms that unify and orchestrate end-to-end SDLC capabilities, including requirements management and traceability; design and documentation; project and task management; source code and artifact version control; testing; release planning and lifecycle governance; collaboration and knowledge; analytics and visualization; workflow automation and integration; and security and access controls. These capabilities are delivered as native platform functionality and enhanced by AI, including machine learning (ML), generative AI (GenAI) and agentic capabilities, to automate and assist enterprise application delivery without reliance on outsourced or managed services.

ISG Research also monitors a set of emerging AI-Driven AppDev providers whose offerings address focused development use cases or specialized workflows. These providers may deliver differentiated AI-assisted capabilities within defined contexts but are generally earlier in evolution or limited in breadth, ecosystem integration or enterprise adoption. As a result, they do not meet inclusion criteria for the main Buyers Guide and are assessed independently as niche or evolving offerings that can complement, but not replace, comprehensive AI-Driven AppDev platforms.

> **AI-Driven AppDev Platforms emphasize the integrity of the application asset itself.**

AI-Driven AppDev platforms emphasize the integrity of the application asset itself. While DevOps tooling focuses on infrastructure and delivery pipelines, AppDev platforms center on application logic, data and business value, supporting governance and quality throughout the lifecycle.

For enterprise IT leaders, these platforms provide centralized environments for software delivery. Unified workspaces bring requirements definition, agile planning, design, version

control and defect tracking closer to development activities, supporting design-to-code traceability and reducing drift between business intent and implementation.

From a business perspective, this approach enables predictable execution. AppDev platforms provide visibility into portfolio health, delivery risk and compliance posture rather than focusing solely on deployment speed. Embedding lifecycle management as a core capability allows enterprises to scale custom applications while maintaining stability, auditability and governance.

Adoption spans industries, with strongest demand in regulated sectors such as financial services, healthcare and the public sector, where auditability and policy enforcement are mandatory. Through 2026, 4 in 5 enterprises will adopt low-code or no-code platforms for applications development, reducing IT complexity and improving the agility to adapt to changes, reinforcing the need for centralized platforms that govern diverse development approaches while maintaining consistent controls. These platforms are best suited for large enterprises operating multiple product teams across hybrid and multicloud environments with established DevOps and platform engineering functions.

Successful adoption depends on standardized workflows, mature version control and artifact repositories and high-quality project and test data to support AI capabilities. Clear policies for responsible AI use and integration maturity through APIs and event streams are also critical. Deployments often follow phased approaches, beginning with AI-assisted development and testing, then consolidating overlapping tools and expanding into lifecycle analytics and value stream management.

The category has evolved from fragmented application lifecycle management toolchains to unified, platform-engineered environments that integrate the full software lifecycle. Early gains from CI/CD, infrastructure-as-code and microservices improved delivery speed but introduced governance gaps as environments scaled. Consolidation and workflow standardization became essential to restoring traceability.

The infusion of AI across ML, GenAI and agentic capabilities has accelerated this shift. AI augments code creation, test generation, documentation and lifecycle visibility, moving the category from tool aggregation toward intelligent orchestration. Modern platforms emphasize native automation, policy consistency and value stream analytics to link engineering performance to business outcomes.

Enterprises evaluating AI-Driven AppDev platforms require consistent SDLC standardization combined with selective AI adoption that reliably improves throughput and quality. Core requirements include release governance, artifact provenance, software bill of materials (SBOM) generation and telemetry aligned to service-level indicators (SLIs), service-level objectives (SLOs) and value stream metrics. Interoperability through API-first and event-driven integration and adherence to open standards remains essential.

Effective platforms deliver cohesive, native capabilities across requirements and traceability, design and documentation, project and task management, source and artifact version control, testing and release planning, lifecycle governance, collaboration and analytics, CI/CD and security controls. AI should automate routine tasks such as code generation, test automation and documentation synthesis under configurable guardrails.

> **When assessing emerging AI-Driven AppDev providers, enterprises should focus on how specialized capabilities align with specific use cases or gaps in existing toolchains.**

Interoperability and governance remain key evaluation criteria. Platforms must provide robust APIs and audit-ready controls, support phased adoption and scale reliably with cost transparency to sustain outcomes at enterprise level.

When assessing emerging AI-Driven AppDev providers, enterprises should focus on how specialized capabilities align with specific use cases or gaps in existing toolchains. These offerings may deliver targeted innovation but typically require integration with broader platforms to meet full enterprise requirements for scale, governance and lifecycle coverage.

The 2026 ISG Buyers Guide™ for AI-Driven AppDev Platforms Emerging Providers evaluates software providers across key capability areas including requirements management and traceability, design and documentation management, project and task management, source and artifact version control, test management, release planning and lifecycle governance, collaboration and knowledge management, analytics and reporting, workflow automation and integration, security and access controls and user interfaces spanning no-code, low-code and pro-code development. This research assesses the following providers: Backendless, Betty Blocks, Claris, GeneXus, Simplicité, Thinkwise and WaveMaker.

Key Takeaways

AI-Driven AppDev Platforms Emerging Providers reflect a shift from fragmented application lifecycle tools toward more unified, AI-enabled environments that emphasize governance, traceability and lifecycle integrity. These offerings address focused development use cases or specialized workflows, often delivering differentiated AI-assisted capabilities within defined contexts. While generally limited in breadth or enterprise-scale adoption, they illustrate how AI is reshaping application development through automation, policy consistency and improved visibility across the SDLC.

Software Provider Summary

The ISG Buyers Guide™ for AI-Driven AppDev Platforms Emerging Providers evaluates seven software providers offering products supporting focused, AI-enabled application development and lifecycle workflows. The research ranked the top three overall leaders as GeneXus, Betty Blocks and Thinkwise. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Betty Blocks and GeneXus were rated as Exemplary, with Backendless and Thinkwise rated as Innovative. Claris and Simplicité were rated as Assurance; and WaveMaker was rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (25%) and Platform (55%), which includes adaptability, manageability, reliability and usability. GeneXus, Betty Blocks and Thinkwise achieved the highest performance as Leaders in this category, supported by breadth and depth across the full application lifecycle and enterprise-grade adaptability and manageability spanning business and IT requirements. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Claris, GeneXus and Simplicité were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should evaluate emerging AI-Driven AppDev providers as targeted complements to broader platform strategies rather than full replacements for enterprise-scale solutions. Buyers should align specialized capabilities to clearly defined use cases, integration gaps or innovation needs while ensuring interoperability with core SDLC platforms. Clear governance models, API-driven integration and responsible AI policies are essential to sustaining value as these offerings mature.

The Findings – AI-Driven AppDev Platforms Emerging Providers

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds GeneXus atop the list, followed by Betty Blocks and Thinkwise. Providers that place in the top three of a category earn the designation of Leader. GeneXus and Betty Blocks have done so in four categories; Thinkwise in three; and Backendless, Claris, Simplicité and WaveMaker in one category.

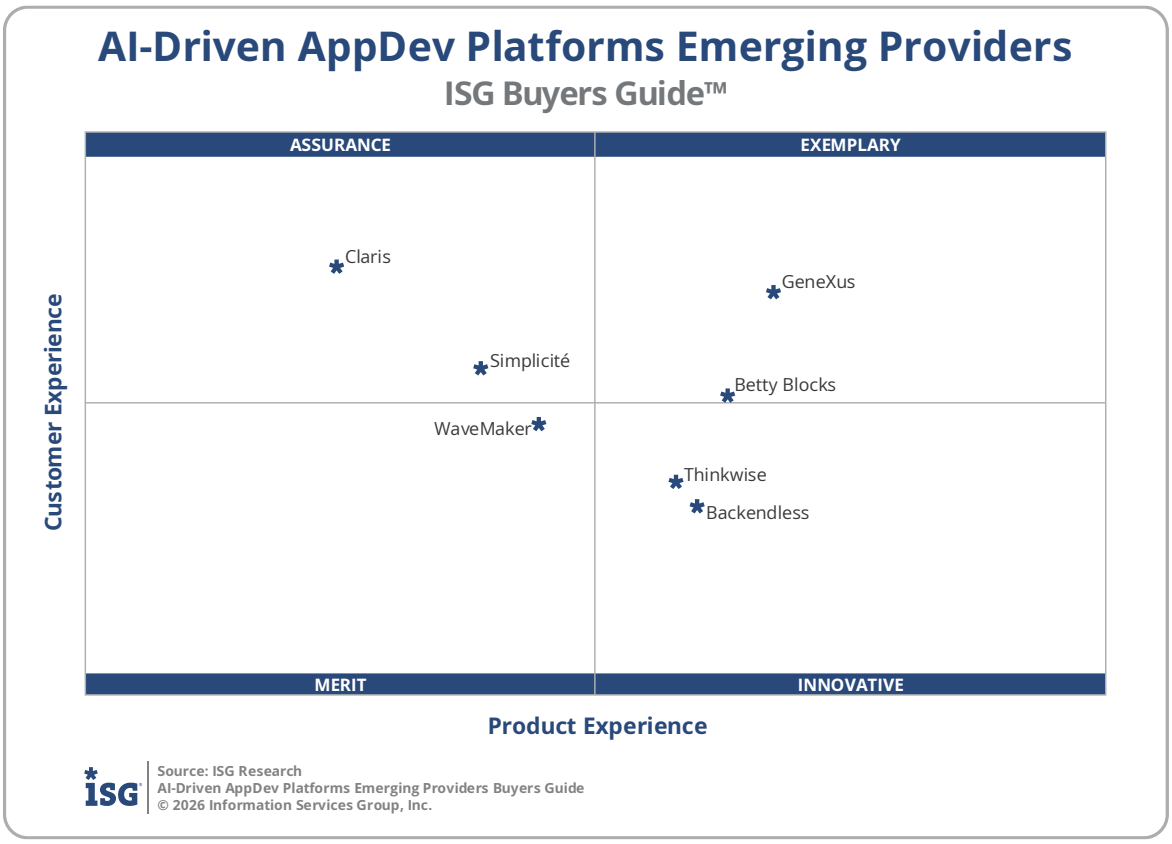
AI-Driven AppDev Platforms
Emerging Provider
Overall

Providers	Grade	Performance
GeneXus	B-	*Leader* 60.1%
Betty Blocks	B-	*Leader* 57.3%
Thinkwise	C++	*Leader* 55.2%
WaveMaker	C++	52.5%
Backendless	C++	51.7%
Simplicité	C++	50.6%
Claris	C+	49.3%

Source: ISG Research
AI-Driven AppDev Platforms Emerging Providers Buyers Guide

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Betty Blocks and GeneXus.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Backendless and Thinkwise.

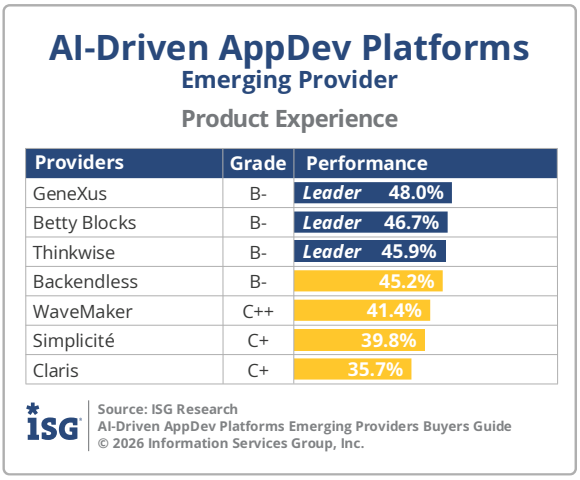
Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Claris and Simplicité.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The provider rated Merit is: WaveMaker.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.



The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (25%) and Platform (55%). GeneXus, Betty Blocks and Thinkwise were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are Claris, GeneXus and Simplicité. These category Leaders best communicate commitment and dedication to customer needs.

AI-Driven AppDev Platforms
Emerging Provider
Customer Experience

Providers	Grade	Performance
Claris	B++	*Leader* 15.7%
GeneXus	B++	*Leader* 15.1%
Simplicité	B	*Leader* 13.4%
Betty Blocks	B	12.7%
WaveMaker	B-	12.1%
Backendless	C++	10.9%
Thinkwise	C++	10.3%

Source: ISG Research
AI-Driven AppDev Platforms Emerging Providers Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – AI-Driven AppDev Platforms Emerging Providers

For inclusion in the 2026 ISG Buyers Guide™ for AI-Driven AppDev Platforms Emerging Providers, a software provider must be in good standing financially and ethically, have at least $1 million, but not more than $30 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 full-time employees. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
Backendless	Backendless	N/A	June 2025
Betty Blocks	Betty Blocks	2025.22	October 2025
Claris	Claris FileMaker	N/A	July 2025
GeneXus	GeneXus Next	2025.01	October 2025
Simplicité	Simplicité Software	7.0	November 2025
Thinkwise	Thinkwise	2025.3	October 2025
WaveMaker	WaveMaker Platform	v11.14.2	December 2025

AI-Driven DevOps Platforms Emerging Providers

Over the next 12 to 24 months, CIOs and IT leaders will prioritize reliability, security and speed at scale as software delivery continues to expand across hybrid and multicloud environments built on containers and microservices. Talent constraints across DevOps and Site Reliability Engineering (SRE) teams, escalating software supply chain risks and tighter governance expectations are pushing enterprises to standardize platform engineering and automate across the full DevOps lifecycle. Enterprises are consolidating fragmented toolchains, expanding GitOps and infrastructure-as-code practices and increasing investment in observability mapped to business outcomes. At the same time, artificial intelligence (AI) spanning machine learning (ML), generative AI (GenAI) and agentic capabilities is shifting expectations toward predictive incident management, automated change risk assessment and policy enforcement at scale, driving demand for AI-augmented DevOps platforms with strong native automation and guardrails.

ISG Research defines AI-Driven DevOps platforms as software platforms that deliver native automation and infrastructure capabilities to support ongoing operations for enterprise developers and SRE teams. Core capabilities include CI/CD, infrastructure as code and environment management, automation and orchestration, monitoring, logging and observability, security and secrets management, collaboration and workflow management, role-based access control and Policy-as-Code, multicloud and container orchestration and disaster recovery and resilience. These platforms are enhanced by AI technologies, including ML, GenAI and agentic AI, to improve delivery speed, operational reliability, security and cost efficiency.

AI-Driven DevOps platforms are applicable across industries and are particularly valued in sectors with stringent uptime, security and audit requirements.

ISG Research monitors a group of emerging AI-Driven DevOps providers that address targeted operational challenges or specialized deployment models. These offerings often focus on specific DevOps personas or narrow use cases and may lack the breadth of integration, governance depth or enterprise scale required for inclusion in the main Buyers Guide. While some demonstrate technical differentiation or early adoption, they are evaluated separately as niche or evolving options within the broader DevOps ecosystem.

AI-Driven DevOps platforms are applicable across industries and are particularly valued in sectors with stringent uptime, security and audit requirements such as financial services, healthcare, telecom and the public sector. They are best suited for large enterprises operating Kubernetes-based workloads across hybrid and multicloud estates with established CI/CD pipelines and platform engineering functions seeking unified governance

and automation. By 2027, 4 in 9 enterprise DevOps teams will utilize GenAI in the design, development and maintenance of applications that conform to industry and business standards for quality and security, reinforcing the need for platforms that embed AI responsibly within operational workflows.

Successful adoption depends on mature infrastructure as code and GitOps practices, standardized pipelines with artifact provenance and software bill of materials (SBOM) generation, and consolidated observability telemetry mapped to service-level indicators (SLIs) and service-level objectives (SLOs). Robust secrets management, least-privilege access controls and adoption of Policy-as-Code are also essential to maintain security and compliance as automation scales. Effective deployments typically begin with AI-assisted observability, noise reduction, incident classification and change risk scoring, then progress toward supervised, policy-bound remediation. Mid-market organizations often favor software-as-a-service (SaaS) delivery with opinionated defaults, managed runners and prebuilt cloud and Kubernetes integrations to accelerate time-to-value with cost transparency.

The DevOps category evolved through the convergence of agile development, CI/CD, infrastructure as code and cloud-native architectures. As enterprises adopted microservices and containers, GitOps, service meshes and comprehensive observability became critical to managing operational complexity. In parallel, SRE disciplines formalized reliability targets and operational playbooks, elevating uptime, incident response and change management to strategic priorities.

The integration of AI has accelerated this evolution. Modern platforms now augment detection and triage, infer root cause, score change risk, optimize capacity and cost and enforce operational policies through code. This shift is moving DevOps from reactive operations toward proactive, automated resilience, aligning security, compliance and performance objectives across hybrid and multicloud environments.

Enterprises evaluating AI-Driven DevOps platforms require reliability, security and delivery velocity at scale. This starts with standardized pipelines, artifact signing and SBOMs to secure the software supply chain, alongside consistent infrastructure provisioning through infrastructure as code and GitOps. Unified observability across metrics, logs and traces is essential to connect operational health with business impact, while automated controls help meet regulatory expectations without slowing delivery.

To safely capture AI's benefits, organizations need clear usage policies, model lifecycle management and guardrails for agent-driven actions. AI capabilities should integrate directly with CI/CD, environment management, Kubernetes orchestration and incident workflows to deliver measurable improvements in mean time to detect and resolve issues (MTTD/MTTR), change failure rates and cost efficiency. FinOps visibility is increasingly important as automation accelerates deployment frequency and cloud usage.

Effective AI-Driven DevOps platforms deliver cohesive, native capabilities across CI/CD, infrastructure and environment management, automation and orchestration, observability, security and secrets management, Policy-as-Code, multicloud and container orchestration and disaster recovery. AI should enhance core automation by enabling predictive alerting, noise reduction, root-cause inference, change risk scoring and supervised remediation under defined policies.

> **Interoperability and governance remain critical evaluation criteria.**

Interoperability and governance remain critical evaluation criteria. Platforms must expose robust APIs and event streams, integrate with major cloud services and Kubernetes ecosystems and support artifact signing, vulnerability management and auditability. Phased adoption models that begin with AI-assisted observability and incident response and expand toward policy-bound automation help organizations build trust, demonstrate value and reduce operational risk.

When assessing emerging AI-Driven DevOps providers, enterprises should focus on how specialized capabilities align with specific operational needs or gaps in existing toolchains. These offerings can deliver targeted innovation but typically require integration with broader platforms to meet enterprise requirements for scale, governance and end-to-end lifecycle coverage.

The 2026 ISG Buyers Guide™ for AI-Driven DevOps Platforms Emerging Providers evaluates software providers across key capability areas including CI/CD, infrastructure as code and environment management, automation and orchestration, monitoring, logging and observability, security compliance and secrets management, collaboration and workflow management, role-based access control and Policy-as-Code, multicloud and container orchestration and disaster recovery and resilience. This research assesses the following software providers: Buildkite, CircleCI, CloudBees, Harness and Octopus.

Key Takeaways

AI-Driven DevOps Platforms Emerging Providers illustrate the continued evolution from discrete CI/CD and infrastructure tools toward more integrated, automation-centric operational platforms. These offerings focus on targeted DevOps challenges, emphasizing reliability, security and delivery speed within defined scopes or personas. While typically narrower in breadth and enterprise reach, they highlight how AI-enabled automation and policy consistency are reshaping operational resilience across hybrid and multicloud environments.

Software Provider Summary

The ISG Buyers Guide™ for AI-Driven DevOps Platforms Emerging Providers evaluates five software providers offering products supporting targeted, AI-enabled DevOps and operational workflows. The research ranked the top three overall leaders as Octopus, CloudBees and Buildkite. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. CloudBees and Octopus were rated as Exemplary, with Buildkite rated as Innovative. CircleCI was rated as Assurance; and Harness was rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (25%) and Platform (55%), which includes adaptability, manageability, reliability and usability. Octopus, Buildkite and CloudBees achieved the highest performance as Leaders in this category, supported by strong native automation across CI/CD and infrastructure workflows and robust platform foundations for governance and scalability in containerized environments. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. CircleCI, Octopus and CloudBees were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should consider emerging AI-Driven DevOps providers as focused enablers that address specific operational gaps rather than complete replacements for end-to-end DevOps platforms. Buyers should prioritize alignment with targeted use cases, integration maturity and governance requirements, particularly around CI/CD standardization, observability and policy enforcement. Phased adoption that begins with AI-assisted observability and incident response can help organizations build trust while limiting operational risk.

The Findings – AI-Driven DevOps Platforms Emerging Providers

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds Octopus atop the list, followed by CloudBees and Buildkite. Providers that place in the top three of a category earn the designation of Leader. Octopus and CloudBees have done so in five categories; Buildkite in four; and CircleCI in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

AI-Driven DevOps Platforms
Emerging Provider
Overall

Providers	Grade	Performance
Octopus	B	Leader 66.2%
CloudBees	B	Leader 64.2%
Buildkite	B-	Leader 61.8%
CircleCI	B-	59.6%
Harness	C++	51.9%

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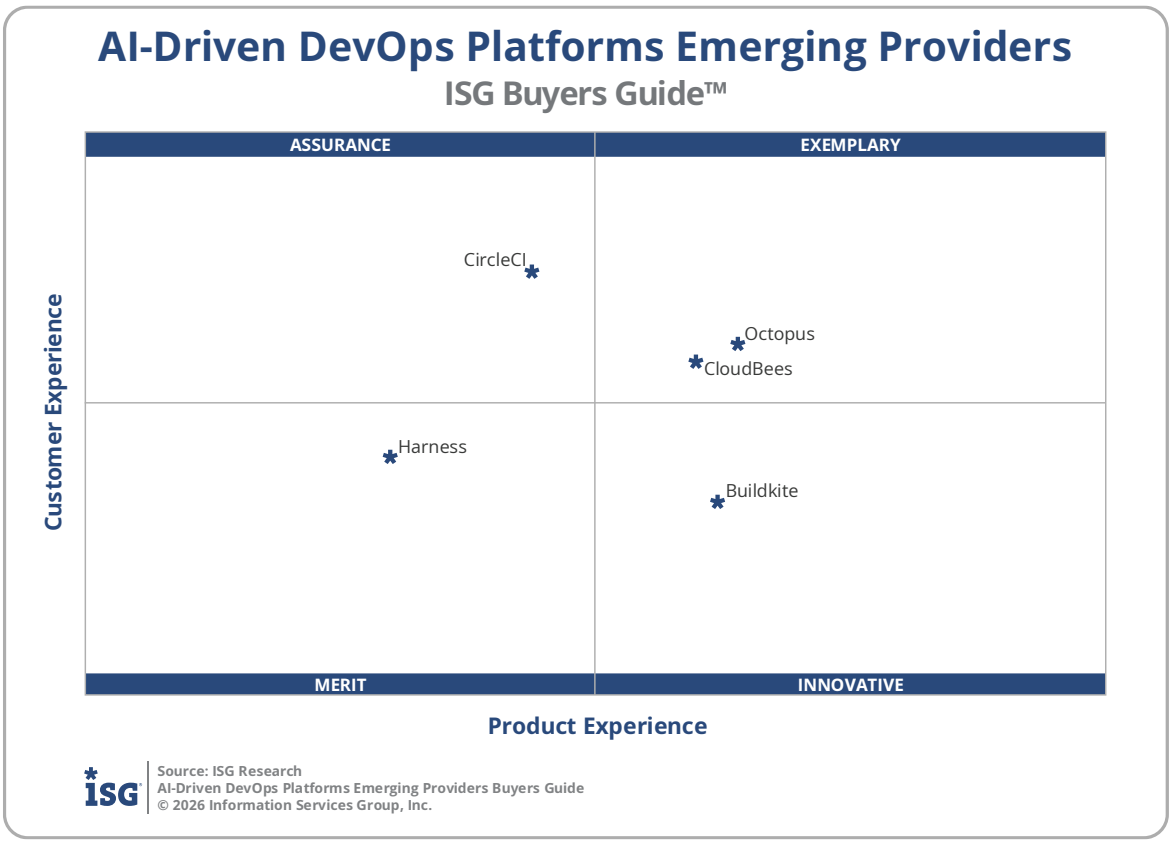
Source: ISG Research
AI-Driven DevOps Platforms Emerging Providers Buyers Guide

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: CloudBees and Octopus.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: Buildkite.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The provider rated Assurance is: CircleCI.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The provider rated Merit is: Harness.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

AI-Driven DevOps Platforms
Emerging Provider
Product Experience

Providers	Grade	Performance
Octopus	B	Leader 52.7%
Buildkite	B	Leader 51.9%
CloudBees	B	Leader 51.1%
CircleCI	B-	45.2%
Harness	C++	40.1%

Source: ISG Research
AI-Driven DevOps Platforms Emerging Providers Buyers Guide

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (25%) and Platform (55%). Octopus, Buildkite and CloudBees were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

AI-Driven DevOps Platforms
Emerging Provider
Customer Experience

Providers	Grade	Performance
CircleCI	A-	Leader 17.2%
Octopus	B++	Leader 15.4%
CloudBees	B++	Leader 15.0%
Harness	B	12.7%
Buildkite	B-	11.6%

Source: ISG Research
AI-Driven DevOps Platforms Emerging Providers Buyers Guide

The software providers that evaluated the highest in the Customer Experience category are CircleCI, Octopus and CloudBees. These category leaders best communicate commitment and dedication to customer needs. Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – AI-Driven DevOps Platforms Emerging Providers

For inclusion in the 2026 ISG Buyers Guide™ for AI-Driven DevOps Platforms Emerging Providers, a software provider must be in good standing financially and ethically, have at least $30 million, but not more than $150 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 125 full-time employees. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
Buildkite	Buildkite Test Engine	N/A	August 2025
CircleCI	CircleCI Platform	N/A	September 2025
CloudBees	CloudBees Unify	N/A	May 2025
Harness	Harness Software Delivery Platform	1.114.x	October 2025
Octopus	Octopus Deploy	N/A	July 2025

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.