WAVE REPORT

The Forrester Wave™: Cognitive Search Platforms, Q4 2023

The 14 Providers That Matter Most And How They Stack Up

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FORRESTER®

Summary

In our 27-criterion evaluation of cognitive search platforms providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps search teams, knowledge management professionals, and a growing array of application development professionals select the right one for their needs.

Additional resources are available in the online version of this report.

Cognitive Search's Evolution Is Driving Toward Radical Transformation

The cognitive search market has seen a surge in interest this past year driven by generative AI (genAI). Cognitive search platforms are one of the few places where the technologies that underly genAI applications, such as large language models (LLMs) and vector databases, were being used and deployed prior to the release of ChatGPT. With ChatGPT, the door to the art of the possible was thrown wide open and has led to an explosion in demand from the customer and user side. Customers are asking for search-driven applications embedded everywhere — even if they don't always know it. Additionally, an increasing array of vendors who weren't previously in the cognitive search market are rebranding themselves. Cognitive search has an opportunity to enter a golden age with renewed interest from buyers injecting more interest and investment into providers who can radically transform to provide more consumable, comprehensible, and useful knowledge from search.

As new providers enter the space, buyers should be careful when making their selections as there is much more to search than simply providing a query box and set of results or being able to use an LLM to interact with a single PDF (as hyped by genAI). All the vendors in this Wave go far beyond those capabilities to provide valuable platforms that efficiently empower the most valuable enterprise resource: knowledge. Discerning buyers of cognitive search platforms should seek offerings that:

- **Provide a composite approach to indexing and searching.** The breadth of approaches to indexing and finding information for cognitive search is expanding. The introduction of natural language processing (NLP), vector databases, LLMs, and knowledge graphs enables organizations to choose the search approach that makes the most sense for their context. Lexical and keyword search are still a critical part of a complete cognitive search platform, as some use cases like legal discovery demand the precise results they provide.

- **Enable the deep understanding of user intent and relevancy of data.** Delivering the right knowledge to the right user at the right time involves many capabilities adjacent to core search functionality. Cognitive search platforms understand both static and dynamic aspects of a user — such as their job function and security access, or their physical location and most recent five searches — to understand their intent and help shape the search query. These platforms retrieve and deliver the most relevant content back to the user in the way that is most useful to them, not just a list of results but graphs, timelines, and increasingly, chat interactions, narratives, and summarizations of content.

- **Offer strong data pipelines and robust connectors to a wide variety of data sources.** Cognitive search platforms need to reach data stored all over enterprises in a huge variety of formats and systems. Some providers put a strong emphasis on developing robust connectors for specialized data needs of industries like pharmaceuticals, healthcare, and manufacturing, while others may focus more on specific enterprise ecosystems like connectors for customer relationship management (CRM) applications. Connectors are not all created equal, and buyers must understand the degree of granularity and data that must be indexed to plan for the degree of custom development needed in this area.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in The Cognitive Search Platforms Landscape, Q3 2023.

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 Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.

Figure 1
Forrester Wave™: Cognitive Search Platforms, Q4 2023

THE FORRESTER WAVE™
Cognitive Search Platforms

Q4 2023

Figure 2
Forrester Wave™: Cognitive Search Platforms Scorecard, Q4 2023

	Forrester's weighting	Algolia	Amazon Web Services*	Coveo	Elastic	Glean Technologies	IntraFind	Kore.ai
Current offering	50%	2.79	1.63	3.47	3.16	2.16	2.75	3.20
Data	15%	3.00	2.00	4.00	3.00	2.40	3.00	3.00
Intelligence	15%	3.00	2.00	4.00	3.00	4.00	3.00	3.50
Development	15%	3.00	2.50	3.00	3.00	1.50	2.50	3.00
End user	15%	3.00	1.00	2.00	4.00	1.00	2.00	3.00
Scope	15%	1.00	0.50	4.00	1.00	1.00	2.00	3.00
Operations	10%	3.00	2.50	5.00	4.00	2.50	3.00	3.00
Architecture	15%	3.60	1.20	2.80	4.40	2.80	3.80	3.80
Strategy	50%	2.20	2.60	4.10	2.90	2.50	2.70	3.20
Vision	25%	1.00	3.00	5.00	3.00	1.00	5.00	3.00
Innovation	20%	1.00	3.00	3.00	3.00	3.00	1.00	3.00
Roadmap	25%	3.00	3.00	5.00	3.00	3.00	3.00	3.00
Partner ecosystem	10%	5.00	3.00	3.00	3.00	1.00	3.00	3.00
Adoption	15%	3.00	1.00	3.00	3.00	5.00	1.00	5.00
Pricing flexibility and transparency	5%	1.00	1.00	5.00	1.00	1.00	1.00	1.00
Market presence	0%	5.00	3.00	4.50	5.00	2.00	2.50	2.50
Revenue	50%	5.00	3.00	5.00	5.00	1.00	1.00	1.00
Number of customers	50%	5.00	3.00	4.00	5.00	3.00	4.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).
*Indicates a nonparticipating vendor

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	Forrester's weighting	Lucidworks	Microsoft*	Mindbreeze	OpenText	Sinequa	Squirro	Yext
Current offering	50%	3.18	2.28	3.71	4.43	3.92	3.12	2.31
Data	15%	3.60	2.40	3.40	4.00	5.00	2.60	2.00
Intelligence	15%	3.00	2.50	3.50	4.00	3.50	4.00	3.00
Development	15%	3.00	2.50	3.00	4.50	3.50	4.50	4.50
End user	15%	3.00	2.00	4.00	5.00	3.00	3.00	1.00
Scope	15%	3.00	2.00	4.00	5.00	4.00	2.00	2.00
Operations	10%	3.00	3.00	4.50	3.00	5.00	2.50	2.50
Architecture	15%	3.60	1.80	3.80	5.00	3.80	3.00	1.20
Strategy	50%	3.90	3.10	2.90	2.20	3.60	3.70	1.90
Vision	25%	5.00	3.00	3.00	1.00	3.00	5.00	3.00
Innovation	20%	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Roadmap	25%	3.00	3.00	3.00	3.00	5.00	3.00	1.00
Partner ecosystem	10%	3.00	5.00	3.00	3.00	5.00	3.00	1.00
Adoption	15%	3.00	3.00	3.00	1.00	3.00	5.00	1.00
Pricing flexibility and transparency	5%	3.00	1.00	1.00	3.00	1.00	1.00	1.00
Market presence	0%	3.00	3.00	4.00	3.50	3.00	1.00	4.00
Revenue	50%	3.00	3.00	3.00	3.00	3.00	1.00	3.00
Number of customers	50%	3.00	3.00	5.00	4.00	3.00	1.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).
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Vendor Offerings

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Algolia	Algolia Search and Discovery Platform	Algolia Platform 2023
Amazon Web Services	Kendra	N/A
Coveo	Coveo Relvance Cloud	N/A
Elastic	Elastic Enterprise Search	8.10
Glean Technologies	Glean	N/A
IntraFind	iFinder	5.7
Kore.ai	Kore.ai SearchAssist	v1.2
Lucidworks	Lucidworks Fusion	Lucidworks Fusion 5.9
Microsoft	Cognitive Search	N/A
Mindbreeze	Mindbreeze InSpire	Version 23.5
OpenText	IDOL	23.3
Sinequa	Sinequa Search Cloud	11.1
Squirro	Squirro Cognitive Search	N/A
Yext	Yext Search	Yext Search

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Vendor Profiles

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

Leaders

- **Coveo uses advanced understanding of intent and relevance to deliver knowledge.** Coveo's cognitive search platform continues to evolve to incorporate more advanced hybrid search capabilities, building upon its strengths in intent and relevance. Its vision to provide a platform emphasizing support for business users while also increasing the breadth of application integrations with platforms like Salesforce, ServiceNow, and Snowflake will keep the platform competitive. The

focus on so many service- and commerce-related cognitive search use cases can come at the cost of appealing to more specialized markets. Coveo's superior product roadmap will attack key issues that prevent successful use of LLMs for search — namely sourcing and citing of the information provided. The roadmap will continue to introduce deep integrations with popular enterprise applications for service, support, and sales.

Coveo offers strong capabilities in understanding user intent at query time and following through with highly relevant search results. The platform can ingest and understand a wide range of content, including analyzing the content of images and video. Coveo must continue to focus on expanding its capabilities for parsing and snippeting content to support additional future retrieval-augmented generation (RAG) use cases, as well as its hybrid search approach to include additional methods of submitting queries (e.g., images) and other approaches to indexing beyond vector databases. Reference customers like Coveo's analytics and machine learning capabilities and its genAI roadmap, but also noted challenges around vendor support of certain data connectors. Coveo is a good choice for firms that want powerful automated relevancy tuning along with rich analytics that drive rich search experiences.

- **Sinequa brings the power of search and genAI to even esoteric enterprise data.** Sinequa provides advanced cognitive search for industries with complex data demands. Its strategy is to focus on core differentiators: specialized data sources and complex data relationships. Sinequa continues to build on its existing innovation advantage (being one of the first to include LLMs in search) by leveraging LLMs and advanced technologies to provide deeper and more contextual search experiences. This provides tailwinds for both innovation and implementation work with customers. Although an early entrant in the neural search market, Sinequa must keep an eye on other methods of indexing to maintain a competitive edge, e.g., knowledge graphs. Its superior roadmap has enhancements to AI capabilities: leveraging multimodal models and embeddings, developer tools to manage and orchestrate models, and investment in core functionalities like maintenance and expansion of connector offerings.

  Sinequa has a variety of data connectors for many enterprise systems, including specialized data types, models, and industries. Its platform can ingest a variety of content and natively leverages LLMs to snippet and chunk content for vector search. Sinequa has strong capabilities for delivering query and results, but must continue to build upon these to keep pace with the market. Reference customers

like Sinequa's strong NLP, variety of prebuilt connectors, data ingestion capabilities, and customer-centric approach to innovation. Sinequa is a good fit for large enterprises that have a variety of different data types, especially specific data demands such as pharma and manufacturing, and that want to deliver a highly contextual search experience that brings those data types together in multimodal results.

Strong Performers

- **Lucidworks' strong platform appeals to business users and application developers.** Lucidworks Fusion provides a clean enterprise wrapper to a highly customizable search experience built on an open-source foundation. Lucidworks' superior strategy is to offer enterprises a high quality and customized search platform that can be leveraged both by developers and business users to deliver complex search applications. The vision for the future is to infuse search as a power that underlies any application. Lucidworks needs to aggressively move forward with its integration of LLM-supported capabilities in order to meet accelerating customer demands in this area. Lucidworks' product roadmap includes a focus on improving and simplifying its user experience in addition to a range of enhancements to its core platform's lexical and vector search capabilities.

  Lucidworks offers strong capabilities in its wide array of data connectors, enterprise security capabilities, scalability, and search analytics. Lucidworks needs to focus on expanding its array of search methods — the lexical-vector hybrid approach is solid today but Lucidworks will need to fold in additional capabilities such as a knowledge graphs and additional localization in order to remain competitive. Reference customers like how Lucidworks fosters a close partnership with them, but also noted the need for internal resources to maximize success of the platform. Lucidworks is a good choice for large enterprises who want to build a highly customizable search solution that can support robust internal- and external-facing search experiences.

- **Squirro builds an AI/ML platform with a search focus but has a long way to go.** Squirro has a strong vision for becoming an AI/ML platform with a search focus. However, this endeavor will take a lot of work, and given Squirro's relatively slow growth over recent years, it remains to be seen whether it stays an important player in this market. Squirro's roadmap includes providing deeper feedback loops to further refine its data pipelines and improving its understanding of documents to provide relevant and useful results. While Squirro has struggled to see significant growth in recent years, customer interest in genAI has significantly

accelerated adoption in the past year.

Squirro offers strong capabilities in its core search method approach by automatically bringing customer data into all relevant indexes and supporting that with solid features for understanding user intent and automatically tuning relevancy. Squirro has significant work to do in expanding its features around its manual tuning and content ingestion capabilities in order to grow and serve a wider variety of enterprise customers. Reference customers like the high-touch engagement from the vendor to ensure their success. Squirro is a good fit for companies who want to build a powerful and flexible search experience for core use cases with focused data sets.

- **OpenText has a cornucopia of multimodal search tools but must expand usability.** OpenText's IDOL platform has been around the block a few times, with a series of acquisitions over the past decade, landing this year in OpenText. IDOL is one of the most robust and complex platforms for handling myriad content types and managing knowledge. OpenText's grand vision is to bring IDOL capabilities to all OpenText offerings, embedding the power of cognitive search wherever possible, a substantial engineering challenge. But it remains to be seen whether this vision will successfully manifest in the product. For now, the IDOL platform has earned decades of customer loyalty from buyers, though it's struggling to grow significantly in the market. IDOL's product roadmap comprises a range of capabilities supporting LLM-based search, including sourcing and attribution of results, and leveraging multimodal LLMs into its search experiences.

  OpenText offers powerful capabilities for ingesting and understanding a wide array of different content and data types, including multimedia content types. The platform is heavily customizable by developers who can leverage its powerful query understanding and results delivery capabilities for end users. OpenText must invest in making the platform more abstracted and usable for less technical users to take full advantage of the platform's capabilities. This will allow OpenText to take advantage of the growing array of enterprise users with limited technical capabilities who are now coming to search. Reference customers like IDOL's wide set of data connectors and the flexibility of platform customization, and noted that formal training in the platform is important for success. IDOL is a good fit for customers who want one of the most extensive search toolboxes, but must be prepared to have some good builders on hand to achieve success with this complexity.

- **Mindbreeze offers a solid and secure platform and must capitalize on it with genAI.** Mindbreeze has built a strong basis of customers in the search market with their product InSpire over the past decade and a half. It benefitted from migrating Google Search Appliance customers from site search to full cognitive search customers. Mindbreeze's emphasis on secure and accurate search provided trust for enterprise search applications, helping it expand its customer base. US federal agency certifications position Mindbreeze to be attractive to government buyers. While Mindbreeze is expanding its external partner ecosystem, it's also investing heavily in its Business Decision Insights ecosystem to accelerate customer application implementation, including acquiring search solution companies. This approach will enable it to deliver some advanced business applications more quickly, but may also distract from the primary focus of enhancing InSpire. Mindbreeze's product roadmap includes the integration of LLMs for delivering RAG and other LLM-based search experiences, and natively snippeting and summarizing content.

  Mindbreeze offers powerful capabilities for deploying search in hybrid environments, ensuring secure and reliable delivery of the most relevant results. The platform offers a range of applications to help enterprises spin up search projects quickly. However, capabilities for snippeting and RAG searches must continue to improve to keep pace with a quickly changing market. Reference customers like that the vendor updates the product consistently and the ability to deploy search across many data sources. Mindbreeze is a good fit for companies who want to build a safe and secure search, but buyers should know that professional services or training will be needed to get the most out of the platform.

- **Kore.ai enables knowledge workers but needs to connect more content.** Kore.ai's strategy is to deliver a world-class search experience that answers any question employees or customers may have from the enterprise knowledge base. Its focus has been on adoption at large enterprises. Kore.ai is working to abstract the complexity of the platform to increase adoption with less technical users. Kore.ai's roadmap includes deepening its capabilities for personalizing and contextualizing search queries and results. Additionally, the platform plans to incorporate more advanced capabilities for orchestrating and managing multiple LLMs.

  Kore.ai has strong capabilities to understand user intent using a variety of data and context inputs to help drive the best query and to deliver results. The platform has solid capabilities for ingesting content and snippeting it down into usable chunks

for advanced vector search. Kore.ai needs to continue to build more connectors for specialized domains and to broaden its capabilities for multimedia content ingestion and search in order to differentiate itself further in this market. Reference customers have recently chosen the platform specifically for its LLM capabilities as part of its broader enterprise ecosystem. Kore.ai is a good fit for companies who want to build cognitive search solutions for knowledge workers or for scenarios where direct answers are needed.

- **Elastic gives scalable power to search developers but must speed up time to value.** Elastic continues to invest beyond its open-source foundation, helping to expand further into the world of hybrid search and capitalizing on enabling a broad swath of customers, not only enterprises. It's putting the pedal to the metal in embracing genAI for developers, releasing support for LangChain in mid-2023. But even with this early push, Elastic must continue to invest heavily in R&D to keep pace with competitors. Elastic's roadmap shows plans to continue developing capabilities for developers to build search solutions supported by LLMs, vector search, and lexical search. It plans to expand the platform's broader AI/ML capabilities through further integration with data science notebooks.

  The core Elastic platform offers strong security, including many different certifications and data protection standards. Elastic has solid native capabilities for data ingestions and content understanding capabilities. It offers powerful tooling to extend and build upon the platform's core offering. Elastic needs continued focus on building better business administration capabilities and abstractions in its platform to make its flexibility and power more accessible to less technical users. Reference customers like Elastic's open and flexible nature and the platform's ability to extend beyond search into other operational areas like security and observability, but noted that other buyers should be attentive to managing infrastructure cost when self-hosting. Elastic is a good fit for companies who want to build a hybrid search experience on a flexible foundation, either using their own internal resources or working with a partner to customize the platform to their business needs.

- **IntraFind delivers deep search in complex industries but must increase innovation.** IntraFind has more than two decades in enterprise search and a wealth of experience driving better knowledge delivery within its core industries: government and manufacturing. IntraFind's strategy to go deep on specific industries to build out complex implementations will be appealing to its customer base, along with its focus on building out broader model monitoring and support capabilities. IntraFind needs to increase its innovation in delivering native search

capabilities in more data formats and deliver a smoother search builder experience for non-technical users to keep up with competitors and fend off adjacent providers who are encroaching into the search space. IntraFind's roadmap includes evolving more capabilities into their single platform with a composable architecture for building enterprise AI applications focused on search and knowledge retrieval and to add capabilities for data scientists to train and deploy models directly within the platform using their notebook of choice.

IntraFind has a solid platform across many key areas including data ingestion, connectors, intent, and relevancy tuning. It offers extensive security capabilities with many certifications for different data types and environments. IntraFind must expand its capabilities to help enterprises take advantage of multiple indexing and search methods as well as the methods by which users can submit a query (beyond text) in order to remain competitive. Reference customers like IntraFind for its connectors and ability to integrate different data sources into search. IntraFind is appealing to customers who want to deploy an extensible search solution that can run both on-premises and in the cloud, particularly those in government and manufacturing.

- **Microsoft can deliver next-gen search but must expand the ecosystem.** Microsoft's cognitive search API is part of Azure's cognitive services and enables enterprises to natively leverage their Microsoft content in advanced search experiences. Microsoft is expanding its cognitive search capabilities through its close partnership with OpenAI to provide embeddings and support RAG-based search applications. This strategy will likely result in a greater adoption of the cognitive search API, but Microsoft will need to help customers understand how to best bring together the Cognitive Search API with OpenAI services. Products like the Azure AI studio (where simple RAG application can be built) could also confuse users. Microsoft's roadmap includes making the platform more comprehensive and leveraging LLMs in search. However, it needs to continue to expand on first-party connectors in order to be a preferred platform for use cases with esoteric data needs.

Microsoft offers solid capabilities in ingesting, chunking, and snippeting content, as well as leveraging multiple different search methods — lexical, vector, and knowledge graph — to deliver the most relevant results to the user. Microsoft's current offering lacks a wide variety of data connectors, particularly for more specialized enterprise data sources. It also doesn't offer a wide range of modalities for displaying search results. Microsoft's Cognitive Search offering is a

good fit for users of the Azure platform who want to build search experiences within the Microsoft ecosystem that can leverage the power of genAI. Microsoft declined to participate in the full Forrester Wave evaluation process.

Contenders

- **Algolia offers powerful cloud-based search but must expand localization and apps.** Algolia offers a cloud-based search platform focused on delivering search applications that handle high query volumes and high availability. Algolia's strategy of building out its own internal platform as a developer-oriented API with strong customer support has driven significant recent adoption of the platform. Its vision is to double down on its neural hashing approach to efficiently running vector databases, but this approach won't continue to significantly differentiate it from many of its peers. Algolia's roadmap shows plans to expand its capabilities to better understand user intent and provide more relevant and personalized results. To continue to reach customers where they are, the platform will need to reach beyond its private cloud roots and into the public cloud world.

  Algolia's product offers powerful scalability to high volumes of queries and responses and an API-oriented platform for enterprises to build and customize their search experiences and has strong capabilities to deliver the most relevant content to the search user. Algolia needs to improve its localization capabilities and increase its application offers in order to address more cognitive search use cases. Reference customers like the vendor's approach to hybrid keyword/vector search. Algolia is a solid platform for companies who want to build a highly scalable search capability without having to manage a cloud partnership or underlying infrastructure.

- **Glean has advanced AI search for developers and is expanding enterprise functionality.** Glean Technologies provides application developers with a cognitive search platform with a strong focus on chat as the mechanism for knowledge delivery. Glean's vision to enable everyone in the workplace with an AI assistant is a sensible goal. However, without clearer differentiation, Glean risks being overlooked in an increasingly active and crowded market. Glean's product roadmap shows plans to expand its breadth of data connectors and the capabilities of the platform to not only discover knowledge and insights, but also execute actions and move the business forward.

  Glean has strong capabilities in understanding user intent and delivering automated tuning of search results, though the manual tuning capabilities aren't

comprehensive compared to others in the market. Glean's platform also offers a good set of data connectors and analytics for understanding and refining search behavior. Glean must significantly expand its localization capabilities as well as its capability to snippet and summarize content in order to maximize the effectiveness of its next-gen search capabilities. Reference customers like the speed with which they were able to deploy Glean, and the speedy integration of an LLM-supported chat function into the product. Glean is a good fit for customers looking for a search capability that can be quickly deployed in their search applications and want to elevate virtual assistants to the same level as the rest of enterprise search.

- **AWS offers genAI-enhanced search but needs more data ingestion and processing.** Amazon Web Services (AWS) offers two different approaches to cognitive search for users: 1) OpenSearch, an open-source fork of Elastic's open source software and 2) Amazon Kendra. Amazon has moved quickly to add generative AI capabilities to the Kendra platform, releasing their Retrieval API in mid-2023. GenAI has elevated search capabilities to the enterprise spotlight — and Amazon must leverage this association as part of its genAI strategy to expand Kendra's share of the market.

  AWS has strong capabilities in its data connectors and security, and in delivering more context-relevant search with the Retrieval API. Kendra's ability to ingest and parse data is below par compared to competitors in this analysis and must expand data ingestion and processing. Amazon Kendra is a good choice for users who have a data investment in AWS and who wish to quickly develop search apps that use RAG across a large data set. AWS declined to participate in the full Forrester Wave evaluation process.

- **Yext increases its focus on cognitive search but must open itself to more data types.** Yext is one of the newer entrants into the cognitive search market, emerging from its roots in site search. Its search vision is inspired by the seminal paper Attention Is All You Need, which informs its hybrid approach to indexing and searching. Yext's strategy to focus growth on cognitive search uses will give it a richer landscape of potential buyers than its commerce search roots alone. While Yext has a clear vision of providing a deep and contextual workplace and site search functionality, it will need to show success with its new partner program in order to ensure scalable growth of the platform. Yext's product roadmap has capabilities for improving the speed and efficiency of vector search and snippeting and chunking of documents for the most precise and relevant answers, it but needs to also expand its ingestion capabilities for multimedia content.

Yext has strong capabilities for delivering search through multiple modalities, using a knowledge graph in addition to its vector and lexical search offerings. Yext must expand the number of formats by which it can deliver search results to end users, as well as enhance its native security capabilities. Reference customers like how they can easily deploy and manage a variety of distinct search experiences with a relatively low level of technical expertise. Yext is a good fit for customers who want good features for snippeting and summarizing content to drive more contextual vectorized search across complex bodies of text with a fast time to deploy.

Evaluation Overview

We grouped our evaluation criteria 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 data, intelligence, development, end user, scope, operations, and architecture.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, innovation, roadmap, partner ecosystem, adoption, pricing flexibility, and transparency.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue and number of customers.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- Come up in Forrester coverage of the market, including client inquiries, and specifically positions itself as a cognitive search or enterprise search platform.

- A comprehensive platform with the ability to connect and index a wide variety of data sources, to search and query that information with robust controls to refine and target relevance and accuracy, and then to deliver that information though multimodal results (list of documents, maps, graphs, summaries, etc.).

- An annual revenue of at least $10M or over $100M in venture capital investment.

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 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 September 20, 2023 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 our 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 our vendor participation policy and publish their positioning along with those of the participating vendors.

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We conduct all our research, including Forrester Wave evaluations, in accordance with the integrity policy posted on our website.

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