IDC MarketScape

IDC MarketScape: Worldwide eDiscovery Early Case Assessment Software 2022 Vendor Assessment
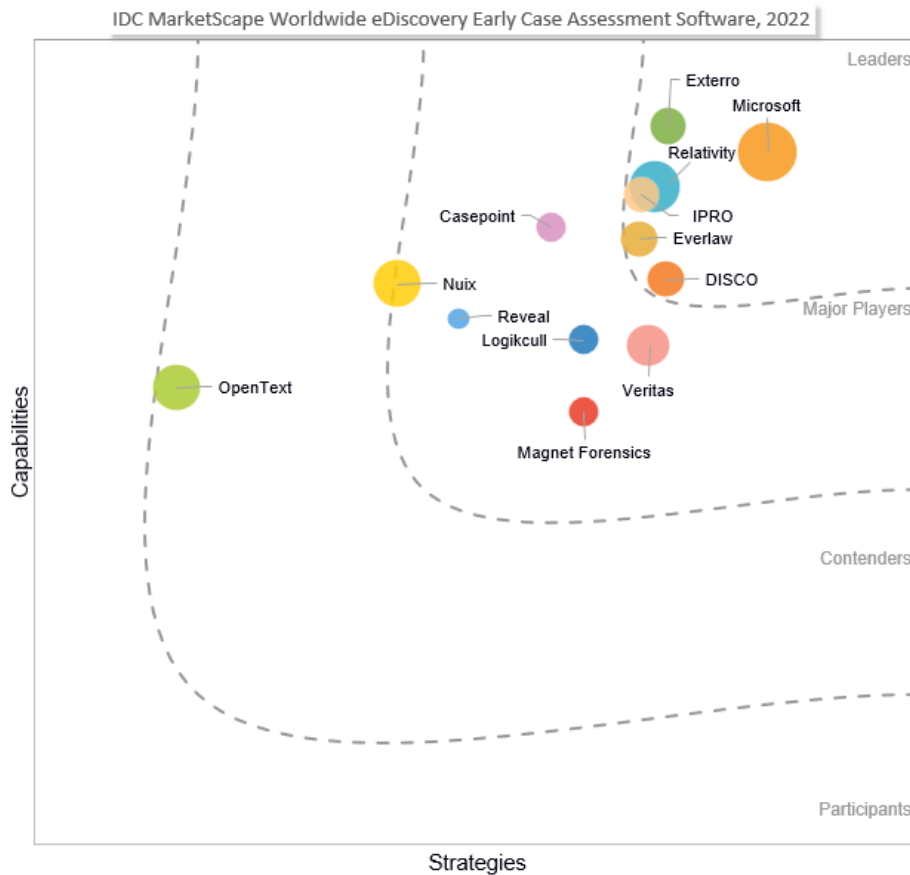
Ryan O'Leary

THIS IDC MARKETSCAPE EXCERPT FEATURES MICROSOFT

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide eDiscovery Early Case Assessment Software Vendor Assessment

Source: IDC, 2022
Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide eDiscovery Early Case Assessment Software 2022 Vendor Assessment (Doc # US48970222). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Review continues to be the costly aspect of ediscovery despite technological advances. Proficiency at early case assessment continues to be a hallmark of mature ediscovery practitioners. This IDC MarketScape covers major vendors participating in the worldwide ediscovery software market with a focus on functionality for early case assessment. This vendor evaluation is based on a comprehensive criterion expected to be most conducive to success in providing tools to enable collecting, processing, culling, and analyzing data in junction with investigations and litigations. The evaluation criteria emphasize capabilities and strategies that enable the minimization of the data corpus and mitigate cost. IDC expects critical success factors for early case assessment ediscovery software to be:

- Cloud-to-cloud data ingestion connectors that enable customers to ingest cloud-native data with the click of a button
- Cybersecurity that must be a point of emphasis considering the heavy fines and reputational damage associated with data breaches
- Transparent and predictable pricing
- Strong analytics and machine learning functions that enable de-duplication and culling of data
- Comprehensive ability to collect and process data from a wide variety of devices and applications

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The inclusion criteria for this IDC MarketScape required vendors to have at least $10 million in yearly revenue related specifically to selling ediscovery software and to have functionality that is specifically tailored to the early case assessment use case.

ADVICE FOR TECHNOLOGY BUYERS

The majority of costs associated with ediscovery are still associated with the review process. That is the piece that requires the largest head count and time to complete. The burn rate of review is a direct function of the volume of the corpus of data and the speed of the reviewers. Reviewer speed can only be improved so much, but the volume of data is often way larger than it needs to be. Often, ediscovery can be an afterthought for organizations, and they will overcollect everything remotely related to an investigation or litigation. Spray and pray method of collection leads to incredible cost overruns. Proactive and thoughtful ediscovery practitioners will optimize their early case activities to ensure that only the documents most likely to contain responsive materials are collected. Ensuring the data set is narrowly tailored can save millions of dollars a year. Organizations must prioritize investment in technology that can effectively create the smallest corpus possible. The days of collecting every

document in a custodian's possession should be over. Targeted and thoughtful collections buoyed by analytics, de-duplication, and searching will be the standard going forward.

While good ediscovery practitioners are worth their weight in gold, they need the right technology to be able to effectively deploy their craft. When evaluating technology to optimize your early case assessment workflows, it is important to consider the types of data that you will be collecting and the makeup of your legal operations department. Within the market, there are a variety of players that can suit an organization's needs. Not every organization needs deep analytics and artificial intelligence (AI) to cull their data. Introspection is necessary before any technology purchase. Does your organization need a cloud solution? Do you have a significant volume of on-premises or legacy data that needs attention. Digitally transformed organizations should focus on vendors that enable preservation in place, while those with a variety of data types perhaps may want to engage with vendors with a large partner network. Buyers need to focus on what strategies will enable them to cull data the best.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of the vendor's strengths and challenges.

Microsoft

Microsoft is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide ediscovery early case assessment software.

Microsoft Corp. is a publicly held software vendor. The company was founded in 1975 and is headquartered in Redmond, Washington, the United States. Microsoft offers a wide variety of products, but this IDC MarketScape focuses on Microsoft's Purview eDiscovery product that is part of the compliance suite within Microsoft 365. Microsoft 365 owns and creates the lion's share of responsive data within the eDiscovery world. Microsoft has realized that the Microsoft 365 customers need to be able to better manage and collect the data within 365 natively. Advanced ediscovery has now become a part of the Purview product and allows practitioners to analyze, de-duplicate, hold, and collect data right within the 365 environments. Microsoft focuses on enterprise customers that are using 365 as the solution is not available outside of Microsoft 365 but can pull in data from outside Microsoft 365. However, as time marches on this becomes less of an issue as the world standardizes on cloud. Microsoft Purview is a strong partner to legal operations teams and is laser focused on providing ECA capabilities to those practitioners and interfacing with whichever review tool they chose.

Strengths

- **Proximity to 365 data:** The benefits of Microsoft's proximity to the data should be obvious. Customers indicated that being able to investigate, search, and de-duplicate the data right within 365 without moving it provided a huge advantage. Customers also indicated that they were able to better leverage insights into their custodians than they had been using external to 365 tools. Legal operations teams can easily create matters within 365 to populate data sets devoid of universally privileged material and populate review sets even quicker.

- **Version as shared functionality:** As technology evolves, end users are sending attachments less and less. The traditional parent-child relationship that ediscovery has been built on is harder to collate when organizations are just sharing hyperlinks to documents. Microsoft solves for this. Microsoft enables its customers to archive and collate the appropriate version

of the document attached to a communication. Users can configure policies so that cloud attachments shared are automatically preserved as shared for later addition to review sets in the appropriate context. Basically, Microsoft captures a version of the document as shared to create the traditional parent-child relationship and better enable ediscovery teams to analyze the events of a case even as technology advances.

Challenges

- **Non-Microsoft data source perception:** The knock on Purview, generally, has been that it can only impact Microsoft data. This is not true. Microsoft's challenge is to make the market aware of its capabilities outside of data within 365. Currently, Microsoft has a significant number of connectors to major data sources and are constantly building out more. Microsoft needs to focus on building out more and being able to import the data into 365. This functionality coupled with market awareness would create an even more formidable tool.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

eDiscovery applications span the Electronic Discovery Reference Model (EDRM), including early case assessment applications, ediscovery review applications, full-spectrum ediscovery suites, and applications focused on individual EDRM components. These applications also capture and store real-time network and device data and identify how business assets are affected by network exploits, internal data theft, and security or human resources (HR) policy violations. eDiscovery applications support and enable both internal and external investigations.

These applications automate business process management and data management activities during early case assessment, early data assessment, collection, review, analysis, and production. These applications offer not only search, text analytics, and data mining functions but also business process workflow automation, project management, document management, and decision support mechanisms. In most instances, these applications are offered as either standalone full-suite products or complementary software products. In some cases, specific applications are offered solely as add-on modules that run atop proprietary archiving or enterprise content management platforms.

Related Research

- *Market Analysis Perspective: Worldwide eDiscovery, 2022* (IDC #US46970121, July 2022)
- *2022 Corporate eDiscovery Survey* (IDC #US47699422, June 2022)
- *Worldwide eDiscovery and Forensics Applications Software Forecast, 2022-2026* (IDC #US47699622, June 2022)
- *Worldwide eDiscovery and Forensics Applications Market Shares, 2021: Relativity Continues to Lead the Market Despite Strong Competition* (IDC #US46970521, May 2022)

Synopsis

This IDC study represents a vendor assessment of providers offering ediscovery early case assessment software through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for offering ediscovery early case assessment. The evaluation is based on a comprehensive and rigorous framework that assesses how each vendor stacks up, and the framework highlights the key factors that are expected to be the most significant for achieving success in the ediscovery early case assessment market over the short term and long term.

"When evaluating technology to optimize your early case assessment workflows, it is important to consider the types of data that you will be collecting and the makeup of your legal operations department. Within the market, there are a variety of players that can suit an organization's needs. Not every organization needs deep analytics and AI to cull its data." – Ryan O'Leary, research director, Privacy and Legal Technology at IDC

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com