

Market Share Analysis: Enterprise Software, Worldwide, 2020

Published 27 August 2021 - ID G00746553 - 34 min read

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The enterprise software market grew 9.0% in 2020 to about \$536 billion, confirming its status as the fastest-growing IT macro segment and one of the most dynamic. Native cloud vendors continue to cause the most disruption.

Overview

Key Market Findings

- The COVID-19 pandemic had a small impact on the software market in 2020, which grew by \$44.3 billion from 2019, even as the overall growth rate reduced from 11.7% in 2019.
- The top five vendors in 2020 remained the same as in 2019 (Microsoft, Oracle, SAP, IBM and Salesforce) although the order changed slightly.
- The market observed a slight shift of concentration toward the middle-tier vendors. The revenue share of the top five vendors decreased and the revenue share of the next five vendors increased in 2020.
- Data and analytics achieved the highest growth among macro software markets at 13% in 2020. Within data and analytics, the database management system (DBMS) market saw the strongest growth of 17.1% in 2020.
- The \$1.9 billion robotic process automation (RPA) segment remains the fastest-growing subsegment at 38.92%. It is closely followed by integration platform as a service (iPaaS) and nonrelational DBMS at 38.71% and 34.49%, respectively.

Vendor Performance Highlights

- Microsoft, followed by Google, added the most amount of new software revenue in 2020 at \$8.7 billion and \$4.5 billion, respectively.
- Google registered strong growth of over 48% in 2020, with the majority of revenue from DBMS and email and authoring.
- SAP is now the third largest vendor in 2020 replacing IBM. It registered a growth of 3% in 2020.
- Salesforce grew over 25.7% in 2020, with its total revenue of \$19.67 billion. Salesforce showed an incredible growth of 122.2% in analytic platforms, benefiting from the acquisition of Evergage in February 2020.

Market Share Data

Table 1 provides an overview of the worldwide market share for enterprise software. Following are the key highlights:

- The market observed a slight shift of concentration toward the middle-tier vendors. The revenue share of the top five vendors — Microsoft, Oracle, SAP, IBM and Salesforce — decreased in 2020 to 36%, down from 38% in 2019. However, the revenue share of the next five vendors — Amazon, Google, Adobe, VMware and Apple — increased in 2020 to 11% (up from 9% in 2019). Both Google and Amazon gained considerable market share in 2020 on account of solid growth achieved in relational database management system (RDBMS). Google also gained on account of high growth achieved in email and authoring.
- Microsoft had another solid year by adding more than \$8.7 billion to its 2019 revenue. No other vendor added so much net new revenue — Google added \$4.5 billion, Amazon added \$4.5 billion and Salesforce added \$4 billion. Microsoft's strategy prioritizes expanding sales in key market areas, such as public cloud, unified communications, security, ERP, CRM and low-code application platforms.
- Google grew over 48% in 2020, with the majority of revenue from database management systems (21.3%) and email and authoring (21.8%). Over the past two years, Google has been introducing resources and dbPaaS products for use by enterprises. It has added functionality to BigQuery and Cloud Spanner (including stronger SQL support). Google also moved up a position in terms of market share to seventh in 2020 from eighth in 2019.

- SAP is now the third largest vendor in 2020, from being fourth in 2019, replacing IBM. It showed a growth of 3% — now amounting to a market size of \$26.5 billion. Its share in the total market in terms of percentage has declined to 4.9% in 2020 from 5.2% in 2019. SAP continues to invest in expanding its data management product portfolio to support hybrid cloud environments.
- Salesforce grew over 25.7% in 2020, with its total revenue of \$19.67 billion. Salesforce showed an incredible growth of 122.2% in analytic platforms, benefiting from the acquisition of Evergage in February 2020. Salesforce remains the fifth largest vendor in terms of market share, increasing its share to 3.7% in 2020 from 3.2% in 2019. It is a leader in digital commerce. Salesforce excels at selling bundled “multicloud” solutions to enterprise-scale customers.
- Oracle had flat growth of only 0.6%, but still retained its spot as the second largest software vendor. Its total market size now amounts to \$32.2 billion, or 6% of the total market. Oracle is an established enterprise software vendor and, with Oracle Autonomous Database and Oracle Cloud Infrastructure, Oracle is also gaining recognition as an enterprise cloud provider.
- Amazon remains in sixth position, following a successful year with a growth rate of 32.9% in 2020. Amazon Web Services (AWS) continues to be the No. 1 vendor by market share in the dbPaaS segment, with 51% market share. Retaining its No. 1 position in the cloud infrastructure and platform services (CIPS) market in 2020 helped, as we witnessed market dominance of cloud service providers in the dbPaaS segment. IBM, which was the third largest vendor in 2019, slipped to fourth in 2020, replaced by SAP, which was fourth largest in 2019. A drop of \$766 million in application infrastructure and middleware (AIM) and \$386 million in DBMS revenue contributed to IBM’s overall decline.

Table 1: Enterprise Software Market Share by Revenue, Worldwide, 2019 and 2020
(Millions of Dollars)

(Enlarged table in Appendix)

2019 Rank	2020 Rank	Rank Change	Company	2019 Revenue	2020 Revenue	2019 Market Share (%)	2020 Market Share (%)	2019-2020 Growth (%)
1	1	0	Microsoft	85,169	93,891	17.3%	17.5%	10.2%
2	2	0	Oracle	32,011	32,214	6.5%	6.0%	0.6%
4	3	↑1	SAP	25,711	26,474	5.2%	4.9%	3.0%
3	4	↓1	IBM	25,823	22,955	5.3%	4.3%	-11.1%
5	5	0	Salesforce	15,647	19,672	3.2%	3.7%	25.7%
6	6	0	Amazon	13,310	17,694	2.7%	3.3%	32.9%
8	7	↑1	Google	9,364	13,869	1.9%	2.6%	48.1%
7	8	↓1	Adobe	11,071	12,863	2.3%	2.4%	16.2%
9	9	0	VMware	7,434	8,789	1.5%	1.6%	18.2%
10	10	0	Apple	4,784	5,128	1.0%	1.0%	7.2%
			Others	110,626	117,899	22.5%	22.0%	6.6%
			Total	491,622	535,957	100.0%	100.0%	9.0%

Source: Gartner (August 2021)

Table 2 outlines the worldwide enterprise software market share by macro segment for 2019 and 2020.

Table 2: Enterprise Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

(Enlarged table in Appendix)

Macro Segments ↓	Software Markets ↓	2019 ↓	2020 ↓	2019 Market Share ↓	2020 Market Share ↓	2020 AGR ↓
Enterprise Applications	Customer Experience and Relationship Management	61,572.0	69,343.1	12.5%	12.9%	12.6%
	Enterprise Resource Planning	38,928.0	40,326.4	7.9%	7.5%	3.6%
	Supply Chain Management	15,064.4	15,846.9	3.1%	3.0%	5.2%
	Project and Portfolio Management	3,356.0	3,648.0	0.7%	0.7%	8.7%
	Email and Authoring	20,270.9	22,918.3	4.1%	4.3%	13.1%
	Content Services	11,848.0	12,641.5	2.4%	2.4%	6.7%
Application Architecture, Development, Integration and Platforms (AADI&P)	Application Infrastructure and Middleware	37,600.5	40,944.0	7.6%	7.6%	8.9%
	Application Development	12,695.2	13,756.8	2.6%	2.6%	8.4%
Infrastructure and Operations	IT Operations	31,261.4	33,905.5	6.4%	6.3%	8.5%
	Operating Systems	35,577.1	37,307.9	7.2%	7.0%	4.9%
	Storage Software	15,682.3	15,529.0	3.2%	2.9%	-1.0%
	Virtualization Infrastructure Software	6,946.1	7,652.9	1.4%	1.4%	10.2%
Security	Security	45,038.4	49,658.1	9.2%	9.3%	10.3%
Data and Analytics	Database Management Systems	55,342.9	64,802.7	11.3%	12.1%	17.1%
	Data Management Software (Excluding DBMS)	7,826.0	8,404.5	1.6%	1.6%	7.4%
	Analytic Platforms	24,470.4	25,927.1	5.0%	4.8%	6.0%
Other Enterprise Software	Other Application Software	45,805.5	50,067.2	9.3%	9.3%	9.3%
	Other Infrastructure Software	22,337.2	23,277.2	4.5%	4.3%	4.2%
Total		491,622.3	535,956.9	100.0%	100.0%	9.0%

Note: Columns may not add to totals shown because of rounding.
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate; DBMS = database management system

Source: Gartner (August 2021)

Figure 1 shows the top five enterprise software vendors by both revenue in 2020 and by segment.

Figure 1. Top Five Enterprise Software Providers' Revenue, Worldwide, 2020

Top Five Enterprise Software Providers, Worldwide, 2020

Revenue (Millions of U.S. Dollars)

	Microsoft \$93,891	Oracle \$32,214	SAP \$26,474	IBM \$22,955	Salesforce \$19,672
Analytic Platforms	4,181	1,198	3,248	957	1,843
Application Development	2,617	78	149	1,179	
Application Infrastructure and Middleware	1,840	3,274	834	5,198	4,308
Content Services	2,992	143		715	
Customer Experience and Relationship Management	1,754	3,022	3,611		13,521
Data Management Software (Excluding DBMS)	123	333	1,504	1,004	
Database Management Systems	15,974	15,612	3,732	4,482	
Email and Authoring	19,699				
Enterprise Resource Planning	1,440	4,373	8,584	353	
IT Operations	2,781	509		2,386	
Operating Systems	30,886	291		958	
Other Application Software	1,261	663		1,312	
Other Infrastructure Software	4,670	8		382	
Project and Portfolio Management	501	401	219		
Security	3,173	534	193	2,056	
Storage Software		12		1,858	
Supply Chain Management		1,750	4,399	115	
Virtualization Infrastructure Software		13			

Source: Gartner (August 2021)

Note: The size of the bubble and value equal 2020 revenue (millions of U.S. dollars), and the color coding equals positive or negative year-over-year change. A green bubble represents positive change, and a red bubble represents negative change.

DBMS = database management system

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Overall Market Segment Performance Analysis

Software Growth Down to Single Digits in 2020; Still the Highest Among All Enterprise IT

Enterprise software in 2020 was the highest growing segment of the IT market, registering a growth of 9% (which is 7% higher than the average growth achieved by the IT market). The high growth performance (9%) during 2020 underlines the importance of software technologies (including functionality delivered as platform as a service [PaaS] and SaaS) in attaining business continuity for enterprises. Main software areas driving this growth were:

- Database management systems (registering double-digit growth of 17%)

- Email and authoring (registering double-digit growth of 13%)
- Customer experience and relationship management (registering double-digit growth of 13%)
- Security (registering double-digit growth of 10%)
- Virtualization infrastructure software (registering double-digit growth of 10%)

Demand for Software That Supports Digital Transformation Was Heightened by the COVID-19 Pandemic

The year 2020 saw a radical increase in remote working and e-commerce activities, emphasizing the need for digital transformation across organizations. Spending on software technologies is fundamental in driving this transformation. For example, digital transformation accelerates the demand for innovative user experience (UX) and custom integration in enterprise applications, such as CRM, supply chain management and ERP. Furthermore, combinations of platform as a service (PaaS) and SaaS help create solutions (offering increased application capability and delivery speed) that allow the organizations to go beyond the currently available commercial capabilities.

While digital initiatives across all business processes saw a heightened demand in 2020, two areas — namely, remote work and service delivery (in all forms) — drove the maximum spend. Software markets that were positively impacted by this include application infrastructure and middleware, security, RPA, email and authoring, to name a few.

Cloud Adoption Accelerated With Increasing Digital Business Investments for Business Agility

In 2020, the enterprise's emphasis was on projects that could be quickly implemented. One of the consequences of this behavioral change was that the enterprises preferred to accelerate the adoption of cloud solutions (platforms and software) giving them the flexibility to pay just for the necessary capacity and consumption. Additionally, we saw industries such as government, healthcare and education that were forced into digitalization to meet customer needs, and much of this was made possible through the cloud.

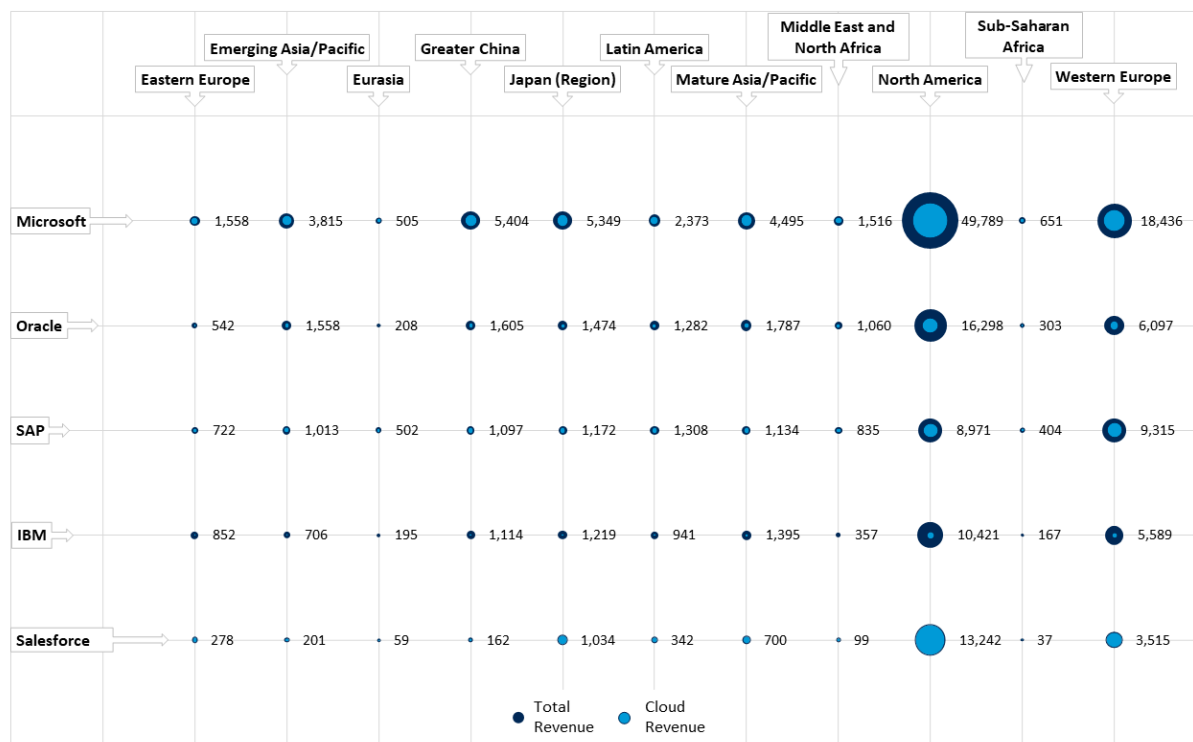
While software as a service (SaaS) emerged as the largest market segment for cloud software spending at \$123 billion (growing at the rate of 16%), platform as a service (PaaS) grew at a higher rate, at 37.3% in 2020, reaching a market size of \$62 billion. The growth in PaaS was driven by remote workforce's continual need to access high-performing and scalable infrastructure via modernized and cloud-native applications.

Within the vendor landscape, the fastest-growing providers were the ones that generated revenue from cloud-based models. The cloud-native providers such as Alibaba, Amazon, Google, Salesforce, Workday and so on showed desire to use cloud technologies and capabilities across their product portfolios to enable more integrated product value propositions for their customers. Also, we are beginning to see the emergence of cloud models to differentiate through vertical integration and bundling rather than individual products. This will become a key focus in the near and midterm for most providers.

Figure 2 shows the top five enterprise software vendors by region and by revenue type.

Figure 2. Top Five Enterprise Software Providers' Revenue by Region, Worldwide, 2020 (Millions of Dollars)

Enterprise Software Vendor Regional Analysis



Source: Gartner (August 2021)

Gartner defines the Greater China region to include China, Hong Kong and Taiwan.

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AIM Technologies Like RPA and iPaaS Remain Key Building Blocks for Digital Transformation

Application infrastructure and middleware technologies remain a key building block for digital transformation and grew by 8.9% in 2020 to almost \$41 billion. AIM technologies play a significant role in improving the performance of core functional areas by ensuring optimal performance of digital platforms that need to scale for extreme data analytics initiatives, for Internet of Things (IoT) initiatives, omnichannel customer experience, API economy, ecosystem and partners, platform business models and so on.

Within AIM, robotic process automation and integration platform as a service (iPaaS) were the fastest-growing markets (around 39% each). In fact, these two markets were also the fastest-growing enterprise software segments overall.

To empower digital transformation efforts, user organizations are revising their approach to integration. As such, organizations are increasingly implementing hybrid integration platforms (HIPs) that support hybrid personas, integration patterns, endpoints and deployment models. iPaaS is a foundational technology for building and creating a HIP, along with API management tools, event brokers, classic integration platform software and other components.

Alternatively, RPA as a tool appeals to organizations due to its quicker deployment cycle times compared to other options. An important driver for RPA projects is the ability to integrate new digital systems with old legacy systems. Using these tools, organizations can quickly make headway on their digital transformation initiatives and unlock the value associated with past technology investments.

Need for Quick and Accurate Decision-Making Helped Data and Analytics Achieve Its Highest Growth

Data and analytics (D&A) achieved 13% growth in 2020, surpassing all other segments. We define data and analytics markets (which is composed of three software markets) as the following:

1. Database management systems
2. Data management software (excluding DBMS)
3. Analytics platforms

The COVID-19 pandemic served as an engine of innovation and sometimes forced organizations to make radical changes promptly. We saw unprecedented shifts in how we work, how we live, what we buy and what we value. D&A played a critical role in making these shifts possible by helping organizations to make decisions quickly and accurately. For example, analyzing a greater variety of data for better situational awareness requires better D&A. In addition, in the face of more competition, digitization and more emancipated consumers, decisions must be made more quickly and more accurately, and must be personalized — again requiring D&A to play a pivotal role.

Within data and analytics, the database management system (DBMS) market saw strong growth of 17.1% in 2020, primarily driven by cloud database platform as a service (dbPaaS) growth of roughly 50%. This has meant that more than 90% of the DBMS growth came from dbPaaS in 2020. The nonrelational DBMS segment grew by 34.5% to take a 15.2% share of the DBMS market, while the relational DBMS segment grew by 15.2% for a segment share of 82.0%.

Data management software (excluding DBMS) which now combines the following four markets (in addition to other data integration software) also registered significant growth despite the 2020 slowdown:

1. Data integration software
2. Data quality software
3. Master data management software
4. Metadata management software

The largest of these markets — the data integration software market — grew 6.8% in 2020, reaching \$3.3 billion. Growth was sustained by the need for solving multicloud and hybrid data integration challenges of customers, along with the sustained need for supporting specific data integration styles needed by customers.

The analytics platform market growth of 6% in 2020 was driven by analytics and business intelligence (ABI) platforms (16.4% growth), and artificial intelligence and data science (ADS) platforms (17.5% growth). The capabilities, deployment models and pricing/packaging of ABI platforms continue to dominate enterprise reporting platforms for buyers, which was its driving growth factor in 2020. In contrast, ADS platforms have seen significant innovation over the past several years. Machine learning (ML)/artificial intelligence (AI) outcome prioritization, cloud, augmented analytics and data scientist work styles have significantly transformed the expectations for data science and ML platforms.

Security Performed Strongly in 2020 — The Result of Remote Working

The security software market grew 10.3%, reaching \$49.7 billion in 2020. The demand was driven by cloud-based delivery models, user authentication or remote worker technologies and vulnerability assessment and security testing. The top three segments by growth were:

1. Application security testing (28.7%)
2. Access management (24.4%)
3. Endpoint protection platform — enterprise (20.2%)

Application security testing was largely driven by increased software and supply chain risk focus, including vulnerabilities within critical networking and application infrastructure, as well as emerging technologies. Whereas growth in access management and endpoint protection platform was fueled by cloud managed offerings.

Microsoft is now the largest security software provider, after a growth of 49.1% over 2020. This growth has primarily come from Microsoft Office 365 E3 and E5 license growth. Microsoft has replaced McAfee and NortonLifeLock (formerly Symantec) for the top spot. Microsoft's integrated approach across cloud and other platforms and a bundled offering including a growth of 78% has elevated it to the first position.

Email and Authoring Was the Fastest-Growing Enterprise Application Market in 2020

Email and authoring grew by 13% in 2020. The COVID-19 pandemic emphasized the need for collaborative platforms that organizations could scale easily and provide reliably. Thus, a large part of the increased adoption in 2020 was cloud-driven. In this space, the cloud-native provider, Google, benefited a great deal, where it achieved a growth rate of 54% on the back of its SaaS offering. This helped Google to strengthen its share in the market, which grew from 10% in 2019 to 13% in 2020. The largest provider in this space, Microsoft, also showed growth in its email and authoring revenue by 9% over 2019, driven by new customer growth, mainly from cloud.

Growth in the future will continue to be driven by cloud offerings wherein players in this market will deliver a suite of applications that are integrated with each other to meet enterprise needs of flexibility when providing work from anywhere and greater collaboration capabilities.

Top Vendors Analyzed

Microsoft

Innovation is a key to Microsoft's retention of existing customers. Microsoft continues to innovate, despite its strong front-runner status. The company continues to make substantial investments in research and development (R&D), with one of the largest annual R&D investments in high tech. This shows a willingness of Microsoft to innovate at the core of a successful franchise. These actions, along with a renewed attention to strategic partnerships, allowed the company not just to maintain, but also to accelerate its lead over other providers.

Microsoft added \$8.7 billion of new revenue in 2020 with total revenue reaching \$93.9 billion. The company grew 10.2% and captured 17.5% share in the global enterprise software market. The company continues to accelerate its go-to-market (GTM) shift that consolidated more than 60% of its software offerings (by revenue) under the Microsoft 365 umbrella. At the highest level, Microsoft 365 combines:

- Productivity (Office)
- Device and app management (such as Microsoft Endpoint Manager)
- Advanced analytics (including Power BI Pro)
- New applications and low-code development (such as Planner, Sway and Power Apps)
- Unified communications (now embedded in Teams)
- Operating system (Windows Enterprise)
- Threat protection (Defender for Endpoint, Defender for Identity and Defender for Office 365)
- Information protection (including BitLocker and Microsoft Azure Information Protection P1 and P2)
- Compliance (including Advanced eDiscovery and Customer Lockbox)

This consolidated offering, which is intended to accentuate relationships between the products, enables cross-selling of components and increases depth of adoption.

Microsoft successfully transitioned one of the largest enterprise user bases in software from its client/server product, mostly paid on a three-year upgrade cycle, to cloud-delivered services offered as SaaS. Rather than forcing users to move to the cloud, Microsoft effectively changed how IT buyers view the role of the Office suite, while driving rapid growth and high customer satisfaction. In particular, Teams has been a major success for Microsoft during this time of user transition to the cloud. As Microsoft's new cloud-based hub, Teams provides a proof of value — for both Microsoft and users — of this shift to the cloud. Now, Microsoft is moving beyond Office 365 to focus on Microsoft 365, which combines Office 365 with Windows, management and security. This is an ideal time, then, to evaluate what Office 365 has accomplished over the last decade and how it was done.

Also, Microsoft offers content migration to Office 365 with out-of-the-box migration tools (SharePoint Migration Tool, Mover Migration and Migration Manager), through FastTrack services for organizations with 500 or more licensees, and together with qualified partners. The vendor has two event stream processing (ESP) products — Microsoft Azure Stream Analytics (ASA) and Microsoft StreamInsight. ASA is Microsoft's PaaS offering for large-scale, cloud-based, streaming analytics, although a version is also part of Microsoft's IoT Edge/Azure Stack Edge for low latency on-site analytics. StreamInsight is Microsoft's original ESP platform for on-premises stream processing. These products, coupled with Microsoft's global presence, brand recognition, broad customer portfolio and constant ability to innovate/invest in its products, give it a strong position in the ESP marketplace.

In late 2019, Microsoft rounded out its Dynamics 365 portfolio with a digital commerce offering that includes content management tools. This solution is based on its own internal offering that runs Microsoft's own digital sites and shopping experiences. With the end of support for Windows 7 in January 2020, Windows 10 is now firmly established as the mainstream version of Windows and is a dominant presence in the PC OS market. Enterprises have moved from migration projects to concentrating on improving operational processes associated with updating and maintaining the OS. Additionally, Power BI is the dominant product in the analytics and business intelligence (BI) platforms segment and continues to gain market share. Microsoft has strong integration among its data management and analytics products, making it easy to implement as a solution both on-premises and in the cloud. Microsoft is enhancing this integration with Azure Synapse Analytics, a complete enterprise data warehouse and data analytics platform.

Table 3: Microsoft Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	23,970	26,387	28.1%	28.1%	10.1%
Application Architecture, Development, Integration and Platforms (AADI&P)	4,012	4,457	4.7%	4.7%	11.1%
Infrastructure and Operations	31,861	33,667	37.4%	35.9%	5.7%
Security	2,128	3,173	2.5%	3.4%	49.1%
Data and Analytics	17,312	20,278	20.3%	21.6%	17.1%
Other Enterprise Software	5,886	5,931	6.9%	6.3%	0.8%
Total	85,169	93,891	100.0%	100.0%	10.2%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Oracle

The breadth and depth of functionality continues to put Oracle in a strong competitive position. Customers often acknowledge the range of available Oracle applications as a positive factor influencing their choice. Its portfolio spans a broad spectrum of markets, including enterprise applications — enterprise resource planning (ERP)/enterprise performance management (EPM), customer experience (CX), human capital management (HCM) and supply chain management (SCM). Its portfolio also includes database and broader data management capabilities, analytics, content services, integration, application development tooling, security and hardware. Oracle's strategic focus is to progressively move all aspects of its portfolio to the cloud in the form of either infrastructure as a service (IaaS), PaaS or software as a service (SaaS) delivery models.

Gartner estimates that Oracle generates most of its revenue from DBMS, ERP and AIM markets, which grew 3%, 4% and 7.8%, respectively, year over year (YoY) in 2020. Revenue generated from DBMS stood at \$15.6 billion in 2020. Likewise, it continues to expand in other key applications markets — for example, achieving revenue of \$4.4 billion in 2020 for ERP applications.

Oracle markets a complete set of DBMS products for both operational and analytical use cases, anchored by flagships Oracle Database, Oracle Autonomous Database and Oracle MySQL Database Service with HeatWave. The vendor continues to be a market share leader in DBMS technologies, and Oracle customers rate the products highly for functional capabilities and performance. Its market share has dropped over the past years due to strong competition from Microsoft and Amazon — the two leading cloud platform vendors. Reflecting technology trends and market demand, the Oracle DBMS products today are available as server-based software, appliances (engineered systems) and as cloud services.

Oracle's efforts to improve the implementation and support experience for applications have generated increased customer ratings on product quality, service and support. This is most visible in the ERP/EPM and HCM applications markets. For enterprise resource planning, Oracle goes to market with Oracle Fusion Cloud ERP and Oracle NetSuite. Oracle NetSuite is exclusively public-cloud-deployed, while Oracle Fusion Cloud ERP is mainly sold and deployed as a public cloud solution, in select situations, and it can also be privately deployed via Oracle Cloud@Customer. In addition, Oracle has a heritage portfolio of products (E-Business Suite, JD Edwards EnterpriseOne, Hyperion, PeopleSoft and Siebel), which remain supported under Oracle's Applications Unlimited program.

Oracle has a “cloud first” development strategy for enterprise applications. It also continues to support the on-premises versions (E-Business Suite, JD Edwards EnterpriseOne, Hyperion, PeopleSoft and Siebel) through the Applications Unlimited support program, which has been extended until at least 2032. Oracle’s broad base of technology and related innovations are increasingly applied to extend the capabilities of its applications. The introduction of various AI-driven functionality shows Oracle’s desire to differentiate — examples range from the general idea of adaptive intelligence across the portfolio, to specific features such as the Oracle Intelligent Advisor in the CX suite. As part of its effort to shift brand perception (which began in 2019), Oracle is infusing its applications with enhanced usability and mobility (which Oracle has named the “Redwood” user experience project).

**Table 4: Oracle Software Market Share by Macro Segment, Worldwide, 2019 and 2020
(Millions of Dollars)**

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	9,504.2	9,688.8	29.7%	30.1%	1.9%
Application Architecture, Development, Integration and Platforms (AADI&P)	3,274.8	3,352.4	10.2%	10.4%	2.4%
Infrastructure and Operations	818.0	824.9	2.6%	2.6%	0.8%
Security	502.6	534.4	1.6%	1.7%	6.3%
Data and Analytics	16,686.8	17,143.0	52.1%	53.2%	2.7%
Other Enterprise Software	1,224.2	670.6	3.8%	2.1%	-45.2%
Total	32,010.5	32,214.1	100.0%	100.0%	0.6%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

SAP

SAP maintained its long-standing market share lead of the ERP market. SAP offers end-to-end ERP suites that can be deployed on-premises, in a private cloud, in a public cloud or SaaS, as well as in hybrid models. These ERP suites are complemented and augmented by line-of-business solutions such as SAP Experience Management, SAP Concur and SAP SuccessFactors. These line-of-business solutions are actively sold to non-SAP ERP customers. Despite challenging conditions, SAP continued to make progress on sales of S/4HANA (SAP's offering for core ERP to midsize, large and global organizations), adding more than 2,000 customers year-over-year with over 17,000 customers by 31 July 2021. It continued to benefit from its strong global presence, large partner ecosystem and the ability to cross-sell to its large ERP customer base.

SAP generated more than \$26 billion revenue and climbed to No. 3 position in 2020 in the overall enterprise software market. The company registered a modest growth rate of 3% in 2020 among the top five vendors. Through the pandemic, SAP continued to benefit with its cloud-first approach with a large share of net new customers deploying its cloud products. SAP also continues to support its existing customer base that runs SAP on-premises deployments. It sells mostly into the manufacturing, professional services, consumer packaged goods (CPG) and high-tech industries, and provides both B2B and B2C capabilities. Additionally, SAP has continued to expand beyond its traditional customer base in retail and manufacturing to wide-ranging verticals — albeit at smaller shares — such as wholesale, high technology and IT, life sciences and healthcare, among others. It grows mainly from its sales to small, midsize and large businesses, with a focus on those with gross merchandise value (GMV) from \$10 million to \$1 billion — although some of its customers have more than \$1 billion in online sales. SAP has a wide geographic presence across all regions and a large IT services partner ecosystem with over 22,000 partners.

SAP designs technology platforms and point technologies as enablers for its Intelligent Enterprise vision and for the associated point applications. As such, customers often buy them in the context of SAP application initiatives. This adoption strategy has more to do with SAP's go-to-market approach than with the technology itself, which is now less SAP-centric than it used to be, thanks to greater support for open standards, open-source software and third-party capabilities. SAP technology is much more open now than it was in the past. As a result, the SAP environment is easier to integrate and extend than in the proprietary Basis/advanced business application programming (ABAP) times. SAP has a large IT services ecosystem and a wide geographic presence across all regions — extended further via the [SAP Store](#) digital marketplace, where customers can find, try and buy more than 1,800 solutions from SAP and its partners.

SAP is also expected to see its iPaaS revenue increase in the next 12 to 36 months given its large client base. These customers are attracted to the SAP Cloud Platform Integration Suite's increasingly key role in SAP's overarching Intelligent Enterprise strategy; its focus and commitment to integration generally; and to its iPaaS' product depth, breadth and technology vision.

**Table 5: SAP Software Market Share by Macro Segment, Worldwide, 2019 and 2020
(Millions of Dollars)**

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Business Applications	16,319.5	16,813.3	63.5%	63.5%	3.0%
Application Architecture, Development, Integration and Platforms (AADI&P)	833.3	983.5	3.2%	3.7%	18.0%
Security	184.7	193.3	0.7%	0.7%	4.6%
Data and Analytics	8,373.1	8,483.5	32.6%	32.0%	1.3%
Total	25,710.6	26,473.6	100.0%	100.0%	3.0%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

IBM

After 20 consecutive years, IBM continues to be the AIM market leader with around \$5.2 billion in 2020 with presence in most of the AIM segments. It continues to generate around \$1.0 billion in application platform software and event brokers and messaging infrastructure, as well as over \$800 million in trusted platform modules (TPMs). The company also generated additional strong revenue in related business process management (BPM) suites. All these revenues are primarily derived from its IBM WebSphere Application Server (supporting Java Platform, Enterprise Edition, Customer Information Control System [CICS]) and other mainframe products.

In cloud and cloud-native application platforms, IBM has much smaller representation with limited presence in the low-code spaces, notably high-productivity application platform as a service (hpaPaaS), RPA and iPaaS. In the iPaaS market, IBM has a 2.7% market share. This lack of traction reflects IBM's historic dominance in the integration markets, its late transition to offering cloud-native as a service integration and the huge number of products in these markets. In the second half of 2020, IBM did acquire an RPA provider, WDG Automation, but it is rather early days with regard to showing a full market impact, and IBM's presence in the RPA space is still small. After the divestiture in the digital experience platform (DXP) space, IBM no longer features in that market, which in the past we estimated had generated around \$300 million for the company.

IBM emerged as the fifth largest vendor in the ESP marketplace, accounting for \$36.4 million revenue in 2020. IBM Streams was a pioneer in ESP, being the first product to implement the now-common distributed cluster stream processing architecture. It runs on-premises, as a cloud service in IBM Cloud Pak for Data and in hybrid deployments. The product is widely deployed in telecommunications and financial services institutions, among other industries. Organizations often use IBM Streams with IBM's Db2 Event Store, a scalable, cloud-native database, to store and analyze massive amounts of structured Apache Parquet event data. IBM Streams is complemented by IBM's supported distribution of Apache Kafka, IBM Event Streams. Separately, IBM also offers several products with stream data integration capabilities, including IBM DataStage, IBM BigIntegrate and IBM InfoSphere Information Server. However, unlike the rest of the top five, who saw positive growth, Gartner estimated IBM's 2020 total revenue declined by 11%.

IBM's broad DBMS portfolio — which includes multiple RDBMSs, document stores, graph stores, and geospatial and time-series capabilities, plus Apache Hadoop and Apache Spark-based offerings — had been a source of confusion for its customers. However, IBM has recently rationalized its branding around DBMS offerings to focus on Db2 and a series of open-source DBMSs. This product rationalization and simplified pricing has allowed IBM to respond to developer demand for a range of dbPaaS options with its Cloud Databases platform. This platform provides open-source databases such as PostgreSQL, MongoDB and others, built natively on IBM Cloud and integrated with IBM's security and governance functionality. In addition, IBM Cloud Pak for Data delivers a consolidated, containerized cloud data ecosystem offering. This supports Db2 deployment via microservices across both hybrid and multicloud environments, demonstrating IBM's differentiated strategy to offer customers freedom of choice and interoperability across popular cloud environments.

IBM Cognos Analytics is one of the few offerings that include enterprise reporting, governed and self-service visual exploration, and augmented analytics in a single platform. In addition, as existing IBM Cognos Framework Manager models and reports from earlier versions can be used in the single environment, there is a migration path and the ability to use existing content. However, IBM's analytic platform revenue declined by 16.5%, partially attributable to a strategic focus on their data science and machine learning platform (Watson Studio), while its market share declined by one percentage point in 2020.

Table 6: IBM Software Market Share by Macro Segment, Worldwide, 2019 and 2020
(Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Business Applications	1,609.7	1,182.7	6.2%	5.2%	–26.5%
Application Architecture, Development, Integration and Platforms (AADI&P)	7,226.1	6,377.4	28.0%	27.8%	–11.7%
Infrastructure and Operations	5,742.2	5,202.4	22.2%	22.7%	–9.4%
Security	2,065.0	2,055.8	8.0%	9.0%	–0.4%
Data and Analytics	6,998.4	6,442.8	27.1%	28.1%	–7.9%
Other Enterprise Software	2,182.2	1,694.4	8.5%	7.4%	–22.4%
Total	25,823.5	22,955.5	100.0%	100.0%	–11.1%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Salesforce

Salesforce exhibited another strong year in 2020 and remained top CRM vendor, achieving a total revenue growth rate of 25.7%. The vendor accounts for a majority 19.5% share in the overall CRM market, up from 18.5% in 2019. Salesforce demonstrated a strong overall performance in 2020 and outperformed the market average even in the face of headwinds from COVID-19.

Salesforce has also extended its product and service portfolio beyond traditional CRM and continues to invest in its ecosystem. Continued investment in platform innovation, continued modernization of its platform architecture and multicloud platform support through partners, along with support of AI and real-time event initiatives, have proven to be a successful strategy for Salesforce. Salesforce is a cloud service provider that operates in all subsegments of CRM, with customer service and support (CSS) capturing the highest share of its revenue at 39.2%, followed by sales at 38.1%. Its Service Cloud surpassed the \$5 billion mark in 2020 with the help of strong momentum and the acquisition of ClickSoftware in 2019, while its Sales Cloud also surpassed the \$5 billion mark in 2020. The vendor's 2020 growth was primarily driven by a big uptick in analytics and BI platforms, along with integration platform as a service (iPaaS), and continued strong growth in the marketing subsegment and digital commerce. Additionally, Salesforce saw a rise in Sales Cloud revenue in 2020. Salesforce's largest cloud is now its Service Cloud.

Salesforce is the market leader in analytics and BI platforms. It realized the highest growth rate among the top 10 vendors in analytic platforms, with a growth rate of 122.3% over 2020 (largely due to the completed acquisition of Tableau), with total revenue amounting to more than \$1.8 billion. Unlike several other vendors in analytic platforms, all its revenue comes from one segment, analytics and BI platforms. Tableau has integrated Einstein Analytics, now called Tableau CRM, into the Tableau platform. It has also further invested in its Business Science initiative with major enhancements to the Einstein Discovery ML capability, including making it available in Tableau. People with domain expertise can now apply advanced analytics and ML techniques to make smarter decisions faster and with more confidence.

It has continued investment in innovation and supported the product ecosystem by expanding the community with API Catalog powered by MuleSoft. These investments have enabled Salesforce to grow its brand, business and product portfolio. This ecosystem consists primarily of AppExchange and Trailhead. They enable extended functionality for Salesforce products and provide learning for a steady stream of skilled resources knowledgeable about Salesforce technologies.

Salesforce regional software revenue is dominated by North America (67%), followed by Western Europe (18%). Salesforce's large technology and services partner ecosystem increased the strength of its expansion execution. Salesforce is strengthening its strategy in Greater China with its partnership signed with Alibaba in 2019. (Note that Gartner defines the Greater China region to include China, Hong Kong and Taiwan.) In this partnership, Alibaba becomes a Salesforce exclusive provider to customers in Greater China, and Salesforce becomes the exclusive enterprise CRM product suite sold by Alibaba. (A target launch date has not yet been announced at the time of publication of this research.) Salesforce also announced Hyperforce making its offerings available on multiple public clouds, which will help with increased geographic coverage.

Salesforce has also doubled down on its industry-specific solutions with its acquisition of Vlocity in early 2020. The acquisition added new clouds for communications, media and energy/utilities, and enhanced existing public-sector solutions and clouds for healthcare and financial services. Salesforce also introduced Consumer Goods Cloud and Manufacturing Cloud in 2019.

Its strong marketing and sales functions earn Salesforce high consideration on shortlists, in turn leading to good close rates and higher-than-market growth rates.

Table 7: Salesforce Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	11,377.1	13,521.0	72.7%	68.7%	18.8%
Application Architecture, Development, Integration and Platforms (AADI&P)	3,440.7	4,308.1	22.0%	21.9%	25.2%
Data and Analytics	829.3	1,842.6	5.3%	9.4%	122.2%
Total	15,647.0	19,671.7	100.0%	100.0%	25.7%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Mergers and Acquisitions

Table 8 lists major merger and acquisition (M&A) activity in the enterprise software market from 2019 through the end of 2020.

Table 8: Major M&A Activity in the Enterprise Software Market, 2019 to 2020

(Enlarged table in Appendix)

Company Name	M&A Activity	Date of Acquisition or Deal Closed
Adobe	WorkFront	December 2020
SAP	Emarsys	November 2020
BMC	Compuware	June 2020
Visma	IntraData	April 2020
Google	Looker	February 2020
Salesforce	■ Evergage	■ February 2020
	■ Vlocity	■ February 2020
	■ Tableau	■ August 2019
VMware	■ SaltStack	■ October 2020
	■ Lastline	■ June 2020
	■ Nyansa	■ February 2020
	■ Pivotal Software	■ December 2019
	■ Carbon Blac	■ October 2019
M&A = merger and acquisition		

Source: Gartner (August 2021)

Evidence

This research required data collection and preparation of market statistics information. Prevailing market conditions, along with political and economic events that affect vendor performance, such as regulations, M&As, a slowed worldwide economic recovery and new version migration, have been taken into account.

Gartner uses public sources of information and works with software vendors to establish estimates for the market. Information from Gartner's secondary research and internal community meetings has also been used to arrive at certain conclusions. The data in this research is published as Gartner estimates/opinion, not as facts that the vendor reported. Gartner estimates are based on vendors' calendar-year revenue, not vendors' fiscal year.

Acronym Key and Glossary Terms

AADI&P	application architecture, development, integration and platforms
ABAP	advanced business application programming
ABI	analytics and business intelligence
ADS	artificial intelligence and data science
AGR	annual growth rate
AI	artificial intelligence
AIM	application infrastructure and middleware
API	application programming interface
ASA	Azure Stream Analytics (Microsoft)
ASC	Accounting Standards Codification
AWS	Amazon Web Services
B2B	business-to-business
B2C	business-to-consumer
BI	business intelligence
BPM	business process management
CIPS	cloud infrastructure and platform services
CPG	consumer packaged goods
CRM	customer relationship management
CSS	customer service and support
CX	customer experience
D&A	data and analytics
DBMS	database management system
dbPaaS	database platform as a service
DXP	digital experience platform
EPM	enterprise performance management

ERP	enterprise resource planning
ESP	event stream processing
GMV	gross merchandise value
GTM	go-to-market
HCM	human capital management
HIP	hybrid integration platform
hpaPaaS	high-productivity application platform as a service
IaaS	infrastructure as a service
IFRS	International Financial Reporting Standards
IoT	Internet of Things
iPaaS	integration platform as a service
M&A	merger and acquisition
ML	machine learning
OS	operating system
PaaS	platform as a service
R&D	research and development
RDBMS	relational database management system
RPA	robotic process automation
SaaS	software as a service
SCM	supply chain management
SQL	Structured Query Language
TPM	trusted platform module
UX	user experience
YoY	year over year

Additional Notes

Non-U.S.-headquartered vendors generally base and judge their annual performance in their home currency rather than the U.S. dollar. However, for the purposes of comparison, Gartner uses the U.S. dollar. Gartner collects market share data for individual vendors in the vendor's local currency. Data reported in currencies other than the U.S. dollar is converted to U.S. dollars for the purposes of cross-country comparisons and aggregation using average exchange rates. The impact of the exchange rate changes can include the following:

- Vendor growth measured in U.S. dollars may differ from the vendor growth measured in the currency in which the vendor reports.
- Occasionally, exchange rate changes may have an influence on the market share positions, where one vendor gets a beneficial effect of the exchange rate changes and another suffers an adverse effect.
- Changes in exchange rates for the current year compared to the prior year mean that, when measured in U.S. dollars, growth rates for revenue accrued in a foreign currency differ from growth rates that are shown in U.S. dollars.

Individual Vendor Revenue Reporting

As a result of Accounting Standards Codification (ASC) 606/International Financial Reporting Standards (IFRS) 15 adoption, which varies from vendor to vendor, Gartner has opted not to restate financial history at the individual vendor level, regardless of the method the vendor has chosen to adopt. We believe our approach to each vendor is the most equitable way to handle the anomalies resulting from this industrywide change in revenue recognition standards.

Total Market Growth Reporting

We have made adjustments such that overall market growth trends are still reflected accurately.

More details regarding this approach will be detailed in the upcoming Market Definitions and Methodology research for each market.

Document Revision History

[Market Share Analysis: Enterprise Software, Worldwide, 2019 - 15 June 2020](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[Market Share: All Software Markets, Worldwide, 2020](#)

[Market Definitions and Methodology: Software](#)

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Table 1: Enterprise Software Market Share by Revenue, Worldwide, 2019 and 2020 (Millions of Dollars)

2019 Rank	2020 Rank	Rank Change	Company	2019 Revenue	2020 Revenue	2019 Market Share (%)	2020 Market Share (%)	2019-2020 Growth (%)
1	1	0	Microsoft	85,169	93,891	17.3%	17.5%	10.2%
2	2	0	Oracle	32,011	32,214	6.5%	6.0%	0.6%
4	3	↑1	SAP	25,711	26,474	5.2%	4.9%	3.0%
3	4	↓1	IBM	25,823	22,955	5.3%	4.3%	-11.1%
5	5	0	Salesforce	15,647	19,672	3.2%	3.7%	25.7%
6	6	0	Amazon	13,310	17,694	2.7%	3.3%	32.9%
8	7	↑1	Google	9,364	13,869	1.9%	2.6%	48.1%
7	8	↓1	Adobe	11,071	12,863	2.3%	2.4%	16.2%
9	9	0	VMware	7,434	8,789	1.5%	1.6%	18.2%
10	10	0	Apple	4,784	5,128	1.0%	1.0%	7.2%
			Others	110,626	117,899	22.5%	22.0%	6.6%
			Total	491,622	535,957	100.0%	100.0%	9.0%

Source: Gartner (August 2021)

Table 2: Enterprise Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Segments ↓	Software Markets ↓	2019 ↓	2020 ↓	2019 Market Share ↓	2020 Market Share ↓	2020 AGR ↓	↓
Enterprise Applications	Customer Experience and Relationship Management	61,572.0	69,343.1	12.5%	12.9%	12.6%	
	Enterprise Resource Planning	38,928.0	40,326.4	7.9%	7.5%	3.6%	
	Supply Chain Management	15,064.4	15,846.9	3.1%	3.0%	5.2%	
	Project and Portfolio Management	3,356.0	3,648.0	0.7%	0.7%	8.7%	
	Email and Authoring	20,270.9	22,918.3	4.1%	4.3%	13.1%	
	Content Services	11,848.0	12,641.5	2.4%	2.4%	6.7%	

Macro Segments ↓	Software Markets ↓	2019 ↓	2020 ↓	2019 Market Share ↓	2020 Market Share ↓	2020 AGR ↓	↓
Application Architecture, Development, Integration and Platforms (AADI&P)	Application Infrastructure and Middleware	37,600.5	40,944.0	7.6%	7.6%	8.9%	
	Application Development	12,695.2	13,756.8	2.6%	2.6%	8.4%	
Infrastructure and Operations	IT Operations	31,261.4	33,905.5	6.4%	6.3%	8.5%	
	Operating Systems	35,577.1	37,307.9	7.2%	7.0%	4.9%	
	Storage Software	15,682.3	15,529.0	3.2%	2.9%	-1.0%	
	Virtualization Infrastructure Software	6,946.1	7,652.9	1.4%	1.4%	10.2%	
Security	Security	45,038.4	49,658.1	9.2%	9.3%	10.3%	
Data and Analytics	Database Management Systems	55,342.9	64,802.7	11.3%	12.1%	17.1%	

Macro Segments ↓	Software Markets ↓	2019 ↓	2020 ↓	2019 Market Share ↓	2020 Market Share ↓	2020 AGR ↓	↓
	Data Management Software (Excluding DBMS)	7,826.0	8,404.5	1.6%	1.6%	7.4%	
	Analytic Platforms	24,470.4	25,927.1	5.0%	4.8%	6.0%	
Other Enterprise Software	Other Application Software	45,805.5	50,067.2	9.3%	9.3%	9.3%	
	Other Infrastructure Software	22,337.2	23,277.2	4.5%	4.3%	4.2%	
Total		491,622.3	535,956.9	100.0%	100.0%	9.0%	
Note: Columns may not add to totals shown because of rounding. AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate; DBMS = database management system							

Source: Gartner (August 2021)

Table 3: Microsoft Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	23,970	26,387	28.1%	28.1%	10.1%
Application Architecture, Development, Integration and Platforms (AADI&P)	4,012	4,457	4.7%	4.7%	11.1%
Infrastructure and Operations	31,861	33,667	37.4%	35.9%	5.7%
Security	2,128	3,173	2.5%	3.4%	49.1%
Data and Analytics	17,312	20,278	20.3%	21.6%	17.1%
Other Enterprise Software	5,886	5,931	6.9%	6.3%	0.8%
Total	85,169	93,891	100.0%	100.0%	10.2%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Table 4: Oracle Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	9,504.2	9,688.8	29.7%	30.1%	1.9%
Application Architecture, Development, Integration and Platforms (AADI&P)	3,274.8	3,352.4	10.2%	10.4%	2.4%
Infrastructure and Operations	818.0	824.9	2.6%	2.6%	0.8%
Security	502.6	534.4	1.6%	1.7%	6.3%
Data and Analytics	16,686.8	17,143.0	52.1%	53.2%	2.7%
Other Enterprise Software	1,224.2	670.6	3.8%	2.1%	-45.2%
Total	32,010.5	32,214.1	100.0%	100.0%	0.6%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Table 5: SAP Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
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Security	184.7	193.3	0.7%	0.7%	4.6%
Data and Analytics	8,373.1	8,483.5	32.6%	32.0%	1.3%
Total	25,710.6	26,473.6	100.0%	100.0%	3.0%
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Infrastructure and Operations	5,742.2	5,202.4	22.2%	22.7%	-9.4%
Security	2,065.0	2,055.8	8.0%	9.0%	-0.4%
Data and Analytics	6,998.4	6,442.8	27.1%	28.1%	-7.9%
Other Enterprise Software	2,182.2	1,694.4	8.5%	7.4%	-22.4%
Total	25,823.5	22,955.5	100.0%	100.0%	-11.1%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Table 7: Salesforce Software Market Share by Macro Segment, Worldwide, 2019 and 2020 (Millions of Dollars)

Macro Market	2019	2020	2019 Market Share	2020 Market Share	2020 AGR
Enterprise Applications	11,377.1	13,521.0	72.7%	68.7%	18.8%
Application Architecture, Development, Integration and Platforms (AADI&P)	3,440.7	4,308.1	22.0%	21.9%	25.2%
Data and Analytics	829.3	1,842.6	5.3%	9.4%	122.2%
Total	15,647.0	19,671.7	100.0%	100.0%	25.7%
AADI&P = application architecture, development, integration and platforms; AGR = annual growth rate					

Source: Gartner (August 2021)

Table 8: Major M&A Activity in the Enterprise Software Market, 2019 to 2020

Company Name	M&A Activity	Date of Acquisition or Deal Closed
Adobe	WorkFront	December 2020
SAP	Emarsys	November 2020
BMC	Compuware	June 2020
Visma	IntraData	April 2020
Google	Looker	February 2020
Salesforce	■ Evergage	■ February 2020
	■ Vlocity	■ February 2020
	■ Tableau	■ August 2019
VMware	■ SaltStack	■ October 2020
	■ Lastline	■ June 2020
	■ Nyansa	■ February 2020
	■ Pivotal Software	■ December 2019
	■ Carbon Blac	■ October 2019
M&A = merger and acquisition		

Source: Gartner (August 2021)