

Oracle gives its search engine more tentacles

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Sector: Enterprise Software

Oracle launched its first stand-alone enterprise search engine in May 2006. At the time, we noted that while Oracle was sensible to emphasize security as an important attribute in search – it is, after all, called Secure Enterprise Search (SES) – the firm didn't reveal much about how it worked and what it could do. Black boxes can take you only so far in enterprise search; since then, Oracle has been working with early adopters to refine the product and open it up to non-Oracle information sources, while also making sure that security policies are maintained.

Oracle has had its Oracle Text search tool (which underpins SES) for 15 years, but it required the user or the application developer to know how to formulate queries to be SQL-friendly – but in the **Google** age, this isn't how users enter queries. Oracle did something about that with version 1 and has other tricks up its sleeve in version 2.

IMPACT ASSESSMENT

The message

Oracle recently revved its Secure Enterprise Search engine, adding many more connectors to non-Oracle data sources and expanding the security options.

Competitive landscape

The main independent enterprise search vendors are Autonomy, Fast Search & Transfer (FAST) and Endeca. Oracle is going after those directly – though mainly the first two, which have many OEM relationships. Google could be a major threat long term; it's well on its way to owning the low end of the enterprise search market. IBM and Microsoft are also becoming major players in enterprise search, though via different routes. There are plenty of other pure-play enterprise search vendors, including Exalead, Isys Search Software and Vivisimo.

The 451 Assessment

We believed at the time of the original launch that having 'secure' in the name was a smart move, although the first version of SES was only really secure within an all-Oracle environment. We still think that angle is a good one to play up but suspect we'll be hearing more from the competition – the pure plays as well as IBM and Microsoft – in due course, so Oracle will need other cards to play. The work it's done with version 2 strikes us as more than enough to give high-end users beyond the Oracle stack a good reason to consider SES ahead of, say, Autonomy or FAST. But those not seeking such sophistication – there are many – will look at SES just as they look at SharePoint or Google. Down the line, we think Oracle will be able to address those higher end customers, too.

Context

The first version – technically, release 10.1.6 – was focused on extracting, indexing and making available for search information stored in Oracle-owned sources, such as portals, content management systems and relational databases.

Version 2 (10.1.8) is focused on a broader set of data sources. But even this version doesn't include the categorization and information-clustering technologies Oracle got from its June 2005 acquisition of enterprise search company **TripleHop Technologies**. That stuff is not likely to appear until a version that we believe will ship sometime in 2008. More understandably, it does not yet take advantage of the new 11g relational database, as that is only now starting to ship on certain platforms.

So while there are some interesting improvements in the next release, there's plenty more to come from Oracle in search.

Products

SES version 1 was adopted by many Oracle customers in its first year (the precise number isn't being disclosed). Most already used some of Oracle's applications, such as CRM, ERP and portals. In the beginning, its appeal was limited mainly to Oracle sources because of the lack of connectors to other data sources – notably, document management systems. But specific things customers liked, according to Oracle, included the flexible APIs (in contrast to SharePoint), the understandably tight integration with Oracle information sources, the security model (although it was a bit inflexible in version 1) and the pricing model.

Early adopters of SES 10.1.6 included **Austrian National Bank, Dairyland Power Cooperative** and the **University of Tokyo**. Another early customer was AT Kearney, which started with Oracle UltraSearch and migrated to SES when it came along. Its main issue was security across disparate information sources, and it went with SES rather than a new document management system. This was how it tried to solve the problem of giving its consultants both access to information and somewhere to securely store sensitive material: it swapped it out for file servers and databases with SES on top.

Version 2 saw improvements in the security model so that customers no longer had to use Oracle's Internet Directory (OID) LDAP implementation; they could use Active Directory or identity management systems from **Sun** or **Novell**, instead. They were supported in the previous version but only if OID sat in front of them to ensure users could see only search returns they were authorized to see (let alone open the returned documents). SES costs \$30,000 per CPU or \$60 per named user, with a minimum of 100.

Extending and federating

Organizations have multiple sources of information – too much information, in fact – and once they have a search engine they trust, federated search becomes a big deal. Oracle's answer to this comes in the form of lightweight representational state transfer (REST)-based access to sources for search returns from other sources. This is a bit like Google One Box, with the results appearing above the returns from the sources directly hooked into SES. If the customer needs the results to be integrated into and ranked along with the SES results, then there's a heavier SOAP interface to do that.

SES version 2 added many out-of-the-box connectors, including SharePoint, **Hummingbird**, **Siebel 7.8**, **IBM's** content management repository and **Documentum's** eRoom as well as connectors to business intelligence repositories, including **Business Objects**, **Cognos** and **Microstrategy**. Other connectors are provided via partners, including **Interwoven**, IBM WebLogic and WebSphere connectors from **Persistent Systems**, which are expected to be available by the end of 2007. SES also links to storage systems through a joint marketing agreement with **Kazeon**. Turning back to Oracle's own stack, connectors for E-Business Suite Release 12 and **Stellent** will likely ship before the end of 2007.

Many of the connectors are free, such as the Oracle and **Microsoft** connectors, but Oracle does charge for some of them, for example, the Documentum connector. We wonder why it feels the need to charge – giving connectors away would certainly help seed the product more quickly into the market. Oracle also has an integration to **Siderean Software's** faceted navigation engine.

Oracle settled on RSS as a way of enabling its crawler to get information out of third-party applications, including metadata.

Competition

The main independent enterprise search vendors are Autonomy, **Fast Search & Transfer (FAST)** and **Endeca**. IBM, Microsoft and Google also have bold enterprise search ambitions. Oracle is going after all these, but some may feel the pinch from Oracle's advances more directly than others.

In regard to Oracle's use of embedded search in its own applications, Siebel licensed search from FAST before the Oracle acquisition. Similarly, Stellent uses **Verity** (now owned by Autonomy); as with most Verity integrations, it is very low level and tough to rip out. But Oracle has created connectors for SES to index both Siebel and Stellent, and Siebel 8.2 will ship with a limited-use SES license.

Google could be a major threat long term, and it's well on its way to owning the low end of the enterprise search market with its blue and yellow appliances, for which it has more than 9,000 customers.

Oracle's perpetual database rivals – IBM and Microsoft – are also becoming major players in enterprise search, though via different routes. IBM's strategy is, like Oracle's, to build its own dedicated enterprise search engine – IBM's OmniFind brand is more extensive than Oracle's, though predating it only by a year or two. IBM is also delving more into areas like text analysis than Oracle. And while it has a low-end free offering via a partnership with **Yahoo**, we think it is less of an out-of-the-box search engine than Oracle's.

Microsoft's approach is via SharePoint, the seemingly all-encompassing portal, content management and search product that has 85 million seats and rising. Its search is often deemed 'good enough' by customers. Still, the fact that some startups – such as **BA-Insight** and **Mondosoft's** Ontolica – aim to improve SharePoint search suggests there's room for improvement.

There are plenty of other pure-play enterprise search vendors as well, including **Exalead**, **Isys Search Software** and **Vivisimo**.

SWOT ANALYSIS	
Strengths	Weaknesses
Oracle has delivered a solid first product and has acknowledged the importance of partnering to extend its reach to become truly enterprise-wide search.	Oracle has a long history and something of a reputation of trying search and getting it wrong. It says it has learned a lot from that; we're sure it has, but there will be skepticism among Oracle customers.
Opportunities	Threats
There is no runaway leader in enterprise search, and Oracle has as good a chance as any company of leading the market in the long term.	IBM is probably the main long-term threat. Autonomy and FAST are the main specialist threats.

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