

Sovereign AI and Data Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY

***ISG** Research



Key Takeaways

Sovereign artificial intelligence (AI) and data capabilities enable enterprises to operate AI and data initiatives in compliance with evolving regional regulations and governance requirements. As AI systems become embedded in business processes, organizations must manage data locality, security and auditability while maintaining operational flexibility across environments. Sovereign strategies therefore emphasize architectural autonomy, allowing enterprises to deploy AI and data platforms across multiple infrastructures and software ecosystems.

Software Provider Summary

The ISG Buyers Guide™ for Sovereign AI and Data evaluates 16 software providers offering products supporting compliant AI and data operations across diverse deployment environments and architectures. The research ranked the top three overall leaders as Oracle, Databricks and IBM. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. AWS, Databricks, Google Cloud, IBM, Oracle and Teradata were rated as Exemplary, with Microsoft and Snowflake rated as Innovative. Huawei Cloud, Salesforce and SAP were rated as Assurance; and Alibaba Cloud, Cloudera, Couchbase, EDB and Tencent Cloud were rated as Merit.

Product Experience

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), which includes adaptability, manageability, reliability and usability. Oracle, Databricks, Teradata and IBM achieved the highest performance as Leaders in this category, supported by broad capabilities across AI and data platform functionality and strong platform adaptability, governance and deployment flexibility across enterprise environments. Leaders demonstrated enterprise-grade platform capabilities supporting sovereign deployment models across varied enterprise roles and operational contexts.

Customer Experience

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. AWS, IBM and Oracle 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

Prioritize AI and data platforms that support compliance with regional regulations while enabling flexible deployment across on-premises and cloud environments. Ensure governance, monitoring and auditability capabilities are embedded to manage evolving regulatory requirements. Maintain architectural flexibility to integrate multiple models, data tools and infrastructure providers where sovereignty requirements apply.



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 Oracle atop the list, followed by Databricks and IBM. Providers that place in the top three of a category earn the designation of Leader. Oracle has done so in five categories; IBM in four; Databricks in three; AWS in two; and Teradata and Google Cloud in one category.

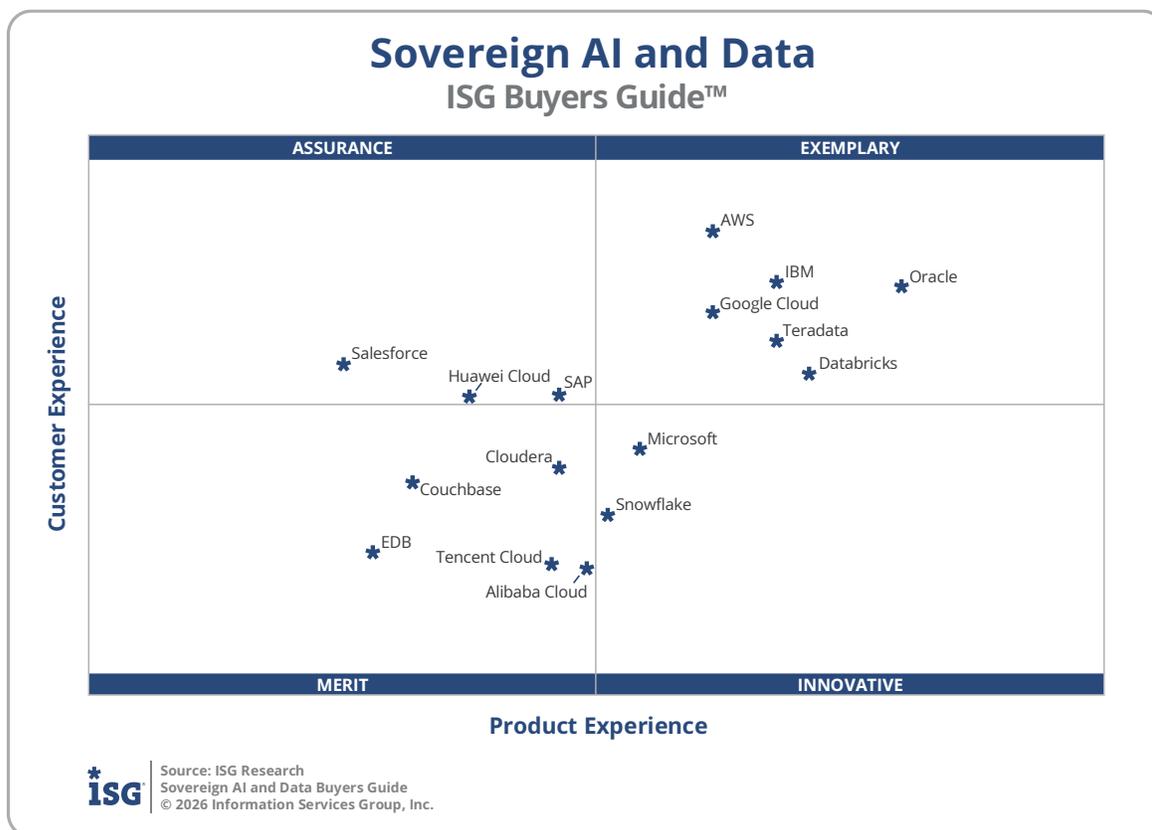
The quadrant chart below presents ratings for Product Experience and Customer Experience on the x- and y-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, 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.

Sovereign AI and Data
Overall

Providers	Grade	Performance
Oracle	A-	Leader 87.1%
Databricks	A-	Leader 83.9%
IBM	A-	Leader 83.4%
AWS	A-	83.0%
Teradata	A-	83.0%
Google Cloud	B++	81.1%
Microsoft	B++	78.0%
SAP	B++	76.2%
Snowflake	B++	75.8%
Cloudera	B+	75.0%
Tencent Cloud	B+	74.4%
Alibaba Cloud	B+	74.3%
Huawei Cloud	B+	73.4%
Salesforce	B+	71.3%
Couchbase	B+	71.0%
EDB	B	68.8%

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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.



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: AWS, Databricks, Google Cloud, IBM, Oracle and Teradata.

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: Microsoft and Snowflake.

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: Huawei Cloud, Salesforce and SAP.

Merit: This rating (lower left) applies to those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Alibaba Cloud, Cloudera, Couchbase, EDB and Tencent Cloud.

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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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 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.

About the Authors



David Menninger

Executive Director, Software Research and Distinguished Analyst

David Menninger leads the overall team for software research and advisory for supporting IT and expertise in AI software at ISG. With over three decades of experience in enterprise software, Dave's leadership has advanced digital transformation with information and insights for enterprises around the world.



Matt Aslett

Director of Research, Analytics and Data

Matt Aslett leads software research and advisory for Analytics and Data at ISG. His focus areas of expertise and market coverage include data platforms, data management, data operations and real-time data, as well as analytics and AI, with a focus on the data management requirements for AI use-cases, including generative and agentic AI.