Data Platforms Emerging Providers Buyers Guide

Software Provider and Product Assessment

iSG® Research

Key Takeaways

Data platforms provide the foundation for organizing, storing, processing and analyzing enterprise data that supports operational systems and analytic applications. As organizations increasingly deploy artificial intelligence (AI)-driven applications and agents, the demands placed on data platforms have expanded to support real-time processing, diverse data models and integration with machine learning (ML) and generative AI (GenAI) workloads. Emerging providers are introducing specialized architectures and capabilities designed to address performance, scalability and data processing requirements that may not be fully served by general-purpose platforms.

Software Provider Summary
The ISG Buyers Guide™ for Data Platforms Emerging Providers evaluates 16 software providers offering products supporting enterprise data storage, processing and analytics for operational and AI-driven workloads. The research ranked the top three overall leaders as MariaDB, Aerospike and PingCAP. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Aerospike, Exasol, Hazelcast, MariaDB and PingCAP were rated as Exemplary, with Supabase, Tiger Data and Yellowbrick rated as Innovative. Percona, ScyllaDB, SQream and TigerGraph were rated as Assurance; and Imply, InfluxData, Pinecone and StarTree were rated as Merit.

Product Experience
Product Experience, representing 80% of the evaluation, focuses on Capability (50%) and Platform (30%), which includes adaptability, manageability, reliability and usability. Tiger Data, MariaDB and Supabase achieved the highest performance as Leaders in this category, supported by capabilities across data persistence, processing and development and strong platform adaptability, scalability and operational reliability. Leaders demonstrated enterprise-grade platform capabilities supporting diverse workloads and data operations across varied enterprise roles and contexts.

Customer Experience
Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Aerospike, PingCAP and MariaDB 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
Evaluate emerging data platforms based on their ability to support diverse data models, real-time processing and integration with AI and analytics workloads. Prioritize platforms that provide strong scalability, reliability and governance while integrating with existing enterprise data environments. Consider specialized architectures where performance or workload requirements exceed the capabilities of general-purpose platforms.

The Findings

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets 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 in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider's website, the buying process and the customer journey.

Overall Scoring of Software Providers Across Categories

The research finds MariaDB atop the list, followed by Aerospike and PingCAP. Providers that place in the top three of a category earn the designation of Leader. MariaDB has done so in four categories; Aerospike and PingCAP in three; Tiger Data, and Supabase in two; and Pinecone in one category.

The quadrant chart below presents ratings for Product Experience and Customer Experience on the *x*- and *y*-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, place farther to the right. The performance and weighting for the Customer Experience category determine 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. Placement represents the software providers' weighted performance in meeting the requirements of product and customer experience.

Data Platforms
Emerging Providers
Overall

Providers	Grade	Performance	
MariaDB	B	Leader	68.7%
Aerospike	B	Leader	66.0%
PingCAP	B	Leader	64.7%
Exasol	B		64.6%
Yellowbrick	B-		60.8%
Tiger Data	B-		59.7%
Supabase	B-		59.3%
Hazelcast	B-		58.3%
Percona	B-		57.4%
InfluxData	B-		57.1%
TigerGraph	B-		56.6%
Pinecone	C++		56.1%
StarTree	C++		55.2%
Imply	C++		55.1%
ScyllaDB	C++		54.5%
SQream	C++		50.8%

Source: ISG Research
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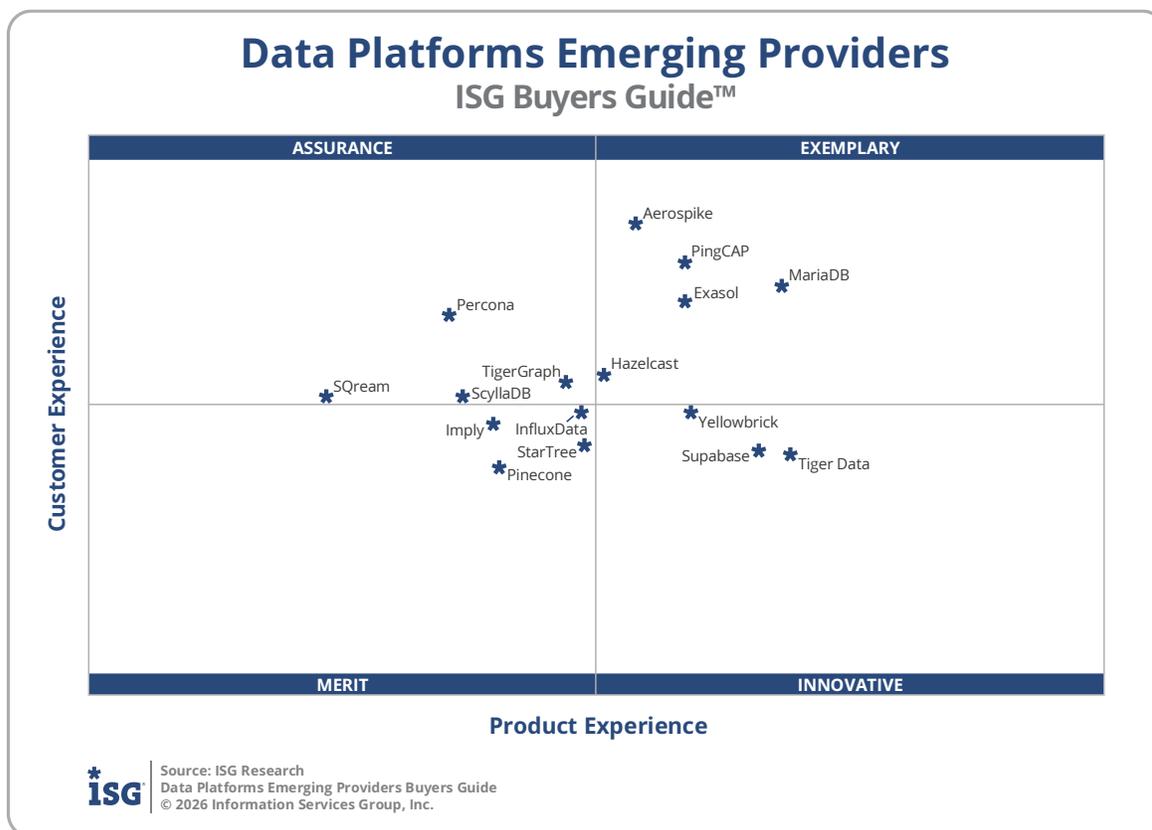
Exemplary: This rating (upper right) applies to those providers that performed above the median on Product and Customer Experience requirements. The providers rated Exemplary are: Aerospike, Exasol, Hazelcast, MariaDB and PingCAP.

Innovative: This rating (lower right) applies to those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Supabase, Tiger Data and Yellowbrick.

Assurance: This rating (upper left) applies to those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Percona, ScyllaDB, SQream and TigerGraph.

Merit: This rating (lower left) applies to those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Imply, InfluxData, Pinecone and StarTree.

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

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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 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 and research, in-depth knowledge and governance of provider ecosystems, and the expertise of its 1,500 professionals worldwide working together to help clients maximize the value of their technology investments.

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