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## Google's Enterprise Search: From Headliner to Bit Player

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Years ago I jotted down a quotation which appeared in a crossword puzzle. I don't know the author, but the idea expressed is important:

*"Success is not permanent. The same is also true of failure."*

The quote is less elegant than “Πάντα ρεῖ καὶ οὐδ' ἐν μένει,” but I saw an American crossword puzzle.

In any language, anyone involved in enterprise search is familiar with success and failure. Technology changes quickly. With the financial pressures rising and falling without warning, today's problem can become a non-issue as new challenges arise.

Enterprise search has been changing more quickly than it was a year ago. In the span of 12 months, search and retrieval via key word queries has become a commodity. I spoke with a Silicon Valley venture firm's turnaround executive on August 9, 2011. He told me:

*Lucene/Solr work pretty well. I keep finding companies using this search technology in their products and for their Intranet systems.*

I found his observation accurate, but our connection dropped before I could share some surprising information from our most recent enterprise search project. Let me highlight three findings which we found particularly interesting.

First, intentionally or unintentionally, Microsoft has created a surge of interest in SharePoint and SharePoint search. Vendors supporting Microsoft's Fast Search technology report a robust demand for their engineering services. In a recent interview with John Steinhauer, vice president of technology for Search Technologies [www.searchtechnologies.com](http://www.searchtechnologies.com), an engineering firm in the Washington, DC area, told me:

*When we engage with customers, we bring experience and proven methodologies with us. That mitigates risks and saves money for customers. We've delivered some massively complex projects on time and on budget, even after others have tried and failed. It is gratifying that we have ongoing, multi-year relationships with household names such as the US Government Printing Office, Library of Congress, Comcast, the BBC, and Yellowpages.com.*

The firm's rapid growth has been helped in part by Microsoft's aggressive proliferation of SharePoint, a system which triggers a strong appetite for scalable, usable search and retrieval. The message from Search Technologies was echoed by other executives. Microsoft has become "the best thing since sliced bread", according to one SharePoint consulting firm. A year ago, Microsoft SharePoint search was a force. For some organizations SharePoint is now the staff of life.

Second, companies such as Autonomy and Exalead are adding customers. Autonomy lands an account with Telstra, and Exalead lands accounts with the US Defense Advanced Research Projects Agency and Capgemini, one of the world's preeminent advisory firms. When I dig into these high-profile licensing arrangements, search is part of the solution. Search is woven into other types of enterprise functions. A year ago, the uptake for search-centric or search-based applications was evident. Arguably, Autonomy and Exalead are two of the most successful vendors of search and content processing solutions. The change is that the emphasis of the search technology has shifted to enabling work processes, not brute force retrieval and laundry lists of hits for an employee to wade through. Exalead has enhanced its enterprise grip with such high-value enhancements as support for social media content, access via mobile devices and comprehensive business intelligence-style information presentation capabilities.

Third, smaller search vendors—often with remarkable technology—are scrambling to reposition themselves. Examples range from Coveo [www.coveo.com](http://www.coveo.com), a Canadian company, which shifted from enterprise search to mobile search to customer support and back to Intranet search. Endeca [www.endeca.com](http://www.endeca.com), one of the Big Five search vendors when I wrote the first edition of the *Enterprise Search Report* (CMSWatch Press) in 2004 notified me that it was entering a market described as "big data." The news story I received asserted:

*Enterprise search vendor [Endeca](http://www.endeca.com) has moved away from traditional search for several years, opting instead for applications built on top of the Endeca platform that address specific business needs. More recently they have moved toward business intelligence and to that end they announced this week integration of [Apache Hadoop](http://www.apache.org/licenses/LICENSE-2.0) with their [sic] [Endeca Latitude](http://www.endeca.com) product. See <http://goo.gl/tbOHv>*

The notion of "big data" has become one of the touchstones of 2011.

In my opinion, repositioning is an indication that a search vendor's management is attempting to adapt to the new business climate. MarkLogic Corp. shuffled its executive team and then alerted me that it was in the enterprise search business. An interview in the August 2011 *Information Today*, page one, with the new MarkLogic CEO, Ken Bado, reported Mr. Bado as saying:

*You know 80 percent of the data that is [sic] created every day by you, me and everybody else is unstructured, whether it is a Word document, PowerPoint, Excel...And for whatever reason, we have not been included in the same thought process as Big Data. Big Data isn't just about big data; it's about quick retrieval and it's about analytics.*

The concern I have is that in the repositioning, Endeca and MarkLogic may collide with such experts as Alistair Croll who asserted

*“There is no such thing as big data.”* <http://goo.gl/hO8l2>

With enterprise search in flux, what about Google?

Google is also a company moving quickly. In some ways, Google is more mercurial than any of the other firms I mentioned in this month's column. If we mute the noise about Google+, Google's new Facebook type of product, there have been some significant developments for the enterprise market.

First, Google has added additional security enhancements to its application engine. Early in August 2011, Google announced that its cloud-services have passed the SSAE-16 Type II audit. In a nutshell, the security features of Google's enterprise applications comply with the legal requirements of Sarbanes-Oxley. On the surface, a security checkmark is a ho-hum announcement, the certification is, in my opinion, long overdue for Google. You can read Google's explanation of the certification in the Official Enterprise Blog <http://goo.gl/tzkHU>. Google's enterprise products and services have been hampered by procurement teams who insisted upon certain security features.

Second, Google announced that Google+ will be available for businesses. Details are sketchy as I write this in mid August 2011. If one measures the success of product in media buzz, Google+ is on a par with a Steve Jobs's "one more thing" like the iPad. Social media has stepped from an understudy's role into the leading part. As successful as social media has been for college students and individuals who want to organize a flash mob, I am not yet convinced that "social media" will revolutionize business.

Google created a chatty video to explain that Google+ for business was coming. Navigate to <http://goo.gl/8aOeO> to view the video. Our research suggests that it is one more mode of communication which has moved from traditional channels to the "Internet." Nicholas Negroponte's *Being Digital* explained that old methods when implemented as zeros and ones create opportunities and challenges. Social media is a digital water cooler with the function blending that happens when bits and bytes replace a walk down the hall.

Third, Google continues to market its enterprise products and services as an alternative to the Microsoft line up of enterprise applications. IT Pro jumped on the bandwagon with a lengthy review of Google's and Microsoft's online versions of a word processor, spreadsheet,

presentation program, and email. “Head to Head: Google Apps vs Microsoft Office 365” <http://goo.gl/HBg1g> concluded:

*In the end, the two services are both powerful but they suit different audiences. If your business already uses Microsoft tools, Office 365 is the logical progression... If you need a mix of on-premise and cloud services, having to manage both Active Directory and the Google Apps control panel is more work than being able to do everything through System Center. Google Apps is a better fit for businesses starting from scratch online with no legacy systems who can benefit from the simplicity without having to keep the service in sync with on-premise tools, but it has definite limits.*

Hardly a revelation, but start ups and small firms may be Google’s sweet spot. Big outfits are likely to give Google’s enterprise services a look, but move with all due bureaucratic speed.

What’s my take on the shift in the enterprise search market and the strategic moves Google has made over the summer?

The highlight for me is that key word or brute force search is now a utility. I characterized it in a recent speech as the digital equivalent of running water and electricity. Users expect to see a search box, pop two or three words in it, hit enter, and see a list of results. For certain routine tasks, brute force search is fine and almost any vendor’s product will do the job. You can go the open source route, use a lower cost cloud service such as Blossom Software’s search service <http://www.blossom.com>, or use what a vendor provides when a client licenses a product like SharePoint or Oracle database.

Three other messages can be unwrapped from these developments. The financial downturn is going to put increasing pressure on smaller vendors. I think that extra time and effort will be required to figure out exactly how a marketing pitch maps to the vendor’s search and content processing system.

Large, established vendors with technology to permit complete applications to be built upon search and content processing frameworks will have an edge. Medium- and large-sized organizations require specific types of features and functions. An Exalead, for example, is well positioned to deliver a search-enabled package tracking solution as well as a point-and-click business intelligence service for a company’s sales force accessing data via an iPhone. The technology advantage requires search and an array of complementary capabilities.

I want to mention that Microsoft SharePoint is not likely to suffer a significant loss of market share in the foreseeable future. The issue is not the raw technical excellence of Microsoft’s enterprise software. Microsoft has an advantage because there is familiarity with the firm’s technology and a motivated, highly capable “shadow” engineering infrastructure which can make Microsoft SharePoint, SQL Server, Exchange, and other enterprise products work quite well. The notion that companies will jettison what is familiar for an alternative which is less well known is easy to understand. The shift is underway, but change will not come overnight.

What's this suggest for Google's enterprise ambitions? I think Google will continue to make gains in the enterprise. I think that Google's senior management are distracted by the challenge of keeping advertising revenues humming, tough competitors like Amazon and Microsoft, and legal battles.

The net net for me is that if I were starting a company, I would seriously consider Google Apps and Google's Site Search service. If I were an established business, I would stick with what I have. An economic crisis may be dimming the lights for some former stars.

Stephen E Arnold, August 12, 2011

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