Magic Quadrant for Insight Engines

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Insight engines combine search with AI to deliver actionable insights derived from the full spectrum of content and data sourced within and external to the enterprise. This Magic Quadrant profiles 15 vendors to help application leaders make the best choice for their organizations.

Strategic Planning Assumptions

By 2020, 50% of analytical queries either will be generated via search, natural language processing or voice, or will be automatically generated.

By 2020, organizations that offer users access to a curated catalog of internal and external data will derive twice as much business value from analytics investments as those that do not.

By 2021, natural language processing and conversational analytics will boost analytics and business intelligence adoption from 35% of employees to over 50%, including new classes of users, particularly front-office workers.

Market Definition/Description

Insight engines are an evolution of search technologies that provide on-demand and proactive knowledge discovery and exploration augmented by semantic and machine learning (ML) technologies. They typically create a new index by crawling, indexing and mining both internal and external data sources, as well as structured and unstructured content, to ensure that a broad set of information is easily discoverable. These indexes are often complemented by language and context models such as ontologies and graphs in order to:

- Model correlations between data and knowledge that may be held natively in different formats or represented by different schemas.
- Improve relevance and support personalization of the search and discovery experience by role or business moment context. Both users and administrators can continually train and evolve relevance rules and algorithms.
- Provide accelerators for particular industries or use cases.

Vendors in this space also extend the reach of their content indexing capabilities to rich media (either natively or via partnership) by using ML capabilities such as computer vision, optical character recognition (OCR) and speech-to-text functions.

Flexible presentation of results is a key capability of insight engines. In contrast to search engines that provide links to original source materials such as documents and videos, insight engines can also provide contextual information about the fact or entity in question. For example, rather than simply link to an HR employee profile, an insight engine can present a richer set of information such as employee social connections, their upcoming meetings, outstanding IT support tickets, and so on. Many vendors offer the ability to surface results inside contact center, business intelligence (BI) tools, and other popular enterprise interfaces.

In contrast to the narrow and often custom-made development of chatbot Q&A systems, insight engines typically span the enterprise. They are able to surface via typed natural language (and increasingly speech) facts and knowledge from a variety of areas such as CRM, external social data, marketing, IT service management, HR, sales and other stores. One dimension of differentiation by vendors is the use of connectors or prebuilt integrations to access both new data sources and platform user interfaces/workflows.

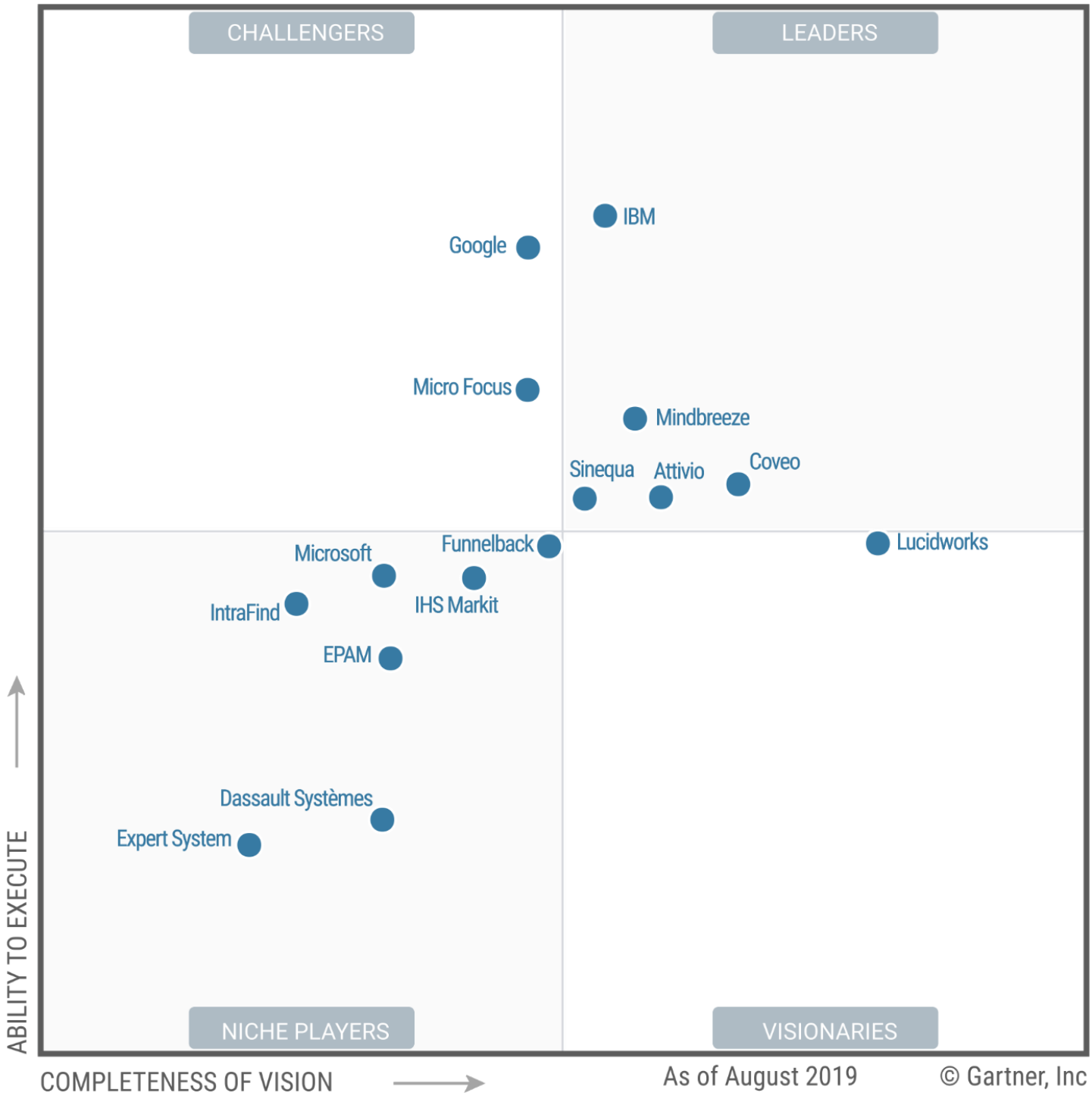
As businesses evolve to become digital and generate more structured and unstructured content, the need for insight engine technology to surface relevant facts, content and knowledge to stakeholders is critical. Vendors in this marketplace have mature solutions and represent a cost-effective and systemic approach to improving the development and consumption of knowledge across the enterprise.

Typical use cases in this market are as follows:

- **Internal (intranet) search** — Enterprise-wide search within the digital workplace; for example, customer service and support searching a wide array of knowledge articles and information.
- **External (public) search** — Search within and across a public-facing digital presence; for example, enabling search across a company's main public-facing website.
- **Extraction of data for analytics** — Deriving data from indexed content for the purposes of analysis and reporting.

Magic Quadrant

Figure 1. Magic Quadrant for Insight Engines



Source: Gartner (September 2019)

Vendor Strengths and Cautions

Attivio

Attivio is a privately held company that was founded in 2007. The company's headquarters are in Boston, Massachusetts, U.S., with another office located in London, England. Worldwide, Attivio has 38 partners, 55% of which provide professional services other than just sales.

Attivio's product is the Attivio Cognitive Search and Insight Platform. The product's principal use cases are for internal search, customer support, and risk and intelligence analytics.

The vendor's customer base spans a selection of industries for the insight engines market, with principal industries being banking and securities, insurance (other than health), IT hardware, IT services and software, and national and international government.

Attivio is positioned in the Leaders quadrant.

Strengths

- Attivio demonstrates "operational" and "explainable" artificial intelligence (AI) through business-centric administration, where both technical and nontechnical administrators can evaluate and approve proposed models, understand and audit differences between models, and export diagnostics for business reporting or compliance purposes.
- Attivio has strong strategic OEM relationships (Arris, NICE, PerkinElmer, Verint), implementation partnerships (Persistent, Raytion, Seavus), and reseller and referral partners (Accenture, Data#3, MC+A, Tata Consultancy Services).
- Surveyed reference customers indicated that Attivio is one of the vendors in this market that connects to the broadest range of data source categories: websites/intranets, content services platforms, databases, third-party websites, content collaboration platforms, digital experience platforms/web content management platforms, social media, digital/media asset management systems, data lakes, and more.

Cautions

- Attivio has a complex product that translates to long deployment times for insight engine projects, requiring a large number of people to deploy and maintain. This, in part, reflects the complexity of those projects, as well as the capabilities of the product. Buyers should ensure that adequate training for relevant staff is given early on to leverage the product effectively.
- Attivio's relatively small size as a company means that it has low staff levels per industry, given the range of industries covered. As such, richer domain knowledge and workflows specific to certain industry sectors, especially those within which the vendor lacks a sizable customer base, may be limited. Buyers should consider both the vendor's and the vendor's partners in this respect.
- In this market, reference customers indicated that the deployment/implementation of the Attivio Platform required the largest cohort of staff from both client and vendor/third party. In particular, the number of staff required client side was the largest in this market.

Coveo

Coveo is a privately held company that was founded in 2005. The company's headquarters are located in Quebec City, Quebec, Canada, with further offices located in Montreal (Canada), San Francisco (U.S.) and London (U.K.). Worldwide, Coveo has 185 partners, all of which provide professional services other than just sales.

Coveo's portfolio of products are based on the Coveo Platform, which is taken to market in three different solution areas: commerce solutions for digital commerce and customer-facing use cases; service solutions for customer-facing employees and customers (self-service); and workplace solutions for intranet collaboration and help-desk use cases. It is also available as an integrated part of third-party solutions (e.g., Coveo for Salesforce).

The vendor's customer base spans a very broad range of industries for this market, with principal industries being IT services and software, IT hardware, manufacturing (especially automotive and consumer nondurable products) and financial services.

Coveo is positioned in the Leaders quadrant.

Strengths

- Coveo has a rich set of productized integrations, forming a well-rounded ecosystem. For sales and customer support in particular, it supports user profiles and needs in third-party platforms such as Salesforce, ServiceNow and Microsoft Dynamics. Further, modules and extensions for Coveo are available in associated third-party marketplaces.
- Coveo has invested in in-house expertise in artificial intelligence (AI), allowing it to employ a flexible mix of machine learning (ML) techniques that are integrated at numerous stages throughout workflow and operation of the platform.
- Reference customers scored Coveo highest for the availability of quality third-party resources (e.g., integrators, service providers). Although small relative to some of the vendors in the market, the size of Coveo's partner network is above the average for this market.

Cautions

- While Coveo has flexible deployment methods for many aspects of the platform, some components (i.e., query processing and admin components) are only available in the cloud. This may deter organizations that are unwilling or unable to accept such a delivery model due to security or other concerns about third-party processing of data.
- Coveo's approach to natural language processing (NLP) relies heavily on shallow and deep learning with little semantic modelling of domains or contexts. Beyond its own basic text analytics, the vendor relies on third-party technology for advanced capabilities.

- Our survey of reference customers identified no Coveo deployments for which the volume of documents/records was larger than 50 million. Customers with higher volumes to index should seek clarity from the vendor on capabilities and constraints.

Dassault Systèmes

Dassault Systèmes is a publicly traded company that was founded in 1981. The company's headquarters are located in Vélizy-Villacoublay, France, with a further 180 offices located elsewhere in Asia/Pacific, EMEA, Latin America and North America.

The vendor's product is EXALEAD. This is a constituent of its 3DEXPERIENCE platform, which comprises many products enabling modelling, simulation, collaboration and information intelligence in the context of product life cycle management, from ideation through to operational support. The product's principal use cases are extraction, transformation and loading (ETL) of data, insight in the flow of knowledge work, a platform for search and insight applications, project and BI, collaborative planning, and data science for life science and materials science customers.

Dassault Systèmes' customer base is broad for this market, with principal industries being manufacturing and natural resources (especially automotive) and transportation (especially air transport, road passenger and freight).

Dassault Systèmes is positioned in the Niche Players quadrant. Its product is used in the context of its own digital platform and ecosystem — 3DEXPERIENCE — and rarely applied to general search use cases (e.g., intranet or website search).

Strengths

- EXALEAD is tightly integrated into Dassault Systèmes' wider 3DEXPERIENCE suite. This provides customers seeking product life cycle management with a complete platform for delivering insight within product life cycle management (PLM)-related workloads.
- Dassault Systèmes is supported by a substantial partner network for this market. It has partnerships with Accenture, Capgemini and Keyrus, along with other business, education, software, services, technology and certification service partners.
- Unlike the majority of vendors in this Magic Quadrant, all reference customers for Dassault Systèmes reported using their solution companywide. Typically in this market, deployment will be either companywide or within specific divisions, regions or business units.

Cautions

- EXALEAD's capabilities as an insight engine stem from its use in the wider 3DEXPERIENCE platform. As a result, the vendor's offering is difficult to assess against the offerings of other vendors in this Magic Quadrant.

- Dassault Systèmes' product offers limited integration with third-party functionality such as indexing tools for rich media (video, speech or image), digital commerce, conversational platforms or customer service platforms. Few customers use EXALEAD in isolation from the vendor's other products.
- Surveyed reference customers revealed low levels of satisfaction with both the product's architecture and deployment model, and with integration and deployment.

EPAM

EPAM is a public company that was founded in 1993. The company's headquarters are located in Newtown, Pennsylvania, U.S., with a further 68 offices located elsewhere in the Americas, Europe, Asia and the Commonwealth of Independent States. Worldwide, EPAM has nine partners located in EMEA and North America.

EPAM's product is InfoNgen. The product's principal use cases are enterprise search and knowledge discovery, brand and competitive intelligence, market intelligence and current awareness, and customer feedback and inquiry intelligence.

EPAM's customer base spans a selection of industries for this market, with the principal industries being banking and securities, other business, technical and consumer services, and manufacturing and natural resources (especially life sciences and healthcare products, and consumer nondurable products).

EPAM is included in this Magic Quadrant for the first time this year, entering the Niche Players quadrant.

Strengths

- InfoNgen utilizes ontologies, taxonomies and a knowledge graph at its core for the tagging of documents/records, assessing relevancy, and aiding user navigation through information. This approach is complemented with the use of ML to identify and extract entities and terms from indexed text.
- InfoNgen offers flexible deployment methods with all components of the platform, deployable on-premises or in the cloud, either separately or simultaneously (hybrid).
- Reference customers reported the highest level of satisfaction in this Magic Quadrant for both their overall experience with the vendor and the value for money that the product provides.

Cautions

- Beyond external sources such as websites and social media, InfoNgen offers comparatively few connectors to third-party data sources. It also offers limited ready-made integrations with third-

party applications (e.g., CRM, RPA), although an API is available. Buyers should look closely at the data sources they need to index and discuss with the vendor.

- InfoNgen's use of AI is focused on NLP to facilitate indexing. Capabilities that can benefit significantly from AI such as personalization and automation of relevancy tuning have yet to mature relative to some of the vendors in this Magic Quadrant.
- Reference customers indicated the narrowest range of data source categories indexed for vendors in this Magic Quadrant. In particular, third-party websites and social media are prominent in terms of data source categories indexed. A few, but not all, vendors can demonstrate indexing across all categories.

Expert System

Expert System is a publicly traded company that was founded in 1989. The company's headquarters are located in Modena, Italy, with a further 13 offices located elsewhere in EMEA and North America. Worldwide, Expert System has 75 partners, 19% of which provide professional services other than just sales.

Expert System's product is Cogito Intelligence Platform (CIP). The product's principal use cases are "know your customer," "know your supplier," risk management and security management.

The vendor's customer base spans a range of industries for this market, with principal industries being national government, local and regional government, banking and securities, and communications, media and services (especially telecommunications).

Expert System is positioned in the Niche Players quadrant.

Strengths

- The vendor has a long pedigree in the development and deployment of semantic technologies across a number of use cases, including search. As a result, Expert System has developed a cache of semantic assets (taxonomies, ontologies, etc.) to accelerate onboarding of clients within specific industries, especially government.
- Expert System is an international company and also the largest European vendor in this Magic Quadrant, with local technical and sales teams close to EMEA customers.
- The majority of Expert System's reference customers reported that the duration of their insight engine project was as planned, scoring the vendor equal first with a minority of vendors in this Magic Quadrant whose projects also went as planned in terms of duration.

Cautions

- Although Expert System has a long history of, and expertise in, semantic technologies, this is not equaled by its use of ML capabilities to develop hybrid approaches that complement symbolic with nonsymbolic (shallow and deep learning) techniques. Buyers should dive deeper on this with the vendor to determine the maturity of the hybrid approach and its suitability to their requirements.
- Expert System has limited integrations to third-party business platforms such as chatbots, robotic process automation (RPA), digital commerce and other aspects of both client digital platforms and wider digital ecosystems.
- Although not dissatisfied, reference customers' level of satisfaction with the product's value for money was among the lowest for Expert System relative to other vendors in this Magic Quadrant.

Funnelback

Funnelback, a subsidiary of its privately held owner Squiz, was founded in 2005. Funnelback's headquarters are located in Canberra, Australian Capital Territory, Australia, with a further 11 offices located elsewhere in Asia/Pacific, EMEA and North America. Worldwide, Funnelback has 13 partners.

The vendor's product is also called Funnelback. The product's principal use cases are site search, intranet search, case management, knowledge management, and product management (retail).

The vendor's customer base spans a broad range of industries for this market, with principal industries being higher education, local and regional government, national and international government, other business, technical and consumer services, and banking.

Funnelback is positioned in the Niche Players quadrant.

Strengths

- Funnelback now supports knowledge graphs, which can be assembled automatically by analyzing the content and data across disparate data sources to represent entities and their relationships (e.g., people, places, things, concepts). This accelerates the development of a key asset for NLP.
- Funnelback offers a lean, stand-alone product focused on ease of use and open integration. Deployment times are accelerated through the use of productized solutions that are available for specific applications of the product (e.g., Funnelback for Higher Education).
- Reference customers reported Funnelback as having the shortest duration for the selection, deployment and implementation of the product in this Magic Quadrant.

Cautions

- The uses of Funnelback's insight engine tend toward customer-facing website search rather than internal use cases, although not exclusively.
- Funnelback provides basic support for multiple languages, relative to other vendors in this Magic Quadrant. Capability provides varying levels of shallow (morphological rather than semantic) analysis across a limited set of languages for processing, indexing and querying. In terms of documentation and user interface, support is limited to one language: English.
- Reference customers indicated that Funnelback is used for deployments for which the range and number of data sources indexed, and volume of documents/records within them, are toward the lower end of the scale for this Magic Quadrant.

Google

Google is a publicly traded company that was founded in 1998. Its headquarters are located in Mountain View, California, U.S., with a further 151 offices located elsewhere in Asia/Pacific, EMEA, Latin America and North America. Worldwide, Google has over 1,500 Google Cloud partners, around 50 of which specialize in Google's insight engine.

Google's product is Cloud Search, which was launched in July 2018. The product's principal use cases are to support intranet, extranet, custom user experiences, data enrichment, and AI service integration.

The vendor's customer base spans a broad range of industries for this market, with most customers belonging to communications, media and services, banking and securities, and manufacturing and natural resources.

Google is included in this Magic Quadrant for the first time this year. It is positioned in the Challengers quadrant.

Strengths

- Google benefits from an exceptionally strong reputation in this domain, and experience to match. The majority of reference customers for other vendors in this Magic Quadrant had considered Google before making their decision. The product therefore benefits from enviable mind share in the market from the outset.
- Given its recent creation, and Google's leading position in AI, the product benefits from a combination of semantic and ML technologies. Use of techniques like transfer learning of search models also enables Google to bootstrap new search models more quickly.
- Reference customers reported the highest percentage of products being delivered as planned in terms of duration of any vendor in this Magic Quadrant.

Cautions

- While the core engine from Google is strong, it is hosted by Google with strong integration with G Suite; however, integration with third-party solutions is very limited. While integration is possible, no ready-made integrations with third-party vendor solutions (e.g., RPA or CRM) are available from a user perspective. Furthermore, for connector and application extensions, buyers must typically work with system integrators and partners like Accenture and Raytion.
- The quantity of documents/records indexed by Cloud Search's customer deployments is towards the lower end of the scale for vendors in this Magic Quadrant.
- Cloud Search is a relatively new product. Reference customers surveyed scored Cloud Search lowest in terms of overall satisfaction with the product's capabilities, relative to other vendors in this Magic Quadrant.

IBM

IBM is a publicly traded company that was founded in 1911. Its headquarters are located in Armonk, New York, U.S., with a further 200 offices located elsewhere in Asia/Pacific, EMEA, Latin America and North America. Worldwide, IBM has over 65,000 partners.

IBM's product is Watson Discovery. The product's principal use cases are to provide a platform on which insight applications can be developed, and to facilitate the delivery of insight into other applications making up the digital workplace.

The vendor's customer base spans a range of industries for this market, with most customers belonging to banking, telecommunications, insurance (other than health), manufacturing and natural resources (specifically energy resources and processing, and natural resources and materials).

IBM is positioned in the Leaders quadrant.

Strengths

- Watson Discovery is one of the few insight engines that provides natural language question answering (NLQA), thereby enabling more immediate surfacing of insight. Out-of-the-box integration with IBM Watson Assistant enables this to be delivered through conversational interfaces.
- Watson Discovery utilizes a mixture of supervised and unsupervised relevancy training combined with simple graphical tools to engage subject matter experts (SMEs) in shaping capability. For example, SMEs can use document analysis tools to guide Watson Discovery to salience within content.

- IBM's reference customers reported the highest level of satisfaction with the product's ease of integration using standard AI and tools.

Cautions

- Harnessing the full potential of Watson Discovery may — according to needs — require embracing a range of products in the Watson family and beyond; for example, Watson Knowledge Studio, Watson Assistant, and Watson Visual Recognition. Buyers should explore the range of IBM products necessary to realize their requirements.
- While Watson Discovery has a number of product integrations to IBM products, especially those within the Watson family, there is a lack of ready-made integrations to other offerings of third-party vendors.
- Reference customers reported that IBM Watson Discovery requires one of the largest cohorts of client and vendor/third-party staff to implement and deploy, out of vendors evaluated in this Magic Quadrant.

IHS Markit

IHS Markit is a publicly traded company that was founded in 1959. Its headquarters are located in London, U.K., with a further 129 offices located elsewhere in EMEA, Asia/Pacific, Latin America and North America. Worldwide, IHS Markit has 930 partners, 90% of which provide professional services other than just sales.

IHS Markit's product is Goldfire. The product's principal use cases are: improving compliance/reducing risk, maximizing development reuse, quality failure analysis, design impact analysis, enterprise search, improved project execution, improved R&D, knowledge management, operational efficiency, accelerating innovation, employee onboarding, accelerating business development, service and maintenance, competitive intelligence, and patent research.

The vendor's customer base spans a selection of industries for this market. Principal industries are transportation (especially air transport and pipelines) and manufacturing and natural resources (especially energy resources and processing and heavy industry).

IHS Markit is positioned in the Niche Players quadrant.

Strengths

- IHS Markit uses natural language generation (NLG) to develop document summaries. This provides a bridge between simple classification of documents and full document content, allowing for quicker consumption of knowledge.

- Pretrained models allow customers to significantly decrease their time to value, while also minimizing the burden of manual tasks.
- IHS Markit came joint first of vendors evaluated in this Magic Quadrant in terms of reference customers' overall satisfaction with the vendor's service and support.

Cautions

- IHS Markit works with customers directly to deploy and implement its product. Without access to a partner network for professional services, reliance on the vendor alone can result in lengthy deployments times. Surveyed reference customers revealed IHS Markit to have the longest deployment times of all vendors in this Magic Quadrant.
- Goldfire supports a limited set of languages compared with other vendors in this Magic Quadrant, although it does this at the deepest — semantic — level and in terms of documentation and user interface, as well as processing. Languages supported are Chinese, English, French, German, Japanese, and Russian.
- IHS Markit received the lowest score from surveyed reference customers for satisfaction with ease of deployment, compared with other vendors in this Magic Quadrant.

IntraFind

IntraFind is a private company that was founded in 2000. The company's headquarters are located in Munich, Germany, with a further two offices located in Bonn, Germany and New York, U.S. Worldwide, IntraFind has 46 partners, 22% of which provide professional services other than just sales.

IntraFind's product is iFinder elastic, which is built on Elasticsearch. The product's principal use cases are enterprise search, intranet search, knowledge management, platform for insight applications, and metadata enrichment.

The vendor's customer base spans a selection of industries for this market, with principal industries being manufacturing and natural resources (especially automotive and heavy industry), national/international government, and telecommunications.

IntraFind is included in this Magic Quadrant for the first time this year, positioned in the Niche Players quadrant.

Strengths

- IntraFind builds on Elasticsearch, bringing its significant experience in natural language technologies to transform the well-known and established search engine into an insight engine, thereby addressing a common client request in this market.

- IntraFind is one of the few vendors in this Magic Quadrant that has demonstrable ability to scale its product to index very large volumes — greater than 100 million — of document/records. This partly arises from its use of Elasticsearch.
- Reference customers for IntraFind reported the lowest level of staff to maintain their insight engine, both in-house and from the vendor, out of all vendors evaluated in this Magic Quadrant.

Cautions

- IntraFind's customer base is predominantly located in EMEA, primarily the DACH countries. Although it has an office in the U.S., IntraFind's partner network reveals few partners outside of EMEA, especially those providing professional services. Reaching beyond EMEA is one of IntraFind's key challenges.
- IntraFind's use of nonsymbolic AI (ML) is applied to complement the company's strength in linguistics and traditional, symbolic AI for NLP. However, its application of nonsymbolic AI to user behavior falls behind that of other vendors in this Magic Quadrant. This, in part, is reflected in the vendor's limited set of levers and methods to evaluate and tune relevance.
- Although not dissatisfied, surveyed reference customers reported that their satisfaction with the timeliness of the vendor's responsiveness was lower than average for this Magic Quadrant.

Lucidworks

Lucidworks is a privately held company that was founded in 2007. Its headquarters are located in San Francisco, California, U.S., with a further five offices located elsewhere in Asia/Pacific, EMEA and North America. Worldwide, Lucidworks has around 138 partners, 70% of which provide professional services other than just sales.

Lucidworks' product is Fusion, comprising Fusion Server, Fusion AI and Fusion App Studio. The product's principal use cases are to support the digital workplace for discovering both information and data, and digital commerce via customer-facing websites.

The vendor's customer base spans a broad range of industries for this market, with most customers belonging to IT services and software, banking, local and regional government, specialty retailers, and insurance (other than health).

Lucidworks is positioned in the Visionary quadrant.

Strengths

- Fusion Server is architected on major open-source projects Apache Solr and Apache Spark, which store and process the data for search and discovery at scale. It also has one of the most flexible sets of deployment options in this collection of vendors.

- Lucidworks can use crowdsourcing and outsourcing plugins to enable third parties to train learning-to-rank models, classifiers and other parameters. It also uses a number of approaches to evaluate and tune relevance, including rich multivariate testing (MVT) tools, audit trails of reasoning, and automated tuning via ML.
- In terms of product capabilities, reference customers selected Lucidworks' product for its ability to evaluate and tune relevance, and correspondingly scored it highest for this capability.

Cautions

- Lucidworks' pricing model is atypical for this market, deciding price on the basis of compute power needed, amplified by the additional products and modules provided to deliver required functionality. This can make it challenging to accurately cost a deployment and forecast future cost.
- Lucidworks' strength in market understanding and market strategy is not matched by its professional services and support. Unusually for vendors in this Magic Quadrant, the majority of its staff are externally focused, at the expense of product support, which is reflected in low satisfaction from reference customers with aspects of service and support.
- Although nearly all of its reference customers would recommend Fusion without qualification, they also gave Lucidworks the lowest satisfaction score in this Magic Quadrant for overall experience with the vendor.

Micro Focus

Micro Focus is a publicly traded company that was founded in 1976. Its headquarters are located in Newbury, U.K., with a further 105 offices located elsewhere in Asia/Pacific, EMEA, Latin America and North America. Worldwide, Micro Focus has 4,838 partners, around 10% of which provide professional services other than just sales.

Its product is IDOL (Intelligent Data Operating Layer), which was obtained as part of a merger with Hewlett Packard Enterprise's spun-off software business in 2017, and originally called Autonomy. Its principal use cases are intranet/staff portal search, enterprise knowledge management, internet search by staff and customer-facing portals.

The vendor's customer base spans a broad range of industries for this market, with most customers belonging to government, banking, IT services and software, telecommunications, and insurance (other than health).

Micro Focus is positioned in the Challengers quadrant.

Strengths

- IDOL is one of the few products in this market that is able to index the spectrum of enterprise content types using its own technology. Content types include data, content (unmodeled data) and rich media (audio, images and videos). Micro Focus makes strong use of neural networks to extract data from rich media, having gone so far as to develop its own speech-to-text technology with a variety of acoustic models to match content sources and types.
- Micro Focus is able to demonstrate one of the richest conversation-based natural language interfaces for extracting information, providing NLQA, responding with “found answers” extracted from the indexed corpus.
- Surveyed reference customers indicated that Micro Focus required fewer staff (from the vendor and end user combined) for the deployment and implementation of IDOL, when compared to other vendors evaluated.

Cautions

- Unlike the majority of vendors in this Magic Quadrant, Micros Focus prefers to pursue a unitary approach to its technology, involving few third parties to provide or extend functionality. All key elements (e.g., connectors) are provided by the vendor. This, in part, constrains its adoption and use of new technologies and approaches. For example, while users can develop (or reverse engineer) taxonomies to support search functions, the broader set of semantic technologies (ontologies, graphs) are not present in the platform.
- Micro Focus’ nonstaff costs are among the highest of all vendors in this Magic Quadrant. Its pricing model is also one of the most complex relative to others, with product tiers, features, modules and connectors — as well as the usual count of documents/records indexed — all contributing to the final cost.
- Gartner research has shown, based on inquiry and reference customers surveyed, that IDOL’s install base is long established. Buyers should query the tenure of customers when considering references to ensure their currency and relevance.

Microsoft

Microsoft is a publicly traded company that was founded in 1975. Its headquarters are located in Redmond, Washington, U.S., with a further 231 offices located elsewhere in Asia/Pacific, EMEA, Latin America and North America. Worldwide, Microsoft has over 65,000 partners.

Its product is Microsoft Search, which builds on both the Microsoft Graph and SharePoint Search. This completes a shift from SharePoint search — a separate product to Microsoft Search — as a product integral to Microsoft Office 365. In addition to Microsoft Search, the vendor offers Microsoft Azure Search, which is built on Apache Lucene, and can be enhanced using Microsoft Azure Cognitive Services to create an insight engine. However, this second offering is not — for this

reason — assessed in this research. Microsoft Search's principal use case is internal search for users within Office 365 using Microsoft's own touchpoints, either dedicated to Microsoft Search or integral to other Microsoft applications making up Office 365.

The vendor's customer base spans a broad range of industries for this market, with most customers belonging to national and international government, banking, IT services and software, telecommunications, and insurance (other than health).

Microsoft is positioned in the Niche Players quadrant. Its product is used within the context of the vendor's digital platform and ecosystem — Microsoft Office 365 — and not used for external search or for the extraction of data from analysis.

Strengths

- Microsoft Search seamlessly integrates search and insight into the numerous applications comprising Office 365. In this way, search is integral to applications and, in many instances, is delivered as proactive recommendations rather than reactive search, exemplifying the definition of an insight engine in terms of user experience.
- Microsoft's graph-based approach, serving many other purposes in addition to search and insight, shifts the focus from the engine and its tuning to content and its use. With Microsoft Search, responsibility for relevance shifts from administration in IT to Microsoft for its enhancement of the product, and interim recommendations.
- Reference customers indicated that Microsoft Search has the lowest overall nonstaff cost of any vendor in this Magic Quadrant by a substantial margin, equating to multiple orders of magnitude. They also revealed that overall cost was the primary factor in selecting the product.

Cautions

- Microsoft Search is limited to Office 365 and the touchpoints within it. This reflects Microsoft's approach to making search and insight a personalized and integral part of the wider Office 365 experience. Although it is possible to develop connectors to data sources outside of Office 365 — with a number of third parties providing ready-made connectors — these lack the deeper integration with Microsoft Graph to include the usage telemetry, in addition to content/data, which is key to the product's relevance. Microsoft's reference customers reported the lowest number of data sources, out of all vendors evaluated.
- Microsoft Search must be used as is, while Microsoft's other search and insight offering — Microsoft Azure Search — can be tailored to purpose. With no overlap or interaction between the two — Microsoft Azure neither underpins nor extends Microsoft Search — customers must opt for one of two extremes or look elsewhere for search and insight.

- Microsoft Search had the lowest number of reference customers out of all vendors evaluated who would recommend the product without qualifying their recommendation.

Mindbreeze

Mindbreeze, a subsidiary of its publicly traded owner Fabasoft, was founded in 2005. The company's headquarters are located in Linz, Austria, with a further seven offices located elsewhere in EMEA and North America. Worldwide, Mindbreeze has 139 partners, 97% of which provide professional services other than just sales.

Mindbreeze's product is InSpire. The product's principal use cases are enterprise search, platform for insight applications, employee portals, intranet search and knowledge management, customer service and contact center, maintenance support, search-driven BI, and chatbots.

The vendor's customer base spans a broad range of industries for this market, with most customers belonging to government (both national and international government, and local and regional government), air transport, and telecommunications.

Mindbreeze is positioned in the Leaders quadrant.

Strengths

- Mindbreeze has a rich hybrid approach to AI, including transfer learning to bootstrap new models, a symmetric approach to content enrichment and expansion using semantics, real-time feedback to schemas and vocabularies, and a flexible training set approach.
- Mindbreeze has established a global partner network with main partners in numerous countries across Asia/Pacific, EMEA, Latin America and North America.
- Reference customers' satisfaction with the capabilities of Mindbreeze's product is the highest of any vendor in this Magic Quadrant.

Cautions

- Despite serving customers across one of the broadest ranges of industries for this market, Mindbreeze also has one of the highest customer-to-staff ratios. Buyers with more complex needs relying on domain-specific knowledge should assess the vendor's customer success in their industry.
- Mindbreeze's marketing execution lags behind that of other Leaders in this Magic Quadrant. Its lack of demonstrable thought leadership underpins a lower-than-expected mind share in a market with few vendors.
- Reference customers gave Mindbreeze one of the lowest overall scores for pricing and contract flexibility out of all vendors evaluated.

Sinequa

Sinequa is a privately held company that was founded in 2002. The company's headquarters are located in Paris, France. A further eight offices are located elsewhere in EMEA and North America. Worldwide, Sinequa has 41 partners, 37% of which provide professional services other than just sales.

Sinequa's product is Sinequa ES. The product's principal use cases are enterprise search, unified enterprise content portal, custom-made search application, expert finder, 360-degree (entity-centric) information views, market intelligence, news/trend analysis, asset management, portfolio management, customer service, information protection, and data privacy.

The product's customer base spans a selection of industries for this market. Its principal industries are manufacturing and natural resources (especially life sciences and healthcare products), banking and securities, and insurance (other than health).

Sinequa is positioned in the Leaders quadrant.

Strengths

- Sinequa has a training and annotation workbench to fast-track the training of new models based on newly labelled datasets. Having developed a large ML/deep learning library, it is able to apply a number of different techniques across the search workflow.
- Sinequa has one of the most flexible sets of deployment options in this market, supporting on-premises, cloud and hybrid deployments across the suite of components that make up an insight engine. This includes support for hosting on the "big four" (i.e., Amazon, Google, IBM and Microsoft) cloud platforms.
- Reference customers indicated Sinequa to be capable of indexing one of the broadest and deepest ranges of data sources out of all vendors evaluated, demonstrating its ability to index many and varied sources of content.

Cautions

- Sinequa's expertise and capability is focused on depth rather than breadth, addressing many and varied use cases within its customer base. Buyers looking to leverage the vendor's AI, particularly in the context of semantics, should consider how the product's capabilities and vendor's expertise with existing clients transfers to them, especially in those industries with few current customers.
- Sinqeua falls behind some vendors in this Magic Quadrant when it comes to packaged integration to third-party products for query and the return of results within the context of customers' digital platforms and ecosystems (e.g., RPA, digital commerce or CRM).

- Relative to other vendors in this Magic Quadrant, a greater proportion of Sinequa's reference customers indicated that their insight engine projects took longer than planned, which in part reflects the complexity of those projects, as well as the capabilities of the product.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant 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

- EPAM — EPAM's InfoNgen supports enterprisewide search and meets the inclusion criteria for this market.
- Google — Google Cloud Search, the successor to the Google Search Appliance, was relaunched in July 2018. Its scope is no longer limited to G Suite.
- IntraFind — Founded in 2000, this long-established search vendor offers an insight engine built on Elasticsearch.

Dropped

- Smartlogic — No longer meets the inclusion criteria since the addition this year of the criterion "creates an index of structured data from both structured and unstructured data and makes this available via query." Smartlogic augments the capabilities of other insight engines and partners with many of those in this market.

Inclusion and Exclusion Criteria

To qualify for inclusion, vendors needed to:

- Sell a product that:
  - Fits the market definition: "applies relevancy methods to describe, discover, organize and analyze data" — this allows existing or synthesized information to be delivered proactively or interactively, and in the context of digital workers, customers or constituents at timely business moments
  - Is available either independent of all others or as part of a generalist software platform intended to support knowledge workers in all roles

    - Uses connectors to access and collect data from multiple repositories other than those sold by the same vendor
    - Creates an index of structured data from both structured and unstructured data and makes this available via query

- Earn revenue from sales of their insight engine product(s) that was more than $8 million in 2018, or at least $6 million with a three-year (starting 2016) compound annual growth rate (CAGR) of 30% or more.
- Have total revenue from sales of insight engine product(s) deriving from:
    - Licenses — the right to use the software based on contract type (perpetual or term license)
    - Cloud-based services — revenue for cloud services including business process as a service (BPaaS), IaaS, PaaS and SaaS
    - Subscriptions — Annual fees for licensed, on-premises software, as well as license revenue for single-tenant managed services (such as hosting)
    - Technical support and maintenance fees — Contract fees for support services (not including training), new versions, updates and upgrades

- Exclude professional services and the sale of products manufactured by other vendors
- Exclude revenue arising from customer requests for software changes, even if such changes are subsequently incorporated into the core insight engine offering, although increases in software license charges resulting from such changes can be considered
- Have an installed base for their insight engine products(s) comprising:
    - At least 100 customers
    - Customers in two or more major geographic regions including North America or Europe, the Middle East and Africa (EMEA)
    - Customers in five or more vertical industry categories

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable provider performance to be competitive, efficient and effective, and to

positively impact revenue, retention and reputation within Gartner's view of the market.

"Ability to Execute" measures how well a vendor is able to implement product features, market, sell and support its insight engine products and services. Vendors are also rated on their financial viability, using a standard Gartner methodology that does not equate size with financial stability. Response to external factors affecting the market and thought leadership across the market as a whole, customer experience and operations are also taken into consideration.

In this research, we measured the vendors' ability to execute by looking at:

- Critical product capabilities and support for third party and open source
- Financial viability, loss, retention and gain of customers, size of business
- Pricing relative to the competitors and the market, sales performance, and customer satisfaction with negotiation of pricing
- Response to external factors affecting the market as a whole, awareness of current factors and market trends
- Brand awareness among prospective buyers, web presence of brand beyond the vendor's website, and thought leadership across the market as a whole
- The most important reasons Gartner believes, and that customers indicate, are valuable for vendor selection, customer agility post-deployment, quality of product and professional services
- Allocation of staff across functional domains, such as support and R&D, efficacy of services and organizational structure

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Low
Market Responsiveness/Record	Low
Marketing Execution	Low

Evaluation Criteria ↓	Weighting ↓
Customer Experience	High
Operations	Medium

Source: Gartner (September 2019)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces and how well they map to Gartner's view of the market.

"Completeness of Vision" measures how well a vendor understands the insight engines market and develops marketing, sales and product strategy based on this understanding. Vendors are also rated on their vertical, industry and geographic strategies and innovation plans.

In this research, we measured the vendors' completeness of vision by looking at:

- Clarity on use cases served and relative priorities, buyer personas and their priorities, awareness of competitors and adjacent markets.
- Mature, achievable marketing plans that are designed to reach the identified prospect base, unique value proposition addressing the needs of buyers, consistency of value proposition throughout messaging.
- Channel strategies that reach prospective customers, impact of partner network on sales, direct sales to customers.
- Progress over the last year on the product's roadmap, principal points of differentiation from competitors in terms of features and functionality and how the product has evolved to gather and apply user data.
- A pricing model that is comprehensible, facilitate comparison and enables costs to be predicted reliably, flexibility in terms of deployment options and drivers and resistors to try, buy and ply.
- Distribution of customer base across industry verticals, product variants and distribution of staff across industry verticals.
- In-house expertise in AI-related capabilities, especially ML, NLP and graphs, participation within a wider digital ecosystem and incorporation of third-party functionality that can be commoditized for use in customer deployments; and distribution of staff across functional domains.

- Geographical reach beyond the country and region of HQ(s), the approach taken across sales, support and professional services and global distribution of customer base.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	Low
Innovation	Medium
Geographic Strategy	Low

Source: Gartner (September 2019)

Quadrant Descriptions

Leaders

Leaders demonstrate strong financial viability and market presence. They have solid products that offer advanced NLP capabilities to incorporate intent and broad architectural choices. They are well positioned to enable users to incorporate structured and unstructured data from multiple sources to generate insights. Their marketing is effective. They are innovators and they understand how to prepare for the market's directional shifts.

Challengers

Challengers are financially stable and can deliver their products effectively. They provide meaningful assurances of long-term viability. However, they do not have as strong a vision of the insight engines market's future as Leaders do, and their innovation strategy is not as robust. Their products are secure, have a broad range of features, and are effective.

Visionaries

Visionaries have innovated effectively to prepare for the next generation of expectations. They may not have the same financial resources as Leaders and Challengers, and their marketing efforts are not necessarily at a level that guarantees attention from their target customers. They have the ability to address the market's increasingly important requirements for natural language query models, personalization and proactivity.

Niche Players

Niche Players offer solid search capability. They may target particular markets, with a regional focus or a horizontal/vertical specialty, or they may address particular architectural use cases. In some cases, these vendors have exceptional perspectives on how to deliver insight engine capability. They do so in ways that not all prospective customers will recognize as valuable, but that some will value highly.

Context

This "Magic Quadrant for Insight Engines" is intended to help application leaders make vendor and product selection decisions. In this market, organizations will find vendors offering products and services to create solutions that provide a universal query engine across an enterprise's gamut of content and data, as well as relevant external sources.

Insight engines should not be treated as discrete, insular applications. Rather, they tap into, enhance and extend a wide variety of other data types, sources and systems. Thus, they are integral to an organization's digital ecosystem, which is complex, extensive and interconnected.

In this market, vendors and their insight engines share the following characteristics:

- **Leverage AI technologies** — They use AI technologies, including NLP, graphs and machine learning, to enrich their indexes of content/data and the queries run against them.
- **Extensile and customizable** — Although providing a "search" application by default, insight engines take a platform-oriented approach on which multiple custom-made applications can be built and tailored to an organization's specific use cases and constraints.
- **Flexible presentation of knowledge** — They offer a choice of touchpoints to data, with options reaching far beyond search query boxes to, for example, conversations with chatbots, rendering data as graphs, and in-application widgets.
- **Broad data access** — They connect to a range of content/data sources and content types (including rich media) to facilitate crawling and indexing of content.

They also vary in the following respects:

- **Deployment mode** — Although all vendors claim cloud, on-premises and hybrid deployment options, the functionality of some offerings is constrained when deployed on-premises, due to the use of multiple products or workarounds to extend the reach of cloud-centric products.
- **Support for rich-media content** — Products differ in their ability to index rich-media content, including images (using optical character recognition or other image-processing techniques), video and audio. Separate products or services — from the same vendor or a third party — may be required.
- **Pricing model** — Pricing models differ, with document count, level of functionality (including connectors to data sources), users and query levels being common dimensions.
- **Range of data sources** — Products differ in their ability to connect to, crawl and index content types across multiple data sources. The number and type of connectors available, who provides them, and their cost vary significantly from vendor to vendor.

Key findings:

- Insight engines represent an attractive solution for surfacing knowledge across the organization via natural language questioning.
- While insight engines can affect many key performance indicators in the organization, including customer and employee experience, the primary reason for adopting them is operational efficiency.
- Few customers deploy insight engines without the involvement of the vendor. Most deploy with the help of the vendor or the vendor plus a partner. Only one in five deploy alone or via a third party other than the vendor.
- On average, it takes approximately 9 people to deploy an insight engine and 6 to maintain it once deployed. In effect, the number of staff reduces by 70% from deployment to maintenance. This varies across vendors, products, clients and projects.
- Curiously, the ratio of internal to third-party (vendor/partner) people for both deployment and maintenance is consistent at 3 (internal) to 2 (third party).
- On-premises remains the dominant deployment architecture, although hybrid deployment has grown at the expense of cloud/SaaS-based deployment.
- It takes, on average, 12 months to select, install and deploy an insight engine. Nearly half of this time (6 months) is spent selecting the vendor/product. Installation takes around 3 months and deployment around 4 months. Most customers report that the duration of their insight engine project was as planned, although 3 in 10 reported longer durations; 1 in 10 shorter durations.

Recommendations:

For application leaders in charge of search and insight:

- Establish a baseline for comparison before undertaking an insight engine selection process by identifying the desired business outcomes and measures of success against your current situation.
- View insight engine approaches in the light of wider NLP and analytics efforts by identifying common language models and knowledge used elsewhere in the business. Begin by examining chatbot and text-mining initiatives and look to (a) harmonize language assets, and (b) explore using insight engines' as a fallback solution when chatbots have low confidence in answers.
- Gather requirements in the light of key stakeholders' business goals, users (end users, administrators, architects, developers and others) and the condition of their content (variety, type, language and so on) by working with key stakeholders from customer service and support, IT service management, sales, marketing and HR teams.
- Identify the opportunities for serving proactive knowledge by interviewing users of existing dashboards throughout the organization to identify knowledge push opportunities and information lacking in existing dashboards.
- Use this Magic Quadrant as one tool to help you select an insight engine vendor, but avoid relying on it exclusively. Your final selection criteria must reflect your organization's particular functional and technical requirements and business objectives. Do not, for example, select a Leader or reject a Niche Player simply on the basis of those labels. A vendor in any one of the four quadrants could be the best choice for your particular needs. An essential companion to this Magic Quadrant is "Critical Capabilities for Insight Engines." This provides deeper insight into providers' product and service offerings by extending the Magic Quadrant analysis. Application leaders should use this research to further investigate product and service ratings based on key capabilities set to important, differentiating use cases.

Market Overview

The market is changing in a number of ways. Several giants are waking up to this market's potential. Some vendors are stirring things up through product consolidations. Others are incorporating open-source software, partnering with vendors and service providers in the insight engines pipeline, and providing capabilities that are accessible to enterprise users.

Much of the functionality currently delivered is not differentiated between vendors, but there is considerable scope for differentiated execution in terms of marketing, sales and operations.

There is a strong emphasis on innovation and visionary roadmaps, as indicated by the positioning of many vendors to the right along the Completeness of Vision axis. Though many vendors are focusing on innovation, no single vendor is clearly innovating in a way that is extremely different from the others. In such a dynamic market, there is still room for vendors to differentiate themselves in ways that surpass their competitors in terms of both execution and vision.

Examining the vision of each vendor in this market reveals a number of trends, foremost of which are:

- **Natural language interfaces** — Many of the vendors in the market highlight their capability to accept queries in natural language. The capability to interface insight engines to chatbots, particularly in the context of workstream collaboration and virtual assistance, is highlighted by several vendors. However, few offer the capability to generate natural language answers, which remains nascent.
- **360 view** — Providing employees with all of the data that an enterprise holds on a particular entity — so called 360 views — is a recurring use case. This might be around a person (employee or customer), business or topic.
- **Artificial intelligence (AI)** — Machine learning (ML) is now key to natural language processing (NLP), with the majority of vendors making reference to hybrid approaches using word-embedding techniques such as Word2Vec and BERT. Knowledge graphs — entity-centric uses of graph technology — continue to feature strongly.
- **Recommendations** — Shifting user experiences from reactive and anonymous to proactive and personalized features strongly. As well as improving the indexing of content as data, AI is used to personify users and deliver recommendations in context.
- **Digital dexterity** — Making insight engines and the applications developed upon them easier to use in ways that boost employee's digital dexterity — the ability and desire to use digital technology — is addressed by many of the vendors in this market.
- **Automation** — A minority of vendors reference the link between insight engines and automation, specifically robotic process automation (RPA).
- **Open-source** — Of the vendors most often shortlisted by the reference customers we surveyed, Elastic (Elasticsearch) appears in the top five, and Apache (Solr) in the top 10. Neither Elasticsearch nor Solr are considered insight engines — extensive development is required for them to meet the market definition. However, they do provide highly effective search engines for those seeking only search capability or wishing to undertake development. Consequently, they form a foundational layer in the stacks of a number of commercial insight engines, including two in this Magic Quadrant: Solr for Lucidworks and Elasticsearch for IntraFind.

Acronym Key and Glossary Terms

AI	artificial intelligence
BI	business intelligence
BPaaS	business process as a service
CRM	customer relationship management
IaaS	infrastructure as a service
ML	machine learning
NLP	natural language processing
NLQA	natural language question answering
PaaS	platform as a service
RPA	robotic process automation
SaaS	software as a service

Evidence

Gartner's assessments and commentary in this Magic Quadrant draw on the following sources:

- Instruction manuals and documentation of selected vendors. We used these to verify insight engines' platform functionality.
- An online survey of vendors' reference customers. This survey elicited responses about the reference customers' experience with vendors' platforms. The list of survey participants derived from information supplied by the vendors.
- A questionnaire completed by the vendors.
- Vendor briefings, including product demonstrations, about individual vendors' strategy and operations.

- A prepared video demonstration of how well vendors’ data science and ML platforms address specific functionality requirements across the critical capabilities.
- Interactions between Gartner analysts and Gartner clients deciding their evaluation criteria, and Gartner clients’ opinions about how successfully vendors meet these criteria.

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.