



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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eDiscovery Market, 2014-2018

SCOPE

This study covers the eDiscovery software market in 2014 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 2014 to 2018. 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 do not represent total company revenue. They represent only product and support revenues for the 2014 calendar year. Professional services revenue is not included in this report.

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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. ESI is stored across a broad range of corporate repositories which may encompass databases, websites, file stores, as well as individual devices such as computers and laptops. ESI are different from paper documents in that they often contain metadata (such as time

stamps or sender information) which must also be maintained and plays an important role as evidence in litigation.

- Software solutions for eDiscovery were initially developed as litigation support tools for use by legal firms to help automate and expedite the complex process of dealing with large amounts of ESI. However, as legal compliance requirements for corporations have grown in quantity and complexity, the need for eDiscovery solutions has found an increasingly important place in the corporate world where it is often part of an organization's overall information governance mandate.
 - *Note: Many Information Archiving vendors, Enterprise Content Management (ECM) vendors, and other vendors of data management solutions offer eDiscovery modules or add-on components to their solutions and touting that they support "eDiscovery". These vendors are not included in this report, as the functionality they provide is meant primarily to ease access to their own data repositories for transfer into full-fledged eDiscovery solutions.*
- The eDiscovery market continues to show strong growth as litigation increases, and more organizations are bringing eDiscovery in-house as part of a broader information governance mandate.
- Acquisitions and consolidation among the larger players in this market has slowed down in 2014, however, we are seeing the entry into the market of many new, relatively small players with highly specialized offerings aimed mainly at the corporate eDiscovery market. In many cases these vendors focus on only parts of the EDRM rather than providing full EDRM functionality. Also, a number of these vendors have a regional focus, and see growing opportunities by offering multi-lingual eDiscovery support, with a particular focus on Asian languages.
- Figure 1, shows the forecast for the eDiscovery market from 2014 to 2018. Revenues are expected to grow from over \$1.6 billion in 2014 to over \$3.8 billion by 2018, which represents an average annual growth rate of over 24%.

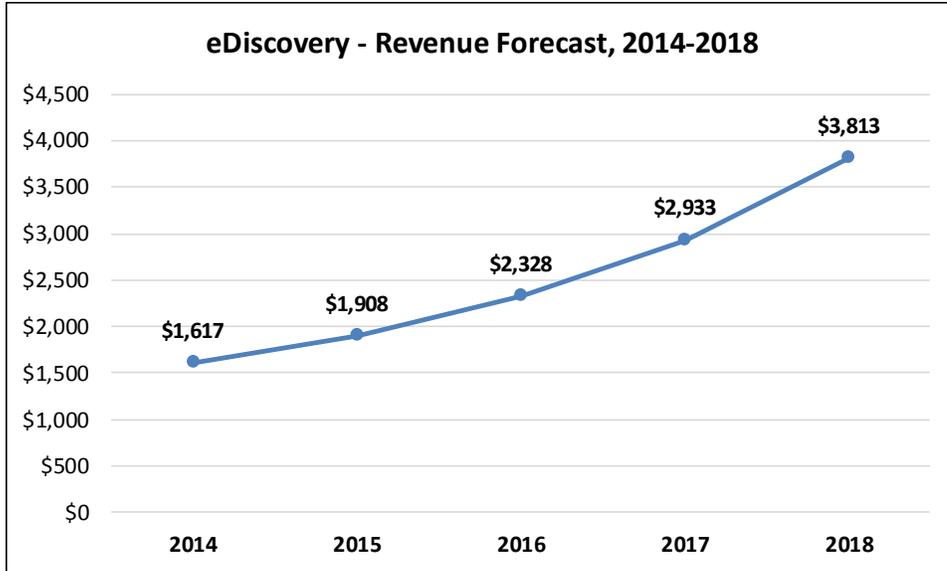


Figure 1: eDiscovery Solutions Revenue Forecast, 2014-2018

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