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eDiscovery Market, 2015-2019

SCOPE

This study covers the eDiscovery software market in 2015 and its expected evolution over the next four years. The report provides worldwide market size, revenue market share by vendor, as well as worldwide market growth forecasts from 2015 to 2019.

The report also provides an analysis of leading vendor products and strategies.

Note: This study only covers the sale of eDiscovery software and technology.

1. The eDiscovery market has a large professional services and legal consulting component which is not included in this report.

2. Also, this study does not include eDiscovery add-on solutions offered in conjunction with information archiving, or other repositories and where the eDiscovery component is aimed primarily at dealing with the data stored in those repositories.

All market numbers, such as market size, forecasts, revenue information, and any financial information presented in this study represent worldwide figures, geographical breakouts are also provided. All revenue numbers are expressed in \$USD.

The revenue numbers listed for each vendor and service provider are our own estimates and do not represent total company revenue. They represent only product and support revenues for the 2015 calendar year.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- eDiscovery is defined as a set of processes for the identification, preservation, collection, processing, review, analysis and production of Electronic Stored Information (ESI). eDiscovery is typically done in the context of civil or criminal litigation procedures and/or to satisfy government investigations.
- ESI can take many forms, such as email, documents, images, databases, audio files, web sites, computer applications, and more.
- eDiscovery solutions were originally disparate sets of software functionality which dealt mainly with ESI collection and review. In 2005, however, the Electronic Discovery Reference Model (EDRM) was created to provide a framework of terms and definitions to help

customers better understand the market, while also enabling vendors and service providers to work towards achieving greater interoperability between their solutions.

- Vendors servicing primarily the legal market have traditionally focused on what is referred to as the “right hand side” of the EDRM that is processing, review, analysis, production and presentation. While vendors targeting mainly corporate organizations (and their internal legal counsel) have instead typically focused primarily on the “left hand side” of the EDRM, which involves: information management, identification, collection and preservation. More recently, however, all vendors are working to address the full EDRM spectrum with traditional legal-focused vendors adding “left hand side” functionality and corporate focused vendors adding “right hand side” functionality.
- Many information archiving vendors, Enterprise Content Management (ECM), and other types of information management vendors offer eDiscovery modules or add-on components to their solutions and thus claim they are supporting “eDiscovery”. These vendors, however, are not included in this report as they typically cover only the early stages of the EDRM and only provide functionality meant to ease access to their own data repositories for later transfer and processing by full-fledged eDiscovery solutions.

Note: This report covers only the sale of eDiscovery software and technology. The eDiscovery market also has a large professional services and legal consulting revenue component which is not included in this report.

- Figure 1, shows worldwide eDiscovery market revenues growing from over \$1.8 billion in 2015 to over \$3.7 billion by 2019. An average annual growth rate of 19%.

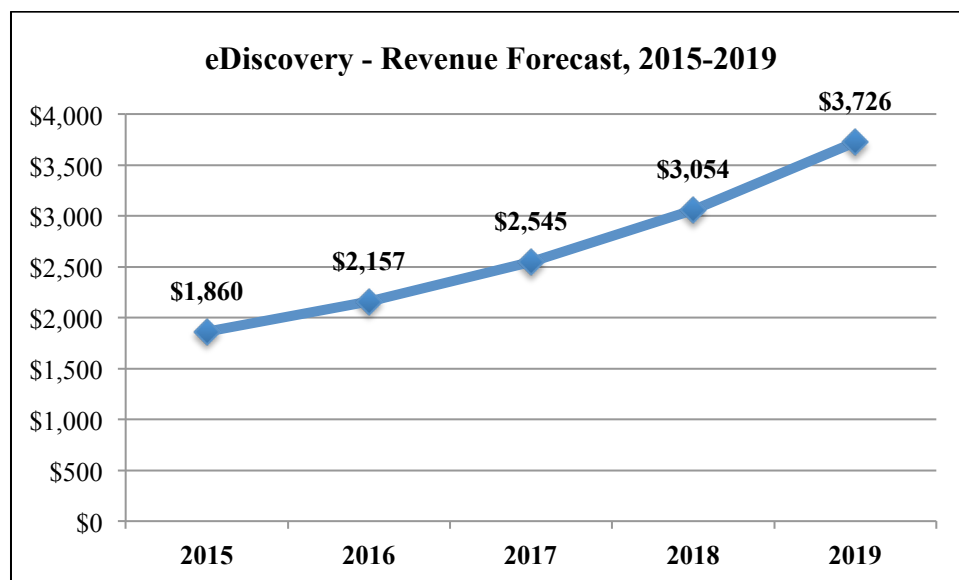


Figure 1: eDiscovery Solutions Revenue Forecast, 2015-2019

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