
Google Levels Up Its Search Appliance

Google and Microsoft are engaged in a drama worthy of Shakespeare. A couple of years ago, Google directly challenged Microsoft's grip on office software. Word processing, spreadsheets, presentations, and email are worth billions to Microsoft.

Then the price and technology howitzer shells exploded. For less than \$5 per month per employee, Google offers an alternative to traditional office software. Office software was available via the cloud. Goodbye crazy updates and the hassles of local software installations. Google does not release actual market share or Google Apps revenue figures, but I know Google Apps has traction. Microsoft rolled out its Office 365 product. Billed as a "cloud-based productivity and collaboration suite", the Redmond, Washington-based company service is reacting, albeit slowly, to Google's challenge.

Google senses an opportunity and continues to put pressure on Microsoft. The Google Search Appliance or GSA has been available since 2002. In an effort to steal customers from Microsoft's lucrative Office productivity suite, the next release of the GSA is the "cloud connect" model. Google's goal is to link the GSA to content within Google Apps and Google Sites. The new system can aggregate content from Web sites, including Twitter. With Version 6.8, which is likely to be available as you read this, the GB-7007 can index and make findable behind-the firewall content and information stored in the cloud. For years, Google has emphasized the ease of deployment and the value of a Google-style interface to accessing enterprise information. Now Google has made the GSA more versatile. The Google Apps and other cloud services are connected to GSA users via a digital umbilical cord. The line between information here and information there is almost erased. Users need access to information and Google's revamped GSA makes that quick, easy, and intuitive.

The newest version of the GSA is leveling up by formalizing what most professionals have known for years. The information needed to answer a business question is no longer limited to content behind the organization's firewall.

The new GSA adds other useful functions as well. For example, the People Search feature allows a user to locate an individual in the organization who is an authority on the user's search topic. Then, from the search results page, the user can contact that person from the search results page. The GSA also provides an assisted navigation feature called "Dynamic Navigation." Users can scan hot links to content related to the users query as well as slice and dice the search results by topics and other delimiters and filters. The GSA can index content residing in third-party systems, including Microsoft SharePoint. (The easiest way to get a full list of the GSA features is to navigate to Google.com, run the query "Google Search Appliance", and then click on the hot link for the GSA Data Sheet.)

Google adepts can make the GSA the hub of a licensing organization's information access activities.

The flood of information about the features of the new version of GSA omitted a significant detail—the two year license fee. I was able to identify some of the costs for the cloud-

capable GB-7007 via the US government's GSAAdvantage.gov site. Note that the pricing information in this column applies only to US government entities. Commercial license fees will vary, but the fees available from www.gsaadvantage.com provide an indication of the range of prices for the GB-7007, Version 6.8. My rule of thumb is to add 15 percent to a US government price, which provides a number suitable for preliminary planning.

What's interesting is that a GB-7007 with a capacity of five million documents, including the two-year technical support option is about \$189,000. This price does vary slightly by Google reseller, presumably because of the different mark ups applied by the resellers. The variances are not material in my opinion.

What if a customer wants a hot back up for the GB-7007. Hardware does suffer glitches, and a spare mirror aligned with the primary GSA is a prudent step. The cost of that unit plus two years support is about \$25,000.

At first glance, the license fees work out to a little more than \$200,000 per year to index five million behind-the-firewall, Google Apps and Sites domain, and targeted Web content. The one year licensing cost is \$100,000. The per document cost works out to four cents a document.

What happens if an organization maxes out the GSA-7007 at five million documents in the first six months of operation? One solution is to add another GB-7007 and hot spare or cut back on the number of documents processed by the system.

With an organization's digital content doubling every six to nine months, a figure Martin White and I reported in our 2010 study Successful Enterprise Search Management, the GSA licensee may have to allocate another \$200,000 to accommodate the additional document volume.

Some organizations may balk at the notion of licensing additional GSAs, but in comparison with other carrier-class enterprise search solutions, the Google GSA licensing data from the GSAAdvantage.gov site is not out of line. In fact, in the pricing analyses we perform each year, other blue-chip proprietary systems require a similar investment. Google's economists and analysts are too savvy to fall out of step with the fees associated with mainstream search solutions from IBM, Microsoft, and Oracle, among others.

The GSAAdvantage.gov pricing data indicate that the GB-7007 is available in a 10 million document configuration with two years of support. The license fee for that configuration is about \$300,000. The hot back up is listed at about \$19,000 from Google reseller Merlin International. The per document cost for the 10 million configuration is about three cents a document.

One interesting pricing option is the GB-7007 with 10 million documents and a three year support package. That product configuration costs about \$526,000. The interesting point about this price is that on the surface, the additional year of support adds \$200,000 in licensing costs.

I was curious about the lowest reported price for the GB-7007. The GSAAdvantage.gov compare prices function was helpful. The lowest price for a GB-7007 with a capacity of 500,000 documents with two years of support was about \$22,000.

The GSAAdvantage.gov system contains 15 pages of prices for the GB-7007. Vendors range from specialist firms such as Washington, DC-based Fig Leaf Software, Inc. with a thriving training business in addition to its role as a GSA reseller to integrators and engineering firms like Onix Networking Corporation in Cleveland, Ohio. The other Google resellers identify themselves via the GSA's Vendor Contact Information link, often with an accompanying Google badge bearing the "Enterprise Professional" sobriquet.

Google does not provide data about the total number of GSAs licensed. Nor does Google make a breakdown of licenses for each GSA available. The product line up includes the aforementioned cloud-capable GB-7007 and the GB-9009. The information available when I searched for "Google Search Appliance" on Google.com did not reference the GB-1001, the GB-5005, or GB-8008 devices. The Google Mini, an entry level device, is available directly from Google's Web site for about \$3,000. Its capacity is 50,000 documents, which works out to six cents per indexed document. The Google Mini is useful as a learning platform, but its document limits makes the device a questionable enterprise choice. For indexing a Web site, Google offers a low cost cloud solution called Google Site Search. More information is available at <http://www.google.com/sitesearch/>. The fee for site search is based on the number of Web pages indexed and the number of queries passed against the index in a 12 month period. If you have a Web site with 25,000 pages and you serve 500,000 queries a year, Google charges \$750, which strikes me as reasonable. A similar service is available from Blossom Software at a significantly more attractive price point. For more information about Blossom's site search service, navigate to <http://www.blossom.com>

Google's changes to the Google Search Appliance are significant. My thinking is that Google is targeting Microsoft, not other vendors of enterprise search solutions. If Google can bleed revenue from Microsoft's Office product line, Google further weakens Microsoft's choke hold on the enterprise market.

Is Google focusing too much attention on Microsoft?

There are broader trends in enterprise search and content processing. These range from Autonomy's increasingly broad solutions business. Autonomy has been able to maintain its traditional search business while building strong revenue flows from eDiscovery, fraud detection, and rich media processing. Dassault Exalead has experienced strong growth with its search enabled applications approach, winning customers that span logistics to manufacturing to mobile. Coveo has made solid strides in customer support and email search markets. Attensity has morphed from a specialist tool for the US government into a marketing analytics firm. And moving with apparently greater velocity is the interest in Lucene/Solr open source search systems. Cisco Systems, to cite one example, has embraced open source search.

Google is flexing its muscles, particularly in enterprise search with what seems to me a focus on Microsoft. Microsoft, on the other hand, is responding to Google. Other search vendors have been able to make market gains as these two giants perform an elaborate, large-scale

STEPHEN E. ARNOLD

animal act. Enterprise search is a bit like a three-ring circus. The Google-Microsoft act is in one ring. The established search vendors are in a second ring. And the open source crowd are in a third ring. Search in 2011 will be entertaining.

Stephen E Arnold, November 1, 2010

Mr. Arnold is a consultant. More information about his practice is available at www.arnoldit.com and in his Web log at www.arnoldit.com/wordpress.