

Analytic Data Platforms Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***ISG** Research



Analytic Data Platforms

As enterprises strive to automate business processes and decisions using artificial intelligence agents, their reliance on data and the importance of the analytic data platform have never been greater.

ISG Research defines analytic data platforms as data platforms that run applications to analyze the business, including decision support, business intelligence, data science and AI and machine learning (ML). Complemented by data operations and data intelligence platforms

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Analytic data platforms play a fundamental role in enabling enterprises to generate value from accumulated data.

and tools, analytic data platforms play a fundamental role in enabling enterprises to generate value from accumulated data, supporting BI and data science initiatives to evaluate the business to increase efficiency, as well as identifying and responding to new business challenges and opportunities.

Analytic data platforms encompass real-time analytics data engines, data warehouses and data lakehouses as well as the increasing convergence of data warehouse, data lake and data-streaming technologies. Without analytic data platforms, enterprises would be reliant on a combination of paper records, time-consuming manual processes and huge libraries of physical files to analyze business information.

At the heart of any data platform is the storage and management of a collection of related data. This is typically provided by a database management system (more commonly referred to simply as a database) that provides the data persistence, data management, data processing and data query functionality that enables access to—and interaction with—the stored data. Since the 1980s, the market for analytic data platforms has been dominated by the relational data model and relational database management systems.

More recently, data processing frameworks, such as Apache Spark, have been used to form the basis of a data platform by providing data persistence, data management, data processing and data query functionality alongside object storage. Early data lake projects—designed to store and process large volumes of raw data economically—were primarily based on Hadoop. Today, adoption of cloud computing environments has also led to the widespread use of object stores as an underlying data persistence layer for data platforms, with query engines such as Apache Spark, Apache Presto and Trino adding the data processing functionality required of a data platform.

While cloud-based object storage provides a low-cost environment for storing large volumes of data, it lacks structured data management and processing functionality to support multiple



BI projects as well as data science and operational applications. Accelerating the analysis of data in data lakehouse environments is a key trend driving the analytic data platform space. The data lakehouse concept is designed to incorporate data warehousing functionality—such as structured data management and processing functionality, including support for table formats, metadata management and transactional updates and deletes—with cloud-based object storage. Support for open table formats—specifically Apache Hudi, Apache Iceberg and Delta Lake—is now a critical feature for providers of analytic data platforms to enable the persistence and analysis of structured and unstructured data in object storage. We assert that by 2027, more than 8 in 10 data lakehouse users will adopt open table formats to deliver support for ACID transactions and CRUD operations on data stored in object storage.

Data Platforms
Market Assertion

By 2027, more than 8 in 10 data lakehouse users will adopt open table formats to deliver support for ACID transactions and CRUD operations on data stored in object storage.

Matt Aslett
Director of Research, Analytics and Data

ISG Research

Migration of analytic workloads to the cloud is a significant trend in the analytic data platform sector. Most analytic data platforms were traditionally deployed on-premises. Today, enterprises are increasingly deploying analytic data platforms on cloud infrastructure or using analytic data platform functionality delivered as managed cloud services. More than one-half (58%) of participants in ISG's Market Lens Cloud Study use the cloud for the majority of their data platforms.

Another key trend in the data platform sector is the blurring of the lines between operational and analytic workloads. While there have always been general-purpose databases that were used for both analytic and operational workloads, traditional architectures have involved the extraction, transformation and loading of data from the operational data platform into an external analytic data platform. This enables operational and analytic workloads to run concurrently without adversely impacting each other, protecting the performance of both.

The development of intelligent applications infused with contextually relevant recommendations, predictions and forecasting driven by ML, generative AI (GenAI) and agentic AI provides workloads that span traditional requirements. While this impacts the requirements for operational data platforms to support real-time analytic functionality, it does not eradicate the need for analysis of data in a separate analytic data platform to support BI and data science projects, as well as the development, training and fine-tuning of AI models. There is an ongoing need for data platforms designed specifically to support analytic workloads, with dedicated functionality for data engineering, including the development, training and tuning of ML and GenAI models. The Analytic Data Platforms Buyers Guide reflects this requirement by assessing products positioned as analytic data platforms on the ability to serve specific requirements of analytic use cases.



Separately, we have also created the Operational Data Platforms Buyers Guide, which excludes dedicated analytic functionality and data platforms. Meanwhile, the Data Platforms Buyers Guide evaluates a software provider's ability to serve a combination of both operational and analytic workloads, taking into account the analytic processing capabilities of operational data platforms, and vice versa. Our assessments also considered whether the functionality in question was available from a software provider in a single offering or as a suite of products or cloud services.

The ISG Buyers Guide™ for Analytic Data Platforms evaluates software providers and products in key areas, including data persistence, data management, data processing and data query; database administrator functionality; developer functionality; data engineering functionality; and data architect functionality. To be considered for inclusion in the Analytic Data Platforms Buyers Guide, a product must be marketed as a general-purpose data platform, database, database management system, data warehouse, data lake or data lakehouse. The primary use case for the product should be to support worker- and customer-facing analytics workloads (business intelligence, artificial intelligence or data science).

This research report evaluates the following software providers which offer products that are considered analytic data platforms as we define it: Actian, Aiven, Alibaba Cloud, AWS, Broadcom, Cloudera, Couchbase, Databricks, Dremio, EDB, Google Cloud, Huawei Cloud, IBM, Incorta, InterSystems, KX, MariaDB, Microsoft, Neo4j, OpenText, Oracle, Percona, PingCAP, Progress Software, Salesforce, SAP, SingleStore, Snowflake, Starburst, Tencent Cloud, Teradata and VAST Data.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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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 undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Analytic Data Platforms is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for analytic data platform software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for analytic data platforms to an enterprise's requirements.

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. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of analytic data platform can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment time and



eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of analytic data platform software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating analytic data platforms and offer this Buyers Guide 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 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.

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 needs.
Defining the business 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: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology 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.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Databricks atop the list, followed by Oracle and Google Cloud. Providers that place in the top three of a category earn the designation of Leader. Databricks has done so in seven categories; Oracle in six; Google Cloud and InterSystems in three and IBM in two.

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 a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories 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.

Analytic Data Platforms Overall

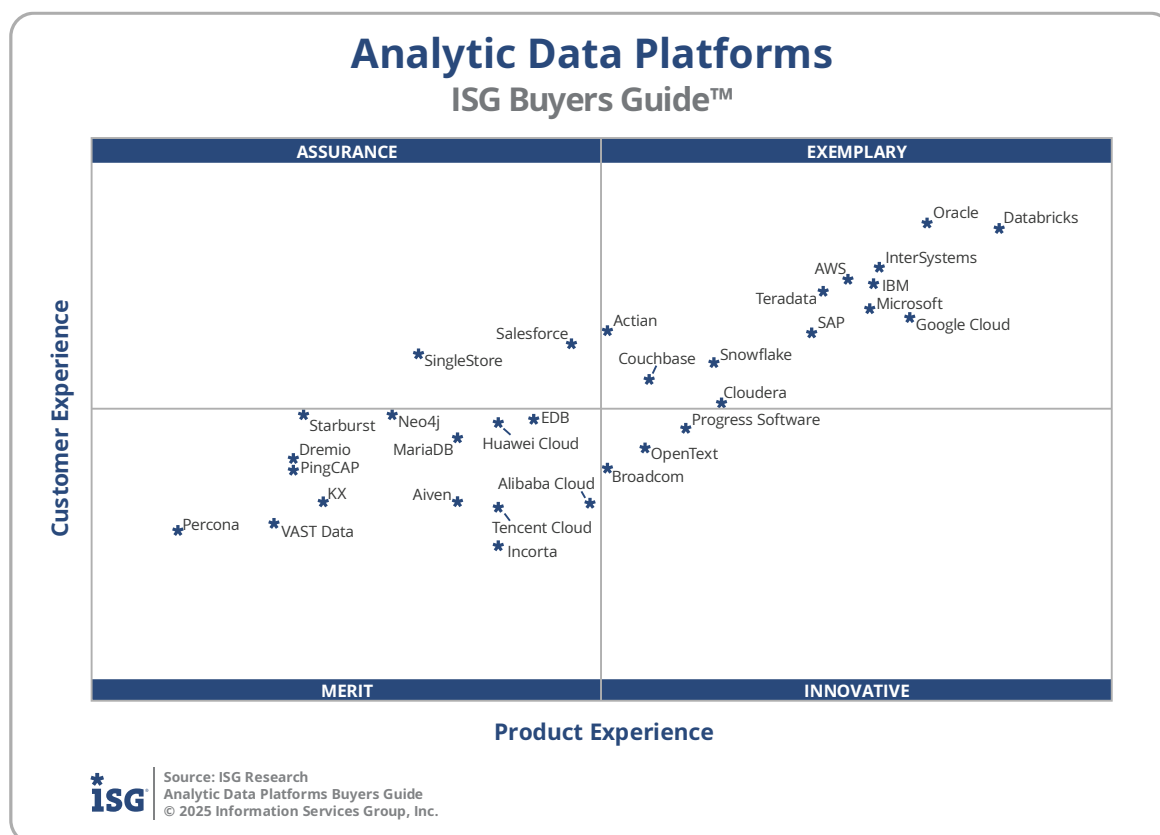
Providers	Grade	Performance
Databricks	A	Leader 91.7%
Oracle	A	Leader 88.8%
Google Cloud	A-	Leader 87.0%
InterSystems	A-	86.8%
IBM	A-	86.6%
Microsoft	A-	85.7%
AWS	A-	85.5%
Teradata	A-	84.5%
SAP	A-	83.1%
Snowflake	B++	79.4%
Cloudera	B++	79.0%
Progress Software	B++	77.5%
Couchbase	B++	76.9%
Actian	B++	76.3%
OpenText	B++	75.9%
Salesforce	B+	74.1%
Broadcom	B+	73.9%
Alibaba Cloud	B+	72.6%
EDB	B+	72.3%
Huawei Cloud	B+	70.7%
SingleStore	B+	69.7%
Aiven	B+	68.9%
Incorta	B+	68.9%
Tencent Cloud	B	68.5%
MariaDB	B	68.5%
Neo4j	B	67.5%
Starburst	B	65.2%
KX	B	64.2%
Dremio	B	63.6%
PingCAP	B	63.5%
VAST Data	B	62.6%
Percona	B-	58.2%



Source: ISG Research
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Action, AWS, Cloudera, Couchbase, Databricks, Google Cloud, IBM, InterSystems, Microsoft, Oracle, SAP, Snowflake and Teradata.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Broadcom, OpenText and Progress Software.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Salesforce and SingleStore.



Merit: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are: Aiven, Alibaba Cloud, Dremio, EDB, Huawei Cloud, Incorta, KX, MariaDB, Neo4j, Percona, PingCAP, Starburst, Tencent Cloud and VAST Data.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle analytic data platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle 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, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (12.5%), Capability (30%), Reliability (12.5%), Adaptability (12.5%) and Manageability (12.5%). This weighting impacted the resulting overall ratings in this research. Databricks, Oracle and Google Cloud were designated Product Experience Leaders. While not Leaders, InterSystems and IBM were also found to meet a broad range of enterprise product experience requirements.

Analytic Data Platforms Product Experience

Providers	Grade	Performance
Databricks	A	Leader 74.0%
Oracle	A	Leader 71.5%
Google Cloud	A	Leader 70.9%
InterSystems	A-	69.9%
IBM	A-	69.6%
Microsoft	A-	69.5%
AWS	A-	68.7%
Teradata	A-	67.9%
SAP	A-	67.4%
Cloudera	B++	64.3%
Snowflake	B++	64.0%
Progress Software	B++	63.1%
Couchbase	B++	61.8%
OpenText	B++	61.6%
Action	B++	60.3%
Broadcom	B++	60.2%
Alibaba Cloud	B+	59.7%
Salesforce	B+	59.1%
EDB	B+	57.8%
Huawei Cloud	B+	56.5%
Tencent Cloud	B+	56.5%
Incorta	B+	56.5%
MariaDB	B+	55.1%
Aiven	B+	55.0%
SingleStore	B	53.7%
Neo4j	B	52.8%
KX	B	50.8%
Starburst	B	50.1%
PingCAP	B-	49.7%
Dremio	B-	49.7%
VAST Data	B-	49.0%
Percona	B-	45.3%



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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Oracle, Databricks and InterSystems. 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 sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Analytic Data Platforms Customer Experience

Providers	Grade	Performance
Oracle	A	Leader 17.8%
Databricks	A	Leader 17.7%
InterSystems	A-	Leader 17.1%
AWS	A-	16.9%
IBM	A-	16.8%
Teradata	A-	16.7%
Microsoft	A-	16.4%
Google Cloud	A-	16.3%
Action	B++	16.1%
SAP	B++	16.0%
Salesforce	B++	15.9%
SingleStore	B++	15.7%
Snowflake	B++	15.6%
Couchbase	B++	15.3%
Cloudera	B+	14.9%
Starburst	B+	14.8%
Neo4j	B+	14.7%
EDB	B+	14.7%
Huawei Cloud	B+	14.6%
Progress Software	B+	14.5%
MariaDB	B+	14.4%
OpenText	B+	14.2%
Dremio	B+	14.0%
Broadcom	B+	13.9%
PingCAP	B+	13.9%
Aiven	B	13.4%
KX	B	13.4%
Alibaba Cloud	B	13.3%
Tencent Cloud	B	13.3%
VAST Data	B	13.0%
Percona	B	12.9%
Incorta	B	12.7%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Analytic Data Platforms in 2025, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 100 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 past 12 months.

Analytic data platforms provide an environment for organizing and managing the storage, processing, analysis and presentation of data across an enterprise and play a critical role in operational efficiency, supporting and enabling analytic applications that are used to evaluate the business.

To be included in the Analytic Data Platforms Buyers Guide, the product must support worker- and customer-facing analytics workloads (business intelligence, artificial intelligence or data science).

The product must be marketed as an analytic data platform, analytic database, analytic database management system, data warehouse, data lake or data lakehouse and address the following functional areas, which are mapped into Buyers Guide capability criteria:

- Core database functionality (data persistence, management, processing, and query)
- Database administrator functionality
- Developer functionality
- Data engineer functionality
- Data architect functionality

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 analytic data platforms 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
Action	Action Data Platform	630.0.18	April 2024
Aiven	Aiven for ClickHouse	24.8	March 2025
Alibaba Cloud	Alibaba Cloud MaxCompute	N/A	March 2025
AWS	Amazon SageMaker Unified Studio Amazon Redshift	N/A patch 190	May 2025 May 2025
Broadcom	VMware Tanzu Greenplum	7.4.1	April 2025
Cloudera	Cloudera on cloud	N/A	April 2025
Couchbase	Couchbase Capella	N/A	May 2025
Databricks	Databricks Data Intelligence Platform	N/A	May 2025
Dremio	Dremio Intelligent Lakehouse Platform	26.0.0	April 2025
EDB	EDB Postgres AI	Q1 2025	March 2025
Google Cloud	Google BigQuery	N/A	May 2025
Huawei Cloud	Huawei Cloud Data Warehouse Service	N/A	February 2025
IBM	IBM watsonx.data	2.1.2	April 2025
Incorta	Incorta	2024.7.42	February 2025
InterSystems	InterSystems IRIS	2025.1	May 2025
KX	KX kdb Insights Enterprise	1.13.2	May 2025
MariaDB	MariaDB Enterprise ColumnStore	23.02.13	March 2025
Microsoft	Microsoft Fabric Data Warehouse	N/A	April 2025



Neo4j	Neo4j AuraDB	2025.05	May 2025
OpenText	OpenText Analytics Database (Vertica)	25.2	May 2025
Oracle	Oracle Autonomous Database	N/A	May 2025
Percona	Percona Distribution for PostgreSQL	17.5.1	May 2025
PingCAP	PingCAP TiDB Cloud	N/A	May 2025
Progress Software	Progress MarkLogic Server	11.3.1	April 2025
Salesforce	Salesforce Data Cloud	Summer '25	May 2025
SAP	SAP Business Data Cloud	1.0	May 2025
SingleStore	SingleStore Helios	N/A	May 2025
Snowflake	Snowflake Platform	9.14	May 2025
Starburst	Starburst Galaxy	N/A	May 2025
Tencent Cloud	Tencent Cloud TCHouse-C	N/A	February 2025
Teradata	Teradata VantageCloud Lake	N/A	May 2025
VAST Data	VAST Data Platform	5.3.0 -SP8	May 2025



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Annual Revenue >\$50m	Operates on two continents	At least 100 employees	General Availability
ClickHouse	ClickHouse Cloud	No	Yes	No	Yes
Exasol	Exasol Espresso	No	Yes	Yes	Yes
Firebolt Analytics	Firebolt	No	Yes	Yes	Yes
GridGain	GridGain Unified Real-Time Data Platform	No	Yes	Yes	Yes
Hazelcast	Hazelcast Cloud	No	Yes	Yes	Yes
Imply	Imply Polaris	No	Yes	Yes	Yes
Kyvos Insights	Kyvos Semantic Warehouse	No	Yes	Yes	Yes
Ocient	Ocient Hyperscale Data Warehouse	No	Yes	Yes	Yes
Qubole	Open Data Lake Platform	No	Yes	No	Yes
SQream	SQreamDB	No	Yes	Yes	Yes
TigerGraph	TigerGraph Cloud	No	Yes	Yes	Yes
Yellowbrick Data	Yellowbrick	No	Yes	Yes	Yes



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

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.