eDiscovery Market, 2011-2015

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SCOPE

This study covers the eDiscovery market in 2011 and its expected evolution over the next four years. The report examines market trends, corporate demand, as well as leading vendor products and strategies.

We provide data on worldwide market size and revenue market share by vendor, as well as worldwide market growth forecasts in terms of revenue from 2011 to 2015.

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 do not represent total company revenue. They only represent sales of solutions and support revenues as a direct result of the sales for the 2011 calendar year. Professional services revenue is not included.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. in 2011. It consists of information collected from vendors, and corporate users via on-going interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various related market segments of the computer industry.

EXECUTIVE SUMMARY

- Electronic Discovery, or **eDiscovery**, solutions enable organizations to identify, preserve, collect, process, review, analyze, and produce data in order to meet compliance, records management, and/or legal discovery requirements. Data can be collected from various corporate repositories and can include: email, text documents, images, databases, audio files, web sites, computer applications, and more.

- eDiscovery enterprise deployments can be complex because they involve a wide variety of business departments (i.e. IT personnel, legal departments) and often times can require multiple solutions from different vendors in order to meet specific eDiscovery needs. Vendors have recognized this complexity and offer a broad range of deployment options and complementary services meant to fit the eDiscovery requirements of each individual customer.

- The eDiscovery market has undergone significant changes over the last twelve months led by a great deal of movement among vendors. There were several acquisitions made by some of the larger vendors that have reshaped the eDiscovery landscape, however, many of the smaller sized vendors have also shown strong organic growth and development of unique technology that will help drive this market over the next years.

- The growth of data among businesses has continued to rise at an exponential rate. Email remains the primary application driving eDiscovery growth, however, dramatic growth of content from Microsoft SharePoint, social media services, IM, and SMS text messages in the enterprise has driven demand for eDiscovery solutions over the last year.

- The majority of eDiscovery solutions deployed today are in response to a specific investigation or lawsuit. This reactive nature is common among businesses that are only interested in an eDiscovery solution in order to deal with a specific case, however, there is a growing rate of proactive customers looking to put an eDiscovery solution in place in order to provide better readiness and ongoing protection against potential discovery issues.

- Some customers have begun to show more interest in cloud-based eDiscovery services over the last year. Typically, most organizations tend to prefer to deploy an eDiscovery solution on-site, however, concerns regarding data safety and accessibility have begun to diminish.

- eDiscovery vendors utilize a few different pricing models for their eDiscovery solutions. Pricing models can be simple but more often pricing of eDiscovery services is very complex and dependent on a variety of different factors.

- A Corporate Survey of 100 organizations, conducted by The Radicati Group in later 2011, showed that more businesses are seeing a need for eDiscovery and are considering deploying an eDiscovery solution in the next 12 months.

Companies Deploying eDiscovery, 2011
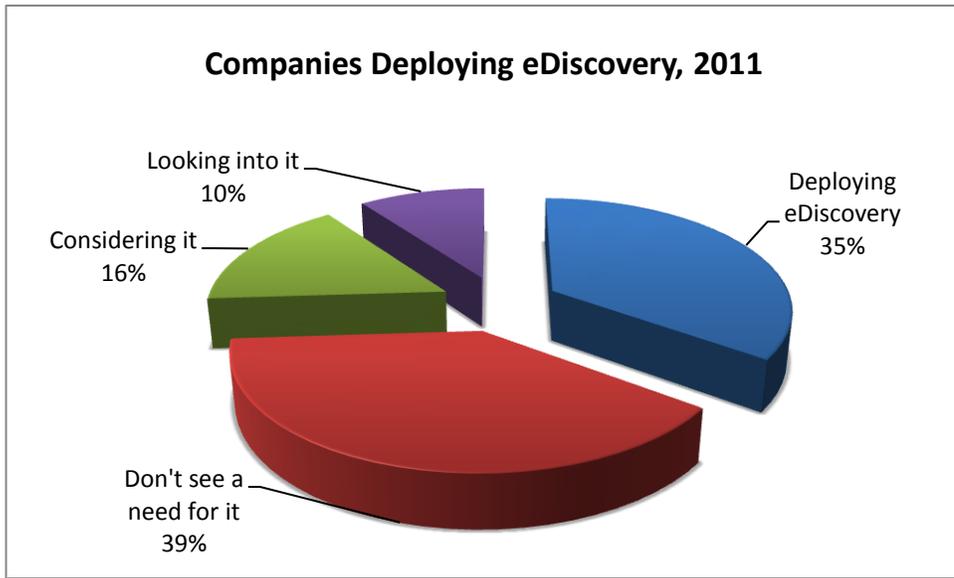
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