Application Platforms Buyers Guide

Software Provider and Product Assessment

EXECUTIVE SUMMARY

iSG® Research

Application Platforms

Over the next 12 to 24 months, CIOs and IT leaders will prioritize platforms that accelerate the delivery of business applications while reducing integration complexity across hybrid and multicloud estates. Enterprises are modernizing core systems, expanding SaaS portfolios and embedding artificial intelligence (AI) into business processes at scale. As application landscapes span ERP, CRM, data platforms and custom services, the ability to integrate, govern and operate applications consistently has become a strategic constraint. In response, organizations are consolidating development stacks under platform engineering, formalizing API- and event-driven architectures and elevating interoperability requirements through standards adoption, policy consistency and shared telemetry. Advances in machine learning, generative AI and agentic AI are amplifying expectations for developer productivity, release quality and runtime optimization, increasing demand for application platforms that combine standards-based connectivity, unified governance and lifecycle management.

> **Advances in machine learning, GenAI and agentic AI are amplifying expectations for developer productivity, release quality and runtime optimization.**

ISG Research defines Application Platforms as enterprise software platforms that enable the development, deployment, integration and lifecycle management of business applications. ISG evaluates these platforms on software platform integration, compatibility and interoperability with existing enterprise systems and IT management tools and the adoption and use of recognized technology standards and frameworks, with the overarching goal of easing and accelerating integration into complex enterprise environments. In today's market, leading platforms extend this foundation with AI-enhanced developer tooling and operations, API-first and event-driven integration, multicloud and container orchestration, unified security and compliance controls and end-to-end observability anchored in open standards such as OpenAPI, AsyncAPI, OAuth2, OIDC, SCIM, OpenTelemetry and Kubernetes CNCF tooling.

Application platforms are industry-agnostic and best suited for large enterprises operating heterogeneous application portfolios across ERP, CRM, data platforms and custom-built services. These organizations typically maintain centralized platform engineering and governance functions that require consistent architectures across development and operations. Prerequisites for success include mature integration practices such as API gateways, service mesh and event streaming, reference architectures that standardize identity, secrets and network policies and a clear interoperability strategy that favors recognized standards over proprietary lock-in. Effective adoption often pairs transformation of core systems with phased rollout of AI-augmented capabilities such as code assistance, test automation and release risk analysis, supported by value stream metrics to track throughput,

reliability and compliance. Mid-market organizations prioritize SaaS delivery, prebuilt connectors, opinionated defaults and managed integrations to accelerate time-to-value while maintaining essential governance and security controls.

The category has evolved from monolithic application servers and proprietary integration stacks to cloud-native, API- and event-driven platforms that emphasize interoperability and lifecycle governance. Earlier approaches centered on SOA, ESB and discrete ALM or ITSM tools, which improved delivery velocity but introduced brittle integrations and fragmented operations. As enterprises adopted microservices, containers and multicloud environments, platform engineering emerged to standardize toolchains, reduce integration debt and improve reliability and compliance across the application estate.

More recently, AI has been embedded across developer and operational workflows. Application platforms now incorporate AI-assisted code generation, testing, documentation and runtime optimization, while also supporting release analysis, anomaly detection and performance tuning. Leading platforms anchor these capabilities in open standards to preserve portability, enforce unified security and enable end-to-end observability across environments. The category has shifted from assembling point tools to adopting interoperable platforms that streamline development, deployment, integration and operations at enterprise scale.

> **Enterprises require application platforms that shorten time-to-market while sustaining reliability, security and compliance.**

Enterprises require application platforms that shorten time-to-market while sustaining reliability, security and compliance. This demands unified lifecycle capabilities spanning requirements, design, deployment and operations, supported by standardized identity, secrets management, network policy and Policy-as-Code for consistent governance. Interoperability remains essential, with API-first and event-driven integration, service mesh where appropriate and adherence to widely recognized standards to reduce software provider lock-in and simplify portability across clouds and environments.

To connect technology performance to business outcomes, organizations need embedded telemetry mapped to service-level indicators, service-level objectives and value stream metrics such as DORA and SRE measures. Analytics must link delivery health to cost, risk and customer experience. AI should be applied with clear guardrails, including responsible use policies, model lifecycle management and human-in-the-loop oversight, so automation improves throughput and quality without compromising compliance or safety.

Successful application platforms deliver cohesive capabilities across requirements management, design and documentation, project and task management, source and artifact version control, testing and release planning, lifecycle governance, collaboration and analytics,

CI and CD, infrastructure-as-code and environment management, monitoring, logging and observability, RBAC and Policy-as-Code, security and compliance, secrets management, multicloud and container orchestration and disaster recovery. AI enhances productivity and decisioning across development and operations while remaining governed and auditable. By 2028, enterprise IT leaders will choose application platform providers that minimize integration complexity to accelerate time-to-value without sacrificing reliability, security or compliance at scale.

ADM & DevOps
Market Assertion

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.

Jeff Orr
Director of Research, Technology Research

iSG Research

Equally important is enterprise-grade control. Application platforms must expose robust APIs and event streams, support open protocols and CNCF-aligned tooling and integrate cleanly with ERP, CRM, data platforms and security systems. Governance should include audit-ready controls, least-privilege access, artifact signing, vulnerability management and data privacy controls, including residency requirements. Effective adoption is phased, beginning with reference architectures and progressing through incremental AI enablement validated by consistent metrics.

Enterprises should prioritize application platforms that combine end-to-end lifecycle capabilities, standards-based interoperability and AI-enabled tooling under clear governance. Require artifact provenance and software bills of materials, validate adherence to recognized standards and measure outcomes using value stream and reliability metrics. Establish platform engineering to enforce policy consistency and reuse, and demand transparent cost controls and auditability. Providers that reduce integration complexity while accelerating delivery enable enterprises to scale application development and operations with confidence.

The 2026 ISG Buyers Guide™ for Application Platforms evaluates software providers across key areas, including requirements management and traceability, design and documentation, project and task management, source and artifact version control with provenance and software bills of materials, testing and release planning, lifecycle governance, collaboration and analytics, CI and CD, infrastructure-as-code and environment management, monitoring, logging and observability, RBAC and Policy-as-Code, security and compliance, secrets management, multicloud and container orchestration and disaster recovery. This research evaluates the following software providers: AWS, C3.ai, Google Cloud, IBM, Infor, Microsoft, Oracle, Salesforce, SAP, ServiceNow, Workday, Zendesk and Zoho.

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.

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The 2026 ISG Buyers Guide™ for Application Platforms is the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for application 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 application 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 application platforms. 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 application platform software and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

Key Takeaways

Application platforms have become a strategic foundation for enterprises seeking to accelerate application delivery while reducing integration complexity across hybrid and multicloud environments. As application estates span ERP, CRM, data platforms and custom services, interoperability, governance consistency and lifecycle management have emerged as binding constraints. Platform engineering, API- and event-driven architectures and standards-based integration are increasingly used to enforce architectural consistency across development and operations. AI-enabled tooling is raising expectations for productivity and reliability, reinforcing demand for platforms that unify delivery, integration and operations at enterprise scale.

Software Provider Summary

The ISG Buyers Guide™ for Application Platforms evaluates 13 software providers offering business products supporting enterprise application development, deployment, integration and lifecycle management. The research ranked the top three overall leaders as Microsoft, ServiceNow and Salesforce. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Microsoft, Oracle, Salesforce, ServiceNow and Zendesk were rated as Exemplary, with Google Cloud and Zoho rated as Innovative. AWS and IBM were rated as Assurance, and C3.ai, Infor, SAP and Workday were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), which includes adaptability, manageability, reliability and usability. Microsoft, ServiceNow and Oracle achieved the highest performance as Leaders in this category, supported by broad application platform capability coverage across development and operations and enterprise-grade platform foundations emphasizing governance, scalability and integration. 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. Oracle, ServiceNow and Salesforce 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 treat application platforms as strategic enablers that unify development, integration and operations under consistent governance. Buyers should prioritize platforms that demonstrate standards-based interoperability, enterprise-grade lifecycle management and governed AI-enabled tooling. Establishing platform engineering functions, enforcing policy consistency and measuring outcomes through value stream and reliability metrics can improve scalability, control and time-to-value.

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 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.

The Findings

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 Microsoft atop the list, followed by ServiceNow and Salesforce. Providers that place in the top three of a category earn the designation of Leader. ServiceNow and Salesforce have done so in four categories, Microsoft and Oracle in three and Zoho 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.
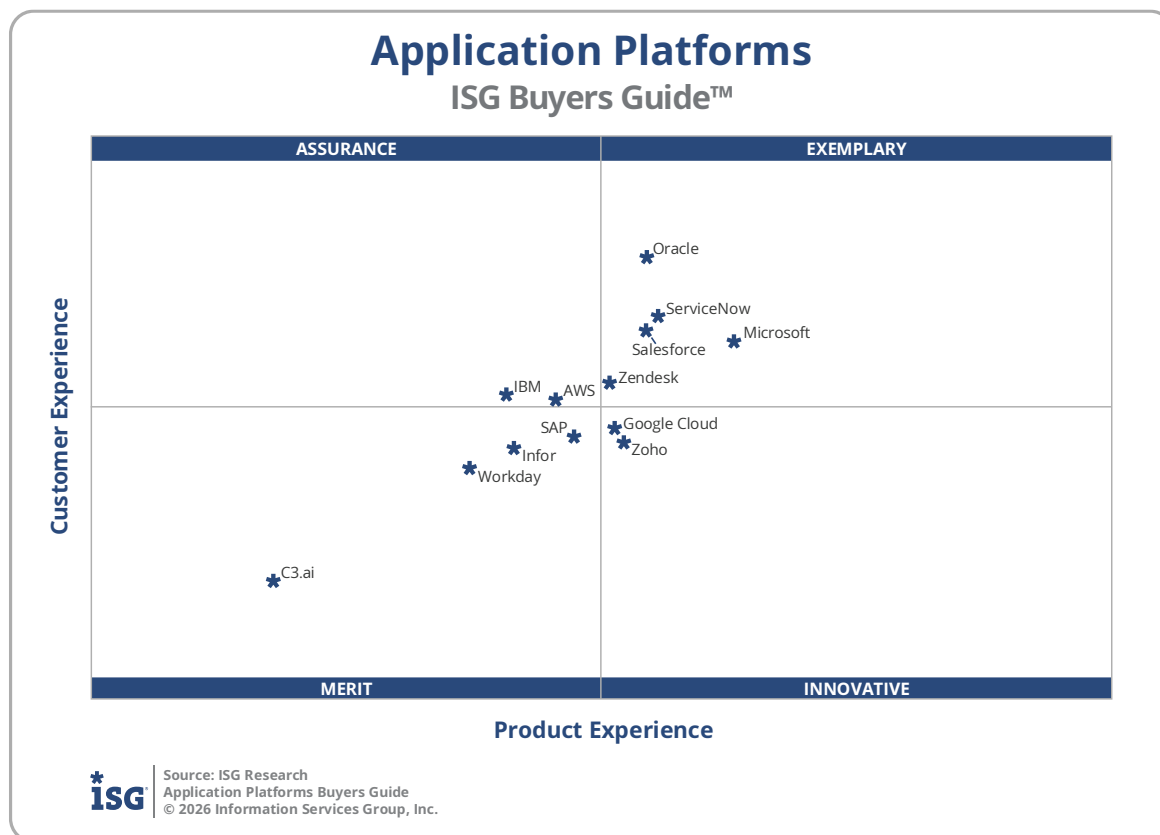
Application Platforms
Overall

Providers	Grade	Performance	
Microsoft	B+	*Leader*	72.6%
ServiceNow	B	*Leader*	68.7%
Salesforce	B	*Leader*	68.2%
Oracle	B		68.1%
Zoho	B		66.9%
Google Cloud	B		66.1%
Zendesk	B		66.0%
SAP	B		64.7%
AWS	B		64.0%
Infor	B-		62.1%
IBM	B-		61.9%
Workday	B-		59.4%
C3.ai	C++		51.7%

iSG Source: ISG Research
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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.

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Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Microsoft, Oracle, Salesforce, ServiceNow and Zendesk.

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

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

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: C3.ai, Infor, SAP and Workday.

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 (40%) and

Application Platforms
Product Experience

Providers	Grade	Performance
Microsoft	B+	Leader 57.9%
ServiceNow	B	Leader 55.0%
Oracle	B	Leader 54.5%
Salesforce	B	54.4%
Zoho	B	53.6%
Google Cloud	B	53.3%
Zendesk	B	53.0%
SAP	B	51.8%
AWS	B	51.1%
Infor	B-	49.5%
IBM	B-	49.2%
Workday	B-	47.8%
C3.ai	C++	40.3%

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Platform (40%). Microsoft, ServiceNow and Oracle were designated Product Experience Leaders.
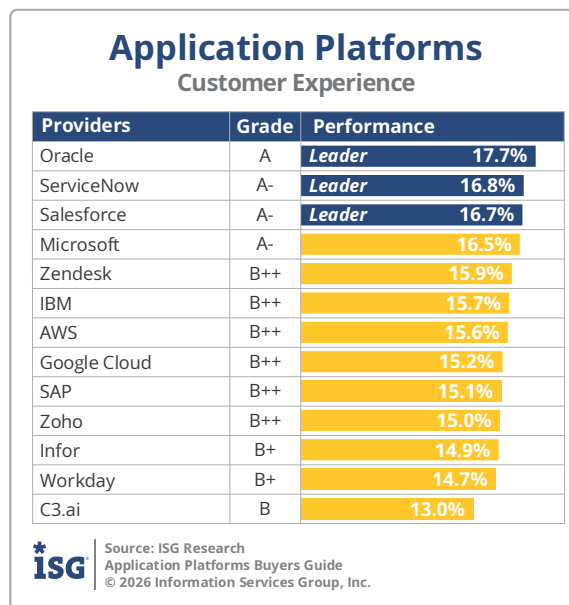
Customer Experience

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 Oracle, ServiceNow and Salesforce. These category leaders best communicate commitment and dedication to customer needs.

Application Platforms
Customer Experience

Providers	Grade	Performance
Oracle	A	Leader 17.7%
ServiceNow	A-	Leader 16.8%
Salesforce	A-	Leader 16.7%
Microsoft	A-	16.5%
Zendesk	B++	15.9%
IBM	B++	15.7%
AWS	B++	15.6%
Google Cloud	B++	15.2%
SAP	B++	15.1%
Zoho	B++	15.0%
Infor	B+	14.9%
Workday	B+	14.7%
C3.ai	B	13.0%

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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.

Appendix: Software Provider Inclusion

For inclusion in the 2026 ISG Buyers Guide™ for Application Platforms, a software provider must be in good standing financially and ethically, have at least $350 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have more than 1,000 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 past 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 application platform 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
AWS	Amazon Q Business	N/A	August 2025
C3.ai	C3 Agentic AI Platform	v. 8.8	July 2025
Google Cloud	Google Cloud Business Applications (Workspace + AI Apps)	N/A	January 2026
IBM	IBM watsonx	v. 5.3.0	December 2025
Infor	Infor Cloudsuite	N/A	October 2025
Microsoft	Dynamics 365	N/A	September 2025
Oracle	Oracle APEX	v. 24.2	January 2025
Salesforce	Customer 360 (Sales Cloud, Service Cloud)	Winter '26	October 2025
SAP	SAP Build Process Automation	N/A	November 2025
ServiceNow	ServiceNow Platform	v. Zurich Patch 4	December 2025
Workday	Workday Enterprise Management Cloud	v. 2025R2	September 2025
Zendesk	Zendesk Platform	N/A	December 2025
Zoho	Zoho One	v. Vani	November 2025

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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.