

## **Gartner Study Shows Worldwide RDBMS Market Declined in 2002**

Colleen Graham, Kevin H. Strange

A Gartner study shows the 2002 worldwide relational database management system (RDBMS) market declined 7 percent. IBM was overall market-share leader, and Oracle maintained its lead in the combined Unix, Windows and Linux market.

## NEWS ANALYSIS

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### Event

On 21 May 2003, Gartner announced the results of its study of the DBMS software market in 2002. The study found that the total RDBMS market declined by 7 percent compared with 2001. Three large software vendors, IBM, Oracle and Microsoft, continue to hold most of the market share in three major DBMS software segments (see Table 1). IBM captured the largest market share in the total RDBMS segment while Oracle maintained its lead in market share in the total Windows and Unix RDBMS segment. (Note: In this First Take, Linux revenue is considered part of the Unix market.)

**Table 1. Worldwide Market Share Held by RDBMS Software Vendors in 2002**

Market Segment	Vendor and Market Share
Total DBMS	IBM 37% Oracle 27% Microsoft 18.8%
Total RDBMS	IBM 36.2% Oracle 33.9% Microsoft 18%
Unix and Windows RDBMS	Oracle 42.5% IBM 24.2% Microsoft 22.8%

Source: Gartner Dataquest, May 2003

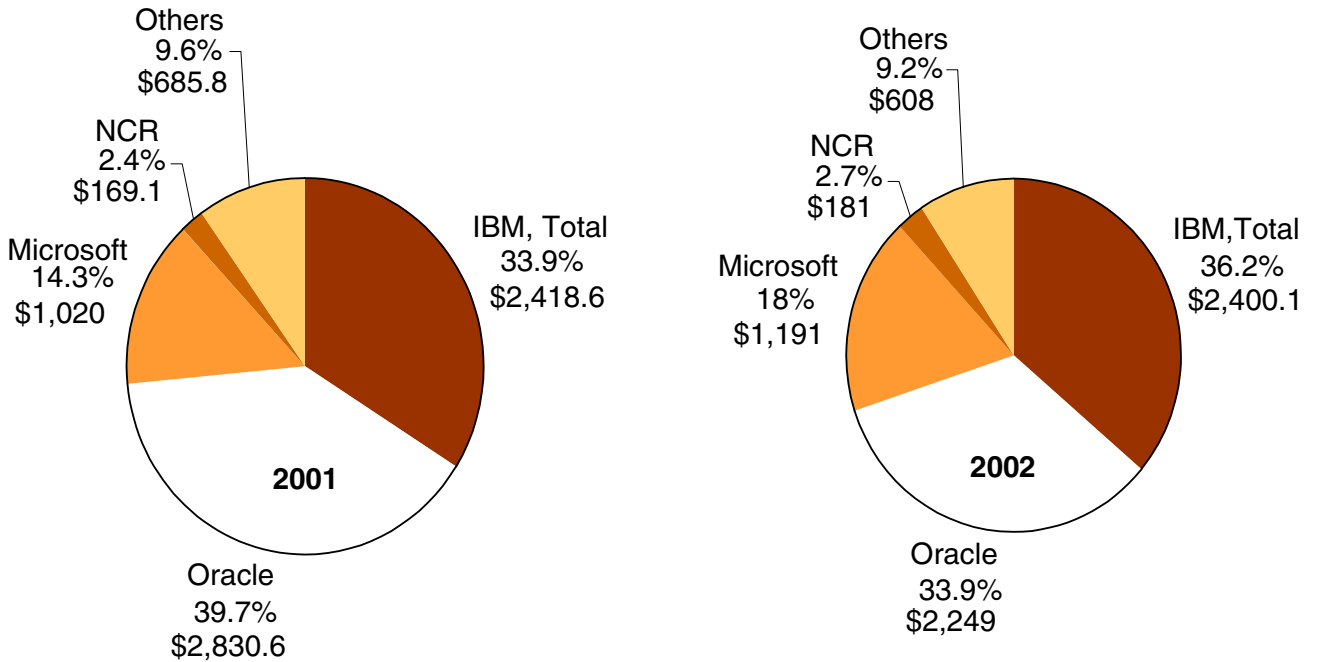
### Analysis

The study examined the total RDBMS market, defined as:

- Windows and Unix
- Mainframe (for example, zSeries)
- Other platforms (for example, iSeries)

**Total RDBMS:** IBM holds more than 36 percent of the market in new license revenue in the total RDBMS market in 2002 (see Figure 1). Gartner attributes IBM's position to its strength in DB2 on nondistributed platforms and to Oracle's 20 percent decrease in RDBMS new license revenue in 2002, compared to 2001. Strong growth on DB2 for the zSeries compensated for a double-digit decline on DB2 for the iSeries and kept IBM's new license revenue flat in 2002. The former Informix RDBMS products declined by 33 percent overall, which likely reflects IBM's plan to encourage Informix customers to migrate to DB2.

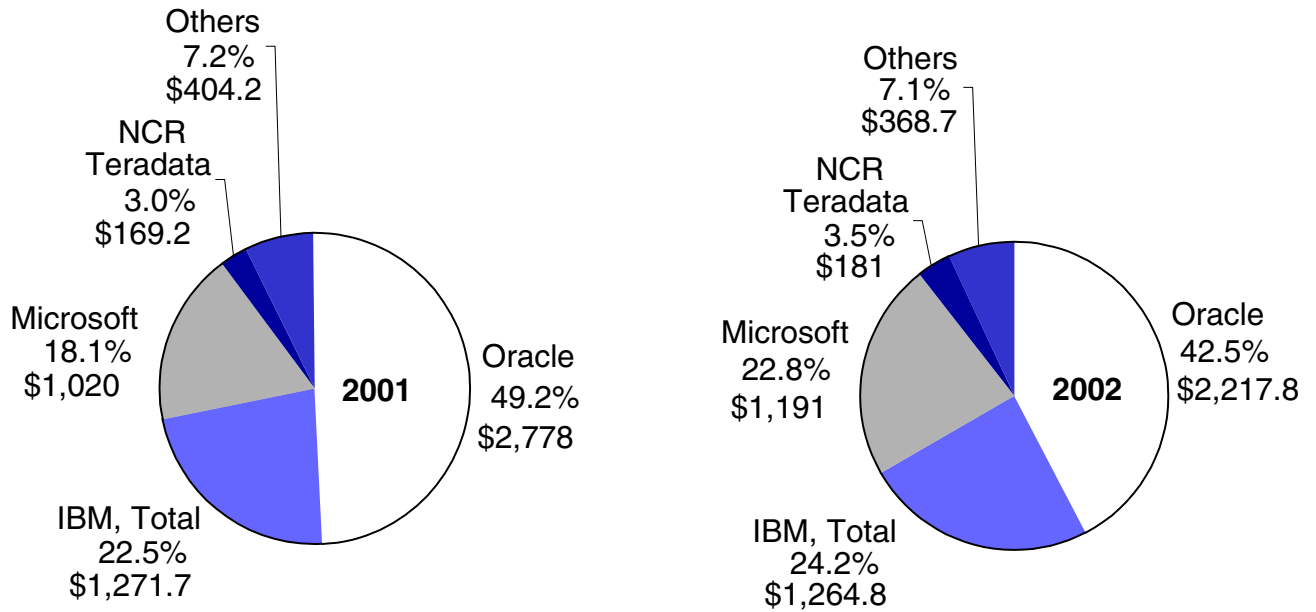
**Figure 1. Worldwide Total RDBMS Market Share in 2001 and 2002, Based on New License Sales (in Millions of U.S. Dollars)**



Source: Gartner Dataquest, May 2003

**Unix and Windows:** Oracle captured nearly 43 percent of RDBMS market share on the Unix and Windows Server platforms (see Figure 2). Oracle led its closest competitor, IBM, by more than 18 percentage points. Although IBM's revenue declined slightly, it still holds more than 24 percent of the market. Microsoft's new license revenue in this market segment grew by 17 percent. Microsoft benefited from cost-consciousness among enterprises and the improved scalability of its RDBMS product.

**Figure 2. Worldwide RDBMS Market Share on Unix and Windows in 2001 and 2002, Based on New License Sales(in Millions of U.S. Dollars)**



Source: Gartner Dataquest, May 2003

**Other Factors for Evaluating Vendors:** Gartner's study assesses the market share of DBMS vendors, based on new license revenue. However, other factors also contribute to a vendor's strength. Prospective customers of RDBMS software vendors should base their selections on a range of criteria, including the requirements of the applications they are running, and the size and growth of the vendor's installed base as well as the vendor's innovation, research and development, scalability, third-party software support, and execution.

**Analytical Sources:** Colleen Graham and Kevin Strange, Gartner Research

#### Recommended Reading and Related Research

- "IBM Informix's Twilight Years" — Although IBM has released a road map for its Informix products, we believe that the Informix product line will become less relevant by 2008. **By Betsy Burton and Bill Hostmann**
- "Dell and Oracle Aim to Drive Migration to Linux Servers" — Dell's analyst conference in April 2003 promoted the benefits of Oracle9i cluster software on Linux-based servers, defining a path for migration from traditional, high-end Unix servers. **By Andrew Butler, George J. Weiss and Betsy Burton**

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