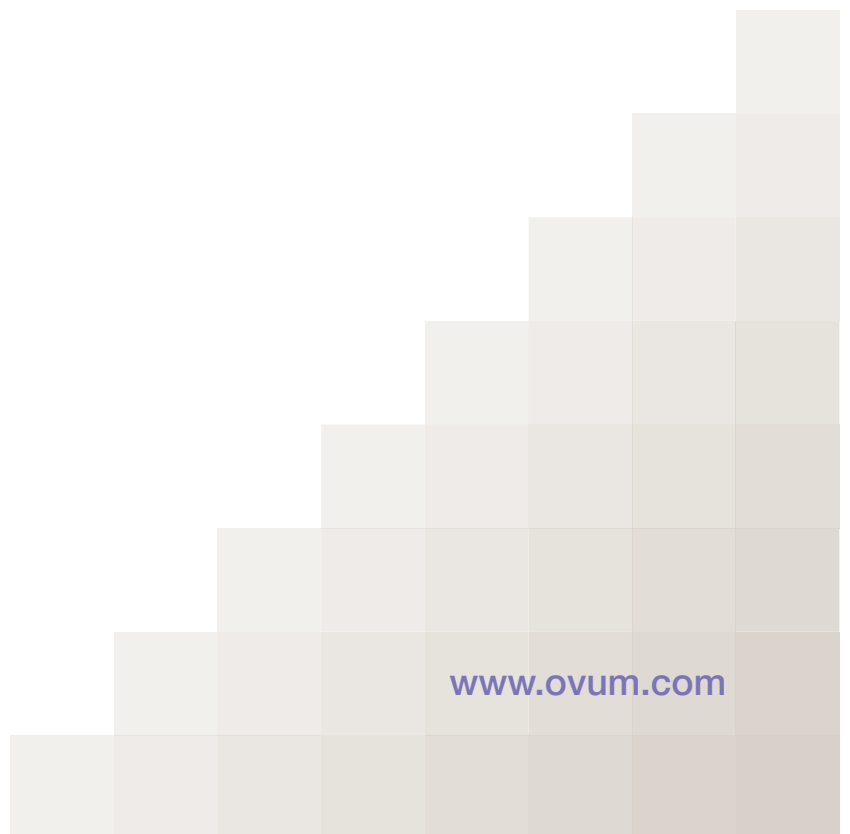




# The future of search

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## The future of search

*The enterprise search market has entered a period of both innovation and rationalisation similar to that which we saw in the enterprise content management (ECM) arena during 2006-2007. The most disruptive elements in the near future are likely to be the actions of Microsoft and Google. The current market driver is the need to quickly retrieve information for business or legislation-based requirements. However, there is a wide range of smaller, functionally very mature, often vertically-focused, enterprise information access products that Mike Davis believes organisations should consider alongside the 'big names'.*

### Key messages

#### **Microsoft's market actions have been driven by Google**

In July 2007, Kevin Turner, Microsoft's COO said, "enterprise search is our business; it's our house and Google is not going to take that business". Four months later, in November, it announced its Search Server product, which is aimed at competing directly with Google's Search Appliance. Latterly, Microsoft undertook an opportunistic move to the 'high end' by making an offer for FAST in January this year, ahead of any potential Google move.

#### **Buyers need to look at 'specialists' for their long lists**

There are a wide range of highly capable products, which provide comprehensive information access functionality but have been tailored to have a specific vertical focus. Supported by the domain expertise of the vendor's staff, these could provide faster out-of-the-box functionality, and potentially more demonstrably measurable returns, for organisations in those verticals.

#### **Consolidation is not stifling innovation**

In parallel to the acquisitions of first Verity by Autonomy, and latterly FAST by Microsoft, a number of new entrants have, and are, developing products with innovative user interfaces and specific focus. These are often being placed in 'beta' on the Internet, prior to their productisation for mainstream business.

### Scope of the report

#### **Why is this report needed?**

There are increasing operational and legislative demands for organisations to be able to retrieve information on demand. Speeding business processes and improving automation driving the former; compliance and e-discovery the latter.



Alongside this is the massive expansion of both structured and semi-structured information required for decision-making.

All the large software infrastructure vendors have comprehensive search engines in their product suites, such as EMC Documentum, and Open Text in its Livelink platform. However, many organisations will require more 'business-specific' functionality, usually linked to operational processes such as case management.

There has been consolidation among the 'pure-play' vendors and efforts by the like of IBM and Microsoft to raise awareness and gain adoption of their products in larger enterprises.

This report provides a snapshot high-level overview of available products and their providers, and reports the trends that Ovum is observing at this time.

## **Enterprise search is the wrong label**

As with ECM, it is very infrequently that we identify an organisation using a product across its whole operation. Moreover, given the increasing capabilities of the product sets being offered by vendors, the term 'enterprise search', while still in the title of most organisations' requests for information (RFIs), is starting to look inadequate, and enterprise information access more appropriate.

### **Enterprise information access**

Ovum's definition of enterprise information access covers four functions and associated processes:

- finding information that is known to be recorded
- searching for information that one hopes is (or sometimes isn't) there
- discovery of information one didn't know was there, but which is appropriate and useful)
- retrieval – presenting that information in an accessible form, in a timely manner, to persons authorised to receive it.

### **Clarification of 'enterprise'**

This report specifically looks at information access products that are intended for corporate enterprises rather than Internet or website search engines, while recognising that many of the vendors also produce offerings for those markets, and that a single platform can support both.

Furthermore, because of the business realities of partnerships and collaboration, the term 'enterprise' has to extend beyond a single organisation, or to a department or division of an organisation.



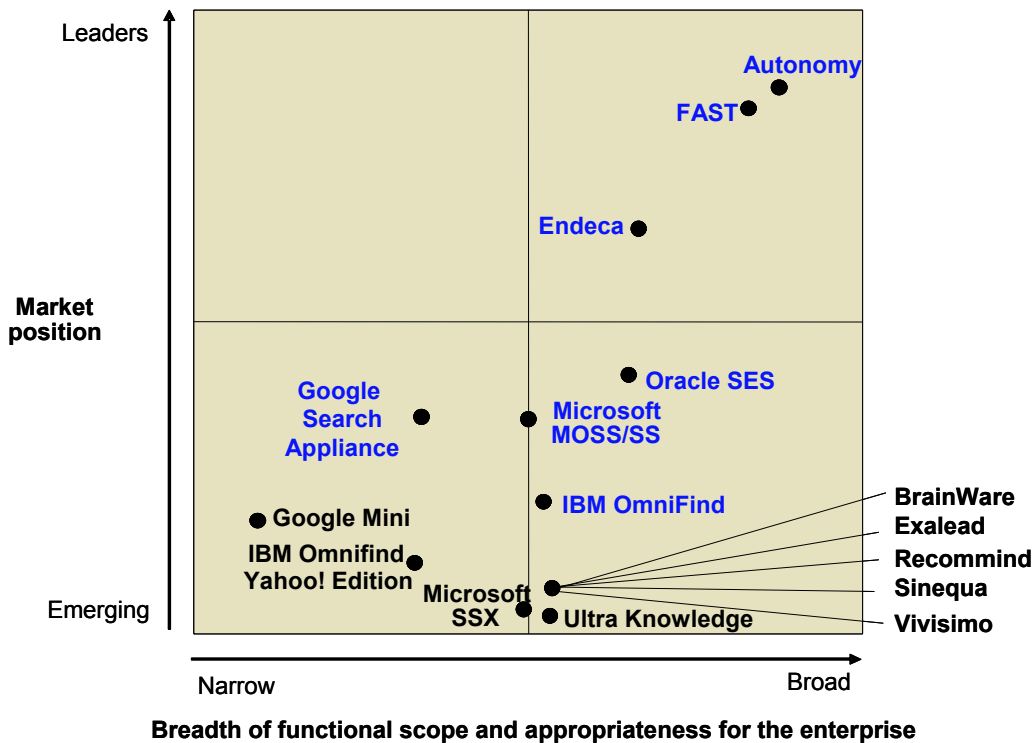
## Market overview

### Products have matured – organisations are behind in their awareness

Our high-level comparisons of enterprise information access solutions (shown in *Figure 1*) reflect both our understanding of the capabilities of the products and their respective vendors, against our knowledge of market awareness and penetration.

The fact that there are so many products shown in *Figure 1* with relatively broad functionality and with, in our experience, little or no visibility on enterprise long lists, shows that the big names have the 'mindshare' as well as market share. It also shows that end-user organisations may not be clearly identifying their functional needs.

Figure 1 **Enterprise information access solutions**



Source: Ovum

### 2007 enterprise information access market in a nutshell

- Autonomy – through its acquisitions in 2007 of the archiving specialist Zantaz, and most recently UK records management specialist Meridio, the company has now demonstrated its differences from the rest of the search and discovery



pack. It can now position itself truly as an enterprise software infrastructure vendor, rather than an information access specialist. Since 2006 it has used the phrase 'meaning-based computing' to describe the function of its Intelligent Data Operating Layer (IDOL) platform. However, it still has potentially the highest market awareness for search, and is the first name on most long lists. Its two 2007 acquisitions give it significant capabilities in the compliance/e-discovery field.

- Brainware – this US company has developed its generic search and categorisation functionality to support high-volume forms processing against enterprise applications such as ERP, and has attracted customers ranging from the UK's NHS to Halliburton in the US. Its Globalbrain Enterprise Edition provides a highly competent enterprise information access tool.
- Endeca – this privately held US company is best known for its Guided Navigation functionality used on a wide range of retail websites. However, its broad functionality and its ease of configuration has gained it customers across a wide range of verticals, including the public sector. The company sees the discovery of relationships between, and analysis of, structured information from corporate systems, alongside the semi-structured as an increasing requirement.
- Exalead – this French company was created by two former Alta Vista researchers who wished to improve the interface of search engines. It has the majority of its deployments in France with the flagship being BMP Paribas.
- FAST – although at the time of writing Norwegian-based Fast Search and Transfer is in the process of being acquired by Microsoft, it is intended in the short-to-medium term that it will operate as a wholly-owned subsidiary. It is regarded as the closest to Autonomy in terms of market awareness of its brand. Like Endeca, it has identified structured information analysis as an emerging requirement, and has developed its Adaptive Information Warehouse (AIW), a framework to unify search and business intelligence (BI) functions. The acquisition by Microsoft, with whom it was already a major partner, will give it greater marketing clout.
- Google – this is still the dark horse in the enterprise arena, although it has some high numbers in terms of deployment. A reported 10,000 Google Search Appliance (GSA, including the OneBox) and its little brother Google Mini were sold between 2002 and October 2007 and, in October 2007, the company announced a range of security, connectivity and usability enhancements to the GSA. Despite Microsoft's actions, Google has not as yet delivered a class of product with the range of functionality to compete at the high end against Autonomy, Endeca and FAST.
- IBM – despite 25,000 copies of the Yahoo! edition of Omnifind being downloaded for free in the first year, and a range of enhancements in November 2007, the company has not managed to develop significant mindshare and awareness around its Omnifind offering outside of its principal customer base.



- Microsoft – in November 2007, Microsoft announced two 'new' offerings for the lower end of the market: Microsoft Search Server 2008 (MSS) and Microsoft Search Server 2008 Express (MSSX). The former was previously announced under the 'catchy' title of Microsoft Office SharePoint Server 2007 for Search. It is exactly the same search functionality currently included in Microsoft Office SharePoint Server 2007 (MOSS), with no limits on the numbers of documents it can search, the ability to cluster, load balance and offer high availability. It is positioned as an enterprise-class product, to compete against Google's Search Appliance. MSSX as a 'try before you buy' product that is aimed at competing with both IBM OmniFind Yahoo! Edition and Google Mini. Microsoft was not expected to get into the high-end enterprise information access market until the release of Office 14 (in approximately 2010); however, the opportunity to acquire FAST (which had been going through restructuring) was taken, and this gives Microsoft customers the prospect of a comprehensive suite of enterprise information access solutions with a clear growth/migration path.
- Oracle is really the 'dark horse' in the enterprise information access market. While its Secure Enterprise Search (SES) offering does not have the public visibility of other products, it is very functional, with significant out-of-the-box connectivity to non-Oracle applications. As part of Oracle's Fusion Middleware it is becoming a core capability with Oracle products, and it has a number of notable deployments around the world. SES is already fully integrated into Siebel, Universal Content Management, and notably Hyperion Essbase, with PeopleSoft, JD Edwards, and E-Business Suite to follow.
- Recommind – with its MindServer products, this company addresses the search, categorisation and e-discovery needs of enterprises and corporate law firms. Referenced customers include T-Mobile and BMW.
- Sinequa – this French company provides a range of navigational tools in the user interface, including conceptual, source, format and extracted entities. Like compatriot Exalead, its customer base is primarily French and includes customers such as Total, *Le Monde* and Verizon.
- Ultra Knowledge – this UK company start-up has focused on publishing, and provides navigation by subject, keywords, clusters of keywords and topic. Notably, its first deployment is for an IT publishing house.
- Vivisimo – this company has taken web search techniques and applied these to its enterprise platform, focusing on providing federated search for organisations. Reference customers include Proctor & Gamble, and Tyco Electronics.

## Microsoft takes the gloves off with Google

With its recent proposal to acquire Internet portal Yahoo!, Microsoft confirmed once again that its nemesis is Google. In July 2007, at Microsoft's Worldwide Partner Conference Kevin Turner, Microsoft's COO said, "enterprise search is our business; it's our house and Google is not going to take that business", adding



"those people are not going to be allowed to take food off our plate, because that is what they are intending to do."

By competing with Google on both the enterprise and Internet search fronts, Microsoft is recognising, and admitting, its concerns that Google's rapid and innovative development model is a major threat to Microsoft's enterprise revenues in the future. Just as much as we believe Google needs to get into the enterprise, Microsoft needs to keep it out.

### **The emergence of 'try before you buy'**

IBM started it with its OmniFind Yahoo! Edition in December 2006. Microsoft did it with Microsoft Search Server 2008 Express (MSSX), announced in November 2007. Now other companies are indicating that they will offer a 'free to download' version of the product, hoping that once adopted the deployment will become invaluable, and the organisation will pay for support and enhancements.

Essentially, this is an extension of a 'proof of concept', but is of relatively little risk to the vendor. If the vendor has created the right interface for installation and configuration, then the user will essentially be doing all the work. The download process itself will also assist vendors in 'pre-qualification' of prospects, and allow more effective allocation of salespeople. This should also be a plus for the potentially purchasing organisation as the vendor representative should have a better understanding of the organisation's needs.

### **The Internet as the test bed**

Google has led the way with its publicly available 'beta' tools accessible from Google.com. However, we are seeing other innovative search engines doing exactly the same thing to both test their products before productising them and, as importantly, to raise awareness and aid adoption when the product goes mainstream.

The benefit of a web-based 'beta' version of a product is the ability to rapidly capture thousands, or even millions, of data points relating to the usability and value of the software, thus reducing the risk of further investment.

### **Innovation continues unabated**

There is a wide range of search engines currently in 'beta' on the Internet, whose interfaces and functionality could be useful for assisting information access within the enterprise. Notably, many are being developed in Europe. Examples of such European sites include:

- KartOO – a visual metasearch engine, which provides innovative visualisation of results returned
- Quintura – which dynamically builds 'word clouds' for navigation/query refining
- Ujiko – which endeavours to give an appealing 3D interface



- Picsearch and ImBrowse – which both enable image browsing.

## **Niche is good**

UK start-up Ultra Knowledge has focused on applying its generic technology to the publishing world; others such as Memex have applied specific techniques to identify relationships between information in very large data sets, such as criminal and military intelligence. PinPoint has applied search, processing and filtering to e-discovery, identifying pertinent and legally admissible information from very large information sets in the legal context. Other vendors such as French Coveo focus on a wholly Microsoft environment.

## **What next for enterprise information access solutions?**

### **Time for Google to play its hand**

The GSA has matured greatly since its first release in 2002. It is now deployed on a standardised Dell Server, and numerous BI and content vendors have worked to interface with the appliance's index. However, there is a need at the high-end for more products to compete with Autonomy, Endeca and FAST (Microsoft). Furthermore, while it is number one in web search and derives a reported 99% of revenues from associated advertising, Google cannot expect to hold that crown in perpetuity. At one time, AltaVista (now part of Overture Services, a Yahoo! company, and previously owned by FAST) was king. Alongside its mobile application ambitions, we believe that Google needs to move further towards mainstream enterprise customers with a high-end product.

### **User interfaces will change markedly**

Having the ability to retrieve from large volumes of information is one thing. Being able to comprehend the importance of the information returned, identify the relationships between items, and then make the best decision is quite another.

Just as IBM adopted a Yahoo! 'look and feel' for its 'try before you buy' edition of Omnifind, the 'beta' interfaces on Internet search engines are likely to significantly influence future front ends to enterprise information access solutions.

### **Users will stop searching**

Information access will become increasingly automated with applications initiating the find/search/discover/retrieval process, and users being unaware of the activity that has been performed. The majority of employees do not either have the time or often the skills/training to search efficiently and effectively. Automated enterprise information access is a major opportunity for improving productivity, reducing error and corporate risk.



## BI and search will come closer together

As discussed in the Ovum's report, [Achieving unified information management](#), to enable individuals, or even applications, in organisations to make better decisions there needs to be a comprehensive view of structured and semi-structured information, including analysis from BI solutions. Furthermore, many of the tools we associate with BI such as ETL, data quality and master data management will have a place in ensuring that the semi-structured information searched is accurate and credible.

Many of the leading BI vendors have developed search capabilities to be associated with their offerings. These include:

- Information Builders WebFocus Intelligent Search, which extends the Google Search Appliance
- Cognos Go Search, a pre-indexed search tool that can be used with both the Google OneBox and IBM OmniFind
- SAS Enterprise Intelligence Search, which can be used with both the Google OneBox and IBM OmniFind.

From the 'search' vendors, FAST has developed its Adaptive Information Warehouse (AIW), and Autonomy its Meaning Analytics Warehouse.

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