

May 28, 2008

The Forrester Wave™: Enterprise Search, Q2 2008

by Leslie Owens

for Information & Knowledge Management Professionals



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Autonomy, Endeca, FAST, And Vivisimo Lead A Competitive Market

by **Leslie Owens**

with Matthew Brown, Ken Poore, and Norman Nicolson

EXECUTIVE SUMMARY

Forrester evaluated enterprise search vendors against 147 criteria and found that Autonomy, Endeca, FAST (a Microsoft subsidiary), and Vivisimo lead the market with impressive technical capabilities and a diverse customer base pushing for further innovation. Over the past two years, IBM, Microsoft, and Oracle have all recognized their potential advantage in the enterprise search market. Not only do they have deep financial resources to support their products, but they also can win customers who seek to natively connect and integrate search with existing IBM, Microsoft, or Oracle applications and content repositories. Yet these vendors are still digesting acquisitions and building search features that customers want now. Meanwhile, Recommind and InQuira deliver distinctive solutions for targeted market segments — legal and customer service, respectively—while Coveo is repositioning itself due to industry shakeups. Google competes effectively on ease of administration, low-cost/high-value appliances, and stellar brand. Search is a buyer's market, and I&KM pros must pragmatically align their requirements to get the best value and fit for their needs.

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NOTES & RESOURCES

Forrester conducted evaluations in November 2007 and interviewed 11 vendor companies: Autonomy, Coveo Solutions, Endeca Technologies, FAST (a Microsoft subsidiary), Google, IBM, InQuira, Microsoft, Oracle, Recommind, and Vivisimo. Forrester also interviewed 22 user companies.

Related Research Documents

["Microsoft: The Latest Disruptor In Enterprise Search"](#)

November 6, 2007

["How to Be A Hero: Develop An Enterprise Search Strategy"](#)

September 24, 2007

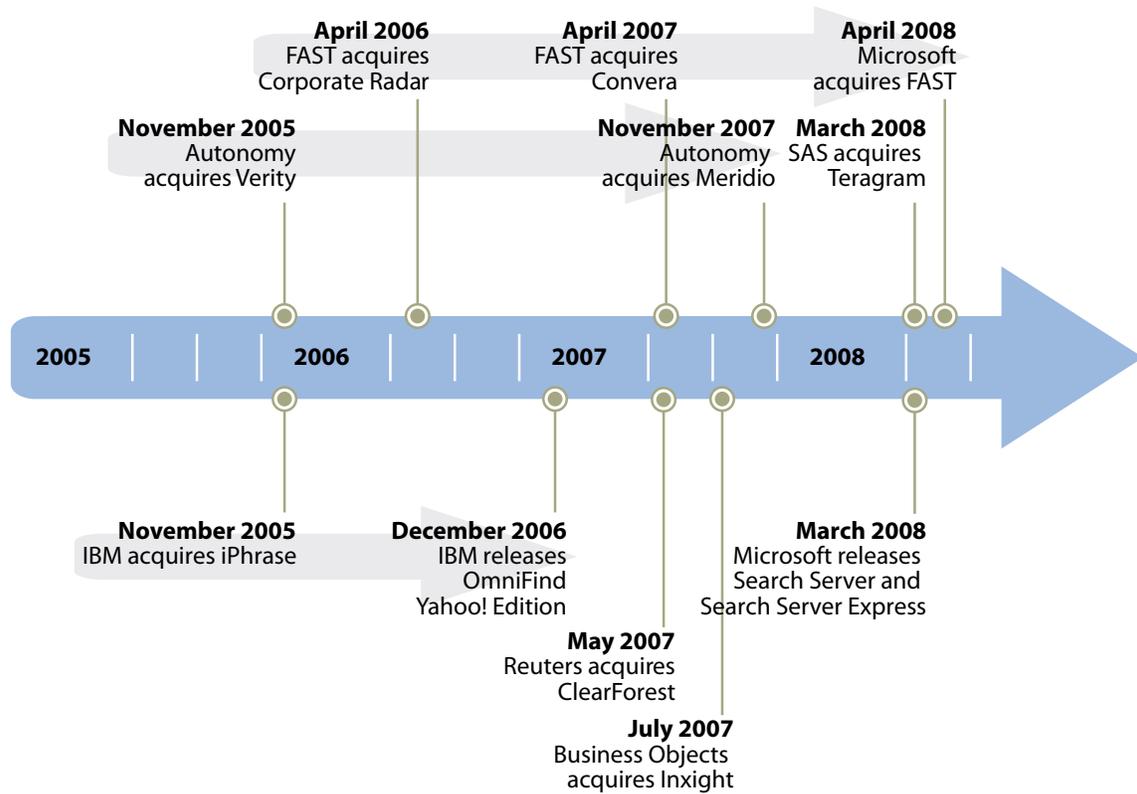
THE GOOD, THE BAD, AND THE UGLY ENTERPRISE SEARCH MARKET

The overall macro-trends for the enterprise search market appear favorable. On external Web sites and secure extranets, companies struggle to stand out and to form sticky relationships with customers, making compelling search experiences a must-have. Enterprise search tools play an important role here, powering some of the world's largest eCommerce and online directory sites. On internal networks, the growth of digital content — including email, files, and other data — shows no sign of subsiding. Further, individual workers increasingly provision a diverse set of tools for communication and collaboration such as team workspaces, wikis, blogs, discussion forums, and others. These tools generate reams of digital artifacts that are hard to find and manage. Simultaneously, companies are under increasingly onerous regulatory pressure to control and produce digital communications and records in a timely manner — making technologies like search that shorten information retrieval times a hot commodity. As a result, enterprise search has moved beyond simply offering faster access to information. Instead, we see search and indexing capabilities deployed to help companies manage the rising tide and growing risks posed by unstructured information.

Yet at a micro level, the search market faces a state of upheaval. A lot has changed since Forrester last studied this sector — including rapid consolidation of both the high-end enterprise search market and its text analytics cousin.¹ Autonomy's acquisition of Verity in 2005, for example, was followed by a string of M&A activity, including FAST Search and Transfer's acquisition of Convera, and the subsequent acquisition of FAST by Microsoft this year. On a parallel path, many of the leading text analytics vendors, including Inxight, ClearForest, and Teragram, have been swallowed up by Business Objects, Reuters, and SAS respectively as the latter group looks to complement traditional business intelligence (BI) and analytical tools with search and text mining capabilities. Large infrastructure vendors — like IBM, Oracle, and SAP — have also gotten their feet wet with enterprise search. IBM and Microsoft in particular have proceeded to butt heads with Google Enterprise, the “small” division within Google that managed to grow its revenues from enterprise search and related products to more than \$180 million as of year-end 2007.² As a direct result of this rivalry, enterprise search became free in the fall of 2006 with the release of IBM OmniFind Yahoo! Edition, only to be matched by the release of Microsoft's Search Server Express 2008 in March of this year (see Figure 1). Expect prices to continue to go down for commodity search tools.

Finally, the information access market is invigorated by innovation from well-differentiated, fast-growing vendors such as Endeca, Coveo, ISYS Search Software, InQuira, Recommind, Vivisimo, Mercado, exalead, Attivio, and SINEQUA. These companies focus on different angles of the “findability” problem, and take up the deep market left unfulfilled by Autonomy, FAST, or the aforementioned infrastructure and text analytics vendors.

Figure 1 The Enterprise Search Market Is In Flux



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Source: Forrester Research, Inc.

IT'S TIME TO FOCUS ON WHAT MATTERS MOST: VALUE AND FIT

When scoping an enterprise search project, Forrester recommends thoughtful attention to requirements. This means identifying critical content that's hard to find with existing mechanisms, but also talking to people to pinpoint information needs — like insight on customer trends — that are unmet with current tools.³ Content such as presentations, proposals, and policies gets squirreled away in enterprise content management (ECM) systems, email, and collaboration tools. Each tool has native search functionality — letting people enter a text query to retrieve information stored in the content repository. Enterprise search solutions have value when blending content from diverse locations is required. In addition, enterprise search can add new capabilities — like clustering and faceted classification — that are unavailable in more traditional applications.

Search buyers can choose from roughly 30 vendors, ranging from household names to new startups like Attivio and open source projects like Lucene. With this wide range of products comes a wide range of pricing, from IBM OmniFind Yahoo! Edition, available gratis, to information access

platforms that index billions of documents and cost well into the seven figures. While this report is biased toward the breadth of capabilities a single vendor offers, I&KM pros should focus on fit with their needs. To get this right:

- **Be realistic about scalability.** A scalable search system must meet your content indexing and query processing demands today and also handle throughput under a bigger load tomorrow. But scale is relative. The majority of enterprise search implementations Forrester sees inside major organizations range in size from the hundreds of thousands to tens of millions of records, not billions. And proper information retention and expiry policies can keep search indices lean and focused on only the most valuable content items businesspeople need. Similarly, query processing speeds of thousands of queries per second are virtually unheard of *inside* of organizations, while they may be imperative to support a consumer-facing audience *outside* the firewall. Planning carefully will optimize value when shortlisting products.
- **Scrutinize real security requirements.** Search security is a complex technology issue that vendors will attempt to exploit as a poison pill to disparage competitors and win deals. After all, no I&KM pro in his or her right mind would accept an “unsecure” search tool in an enterprise setting. Recognize that there are different approaches to securing search implementations that may involve trade-offs in query processing speed and achievable scale, but these approaches don’t necessarily compromise security of the information itself. In fact, even some of the entry-level products on the market today enforce security at a document level using widely accepted security standards and protocols. Of course, leading vendors offer the most comprehensive approaches to minimize trade-offs among security, scale, and performance.⁴
- **Ask yourself: What features really matter?** Search vendors sell cool bells and whistles like the ability to detect the sentiment expressed in text or to automatically extract clusters, entities, and other linguistic patterns. These features are important in advanced analytical search applications, but they may not be relevant to finding today’s lunch menu on an intranet. Product features are just one consideration in a robust software evaluation, and they can differ a great deal across search products.⁵ Also consider ease of making changes and operating the product in your environment.
- **Don’t underestimate the cost or complexity of connectivity.** Search engines rely on connectors to hook into databases and applications. Some vendors include all connectors with the delivered product; some sell them piecemeal. A broad menu of connectors is not necessary if you only intend to search across two or three repositories. Also, the cost of connectivity involves more than just software. Applying enterprise search across line-of-business applications or departmental databases may introduce issues of governance, budget allocation, and project management. And connectivity isn’t a one-time effort. Once linked, the search administrator and the application owner(s) must coordinate and communicate to ensure that the connection is stable and secure and that the indexing job is running as scheduled.

- **Take relevance tune-ability with a grain of salt.** Vendors employ profoundly different approaches to calculate and rank the “right” answer to a given query, and to some extent the algorithms behind the rankings can be manipulated. For example, search administrators may want to boost documents coming from an authoritative document management system more than those from a file share. The level of “tune-ability” should match with the level of effort you are prepared to invest in tuning. Unless you are willing to sign up for painstakingly biasing the relevance algorithm at a metadata attribute level, and then comprehensively testing the system for recall and precision, products that allow basic results boosting may be sufficient. Reweighting hits on title text over hits on the body text can be time-consuming and can have unintended consequences. Careful consideration should be paid to the quality of search results for simple queries out of the box, since relevance algorithms are a key point of differentiation among vendors.

THE ENTERPRISE SEARCH LANDSCAPE HAS BEEN CUT ALONG NEW FAULT LINES

This report comes at a time when the enterprise search category has splintered in several directions. Forrester sees four very distinct segments emerging, with some vendors participating in more than one segment (see Figure 2 and see Figure 3).

Old Model: One Search For Everything Has Failed In Enterprises

The old mental model for enterprise search assumed that people want one consolidated hub to answer every information need across an enterprise. The more consolidated, the better. Hence the familiar refrain: “I wish we had Google for our enterprise.” The problems?

1. **Interfaces don’t scale well to diverse enterprise information.** To leverage the full functionality (such as clustering, clarifying, and relating topics) of today’s highly capable search engines, you need a jam-packed search interface. Comprehensive search UIs don’t scale well when numerous collections of information exist, or when different metadata attributes for different content must be rendered into the interface.⁶
2. **In enterprises, context matters.** There are some “common information goods” in enterprises — like employee profiles, corporate communications, blogs, and some information repositories. But these are a minority. In reality, Forrester finds that the content that matters to a finance professional is entirely different from content that matters to sales, R&D, and other functions. And language differences impose limits of their own to what is relevant (and readable) to people. Successful enterprise search efforts target corpuses of information and set search scopes appropriately. I&KM pros are wise to study information worker context before trying to “Google-ize” their enterprises.⁷

3. **Diverse content requires diverse relevance models.** Since a user’s intent is not known, relevance scoring of dissimilar content (e.g., employee phone numbers, documents, and sales data) requires different approaches. Practically speaking, how could you possibly rank the relative importance of a particular business contract compared with a particular report or customer record from a CRM system? Comparing the relevance of similar information categories is far more effective than comparing relevance of dissimilar categories within enterprises.

Figure 2 Search Market Segments: Information Access Platforms And Embedded Platform Search

	Products	Segment characteristics	Competitive approach	Additional considerations
Information access platforms	<ul style="list-style-type: none"> • Autonomy IDOL • Endeca IAP • FAST ESP • IBM OmniFind Analytics Edition • Vivisimo Velocity Search Platform 	<ul style="list-style-type: none"> • Search, navigate, and visualize both data and content • Transform data • Analyze text for entities and patterns • Connect to heterogeneous sources • Scale to massive volumes • Customize data ingestion and front-end search applications 	<ul style="list-style-type: none"> • Sell to the strategic buyers (CIOs and architects) seeking a broad platform on which custom applications are built • Search value proposition: alleviate risk (a single missed fact may have enormous impact) 	<p>A community of partners to build on and extend these search platforms is critical to their long-term viability.</p>
Embedded platform search	<ul style="list-style-type: none"> • Google Search Appliance • InQuira Intelligent Search • Microsoft Office SharePoint Server 2007 • IBM OmniFind Enterprise Edition • Oracle Secure Enterprise Search 	<ul style="list-style-type: none"> • Search as one part of broader information management stack, such as portal, content, and collaboration • Search deep into the context of business applications and data • Expose business functionality directly through the search interface • Federate and/or index external information sources • Integrate natively across platform components 	<ul style="list-style-type: none"> • Sell to varied roles: business executives, IT directors concerned about out-of-the-box functionality • Search value proposition: deliver information in context 	<p>Infrastructure vendors benefit from lower perceived integration costs when the search solution is part of a larger suite of tools from the same vendor.</p> <p>Google Search Appliance is pressuring platform providers with its emerging definition of a hybrid platform that encompasses the desktop and cloud-based services like Google Apps.</p>

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Source: Forrester Research, Inc.

Figure 3 Search Market Segments: Search Solutions And Commodity Search Point Products

	Products	Segment characteristics	Competitive approach	Additional considerations
Search solutions	<ul style="list-style-type: none"> • Coveo G2B • IBM OmniFind Discovery Edition • Microsoft Search Server • Recommind MindServer 	<ul style="list-style-type: none"> • Address specific market needs, such as searching email archives and file systems • Build a complex solution in stages, create collections and design interfaces at the department level and expand as appropriate • Deliver search functionality on approved devices, such as mobile phones • Federate to other search sources with limited emphasis on direct connectivity 	<ul style="list-style-type: none"> • Sell to business units • Search value proposition: boost knowledge worker productivity with a role-based approach to search 	<p>A departmental approach to search has its pros and cons. It allows for quick and customized deployment but can be difficult to trace. Forrester routinely talks to customers who have more than five search engines in place as a consequence of an ad hoc solution approach.</p>
Commodity search point products	<ul style="list-style-type: none"> • Microsoft Search Server Express • IBM OmniFind Yahoo! Edition • Google Mini 	<ul style="list-style-type: none"> • Get up and running in days • Search files and Web pages • Connect to a limited set of supported repositories • Scale to a vendor-imposed or server-hardware-imposed limit • Live with limited feature set and vendor support 	<ul style="list-style-type: none"> • Available for free download • Search value proposition: simple and free enterprise search empowers employees — try, then buy 	<p>These tools are useful for addressing immediate pains, departmental needs, and for scoping an enterprise search project.</p>

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Source: Forrester Research, Inc.

New Model: Emergence Of Contextual Search, Search Applications, And Services

To be sure, there is still a need in almost every business for keyword-based access to information. Many tools exist to meet that need. There is also a “vertical” market for department and/or application-specific solutions that require some customization or specialized control over the look and feel of query input and results. But the cutting-edge deployment of enterprise search technology tackles far more thorny issues than “what’s our holiday schedule?” More analytical, discovery-oriented search is made possible by:

- **Advances in visualization.** The power to merge structured, unstructured, and semi-structured data has enabled entirely new applications at the intersection of business intelligence and search.⁸ Rather than look for a needle in a haystack, high-end search can now draw the haystack and predict the placement of the needle.
- **Contextual alerting and information services.** High-end search tools show promise for operating as search-enabled middleware. For example, a person working in one application, such as a business process management (BPM) tool, may be alerted of the presence of content in another store, such as email, as part of their activity in the BPM system.
- **Integration of third-party content.** Many of the information access platforms and embedded platform search tools now let I&KM pros configure searches across subscription-only databases and public information sources for purposes of competitive intelligence, market intelligence, and research.

ENTERPRISE SEARCH EVALUATION OVERVIEW

To assess the state of the enterprise search market and to see how vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top enterprise search vendors across 147 criteria.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, Forrester developed a comprehensive set of evaluation criteria. Forrester evaluated vendors against approximately 147 criteria, which were grouped into three high-level buckets:

- **Current offering.** The evaluation focused on fundamentals like core technology architecture and security, as well as the degree of flexibility and control over query processing, indexing and classification, and display of search results.
- **Strategy.** The strategy evaluation looked at vendors’ visions, corporate strategy, product strategy, and cost. Forrester also considered the degree to which the evaluated vendors focus on the enterprise search market and their depth of partnerships. Cost information is provided, but not

given any weight by default; Forrester clients can compare vendors by reweighting any of the criteria.

- **Market presence.** Forrester evaluated vendors' current installed bases and number of dedicated employees and partners. Each vendor's overall revenue also affected its market presence score.

Vendors Selected For An Enterprise-Deployable Product With Solid Growth

Forrester included 11 vendors in the assessment: Autonomy, Coveo Solutions, Endeca Technologies, FAST (a Microsoft subsidiary), Google, IBM, InQuira, Microsoft, Oracle, Recommind, and Vivisimo. Each of these vendors meets at least three of these criteria; most meet all (see Figure 4):

- **At least 75 enterprise search customers in a variety of verticals.** The product must be established and serve a diverse set of enterprise search environments.
- **A customer base that has grown by at least 30% over the past year.** A flock of new customers signals companies that are innovating and moving the market forward with a successful strategy.
- **Revenue growing at more than 25%, exceeding \$10 million in 2007.** We evaluated vendors that had an enterprise search offering that generated significant revenue and growth over the past calendar year.
- **Addresses enterprise search needs and is in demand.** We selected products that have been deployed in larger enterprises in more than one vertical and receive frequent mentions by clients in Forrester's inquiry and consulting service.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Autonomy	Intelligent Data Operating Layer Server	7	January 2006
Coveo Solutions	Coveo Enterprise Search	5.1	January 2008
Endeca Technologies	Endeca Information Access Platform	5.1	November 2007
FAST, a Microsoft subsidiary	ESP	5.1	October 2007
Google	Google Search Appliance	5.0	October 2007
IBM	OmniFind Enterprise Edition	8.5	February 2008
InQuira	InQuira Customer Experience Platform	8.0	December 2007
Microsoft	Microsoft Search Server 2008	-	March 2008
Oracle	Secure Enterprise Search	10g	February 2007
Recommind	MindServer Enterprise Search	5.1	November 2007
Vivisimo	Velocity Search Platform	6.0	November 2007

Vendors selected satisfied most or all of these criteria:

At least 75 enterprise search customers in a variety of verticals. The product must be established and serve a diverse set of enterprise search environments.

A customer base that has grown by at least 30% over the past year. A flock of new customers signals companies that are innovating and moving the market forward with a successful strategy.

Revenue growing at more than 25%, exceeding \$10 million in 2007. We evaluated vendors that had an enterprise search offering that generated significant revenue and growth over the past calendar year.

Addresses enterprise search needs and is in demand. We selected products that have been deployed in larger enterprises in more than one vertical and receive frequent mentions by clients in Forrester's inquiry and consulting service.

Source: Forrester Research, Inc.

MANY LEADERS EMERGED IN A HETEROGENEOUS, WIDE-RANGING MARKET

The evaluation uncovered a market in which (see Figure 5):

- **Autonomy, Endeca, FAST (a Microsoft subsidiary), and Vivisimo lead the market.** Autonomy and FAST, a Microsoft subsidiary, are longtime rivals and the forefathers of the enterprise search business. Each sells a rich tool kit that more than meets the needs of I&KM pros deploying search across the enterprise. The biggest difference between the two vendors can be found in their road maps. To handle future competition from infrastructure giants, Autonomy is acquiring new companies and branching into new markets, like eDiscovery and records management. FAST was just acquired by Microsoft — an infrastructure giant — so its product strategy and competitive positioning are shifting. Endeca, a longtime leader in this space, and Vivisimo, a newcomer to the Forrester Wave, are privately held companies with highly developed, forward-thinking solutions and high marks from customers for service.
- **IBM and Oracle offer competitive options but lack focus on enterprise search.** IBM OmniFind Enterprise Edition and Oracle Secure Enterprise Search were also Leaders in our evaluation, scoring well on the current offering axis. Both lack some of the mature tools offered by pure-play vendors such as slick reporting and taxonomy management tools. In addition, the vendors have too few live customer deployments to test and optimize scalability in different scenarios of query complexity and document size. But IBM and Oracle's content, collaboration, and portal footprint in the enterprise make them vendors to consider for I&KM pros who see search as part of a broader information management platform.
- **Google Search Appliance, the lone appliance evaluated, is a Leader with a bright future.** The Google Search Appliance dominates the enterprise search market in terms of brand awareness and sheer number of customers. Google's differentiators are its inclusive cost structure (hardware, software, maintenance, and connectors are part of the price) and "Universal Search" concept, which pulls content from different sources, including the desktop, via a single search box and single query. The product stands out in the crowd with its ease of use and sound product strategy.
- **Recommind and InQuira have found their ground by specialization.** Recommind MindServer Enterprise Search and InQuira 8.0 are new participants in our Forrester Wave™ search evaluation. InQuira stands out with its robust natural language support based on a set of packaged dictionaries that can be extensively customized. The majority of InQuira's customers buy the search engine as well as the knowledge base and analytics packages. Legal firms and departments managing large-scale search of document archives are the primary market for Recommind's semantic search technology. InQuira and Recommind are not as full-featured as Autonomy, Endeca, FAST, and Vivisimo, nor are they as affordable as the infrastructure offerings. But they more than satisfy the complex needs of their narrow audience.

- **Coveo is a capable point solution facing serious market pressure.** Coveo Enterprise Search comes with a well-designed Web-based administration environment and a flexible AJAX-enabled user interface that supports many languages at a much lower price than larger vendors. But as an independent player, Coveo faces tough times in a shifting market where basic enterprise search can be downloaded for free. The company is addressing that threat with a focus on knowledge worker productivity solutions. For example, Coveo G2B for Email searches live and archived email from the desktop and from a BlackBerry or Windows Mobile device.
- **Microsoft Search Server fits mass-market search needs but lacks depth in important areas.** Microsoft's Search Server was released in March 2008 and is derived from the search capabilities of Microsoft Office SharePoint Server (MOSS) 2007. Search Server differs from standalone competitors like Coveo and Google Search Appliance in that it serves as an on-ramp to the industry-leading collaboration platform, MOSS 2007. Search Server is not sufficiently comprehensive in features and functionality to be competitive in this evaluation against complex platforms like Autonomy. But Microsoft's aggressive entry into the search market with this product and its FAST acquisition has transformed the competitive dynamics in the industry.

This evaluation of the enterprise search market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 5 Forrester Wave™: Enterprise Search, Q2 '08



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Enterprise Search, Q2 '08 (Cont.)

	Forrester's Weighting	Autonomy	Coveo Solutions	Endeca Technologies	FAST, a Microsoft subsidiary	Google	IBM	InQuira	Microsoft	Oracle	Recommind	Vivisimo
CURRENT OFFERING	50%	4.85	3.39	4.55	4.62	3.27	3.52	3.59	2.70	3.41	3.54	4.38
Query capture and processing	20%	4.75	3.34	4.36	4.69	3.49	3.72	4.05	2.09	3.59	3.34	4.49
Indexing and classification	20%	4.78	2.80	4.68	4.75	2.55	3.55	3.08	1.63	2.95	3.78	4.28
Results display and manipulation	10%	4.90	3.15	4.85	4.75	2.90	2.60	3.95	2.70	2.75	3.60	4.90
Administration and security	20%	5.00	3.77	4.77	4.36	3.36	3.74	4.49	3.54	3.08	3.24	4.61
Core technology architecture	20%	4.90	3.60	4.30	4.80	3.85	3.00	2.55	2.65	3.65	3.40	3.80
Maintenance and support	10%	4.70	3.70	4.50	4.20	3.30	4.60	3.60	4.50	4.80	4.30	4.60
STRATEGY	50%	4.90	3.55	4.65	4.75	4.30	4.30	3.90	4.20	4.15	3.63	4.05
Product strategy	30%	5.00	4.00	5.00	4.50	5.00	5.00	4.00	5.00	4.50	3.00	4.50
Corporate strategy	35%	4.70	4.70	5.00	4.70	3.00	3.00	3.70	2.70	3.00	3.80	4.70
Financial resources	35%	5.00	2.00	4.00	5.00	5.00	5.00	4.00	5.00	5.00	4.00	3.00
Cost	0%	2.50	3.90	2.20	2.10	5.00	3.90	2.10	5.00	3.70	2.00	3.30
MARKET PRESENCE	0%	4.79	2.32	4.11	4.51	4.54	3.09	1.74	3.77	3.85	2.21	2.05
Installed base	40%	4.60	2.80	4.00	4.40	5.00	2.60	1.90	2.75	3.80	2.25	3.20
Revenue	25%	5.00	1.00	4.00	4.00	5.00	5.00	2.00	5.00	5.00	1.00	1.00
Revenue growth	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue sources	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Systems integrators	10%	5.00	5.00	5.00	5.00	5.00	1.00	0.00	5.00	3.00	5.00	0.00
Services	5%	4.00	0.00	4.00	5.00	0.00	0.00	3.00	5.00	4.00	1.00	2.00
Employees	15%	5.00	1.80	4.40	5.00	4.40	3.00	2.00	3.60	3.20	2.40	1.80
Technology partners	5%	5.00	3.50	3.00	5.00	2.50	5.00	0.50	2.50	2.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **Autonomy.** Autonomy's IDOL solution is the most complete product evaluated with the best core technology architecture and security capabilities; however, some customers feel that its service and support are lacking, given the cost and complexity of the solution. Unlike FAST and Endeca, Autonomy does not cultivate its user community through large events or outreach. In addition, Autonomy has not communicated clearly with the large base of Verity customers from its 2005 acquisition regarding K2 and IDOL's like-for-like functionality. IDOL's best fit is global, complex, information-intensive enterprises in markets such as finance, pharmaceuticals, and energy, that have the resources and readiness to invest in a single platform for all of their information processing needs.
- **Endeca.** This privately-held, fast-growing vendor has a smaller customer base than Autonomy or FAST. Its Information Access Platform is architected to support searching relational schemas (databases, data warehouses) and non-relational schemas (XML, RSS, documents). The flexibility of the underlying MDEX engine has prompted Endeca to move into new markets like business intelligence, and to win customers who want to leverage the product's superior faceted classification capabilities. Compared with veteran products like FAST ESP and Autonomy IDOL, Endeca IAP is less focused on the complex endeavor of searching massive amounts of unstructured content across the enterprise. Instead Endeca concentrates on search problems that leverage its capabilities for both structured and unstructured content. Customers should consider Endeca first when faced with a problem of searching and presenting structured data such as that from a product catalog, parts database, or other data-centric application.
- **FAST, a Microsoft subsidiary.** FAST ESP is a proven search platform with notable capabilities for data cleansing and federating content from external sources and other FAST ESP instances. Last year, FAST's methods for recognizing revenue came under scrutiny and it reorganized its management team, cut staff, and saw its stock decline. Microsoft acquired the company for \$1.2 billion in April 2008. The FAST ESP product will continue to be sold as a standalone solution and the company is in the process of building out its next-generation platform NextG, which will slim down its core engine and provide deeper query and content analytics. Microsoft is recasting its Microsoft Office SharePoint search strategy with FAST as a core component and has promoted FAST's co-founder, John Lervik, to corporate vice president for enterprise search. FAST is the obvious choice for companies with deep Microsoft platform investments that seek a high-end search solution, but in the short-term, the company is in a state of flux as Microsoft and FAST process the acquisition.
- **Google.** The Google Search Appliance (GSA) is the only hardware and software bundle evaluated here, and it continues to show impressive uptake for entry-level and mid-tier search needs. Google has enhanced its ubiquitous and simple white-box and results list experience with

the ability for users to tag results, promote results, and “search-as-you-type”. Google received low scores for security, not because it can’t handle secure search, but because it only supports a late-binding approach, whereby access control checks are performed against host repositories in real time — which can present latency problems in large-scale environments. Google continues to succeed at responding to the emotional and convenience-oriented search buyer who values the Google brand and the ability to deploy search quickly to meet an immediate need — like searching a corporate Web site or departmental file share. It is a great fit for those customers who don’t want to monkey with the mechanics of search optimization or spend time considering the optimal architecture for massive scalability.

- **IBM.** IBM’s OmniFind Enterprise Edition is part of a stack of solutions-oriented search products. It ships with sample code, scripts, and a well-defined Java API to ease the complexity of integrating the search form and results into Web sites, portals, applications, and the desktop. IBM is the sleeping giant of search. It has a diverse product line that runs the gamut from free (OmniFind Yahoo! Edition) to sophisticated (OmniFind Analytics Edition) and deep expertise in complex matters like semantic search and text analytics, global language support, and application integration. If (not when) IBM smoothes the bumps in its product line and puts some marketing muscle into OmniFind, the enterprise search industry will be transformed. For now, IBM OmniFind Enterprise edition is a good solution for enterprise IT organizations that have committed to IBM Lotus collaboration offerings and WebSphere and that want search functionality to perform “behind the scenes.”
- **InQuira.** InQuira is typically used against content in product catalogs and client support knowledge bases. To meet the needs of its B2C and customer service customers, InQuira’s solution relies heavily on taxonomies and ontologies and has a very capable reporting and analytics subsystem to see what terms (or forms of terms) are driving users to results or sending them astray. InQuira is not ideal for a broad enterprise deployment since it may overlap with existing tools for search and collaboration. Instead it distinctively serves call centers and customer service environments where search is critical and heavily used.
- **Oracle.** Although it scored well for its product capabilities, Oracle is not yet competitive in the search market. Oracle’s deep connectivity to applications and content repositories and robust security enforcement is its strong suit. The product has weak content classification capabilities and lacks advanced analytics. Oracle needs to clarify the focus of its search business and overall go-to-market strategy; future enhancements are both grand (support for eDiscovery) and mundane (better reporting). Oracle is best suited for organizations that view it as a strategic partner and have the influence to impact the future direction of the offering.
- **Recommind.** This vendor, well-known for search and categorization in the legal market and for eDiscovery, also serves the enterprise search market. Recommind’s MindServer platform is a semantic-based engine that is especially good at indexing large-volume document archives, and

it also capably searches other unstructured content assisted by solid parametric search features. However, to compete in the broader enterprise market, MindServer will need to improve its query capture and processing capabilities and be more aggressive with planned enhancements. MindServer can be run in parallel on multiple machines, but it is weak on search performance where maximizing queries per second is required. Enterprises looking at proactively managing content in increasingly litigious-prone industry segments should consider Recommind.

- **Vivisimo.** Vivisimo's investments in Velocity's user interface flexibility, social networking features, federated search, and a rich API make it a market leader. While it lacks some of the deep semantic features of other vendors, Vivisimo's responsive and AJAX-enabled clustered navigation interface enables users to quickly disambiguate queries, explore results sets, and find the most relevant items. It has moderate scalability for crawling, indexing, and querying, and Vivisimo offers a SaaS option for customers that want to host their search indexes off-premise. Like Coveo, Vivisimo offers an interface optimized for mobile users. It's a good fit for those who want an independent search solution with great customer service, out-of-the-box social search capabilities, and a lower price tag than Autonomy or FAST.

Strong Performers

- **Coveo Solutions.** This vendor faces stiff competition now that Microsoft has improved its embedded search feature in SharePoint and free tools are changing the game. Coveo has refreshed its strategic direction in light of this pressure and is moving toward the drastic need for better search on email and increased mobilization of the workforce that demands enterprise search on phones. Although its revenues are growing, the vendor may lack the depth of resources to deliver on its vision. Coveo is a good fit for smaller companies or departments that want a nimble solution from a "can-do" vendor who will respond quickly to project needs, but it is not a stable choice for the broader enterprise.
- **Microsoft.** Microsoft released Search Server in March 2008 with strong GUI-based administration, reporting, security, and customization capabilities. Unlike all the other vendors considered, this product lacks native connectivity to ODBC and JDBC databases (Microsoft supports native ODBC connections through its full enterprise CAL for MOSS 2007 via a module named "Business Data Catalog"). To its credit, Microsoft has standardized on a common search architecture across its three products: the free Microsoft Search Server Express, Microsoft Search Server (evaluated here), and Microsoft Office SharePoint Server 2007. FAST ESP is now part of the Microsoft family at the high end of the market. Microsoft Search Server has been relegated to entry-level needs.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies, and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Forrester evaluated eight leading enterprise search platform vendors in Q2 2006. See the June 13, 2006, "[The Forrester Wave: Enterprise Search Platforms, Q2 2006](#)" report.
- ² Google's 2007 annual report stated that the company generated \$181,343,000 in "Licensing and other revenues." Google Enterprise receives licensing revenue from products other than its search appliances; however, Forrester believes that search products generate the majority of Google's licensing revenue. Source: Google investor relations (<http://investor.google.com/releases/2007Q4.html>).
- ³ To maximize the impact of their search investments, while minimizing the risk of over-investing in the technology, information and knowledge management pros should follow seven steps. See the September 24, 2007, "[How to Be a Hero: Develop An Enterprise Search strategy](#)" report.
- ⁴ Information and knowledge management professionals and enterprise architects should use a worksheet to determine their search security needs and find the most appropriate solution. See the April 12, 2007, "[How Secure Should Your Search Be?](#)" report.
- ⁵ Broad evaluation criteria include cost, training, architecture, ease of installation and administration, as well as vendor support, existing presence at your company, and strategic direction.
- ⁶ Amazon.com demonstrated this when the company had to redesign its interface of stacked tabs as it swelled beyond three levels.
- ⁷ Forrester has explained the importance of providing content within the context of the business process. See the March 8, 2006, "[Context is King In The New World Of Work](#)" report.
- ⁸ Search platforms are beginning to perform BI functions like data visualization and reporting, and BI vendors have begun to incorporate simple-to-use search experiences into their products. See the May 5, 2008, "[Search + BI = Unified Information Access](#)" report.

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