

The Forrester Wave™: Cognitive Search, Q2 2019

The 12 Providers That Matter Most And How They Stack Up

by Mike Gualtieri

May 29, 2019

Why Read This Report

In our 24-criterion evaluation of cognitive search providers, we identified the 12 most significant ones — Attivio, Coveo, Elastic, Grazitti Interactive, IBM, IHS Markit, Lucidworks, Micro Focus, Microsoft, Mindbreeze, Sinequa, and Squirro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) pros select the right one for their needs.

Key Takeaways

Attivio, Coveo, Lucidworks, IBM, Sinequa, And Mindbreeze Lead The Pack

Forrester's research uncovered a market in which Attivio, Coveo, Lucidworks, IBM, Sinequa, and Mindbreeze are Leaders; Microsoft, Squirro, and Micro Focus are Strong Performers; and Grazitti Interactive, Elastic, and IHS Markit are Contenders.

AI And Architecture Are Key Differentiators

As legacy enterprise search technology becomes outdated and less effective, use of AI technologies such as natural language understanding will dictate which providers will lead the pack. Vendors that can provide ingestion intelligence and intent intelligence position themselves to deliver the most relevant search results to their customers.

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Cognitive Search Vendors Double Down On AI

Employees and customers have an insatiable need for information. Cognitive search delivers it. It augments employees' intelligence to help them make smarter decisions and complete tasks faster. It helps customers support themselves and find information about products and services. To deliver on this need for ubiquitous information, cognitive search must find a needle in a haystack every time a person initiates a query. Today, top cognitive search vendors use more and varied AI technologies, such as natural language understanding (NLU), machine learning (ML), and deep learning.¹ Because of these new technologies, cognitive search is attracting more enterprise buyers and making the market more competitive. As good as cognitive search is now, it is still day one. Vendors will continue to use AI technologies to boost information understanding and relevancy.

As a result of these trends, cognitive search enterprise customers should look for providers that:

- › **Understand and enrich enterprise data.** Enterprise data is rich, varied, and voluminous. Cognitive search platforms must not only connect to all the required data sources; they must also organize the data in a way that it can be found by queries. The classic method employed by traditional keyword search engines is to parse and index the data. Cognitive search platforms are different because they combine techniques that include indexing, text analytics, and AI technologies to make better sense of data. Another key difference is the stark contrast between data connectors and *ingestion intelligence*. Enterprises should look for cognitive search vendors that can explain the ingestion intelligence techniques they use to boost the relevancy and completeness of results, not just establish data connections.
- › **Predict users' intent to boost relevancy.** "Garbage in, garbage out" is apropos to cognitive search. People's queries can be cryptic and lack the contextual information needed to find the relevant information or answers. Cognitive search platforms employ *intent intelligence* to interpret a query based on its text, the context (such as the software application) in which the query is issued, and, ideally, an increasingly better understanding of the person making the query. The better the cognitive search platform understands the query, the better the results or answer will be. Enterprises should look for cognitive search vendors that use contextual and user models in addition to analyzing the text of the query.
- › **Include integrated tools for usage analytics, tuning, and app dev.** Use cases for cognitive search are not one-size-fits-all. They must be customized based on the kind of data that the use case requires to ingest, periodically tuned by administrators to boost relevancy, and embedded in applications used by employees and/or customers. Enterprises should look for cognitive search providers that offer out-of-the-box solutions that meet immediate requirements. However, it's highly likely that an enterprise will steadily increase the number of applications for cognitive search needed throughout the organization. Enterprises with multiple use cases should choose vendors that offer the richest set of tools to administer, tune, and customize specific applications of search.

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Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape.

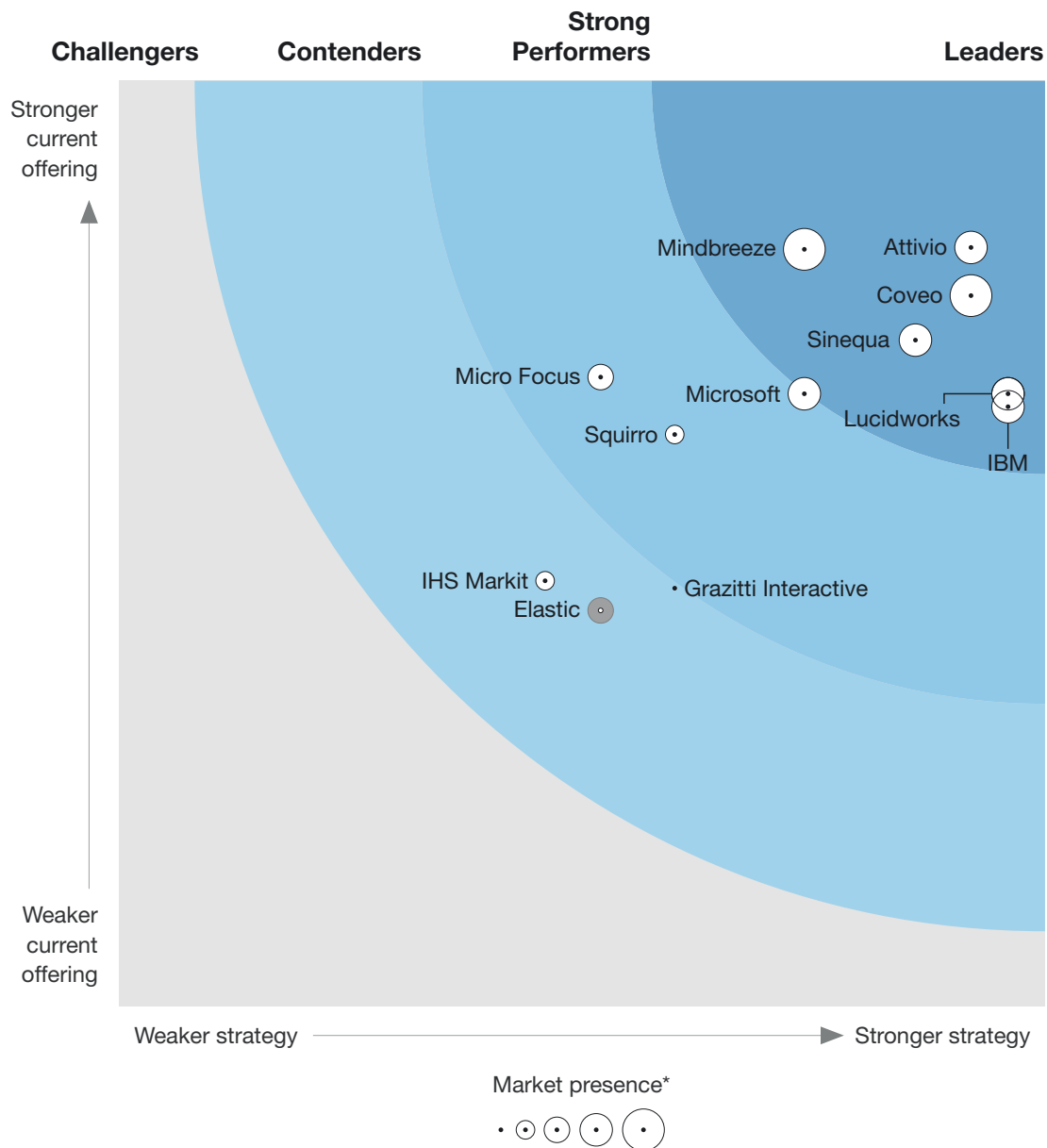
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: Cognitive Search, Q2 2019

THE FORRESTER WAVE™

Cognitive Search

Q2 2019



*A gray marker indicates incomplete vendor participation.

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FIGURE 2 Forrester Wave™: Cognitive Search Scorecard, Q2 2019

		Forrester's weighting	Attivio	Coveo	Elastic	Grazitti Interactive	IBM	IHS Markit	Lucidworks	Micro Focus	Microsoft	Mindbreeze	Sinequa	Squirro
Current offering		50%	4.10	3.84	2.14	2.26	3.24	2.30	3.31	3.40	3.31	4.09	3.60	3.09
Architecture		15%	4.30	3.60	2.90	1.70	2.90	2.30	3.70	2.30	1.70	3.60	3.00	3.60
Information		20%	5.00	4.00	2.00	2.00	4.00	3.00	3.00	5.00	3.00	5.00	5.00	3.00
Intelligence		20%	4.00	3.50	2.00	2.00	4.00	1.50	4.00	3.50	4.00	3.00	4.00	3.00
Operations		15%	4.00	4.00	2.00	3.00	4.00	3.00	4.00	4.00	3.00	4.00	4.00	3.00
Security		15%	3.00	4.00	2.00	3.00	3.00	2.00	1.00	2.00	4.00	5.00	3.00	1.00
Applications		15%	4.00	4.00	2.00	2.00	1.00	2.00	4.00	3.00	4.00	4.00	2.00	5.00
Strategy		50%	4.60	4.60	2.60	3.00	4.80	2.30	4.80	2.60	3.70	3.70	4.30	3.00
Ability to execute		25%	5.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00	5.00	5.00	5.00	3.00
Solution road map		25%	5.00	5.00	1.00	3.00	5.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00
Pricing transparency		10%	3.00	3.00	5.00	5.00	5.00	1.00	3.00	1.00	5.00	1.00	3.00	3.00
Customer service		15%	5.00	5.00	1.00	3.00	5.00	3.00	5.00	3.00	3.00	5.00	5.00	3.00
Partners		15%	5.00	5.00	3.00	3.00	5.00	1.00	5.00	3.00	3.00	5.00	3.00	3.00
Community		10%	3.00	3.00	5.00	1.00	3.00	1.00	5.00	1.00	3.00	1.00	3.00	3.00
Market presence		0%	3.60	4.40	2.40	1.00	3.60	1.80	3.60	2.40	3.80	4.40	3.60	1.60
Customer adoption		40%	3.00	5.00	3.00	1.00	3.00	3.00	3.00	3.00	5.00	5.00	3.00	1.00
Evaluated product revenue		30%	3.00	3.00	1.00	1.00	3.00	1.00	3.00	3.00	3.00	3.00	3.00	1.00
Market awareness		30%	5.00	5.00	3.00	1.00	5.00	1.00	5.00	1.00	3.00	5.00	5.00	3.00

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Vendor Offerings

Forrester included 12 vendors in this assessment: Attivio, Coveo, Elastic, Grazitti Interactive, IBM, IHS Markit, Lucidworks, Micro Focus, Microsoft, Mindbreeze, Sinequa, and Squirro (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Attivio	The Attivio Platform	5.5
Coveo	Coveo AI-powered Search and Recommendations	Available as a SaaS platform. Evaluated as of March 7, 2019.
Elastic	Elastic App Search Service; Elastic Site Search Service	Evaluated as of March 7, 2019.
Grazitti Interactive	SearchUnify	Mamba 2018
IBM	IBM Watson Discovery	Available as a SaaS offering on a continuous release basis. As of March 7, 2019, the current release is February 28, 2019.
IHS Markit	Goldfire	11.0
Lucidworks	Lucidworks Fusion	4.2
Micro Focus	IDOL	12.2
Microsoft	Azure Search (for developers); Microsoft Search (for information workers)	Evaluated as of March 7, 2019.
Mindbreeze	Mindbreeze InSpire	2019 Winter Release
Sinequa	Sinequa	V11
Squirro	Squirro Cognitive Search	2.6.3

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Attivio enriches every touchpoint with exceptional tuning.** Attivio's cognitive search solution is comprehensive and customizable for the world's most challenging use cases. The company accomplishes this by investing relentlessly in customization tools for both the data ingestion pipeline and tuning tools to augment its library of sophisticated NLU analytics. In 2018, Attivio launched Elevate, a suite of applications based on its cognitive search technology for IT service management, customer service management, and HR. A new partnership with ServiceNow should help the company dramatically boost adoption of its cognitive service-powered applications. Customers include Avaya, Bank of America, and New York Life.

Enterprise customers can take advantage of Attivio's prebuilt solutions to quickly attain the benefits of cognitive search. For custom and more complex cognitive search applications, Attivio's platform has all the knobs and dials necessary to create a bespoke search application with strong capabilities in scalability, data connectors, data ingestion intelligence, intent intelligence, and tuning. Enterprise customers can deploy Attivio on-premises or in a public cloud.

- › **Coveo makes business personal.** Relevancy is the cognitive grail of search. Coveo offers enterprise customers relevancy through a comprehensive portfolio of cognitive search products and industry solutions. Enterprises can take immediate advantage of Coveo's cognitive search capabilities by using prebuilt applications, such as customer self-service, customer communities, in-product intelligence, and many more. Coveo has also embedded cognitive search for Salesforce, ServiceNow, Sitecore, and Microsoft Dynamics 365. Plus, the company has horizontal solutions for commerce, service, and workplace. Coveo customers include Formica, Medallia, Sanford Health, and Xero.

Coveo offers strengths in data connectors, data ingestion intelligence, and tuning. Customers will find Coveo attractive for multiple enterprise scenarios, including software-as-a-service (SaaS) applications, custom search, and everything in between. The company offers its cognitive search solution as a managed cloud service and on-premises.

- › **Lucidworks rocks open source, exponentially.** Lucidworks is the company behind Apache Solr, the well-known open source search platform. The company uses Solr as its solid open source foundation for its commercial Fusion product; Fusion turns Solr into a comprehensive enterprise cognitive search solution. In 2018, Lucidworks announced \$50 million in growth financing to expand the company's enterprise offerings.² Lucidworks Fusion customers include Commvault, Moody's, Reddit, Red Hat, and the US Census Bureau.

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Lucidworks Fusion offers strengths in scalability, tuning, and tools for building customer search applications. The Fusion App Studio developer tool helps customers build custom, integrated applications that center on search. Enterprise customers that gravitate toward open source solutions will find that Fusion adds significant value above and beyond Apache Solr.

- › **IBM brings experts in the loop to augment human intelligence.** As good as AI-powered search has become, it still could use a little help from human friends to become even smarter. IBM's approach to cognitive search is to bring its core search technology, Watson Discovery, together with its human-assisted training tool, Watson Knowledge Studio. Knowledge Studio allows human experts to boost IBM's exceptional NLU technology by providing them with tools to help the NLU understand specific business domains. IBM positions Watson Discovery as an AI-powered search engine that specializes in extracting answers from complex business documents. Customers can use Watson Assistant to add a conversational interface to any application. IBM Watson Discovery and Watson Knowledge Studio customers include Gordon Flesch, Prudential Assurance, U.S. Bank, and Woodside.

IBM has strengths in data ingestion intelligence, intent intelligence, relevancy intelligence, and tuning tools. Watson Discovery and Watson Knowledge Studio have unique capabilities but are not currently packaged as a single product. Watson Discovery is a highly capable cognitive search solution on its own. However, customers should only invest in Watson Knowledge Studio if they need a deeper understanding of content and have subject matter experts who have the time to improve the NLU model.

- › **Sinequa augments intelligence en masse.** Sinequa's goal is to help organizations become "information driven" by augmenting the intelligence of every employee. The company accomplishes this by surfacing knowledge, uncovering insights, and connecting experts via its cognitive search technology. Sinequa expertly balances using its own NLU technology in combination with the latest open source ML technology. It has significant industry expertise in and offers solutions for life sciences, financial services, and manufacturing. Its customers include Alstom, Navy Federal Credit Union, Pfizer, and U.S. Bank.

Sinequa's strengths are in data connectors, ingestion intelligence, intent intelligence, and tuning tools. Customers that have complex, high-value cognitive search applications will appreciate the depth and breadth of Sinequa's ingestion intelligence. Sinequa's strong road map includes leveraging the latest open source AI technologies.

- › **Mindbreeze makes implementation simple, without compromise.** Mindbreeze InSpire is the only cognitive search solution in this evaluation that offers an appliance for on-premises and SaaS for cloud deployments. The company has expanded dramatically since Google discontinued its Google Search Appliance (GSA); many customers migrated to Mindbreeze InSpire because the appliance form factor was what they were used to with GSA. As an Austrian company, Mindbreeze continues to have a strong presence in the European market, but it has successfully expanded in

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North America by forging strong partnerships with Dell to build its appliance and several systems integrators to implement and support customers. Mindbreeze customers include Freddie Mac, Lufthansa, T-Systems, and the US Food and Drug Administration.

Mindbreeze InSpire is a natural fit for enterprise customers that wish for the simplicity of a cognitive search solution bundled in a hardware appliance, especially where a cloud implementation is not desired. However, its well-rounded capabilities in enterprise data connectors, data ingestion intelligence, and tuning tools are also attractive. Mindbreeze has leading data security capabilities, backed by third-party audits. It is one of the few companies in this evaluation that offer a visual search application builder tool designed for nonprogrammers such as business users to design and build custom search user interfaces.

Strong Performers

- › **Microsoft empowers developers to sprinkle search into any application.** Microsoft has been steadily pumping out new AI/ML technologies that make information processing and retrieval faster and smarter. The company leverages that expertise to offer cognitive search directly in Office 365, and it offers Azure Search as a managed cloud service that app developers can use to embed cognitive search in custom applications. Microsoft Azure Search customers include Autotrader, NBC Sports, and Real Madrid.

Enterprise developers who use Azure Search benefit from the simplicity and scalability of Microsoft Azure and continued advances in Microsoft's world-class AI technology. Microsoft needs to offer tuning tools and better usage analytics to make the product more attractive to nondevelopers.

- › **Squirro makes SaaS applications more clever, immediately.** Squirro's strategy is to use its core cognitive search solution for multiple prebuilt use cases spanning customer insights, service insights, and risk insights, and it is also available as an embedded Salesforce search service. Additionally, the company offers industry-specific cognitive search solutions for banking, finance, insurance, and manufacturing. Squirro customers include ABB, ING, and Sony.

Squirro has strengths in scalability and prebuilt applications. Customers can get up and running quickly with Squirro's cloud-based service, but it also offers on-premises deployments. Squirro can fill gaps by furthering its capabilities in intent intelligence and tuning tools. Squirro is one of the most affordable cognitive search solutions, with subscription pricing that starts at under \$100 per month for 100,000 documents and 200,000 API calls. The company also offers three levels of global support and packaged implementation services.

- › **Micro Focus is still the king of all media.** Micro Focus acquired IDOL, its cognitive search solution, from Hewlett Packard Enterprise (HPE) in 2017.³ It is the only vendor in this evaluation whose cognitive search solution has comprehensive video search capabilities in addition to text-based cognitive search. To wit, IDOL's clients include media and government intelligence agencies that must search both text and media content (video and audio). Micro Focus IDOL customers include Beijing Future Advertising, Quest Diagnostics, and RTVE.

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Micro Focus' strengths are in data ingestion intelligence, relevancy intelligence, and tuning tools. It also has a vast library of analytics for text, speech, and video that is second to none in the cognitive search market. Additionally, Micro Focus offers a prebuilt search application for virtual assistants and for what it calls "open source intelligence" to uncover trends, patterns, and relationships from broadcasts, social media, websites, and virtually any openly available content from video, images, audio, and text data. An opportunity for Micro Focus is to infuse its vast portfolio of software with IDOL cognitive search and/or boost its marketing and sales efforts so that IDOL becomes better known by enterprise buyers.

Contenders

- › **Grazitti Interactive offers cognitive search to unify digital data.** Grazitti Interactive is a global consultancy focused on helping clients leverage digital platforms such as Adobe, Marketo, Power BI, Salesforce, ServiceNow, Tableau, and others. Seeing a gap in its clients' ability to easily find content from an increasing number of digital platforms, the company launched SearchUnify in 2016. SearchUnify offers connectors for popular SaaS platforms including Box, Dynamics 365, GitHub, Jira, Lithium, Madcap Flare, Marketo, Salesforce, Slack, and Zendesk — for both cloud and on-prem data sources. Its virtual agent leverages search technology to answer conversational questions. SearchUnify is the youngest product in this evaluation. SearchUnify customers include Rubrik, Vlocity, and Zuora.

SearchUnify has a well-thought-out technical architecture that should enable the company to fill gaps in data ingestion, tuning, and tools to build custom applications. Customers will find SearchUnify simple and easy to implement if they require unified search across SaaS applications for which it has data connectors.

- › **Elastic's cloud-based search services focus on making developers quick studies.** Elastic is the company driving the Elasticsearch open source search technology. It is best known for the highly popular "Elastic Stack" — Elasticsearch, Kibana, Beats, and Logstash — to explore, analyze, and search data at scale. In this evaluation, Forrester specifically evaluated Elastic App Search Service and Elastic Site Search Service, which are cloud-based services that offer developers an easy-to-embed search engine for websites and/or applications. Elastic customers include CBS, Okta, and Shopify.

Elastic App Search and Elastic Site Search are ideal for developers, including enterprise developers, who wish to quickly embed search in web or mobile applications. It includes client APIs for Ruby, Java, Python, Node.js, and JavaScript. These are offered as cloud-based services, so developers use them almost instantly by creating an online account. Once implemented, business users can use a management dashboard to tune relevancy. Pricing starts at \$49 per month for up to 50,000 documents and 500,000 API calls. Elastic declined to participate in our research.

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- › **IHS Markit's Goldfire offers cognitive search for capital-intensive industries.** The alchemy of industry data and enterprise data is more powerful together than separate. IHS Markit's primary business is to provide enterprises with intelligence across a wide set of capital-intensive industries. Goldfire, its cognitive search solution, manages enterprise data and gives customers out-of-the-box access to industry data through curated content, including patents, technical journals, and articles. Goldfire customers include Airbus, Cummins, and NASA.

Goldfire cognitive search is ideal for enterprises that wish to augment the intelligence and efficiency of their engineering organization by combining industry standards with their own enterprise data. IHS Markit can be more competitive in the cognitive search market by increasing its use of AI technologies for data ingestion intelligence and relevancy.

Evaluation Overview

We evaluated vendors against 24 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include scalability, data connectors, ingestion intelligence, results relevancy, automated and manual tuning, custom app dev tools, and security.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated their ability to execute, solution road map, pricing transparency, customer service, and partners.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customer adoption, evaluated product revenue, and market awareness.

Vendor Inclusion Criteria

Forrester included 12 vendors in the assessment: Attivio, Coveo, Elastic, Grazitti Interactive, IBM, IHS Markit, Lucidworks, Micro Focus, Microsoft, Mindbreeze, Sinequa, and Squirro. Each of these vendors has:

- › **A comprehensive, differentiated cognitive search solution.** The vendors included in the evaluation must offer a digital search technology solution that provides capabilities for data ingestion, indexing, and use AI technologies such as machine learning and others. If based on open source, the solution must include differentiated features attractive to large enterprises. The solution should also offer tools to manage the solution, tune relevancy, and build custom human interfaces with visual development tools, APIs, and/or a software development kit.

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- › **A standalone cognitive search solution that supports multiple use cases.** Forrester included only solutions that are marketed toward enterprises and support multiple use cases and business solutions. For example, vendors that offer only eCommerce product search are not included in the evaluation. In addition, cognitive search solutions that Forrester deems to be offered as an embedded capability in other applications are not included.
- › **Install base and revenue requirements.** The vendor must have at least 10 paying, named enterprise customers using the cognitive search solution. The vendors needed to provide Forrester with three customer references who were able to complete an online survey and, as applicable, were not previously provided in the 2017 Forrester Wave evaluation.⁴ Included vendors must also have a proven stream of revenue generated by customer adoption of the vendor's cognitive search solution.
- › **Sparked client inquiries and/or has technologies that put the vendor on our radar.** Forrester clients often discuss the vendors and products through inquiries; alternatively, the vendor may, in Forrester's judgment, warrant inclusion or exclusion in this evaluation because of technology trends, market presence, or lack of client interest.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by March 7, 2019, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

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Endnotes

- ¹ See the Forrester report “[The Future Of Machine Learning Is Unstoppable](#).”
- ² Source: Andy Wibbels, “Lucidworks Announces \$50M in Growth Financing,” Lucidworks blog, May 3, 2018 (<https://lucidworks.com/2018/05/03/lucidworks-announces-50m-in-growth-financing/>).
- ³ Source: “Micro Focus Completes Merger with HPE Software Business, Creating One of World’s Largest Pure-play Software Companies,” Micro Focus press release, September 1, 2017 (<https://www.microfocus.com/about/press-room/article/2017/micro-focus-completes-merger-with-hpe-software/#>).
- ⁴ See the Forrester report “[The Forrester Wave™: Cognitive Search And Knowledge Discovery Solutions, Q2 2017 \(Updated\)](#).”

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