



Zona Quiniela Qstat

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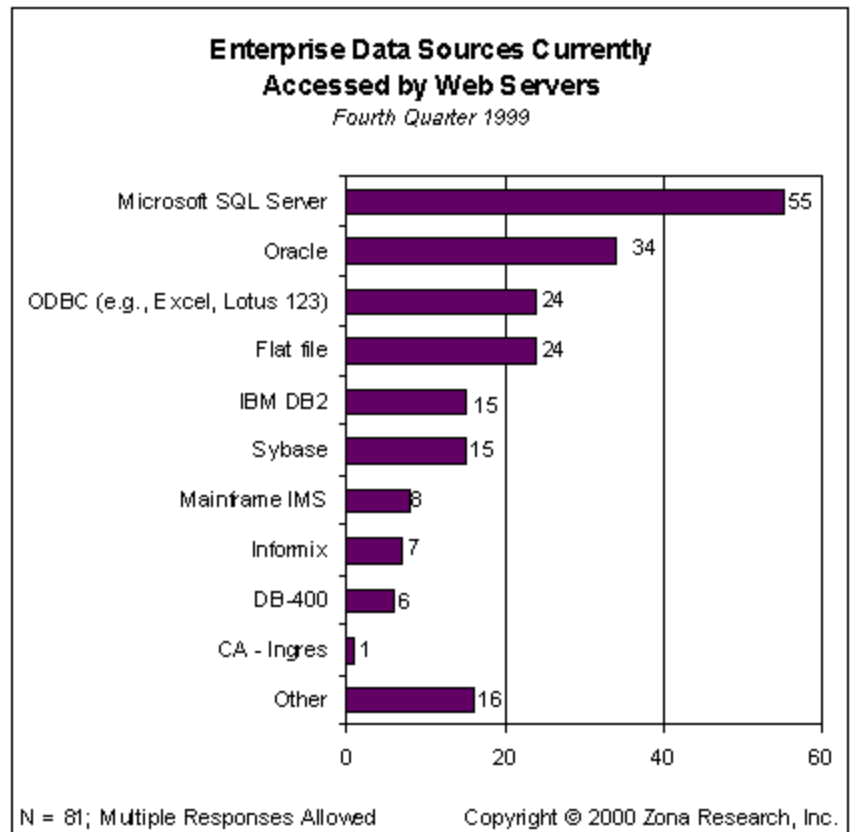
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Where Is Web Data Stored?

Source: *Zona Enterprise Usage Study, Web Application Servers - Q4 1999:*
Table 409

For all of their glitz and glitter, Internet/Intranet based applications are still primarily just mechanisms for shuffling data between users and backend corporate data stores. As Web application developers have moved from using file systems themselves as the storage mechanism to database-driven applications, there has been an exponentially-increasing need to connect these backend databases to applications on the Web application servers. In this context, we asked the ZEUS panel which enterprise data sources they currently find themselves using in their organizations' Web server applications, and compared these responses to similar questions asked in previous quarters. Since many corporations draw upon more than one data source for a variety of applications, the totals add up to more than the number of companies responding.

What we found is that Microsoft SQL Server continues as the



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database used by the largest number of responding companies, growing from 56% of the respondents in Q3 to more than two-thirds, or 68% of the respondents in Q4 1999. Oracle remained level at 42%, and IBM DB2 grew from 13% in Q3 to 19% of the responding companies in Q4. ODBC access to data sources like Excel and Lotus actually shrank from 37% of the responding companies in Q3 to 30% of the companies in Q4.

A very important note about the skew of this data is that it measures the horizontal propensity of companies to use the given data resources, rather than measuring the volume of data transacted from the given databases. It shows that Microsoft SQL Server, being the default relational database with many Windows NT development environments, has a high degree of penetration among greenfield applications and other new projects. Oracle and IBM DB2 databases, though present in a smaller percentage of companies, are still generally regarded as the workhorse databases for high-volume transactional applications. In this sense, the 6% growth in IBM DB2 database usage in Web applications may be the most significant change, reflecting a very energetic expansion of the overall IBM eBusiness systems integration effort. When compared to the rather incremental 1% gain in the connection of IBM mainframe IMS data to Web applications, it becomes clear that DB2 deployments, rather than legacy IMS connections, are the application development choice for true blue shops. Over the next year, we expect to see Microsoft SQL server's horizontal penetration turn more vertical, as larger databases and highly-scalable clustering schemes are placed underneath SQL Server. The commoditization of databases will continue and this will eventually favor Microsoft, but it may take several years before the images of IBM DB2 and Oracle 8 as the Bentley's and Mercedes Benz's of the database genre fade to genericism.