IDC MarketScape

IDC MarketScape: Worldwide Analytical Databases 2025–2026 Vendor Assessment
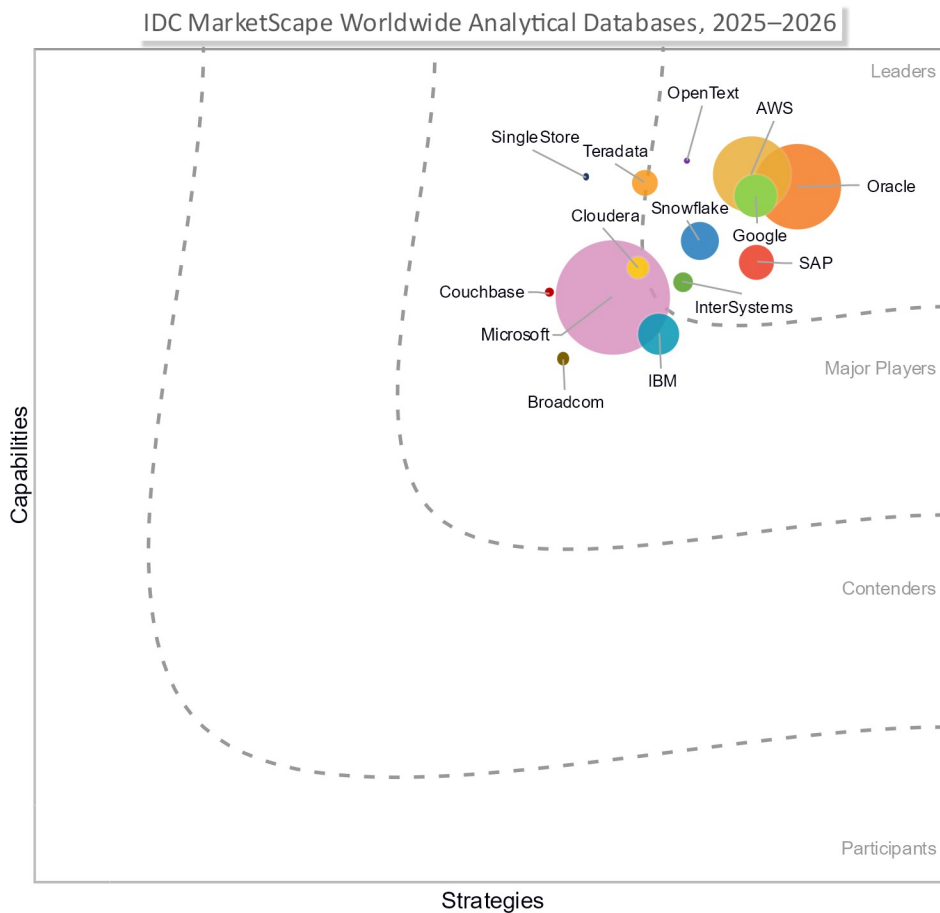
Devin Pratt

THIS EXCERPT FEATURES ORACLE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Analytical Databases Vendor Assessment

IDC MarketScape Worldwide Analytical Databases, 2025–2026

Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Analytical Databases 2025-2026 Vendor Assessment (Doc # US52973925).

IDC OPINION

The analytical database market is entering a new phase of innovation as advances in storage and compute architectures redefine how enterprises extract value from data. For technology buyers, this research provides a strategic framework to evaluate analytical databases based on flexibility, interoperability, and AI readiness, the new drivers of competitive differentiation in enterprise analytics.

The decoupling of storage and compute has fundamentally redefined scalability, elasticity, and cost efficiency, extending the market beyond traditional columnar systems to include lakehouse, object store, and distributed query architectures that deliver analytics wherever data resides. This evolution shifts the focus from raw performance to architectural flexibility, operational efficiency, and long-term cost optimization. As enterprises modernize their data estates, analytical databases are becoming the performance and intelligence layer linking data storage to analytics, the foundation of modern data strategy.

In hybrid and multicloud environments, storage efficiency now determines scalability and cost predictability. Modern architectures that combine columnar compression, vectorized compute, and tiered or object-based storage help enterprises maintain high-speed access to active data while managing colder data cost effectively.

Competitive differentiation now centers on openness, elasticity, and intelligent optimization. Support for open table formats such as Apache Iceberg and Delta enhances durability and interoperability, while embedded machine learning and AI-driven tuning reduce administrative effort and accelerate performance. As organizations advance toward AI and agentic AI–enabled analytics, analytical databases are emerging as the high-performance bridge between data storage and intelligent decisioning.

For technology buyers, the takeaway is clear: success in choosing the right analytical database platform comes from selecting solutions that unite performance with intelligence. Organizations that adopt platforms combining optimized storage, elastic compute, strong governance, and open interoperability gain the agility, scalability, and insight needed to lead in the data-driven era. The vendors evaluated in this IDC

MarketScape demonstrate these capabilities, providing the trusted foundation for intelligent, data-driven enterprises.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

A critical point in this research effort is to meet the following criteria:

- **Core offering:** The vendor must offer an analytical database solution as a core product. This solution should be purpose built for analytics rather than transactional workloads.
- **High-performance querying:** The database must support fast, complex analytical queries optimized for read-heavy operations.
- **Scalability:** The solution must demonstrate the ability to scale horizontally (e.g., by adding nodes) or vertically (e.g., increasing resources on a single node) without performance degradation.
- **Data storage optimization:** The database must employ advanced storage models optimized for analytics, such as columnar storage or hybrid approaches, to enhance query efficiency and compression.
- **Concurrency:** The database must handle high levels of concurrent queries and users effectively.
- **Global presence:** Vendors must operate in North America and generate at least 10% of their revenue from the Americas, EMEA, and APAC regions.
- **Revenue threshold:** Vendors must have at least $25 million in company revenue for 2024.
- **Vendor IP ownership:** The core components of the analytical database (e.g., query engine and storage optimization) must be the intellectual property of the vendor. Partnered or OEM-provided IP is acceptable for supplementary features such as data transformation or governance.
- **Strategic importance:** The analytical database being evaluated must represent a strategic offering within the vendor's portfolio.

ADVICE FOR TECHNOLOGY BUYERS

Based on IDC's research and observed market dynamics, organizations evaluating analytical database platforms should consider the following guidance:

- **Prioritize scalability and workload adaptability.** Analytical databases must deliver predictable performance across diverse workloads, including batch, interactive, and real-time analytics. Buyers should select solutions that automatically scale resources to meet performance objectives as workloads grow

or fluctuate. Evaluate whether platforms scale horizontally and vertically without performance loss. Architectures that separate compute from storage or use massively parallel processing (MPP) provide the elasticity needed to meet dynamic business demand. Organizations should ensure that scaling strategies align with governance, reliability, and cost management goals to sustain performance, predictability, and efficiency. These capabilities form the foundation for both current analytical workloads and emerging AI and agentic AI initiatives.

▪ **Evaluate openness, interoperability, and deployment flexibility.** Hybrid and multi-cloud architectures are now the standard for enterprise analytics. Analytical databases should support open formats such as Apache Iceberg, Delta, or Parquet and integrate with catalogs, orchestration, and governance tools. Confirm that platforms support SaaS, bring your own cloud, or containerized deployment models to meet compliance, sovereignty, and data residency needs. Assess how easily a platform integrates with existing data lakes, pipelines, and BI tools to reduce implementation effort and avoid vendor lock-in. Solutions that deliver consistent performance and governance across environments simplify modernization, strengthen interoperability, and establish the open data foundation needed for both current analytics and future AI ecosystems.

▪ **Align analytical depth with AI and emerging workload readiness.** The analytical database market is rapidly evolving to support AI and machine learning directly within the database engine. Buyers should evaluate how effectively vendors embed capabilities such as in database machine learning, vector search, graph analytics, and integration with generative AI frameworks. Determine whether these capabilities align with the organization's data science maturity and operational goals. AI features should be usable and governable within existing analytics workflows. Platforms that unify analytics and AI simplify architectures, improve performance, and accelerate innovation. Readiness for retrieval augmented generation and vector-enabled querying is becoming a key differentiator as enterprises expand AI-driven and agentic workloads.

▪ **Consider converged workloads built on hybrid transactional and analytical processing (HTAP) architectures for real-time decisioning.** Modern analytical database platforms increasingly support converged workloads that unify transactional and analytical processing within a single system. HTAP enables organizations to analyze live operational data without replication or delay, providing the foundation for real-time decisioning. Buyers should assess whether these capabilities meet requirements such as fraud detection, personalization, or supply chain visibility while maintaining transactional integrity and analytical performance on the same data. Platforms that support both workloads improve responsiveness, reduce data movement, and strengthen

governance. HTAP architectures are also becoming essential for agentic AI, where real-time, context-rich data enables autonomous, data-driven decisioning across the enterprise.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Oracle

After a thorough evaluation of Oracle's strategies and capabilities, IDC has positioned Oracle in the Leaders category in this 2025 IDC MarketScape for worldwide analytical databases.

Oracle is a global enterprise technology provider with a long history in databases and enterprise data management. Its flagship cloud service, Oracle Autonomous Database, automates provisioning, tuning, patching, and scaling to reduce administrative overhead and improve reliability. In October 2025, Oracle introduced Oracle Autonomous AI Lakehouse, expanding upon the capabilities of Oracle Autonomous Database to unify data warehousing, data lake, and AI-driven analytics within a single managed service. Delivered on Oracle Exadata infrastructure and Oracle Cloud, the platform is designed for mission-critical workloads requiring performance, governance, and security at scale.

The database supports structured, semistructured, and JSON data, as well as graph, spatial, and vector workloads, consolidating diverse requirements into a single platform. It also includes in-database machine learning capabilities, allowing organizations to run advanced models without moving data. With workload optimization, compression, and automated scaling features, Autonomous Database provides consistent performance for enterprises consolidating complex estates.

By embedding automation into core operations, Oracle positions Autonomous Database as a strategic choice for enterprises modernizing mission-critical environments. It is particularly relevant for regulated industries, global enterprises, and organizations with large analytical estates that require predictable performance, governance assurance, and automation-driven efficiency.

Strengths

- **Autonomous operations and performance management:** Oracle Autonomous Database automates traditionally manual tasks such as provisioning, tuning, patching, and workload optimization. By embedding automation into the core platform, it reduces reliance on manual DBA intervention while ensuring consistent performance. Autonomous features help organizations minimize downtime and administrative overhead, enabling IT teams to focus on higher-value activities. This automation provides enterprises with predictable performance and operational resilience, particularly in mission-critical environments where consistency and availability are essential.

- **Scale and performance on Exadata Infrastructure:** Autonomous Database runs on Oracle Exadata infrastructure, leveraging optimized hardware and software integration to deliver exceptional throughput and scalability. This combination enables petabyte-scale deployments, high concurrency, and low-latency analytics across structured, semistructured, and JSON data. Exadata's compression, caching, and workload management features further enhance efficiency. By providing enterprises with a proven platform for performance at scale, Oracle positions Autonomous Database as a strong choice for organizations requiring continuous availability and reliability for analytical workloads.

- **Broad in-database analytics capabilities:** Oracle Autonomous Database includes extensive in-database analytics, supporting machine learning, graph, spatial, JSON, and vector workloads natively. These capabilities allow enterprises to build advanced models and perform complex queries without moving data into external systems. By consolidating diverse analytical capabilities within the database, Oracle reduces data movement and governance complexity. This broad analytics portfolio helps enterprises accelerate innovation while ensuring compliance, making the platform suitable for organizations with diverse and demanding use cases.

Challenges

- **Migration complexity:** Moving databases and applications to Oracle Autonomous Database can require planning and validation to ensure compatibility, adjust dataflows, and redesign workflows. These activities may extend implementation timelines and increase initial effort. Oracle provides tools such as Zero Downtime Migration, free heterogeneous migration utilities, and SQL Developer Migration Workbench to simplify the process of moving both Oracle and non-Oracle workloads. The SQL Translation Framework further supports migrations by translating SQL statements from other database platforms into Oracle syntax.

- **Vendor lock-in considerations:** Dependence on a single cloud provider can increase the effort required to migrate or integrate workloads across different environments due to variations in APIs, networking, and identity services. Oracle offers multicloud deployment options, including Oracle Database@Hyperscaler on Microsoft Azure, Google Cloud, AWS, and OCI, to help support flexibility and integration across platforms.
- **Operational adaptation:** The move to an autonomous, AI-driven database can require adjustments to processes and roles as routine administrative tasks become automated. Organizations often reallocate staff time toward higher-value activities such as data modeling, analytics, and innovation following deployment.

Consider Oracle When

Consider Oracle Autonomous Database when the priority is to modernize mission-critical analytics with automation, Exadata-class performance, and enterprise-grade governance. The platform is particularly relevant for organizations that require predictable performance, continuous availability, and embedded analytics such as machine learning, graph, and spatial directly in the database. Enterprises seeking to reduce administrative burden, improve compliance, and ensure operational resilience at scale will find Oracle Autonomous Database a practical option for both hybrid and cloud-native deployments.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this IDC MarketScape, IDC determined the vendor market size using IDC's Software Tracker, 2024, which represents an estimate of each vendor's 2024 software revenue.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market Definition

An analytical database is a specialized data management system designed to store, process, and query large volumes of data for analytical workloads rather than transactional operations. Modern analytical databases support a wide range of use cases, from historical reporting and business intelligence (BI) to real-time analytics, machine learning (ML), and AI-assisted decisioning. They are optimized for high-performance querying and scalable data processing that enable enterprises to derive actionable insights from both structured and semistructured data.

Analytical databases now span on-premises, cloud native, and hybrid architectures, including lakehouse and distributed query models that enable analytics wherever data resides. The separation of storage and compute is a core design principle, enabling elastic scaling, workload isolation, and cost-efficient performance across hybrid and multicloud environments. Many platforms now incorporate automation, vectorized execution, and AI-driven optimization to improve efficiency, reduce administrative overhead, and accelerate time to insight. Together, these innovations define the next generation of analytical databases powering enterprise intelligence.

Related Research

- *IDC FutureScape: Worldwide Data and Analytics 2026 Predictions* (IDC #US53860225, October 2025)
- *IDC MarketScape: Worldwide Data Platform Software 2025 Vendor Assessment* (IDC #US52974125, July 2025)
- *IDC Quick Poll, 2Q25: Agentic AI and Data* (IDC #US53638725, June 2025)
- *Worldwide Database Management Systems Software Market Shares, 2024: Powering AI Workloads and Enabling Autonomous DBMS Operations* (IDC #US53032425, June 2025)
- *Worldwide Database Management Systems Software Forecast, 2025–2029* (IDC #US53032525, June 2025)

Synopsis

The IDC study evaluates worldwide analytical database software platforms for 2025, highlighting how advances in storage and compute architectures are transforming enterprise analytics. Vendors evaluated include AWS, Broadcom, Cloudera, Couchbase, Google, IBM, InterSystems, Microsoft, OpenText, Oracle, SAP, SingleStore, Snowflake, and Teradata. The market is shifting beyond traditional columnar systems toward cloud-native, lakehouse, and distributed query architectures that separate storage and compute to improve elasticity, performance, and cost control.

As organizations modernize data infrastructure and accelerate AI adoption, analytical databases are emerging as the intelligent, high-performance foundation for real-time analytics and data-driven decisioning. Vendors are embedding AI-driven optimization, vector processing, and automation to enhance scalability, accelerate insights, and prepare for agentic AI workloads. The market's growth signals a new phase where analytics, AI, and storage innovation converge to enable faster and more intelligent enterprise decisions.

"Analytics is the engine of enterprise intelligence, and analytical databases are evolving to make it faster, smarter, and more adaptive," said Devin Pratt, research director, Data Management Software at IDC. "As organizations advance their analytics strategies and incorporate AI and agentic AI, leadership will belong to databases that seamlessly unite storage, compute, and automation to turn data into trusted, real-time decisions."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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