

## IDC MarketScape

# IDC MarketScape: Worldwide eDiscovery Services 2021 Vendor Assessment

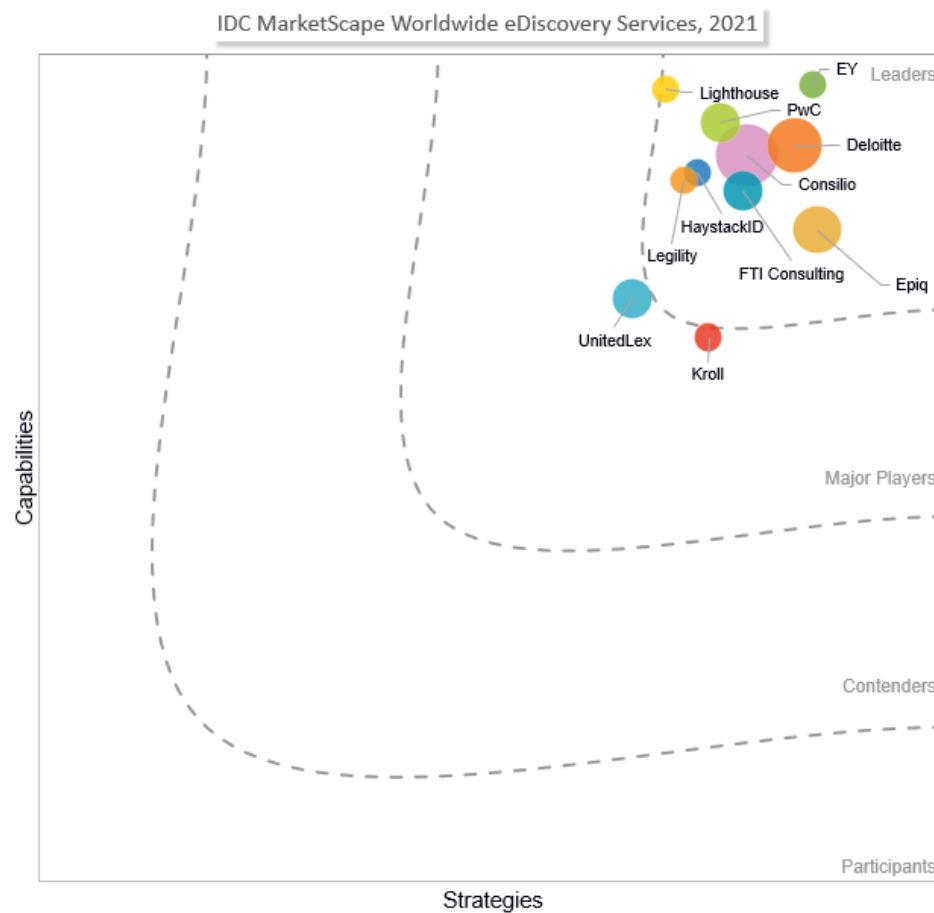
Ryan O'Leary

THIS IDC MARKETSCAPE EXCERPT FEATURES DELOITTE

### IDC MARKETSCAPE FIGURE

FIGURE 1

## IDC MarketScape Worldwide eDiscovery Services Vendor Assessment



Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide eDiscovery Services 2021 Vendor Assessment (Doc # US46838220). 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

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This IDC MarketScape covers major vendors participating in the worldwide eDiscovery services market. This vendor evaluation is based on a comprehensive criterion expected to be most conducive to success in providing forensic, eDiscovery, and litigation support to enterprises both in the short and long term. The evaluation criteria emphasizes capabilities and strategies such as remote review capabilities, investigation capabilities, cybersecurity, and customer service. IDC expects critical success factors for eDiscovery services to be:

- Advanced artificial intelligence (AI)/machine learning (ML) capabilities to analyze and provide additional value for clients across the Electronic Discovery Reference Model (EDRM)
- Global footprint to enable remote collections, remote review, data hosting, and more on a global scale
- Strong focus on cybersecurity capabilities to ensure that client data is protected and secured
- Ability to scale globally on demand to meet tight deadlines and handle large data volumes quickly and accurately

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The vendor inclusion list for this IDC MarketScape is intended to include the most prominent eDiscovery services providers in the market. To be included in this IDC MarketScape study, vendors must have at least \$100 million in yearly revenue related specifically to eDiscovery services. Vendors must also provide managed review, second request services, and managed software seat services.

## ADVICE FOR TECHNOLOGY BUYERS

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The eDiscovery services market has long been dominated by large office-centric review providers that were able to quickly scale up review and solve problems by throwing bodies at it. This was changing before the pandemic. The pandemic kicked the change into overdrive. Services providers need to be able to provide full forensic collections without sending resources onsite. Clients of services providers have been decentralized and will continue to be less centralized even if there is some return to the office after mass vaccinations. Services providers will need to amend their services offerings to meet these new challenges if they haven't already.

The cyclical nature of eDiscovery has long been a strength for services providers. They provide that extra bandwidth on demand for when extremely large litigation occurs so that enterprises do not have to divert their internal resources or keep an eDiscovery department staffed on the off chance there is a major litigation. Buyers should look for eDiscovery providers that are making the most of the remote workforces. Services providers should be able to create value by having a greater access to workers in traditionally underrepresented geographies with lower cost of living. Further, eDiscovery,

and specifically document review, can be grueling jobs. Buyers should look for services providers that put people first and lift up their review teams quality of life and job satisfaction as that will flow into better outcomes for all.

Finally, buyers need to do comprehensive security reviews of prospective services providers. eDiscovery concerns the most sensitive data in an organization. Protecting that data is extremely important, especially since buyers are moving the data out of their systems and into a third-party's environment when they engage a services provider. If buyers only evaluate one thing, it should be security.

## VENDOR SUMMARY PROFILES

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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 each vendor's strengths and challenges.

### Deloitte

Deloitte is positioned in the Leaders category in the 2021 IDC MarketScape for worldwide eDiscovery services vendor assessment.

Deloitte is a global advisory, strategy, technology, risk, and tax firm based in New York, New York. Deloitte has been providing discovery services for over 20 years, starting during the hard copy discovery. Deloitte's discovery experience has driven constant repeat business as well as many relying on the company as trusted advisor in a crisis. Deloitte being one of the "Big 4" accounting firms has a global presence and capabilities in every geography.

### Strengths

- **Technology portfolio:** Deloitte leverages technology quality and does so in a global fashion leveraging datacenters and cloud architecture in every region to provide significant scale. Deloitte has a strong focus on forensics capabilities to provide detailed investigatory capabilities.
- **Adjacent services:** Deloitte has invested significantly in becoming a partner for the entire corporate legal department and not just providing eDiscovery services. Deloitte leverages its large crop of eDiscovery subject matter experts to use eDiscovery tools to solve other problems. Deloitte is positioning itself to be a strategic partner for the long term and focusing on master services agreements instead of one-off projects.
- **Responsiveness and expertise:** Customers interviewed for this assessment reported that Deloitte was extremely responsive to needs at all hours. Customers also mentioned that Deloitte provided excellent representation in guiding the relationship with outside counsel. Deloitte's focus on collaboration and detail helped clients navigate tough conversations.

### Challenges

- **Cost:** Deloitte has built a reputation and business on the level of service it has provided across all its service areas for centuries. Those looking for a low-cost option are not going to find it with Deloitte. Customers reported being satisfied with the experience and an overwhelming feeling of "you get what you pay for."

- **Assurance practice:** Deloitte acts as an auditor for a large portion of the largest corporations in the world. This limits its ability to compete for every eDiscovery project as it is conflicted out of these specific projects.

## APPENDIX

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### 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

The eDiscovery services market encapsulates activities designed to support or enable eDiscovery use cases. Activities may include those designed to assist with or enhance a specific Electronic Discovery Reference Model (EDRM) function but are typically focused on data collection and culling, review and production of data sets, or improving enterprisewide approaches to eDiscovery. For this reason, eDiscovery service activities will generally be discussed in terms of broad early case assessment (ECA) or review and production categories. eDiscovery services will not include legal service activities performed by law firms for the purpose of litigation, regulatory hearings, risk tolerance consulting; the interpretation of laws and regulations and case law; or the application of common law. Services may, however, include consulting activities, performed by law firms, which replicate services offered by solution providers, channel partners, or advisory and consulting firms. Services revenue forecasts will also attempt to make a distinction between governance and information management projects designed to support eDiscovery use cases and those undertaken without a specific discovery intent.

## LEARN MORE

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### Related Research

- *Worldwide eDiscovery Services Forecast, 2020-2024* (IDC #US45857020, September 2020)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2020: Legal and Corporate Strategy* (IDC #US46723218, August 2020)
- *HaystackID Separates Itself from the Alternative Legal Services Providers Pack* (IDC #US46742619, August 2020)
- *2020 U.S. Legal Technology Buyer Survey* (IDC #US45856020, July 2020)

### Synopsis

This IDC study represents a vendor assessment of providers offering eDiscovery services through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for eDiscovery services. 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 services market.

"The eDiscovery services market has long been dominated by large office-centric review providers that were able to quickly scale up review and solve problems by throwing bodies at it. This was changing before the pandemic. The pandemic kicked the change into overdrive. Services providers need to be able to provide full forensic collections without sending resources onsite," says Ryan O'Leary, senior research analyst, Legal, Risk, and Compliance Solutions 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.

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