

Magic Quadrant for Enterprise Search

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Enterprise search projects inspired by virtual personal assistants like Google Now and Apple's Siri are acquiring natural-language and analytical features, with the result that enterprise search technology is growing more powerful. We compare 15 vendors to help you find the right one for your needs.

Market Definition/Description

Enterprise search technology relates users' queries to many different kinds of information in order to identify relevant, contextualized information and, in the process, perform light analysis.

Vendors in the enterprise search market provide the means to discover information, index it, and combine it with information derived from live queries in order to help people find what they need in a timely fashion.

The ability to collect queries from users and apply them to a matrix of information and informative sources, and then to communicate results back to users efficiently, is at the heart of enterprise search technology.

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Search



Vendor Strengths and Cautions

Attivio

Attivio is based in Newton, Massachusetts, U.S. It sells its Active Intelligence Engine (AIE) as a platform with a broad foundation for application development. It concentrates on high-value and strategic search deployments that use both its analytics engine and its core search products.

Strengths

- Attivio offers its platform on an unusually broad set of cloud services, including those of Amazon, Microsoft (Azure) and Salesforce (Force.com).
- Organizations that use Attivio can expect their natural-language queries to be parsed to discover relationships in the expressed syntax. Attivio's engine can translate that syntax into interpretation of relationships within a content corpus.
- Attivio's analysis of results reveals patterns in unstructured content.

Cautions

- Attivio's federation depends on simple passing of queries to external search engines, without significant analysis or comparison of results. It does, however, offer what it calls "Query-Time Join," which combines results in a similar manner.
- Attivio's interface to enable administrators to improve results and manage the applications developed on its platform remains challenging to use, although it has improved significantly.
- Attivio targets very-high-value, broad-spectrum platform installations, and prospective customers report that its prices are significantly higher than those of competing vendors.

BA Insight

BA Insight is based in Boston, Massachusetts, U.S. Its software portfolio includes a stand-alone search application, a search application that runs on Microsoft's SharePoint platform, and connectors and classification capabilities.

Strengths

- Organizations with significant investments in SharePoint in particular can derive value from BA Insight's strong support for this Microsoft platform. They indicate that, among other advantages, they can index Office 365 content via connectors to on-premises SharePoint instances.
- Projects that use BA Insight's software can improve the relevancy of search results via particularly rich analysis of implicit user behavior in search practices. Social functionality for saving and sharing results and search insights is also extremely strong.
- BA Insight provides very useful tools to enable administrators to see why particular results are offered for any search.

Cautions

- BA Insight offers users only limited insight into the logic used to determine its selection of results.
- End users have limited options for understanding how results are selected for individual queries.
- Services or customizations are necessary to render results in syntactically correct language for natural-language question answering.

Coveo

Coveo is based in Quebec, Canada. It sells the Coveo Intelligent Search Platform. It pursues mostly large installations with significant seat counts and installations that are likely to amass large seat counts.

Strengths

- Coveo offers unusually rich security functions. These support various authentication models and enable complex privilege systems to be preserved in search results. Reference customers indicate that they chose Coveo for such capabilities.
- Coveo's autosuggest options enable organizations to derive automatic suggestions from the search index, from dictionaries and from manual additions. The autosuggest interface also allows users to see what repositories the queries will lead to before selection.
- Coveo's analysis of results reveals patterns in unstructured content.

Cautions

- Coveo does not offer rich analysis of natural-language queries or offer answers in natural syntax.
- Coveo's social functionality in the Coveo Intelligent Search Platform depends on tags within its own application and logic, which is an effective but less intuitive approach than that used in competing vendors' applications.
- Coveo mostly targets installations intended to serve large pools of users (a typical installation has more than 100 seats), which makes it less attractive for small user groups, such as collaborative and discrete teams of engineers.

Dassault Systèmes

Dassault Systèmes (3DS) is based in Paris, France and Boston, Massachusetts, U.S. It sells the Exalead search product under the names Exalead OnePart, Exalead OneCall and Exalead CloudView. These are linked to three main focus areas: digital assets, customer interaction, and machine data and analytics.

Strengths

- 3DS's search platform, which is delivered as SaaS, is fully featured and has been in place longer than similar platforms from other vendors.
- Exalead's analysis of results reveals patterns in unstructured content.
- Exalead's autosuggest options enable organizations to derive automatic suggestions from the search index, from dictionaries and from manual additions. Entities that Exalead has located in content also surface in autosuggest.

Cautions

- 3DS increasingly focuses its offering on applications designed to address the needs of manufacturers and to support engineers. Prospective customers in different industries or with different needs will find it less attractive.
- Federation of queries is achieved in a nontraditional way, although Exalead can be used to "mash up" results with data from other sources to present rich results effectively.
- 3DS does not offer rich choices for analyzing search behavior with a view to personalizing results.

Expert System

Expert System is based in Modena, Italy. It sells the Cogito semantic technology platform as various different packaged products for specific use cases relevant to industries such as banking, life sciences, oil and gas, and government.

Strengths

- Expert System supported natural-language queries long before they became commonplace in consumer applications and an element of enterprise search applications. Its offering is exceptional in this regard.
- Searchers have more options for understanding why given result sets are selected and presented than with other vendors. Metadata elements and relevancy logic are exposed intuitively.
- Reference customers indicate that Expert System is unusually attentive to their needs, providing strong service, necessary functionality and a genuine understanding of their application needs.

Cautions

- Expert System's offering runs as a cloud application on comparatively few cloud platforms.
- Analyzing search result sets for an aggregated view or for pattern discovery is difficult.
- Autosuggestion for query completion is limited.

Google

Google is based in Mountain View, California, U.S. It sells the Google Search Appliance as a stand-alone system that includes both software and hardware.

Strengths

- The Google Search Appliance is easy to install and configure, and requires comparatively little configuration, tuning or maintenance.
- The Google Search Appliance's autosuggestion capabilities draw on the market-leading ability of the google.com consumer product, which enables it to deliver an unusually rich end-user experience.

- Google has improved the depth of its features for administrators, to make it easier for them to tune the relevancy of search results.

Cautions

- Federation capabilities are superficial and do not allow for interleaving of search results.
- It is difficult to analyze search results as sets, so as to develop an analytical view of data.
- Although the Google Search Appliance benefits from lessons Google learned from its flagship, consumer-facing google.com, it still lags behind google.com in terms of natural-language answering. Also, it offers no graph search capability.

HP

HP is based in Palo Alto, California, U.S. It sells the HP Intelligent Data Operating Layer (IDOL) engine as part of its HP Big Data Software business unit. The IDOL engine has been combined with HP Vertica products to provide search and analysis across structured and unstructured information.

Strengths

- HP now offers the IDOL engine in a lighter-weight, developer-targeted cloud edition in an effort to attract business from smaller projects that previously could not expect to succeed with the full IDOL platform.
- Security options are extremely flexible — HP's customers often care more about security than those of other vendors. HP's reference customers confirm that security is a particular strength.
- The IDOL engine's analysis of results reveals patterns in unstructured content.

Cautions

- HP does not offer rich analysis of natural-language queries. Nor does it offer answers in natural syntax.
- HP exposes only limited information to users about why result sets or individual results are returned.
- Although HP is improving administrators' access to its rich feature set, reference customers still express concerns about the product's complexity and ease of use.

IBM

IBM is based in Armonk, New York, U.S. It sells IBM Watson Explorer. It intends this to be used especially for content analytics and big data applications, as well as general-purpose enterprise search.

Strengths

- IBM has very strong analytical capabilities for both content results and structured data.
- IBM can draw on many adjacent technologies in the Watson portfolio to add excellent question-and-answering capabilities to its search product.
- Clients often choose IBM for its rich and flexible implementation of security within search.

Cautions

- Clients need to evaluate whether IBM's roadmap for Watson and associated products suits their future needs and expectations.
- IBM's means of showing administrators how particular search results were arrived at are less intuitive than those of other vendors.
- Some products in the IBM Watson family, especially those that offer full smart machine capabilities, require significant resources in terms of consulting and customization.

IHS

IHS is based in Englewood, Colorado, U.S. It sells the IHS Goldfire search engine, mostly to engineering and technical domains, for which it combines its search technology with its engineering insight and information solutions.

Strengths

- IHS's very effective graph search capability uses relationships between entities — even across data sources — to provide insights to users.
- Goldfire enables users to pose questions in natural, semantically intact wording and in multiple languages.
- Goldfire provides results in natural, semantically intact language, enabling intuitive understanding of concepts within, and insights from, the searched materials.

Cautions

- Goldfire has limited social functionality for sharing results and for discovery.
- Autosuggestion is limited to terms from dictionaries, concepts that Goldfire has identified previously, and users' prior queries.
- It is not obvious to users why particular results are presented in response to individual queries.

Lexmark

Early in 2015, Perceptive Software was renamed Lexmark Enterprise Software, a division of Lexmark. It is based in Lenexa, Kansas, U.S. It sells Perceptive Enterprise Search as its main enterprise search solution.

Strengths

- Lexmark has an extremely transparent and effective pricing model.
- Lexmark is well able to provide both cloud and hybrid search capabilities.
- Clients praise Lexmark's strong focus on security.

Cautions

- It is difficult to tune relevancy on the basis of user behavior.
- Perceptive Enterprise Search has no graph search capability.
- Out of the box, Perceptive Enterprise Search offers only limited support for social sharing.

Lucidworks

Lucidworks is based in San Francisco, California, U.S. It sells Lucidworks Fusion as either a stand-alone search platform or an add-on to an existing Apache Solr installation. Lucidworks draws on the Lucene/Solr open-source Apache project, to which it contributes regularly.

Strengths

- Lucidworks takes a very strong hybrid approach that enables cloud-resident capacity to handle searches during peak traffic periods.
- Lucidworks offers a broad range of features for tweaking, tuning and developing search applications.
- Lucidworks essentially offers an open-source-derived product, and which it sells clearly and simply using a processor-based model for enterprises.

Cautions

- Lucidworks does not offer rich analysis of natural-language queries or offer answers in natural syntax, though it intends to in future.
- Lucidworks offers no federation capabilities.
- Users have only a limited number of ways to evaluate and understand why search results are selected. Administrators' ability to examine results is limited to an explanatory model that is not visually intuitive.

Mindbreeze

Mindbreeze is based in Linz, Austria. It sells the Mindbreeze InSpire search engine as a search appliance box, which includes both hardware and software. It focuses strongly on a combination of structured and unstructured search.

Strengths

- Mindbreeze makes excellent use of its search capabilities to promote application use cases beyond ordinary enterprise search, such as autotagging during the capture process and industry use cases, such as ones for the healthcare sector.
- Mindbreeze offers strong mobile app capabilities across a wide range of devices, including Android and iOS tablets and phones.
- Mindbreeze offers many natively developed connectors, which enables indexing of a wide range of data sources. It also offers strong federation capabilities.

Cautions

- It is difficult to tune relevancy on the basis of user behavior.
- Mindbreeze has limited visibility outside Europe, and only a small (but improving) network of partners.
- Since Mindbreeze's pricing is based on the number of documents indexed, clients need to monitor how many repositories and documents they index.

Recommind

Recommind is based in San Francisco, California, U.S. It sells the Decisiv Search engine mainly to law firms and professional services firms, on which it focuses much of its attention and marketing.

Strengths

- Recommind's customers report that its search engine has an intuitive user interface and is easy to install. In previous years, Recommind had faced concerns about the professional resources required to install and manage its product, so this change is welcome and auspicious.
- Text within documents can trigger security groupings, an unusual feature that suits some use cases and that almost no other vendors offer.
- Recommind is extremely well-known in the legal market and has skills that it can easily extend to its other target market of professional services.

Cautions

- Recommind does not actively market its product outside its key target industries.
- Although Recommind highlights its statistical analysis capabilities' provision of some natural-language insight, it does not pursue natural-language question answering or other natural-language responses to the degree that other vendors do.
- Recommind offers only limited social functionality for sharing results.

Sinequa

Sinequa is based in Paris, France, but reports that it generates almost half its new sales revenue in the U.S., and it is expanding its North American presence. It sells Sinequa ES, which combines search and analytics capabilities, for assorted use cases including, but not limited to, enterprise search.

Strengths

- Sinequa has strong analytical capabilities. Its product can analyze data before searches are conducted. It can also analyze and visualize search results.
- Sinequa offers the ability to tune the relevancy of results, based directly on user feedback, aided by a feedback loop to administrators.
- Sinequa has strong features in relation to administrator- or end-user-driven relevancy changes, which enable more relevant documents to be pushed to the top of search results.

Cautions

- Sinequa offers only very basic capabilities when federating searches. No interleaving is available. It relies on administrators to tune relevancy.
- Sinequa focuses strongly on analytics driven by search, which may limit its appeal to a wider audience looking for solutions for tactical, rather than strategic, search projects.
- Sinequa's pricing is more difficult for organizations to interpret than is the case for other vendors with simpler products.

Squiz

Squiz is based in Sydney, Australia. It sells Squiz Funnelback as both a stand-alone product and part of its CRM and content management system products, which are its main focus.

Strengths

- Squiz provides very useful tools to enable administrators to see why particular results are returned for a given search.
- Funnelback's autosuggest capability enables the discovery of prominent document metadata, such as titles, or preselected terms or result pages that administrators have developed.
- Funnelback provides flexible security, including models that work across indexing and result time frames, and that allow for mirroring of particularly complex privilege models.

Cautions

- Squiz has only recently entered the U.S. market with significant investment.
- Funnelback offers only limited social functionality for sharing results.
- Capabilities for analyzing results with Funnelback remain limited.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Squiz

Dropped

- exorbyte
- CustomerMatrix (PolySpot)
- MarkLogic

Inclusion and Exclusion Criteria

To be included in this Magic Quadrant, we required that each vendor:

- Offer a product marketed as a "search engine" or an "enterprise search" product that also met Gartner's definition of enterprise search.
- Offer a search product or products that is/are available separately from all its other products (such as portal, infrastructure, content and records management, e-discovery and CRM products).
- Have generated more than \$6 million in revenue from enterprise search products in 2014.
- Identify at least three reference customers who acquired their enterprise search product in 2014.

Evaluation Criteria

Ability to Execute

The most significant factor determining a vendor's Ability to Execute is its product's maturity in terms of the capabilities that organizations associate with enterprise search requirements. These capabilities include security, social functionality suitable for enterprises, delivery architecture (cloud or on-premises), and federation and customization of results. Other contributing factors are the vendor's financial viability, the attractiveness of its pricing model, the customer experience it offers, the extent and depth of its geographic coverage, and its ability to sell to, and support, customers internationally.

| Evaluation Criteria | Weighting |
|------------------------------|-----------|
| Product or Service | High |
| Overall Viability | Medium |
| Sales Execution/Pricing | Medium |
| Market Responsiveness/Record | Not Rated |
| Marketing Execution | Not Rated |
| Customer Experience | High |
| Operations | Low |

Table 1. Ability to Execute Evaluation Criteria

Source: Gartner (August 2015)

Completeness of Vision

We consider a vendor's ability to defend and increase its market share, as reflected in its vision, to be pivotal to its Completeness of Vision. Also important is how well the vendor has designed its marketing strategy and developed a key marketing message to capture the attention of buyers in a challenging market as customers look for more than the simple, easy-to-use products currently offered by the largest vendors. Other considerations are the vendor's product strategy, including its approach to refining results via user behavior and content analytics; its ability to support mobile users; the transparency of its tool for administrators; and its innovation in relation to natural-language capabilities, analytics and autosuggest functions.

| Evaluation Criteria | Weighting |
|-----------------------------|-----------|
| Market Understanding | High |
| Marketing Strategy | High |
| Sales Strategy | Not Rated |
| Offering (Product) Strategy | High |
| Business Model | Not Rated |
| Vertical/Industry Strategy | Not Rated |
| Innovation | High |
| Geographic Strategy | Not Rated |

Table 2. Completeness of Vision Evaluation Criteria

Source: Gartner (August 2015)

Quadrant Descriptions

Leaders

Leaders demonstrate exceptional technological flexibility to address many use cases. They have a market vision that has enabled them to develop a defensible position. Their products are mature, complete (or nearly so) and fulfill a clear value proposition. They have some of the means to provide consumer-class search experiences on enterprises' public and private websites.

Challengers

Challengers have the resources and visibility to capture the attention of enterprises, but they do not manifest the vision to ensure competitiveness during the next five years of the enterprise search market's development. They have operational strength and solid processes for pricing and supporting clients broadly, but they need to offer greater extensibility, and possibly richer functions, if they want to seize the most demanding opportunities.

Visionaries

Visionaries address the keen desire of enterprises to pursue consumer-class search experiences with fresh capabilities and flexibility. They understand that they must provide search features that enable better collaboration and application development. They also know that innovative means of finding and working with content are particularly valuable.

Niche Players

The enterprise search market rewards vendors that establish specialties in particular vertical markets or categories of application. Those that do — Niche Players — may not achieve the greatest revenues or the highest visibility, but they can nevertheless deliver great value in their areas of focus. Such vendors may remain in their specialties, or may use them as starting points from which to grow in breadth and strength.

Context

Enterprise search is often considered an aspect of enterprise content management. E-discovery software also makes heavy use of aspects of enterprise search technology. As enterprise search technology increasingly addresses structured data, it is also becoming more closely related to business intelligence platforms, although few vendors offer products that overlap in this regard. Furthermore, enterprise search technology often connects to other platforms, including content management, security and horizontal portal platforms. It is important to recognize, therefore, that this Magic Quadrant examines only products that can serve as stand-alone enterprise search engines. This Magic Quadrant compares vendors that compete with each other. Specific capabilities or general strengths will often determine which vendor's platform an enterprise should choose. This Magic Quadrant is only one way of considering vendors' relative strengths, and it should be used in combination with Gartner's inquiry service and other Gartner research. Before selecting a product, clients should also determine whether their needs are particular to their industry or to a specific

project. In some cases, organizations with a search-oriented challenge may wish to look beyond this Magic Quadrant to products that address their specific needs.

Market Overview

What enterprise search technology can do for organizations has both expanded and deepened as technologies and their integration with data sources have improved. Companies and governments are using enterprise search technology effectively in ways that just a few years ago would have been impossible and thought unlikely to succeed in future. Furthermore, over the next 10 years we expect the enterprise search market to expand to include "queryless" search, which will provide insight to users in ways that are independent of explicit queries and that involve implicit understanding of users' needs.

Organizations expect today's search technology to serve as a foundation for analyzing and understanding their content and data. Three out of five of the reference customers identified by the vendors in this Magic Quadrant indicated that they are already combining structured and unstructured data in their projects.

More advanced functions are less mature, but their adoption is still noticeable. Two in five reference customers said they have access to natural-language question answering in their selected products. And while two in three use on-premises software to conduct searches in conventional fashion, one in five now uses cloud or hybrid installations, and the latter figure is growing. (We consider hybrid installations to exist where the index and application logic reside both in the cloud and on-premises, in some cases cleanly divided, in others mixed.) Most reference customers reported that at least 10% of the searches in their organizations are initiated from mobile devices. Bundled, open-source and inexpensive search products are requiring more attention be paid to the sophisticated applications enabled by these advanced functions.

STRATEGIC PLANNING ASSUMPTIONS

By the end of 2017, 25% of workers will engage with search technology in business applications via natural expression at least five times a day.

By the end of 2017, the best result for more than 50% of searches at leading global companies will not be a textual document.

By the end of 2019, more than 10% of internal search results will not originate from explicit queries.

EVIDENCE

The qualifying vendors completed a questionnaire about their experience with enterprise search products. We also used an online survey to collect information from their reference customers.

EVALUATION CRITERIA DEFINITIONS

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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