Market Guide for E-Discovery Solutions

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By Analysts Michael Hoeck

Initiatives: Data Center Infrastructure; Legal and Compliance Technology and Analytics

E-discovery solutions support digital discovery and provide administration of the e-discovery process. Infrastructure and operations leaders responsible for legal and compliance technologies must develop strategies to select products and services that best align with their e-discovery requirements.

Overview

Key Findings

■ Enterprises are increasingly adopting software as a service as a service and other host-based e-discovery solutions from both software and service providers.

■ As organizations adapt to work-from-home practices, infrastructure and operations leaders need new capabilities to better manage the e-discovery of workstream collaboration products and to securely conduct e-discovery remotely.

■ Organizations are using e-discovery software vendor and service provider offerings that “extend left” in the Electronic Discovery Reference Model to establish proactive information governance.

■ As e-discovery vendors expand their use of in-place search, legal teams can introduce early case assessment earlier in the e-discovery process — reducing the costs associated with subsequent collections, processing and review.

■ Other market solutions, such as backup as a service, subject rights request automation and enterprise information archiving, are enhancing e-discovery capabilities for the data sources they manage.

■ The e-discovery solutions market continues to consolidate software and service providers through mergers and acquisitions.

Recommendations

I&O leaders responsible for legal and compliance data center infrastructure should:

■ Improve total cost of ownership by selecting a blend of e-discovery software and service provider solutions that align with their in-house capabilities and the mix and complexity of cases that require e-discovery.
Market Definition

The e-discovery solutions market comprises vendors offering software and services-based solutions that facilitate the electronic discovery process. E-discovery solutions specialize in one or more areas to identify, collect, preserve, process, review, analyze and produce electronically stored information (ESI). ESI fulfills legal and compliance requirements for discovery that result from civil or criminal litigation, regulatory oversight or other investigative proceedings.

E-discovery is typically project-based, reactive or ad hoc. It results from trigger events, which include:

- Lawsuits or audits — initiated by another party or internally
- Internal investigations — such as employee-filed complaints or HR-related issues
- Due diligence processes — such as those required for merger and acquisition (M&A) transactions
- Regulatory investigations by the U.S. Securities and Exchange Commission (SEC), Department of Justice (DOJ), Financial Industry Regulatory Authority (FINRA), European Securities and Markets Authority (ESMA), European Court of Justice (ECJ) or comparable bodies in other jurisdictions
- Public record requests — such as the Freedom of Information Act (FOIA)
- Subject rights requests for privacy regulations — such as the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA)
- Post-data-breach assessments, including assessing liabilities or anticipating lawsuits

Market Description

Infrastructure and operations (I&O) leaders should apply the Electronic Discovery Reference Model (EDRM) to better understand the typical e-discovery process (see Figure 1).
Figure 1: E-Discovery Steps and Parties

E-Discovery Steps and Parties

Although the EDRM is presented as a linear process flow (which often reflects the progression of legal cases), e-discovery processes are often iterative. Technological advancements are disrupting the defined steps, as activities can now happen concurrently and in a different order. For example, rather than waiting to complete the collection and processing stages before analyzing data, I&O leaders can now incorporate elements of analysis into early case assessment (ECA) before formal review.

E-discovery practitioners often divide the EDRM model into two halves. The left side of the EDRM typically includes information governance, identification, preservation and collection activities, whereas the right side of the model includes processing, review, analysis, production and presentation. This division primarily reflects the different focuses and processes of IT and legal teams. The IT team usually leads tasks on the left side, whereas legal teams (including litigation support, compliance, legal department and the general counsel’s office) are responsible for the right-hand-side tasks. Successful e-discovery projects require a collaborative, coordinated effort among all teams.

E-discovery solutions include both software vendor and service provider offerings. Software vendors offer varying degrees of capabilities on both the left and right sides of the EDRM, including:

- Locate, inventory and scope potential sources of ESI
E-discovery service providers often supplement software vendor offerings with distinct, value-added integrations and services to support the right-side EDRM tasks. These offerings include:

- **Hosting technologies** — delivery of e-discovery platform hosting and processing capabilities
- **Consulting** — expertise in legal, industry specialization and technology capacities
- **Managed review** — providing legal review resources
- **Project management** — litigation support and project coordination

E-discovery projects can be costly, complex, unpredictable and non-negotiable. The number of e-discovery cases an organization has to manage varies widely, depending on its business sector, size and regulatory landscape. Organizations with few cases that occur randomly may struggle to establish a repeatable, efficient process, and investing in a complete set of in-house capabilities may not be cost-effective. In these cases, leveraging e-discovery solutions from service providers is often the most-viable solution.

For organizations with many e-discovery projects and varying degrees of complexity and risk, I&O leaders and legal departments will often benefit from combining in-house capabilities and service offerings to reduce costs and manage risk. In addition, large organizations may maintain review capabilities with in-house technology, while leveraging the same review technology from service providers. This enables the organization to handle routine cases in-house, while moving high-profile, complex cases to the service provider — without dealing with platform compatibility issues.

**Market Direction**

On the demand side, buyers are:

- Increasing investment in in-house e-discovery solutions to reduce the cost of legal operations
- Combining capabilities from e-discovery software vendors and service providers to address e-discovery requirements
On the supplier side, software vendors are:

- Supporting a growing number of discovery requests related to privacy, subject rights and public records
- Expecting advanced capabilities to cull data in ECA before the collection process that minimizes data volumes earlier in the e-discovery process
- Seeking solutions to address e-discovery requirements in workstream collaboration technologies, such as Microsoft Teams and Slack
- Favoring solutions that allow legal and compliance users to share data across matters, which can optimize storage efficiency and improve e-discovery results
- Reducing reliance on IT and improving self-service capabilities for legal and compliance users by evaluating solutions based on ease of use and simplicity
- Expecting a clear, predictable and transparent pricing structure

On the supplier side, software vendors are:

- Developing advanced data analysis capabilities, such as semantic analysis, image/video analysis and natural language processing (NLP) to improve review procedures
- Promoting ease of use to improve adoption by corporate legal customers
- Continuing to invest in SaaS-based solutions to accelerate adoption and reduce I&O efforts
- Improving data analysis capabilities in ECA to further reduce data volumes earlier in the discovery process
- Entering the market with best-of-breed solutions to reduce the complexity of the expanding number of electronic communication and social media sources of information
- Expanding software portfolios through in-house development and acquisitions to accommodate requirements of the information governance step
- Offering subscription pricing models for the acquisition of their technology to enable pay-as-you-go purchases
- Remaining active in M&A activities to provide end-to-end coverage of the EDRM

On the supplier side, service providers are:

- Creating differentiation by expanding specialized services in managed review, project management, proactive information governance and industry expertise
- Building new solutions using in-house-developed technologies as alternatives to e-discovery software vendor solutions
Figure 2 showcases some high-level findings across e-discovery offerings, based on the software vendor survey results. I&O leaders should assess vendors further based on their organization’s needs. For more details on the survey and the vendors, refer to the Representative Vendors and Evidence sections.

**Figure 2: Highlights of E-Discovery Software Vendor Solutions**

### Highlights of E-Discovery Software Vendor Solutions

<table>
<thead>
<tr>
<th>Enterprise Legal Management Solutions</th>
<th>Market Facts and Figures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Regional Usage</strong></td>
<td></td>
</tr>
<tr>
<td>Most deployments are in North America (79.15%)</td>
<td></td>
</tr>
<tr>
<td><strong>Pricing</strong></td>
<td></td>
</tr>
<tr>
<td>Pricing for software vendor solutions varies widely based on a combination of factors, such as the number of matters, number of GBs processed, number of GBs stored, number of users</td>
<td></td>
</tr>
<tr>
<td><strong>Deployments Tend to Be Small</strong></td>
<td></td>
</tr>
<tr>
<td>Nearly 60% of deployments are for fewer than 100 users</td>
<td></td>
</tr>
<tr>
<td><strong>Areas of Differentiation and Active Development</strong></td>
<td></td>
</tr>
<tr>
<td>Early case assessment, semantic analysis, legal hold notification, machine learning, custodian-led identification and collection</td>
<td></td>
</tr>
<tr>
<td><strong>Hosted Deployments Are Now Most Common, With Fewer Than 50% On-Premises</strong></td>
<td></td>
</tr>
<tr>
<td>58.7% of deployments are hosted by a vendor or a third party</td>
<td>41.3% of deployments are on-premises</td>
</tr>
<tr>
<td><strong>Smallest Versus Largest Vendor</strong></td>
<td></td>
</tr>
<tr>
<td>29x number of employees dedicated to this market</td>
<td></td>
</tr>
</tbody>
</table>

Source: Gartner

731953_C

**Market Analysis**
Although select, best-of-breed technology vendors continue to deliver niche e-discovery offerings, most vendors are shifting their focus to providing end-to-end solutions that support multiple EDRM steps (including processing, review, production and collection). E-discovery solutions differentiate themselves by delivering targeted capabilities to advance collection and processing, identification, in-place preservation, data analysis and expanding offerings beyond EDRM.

Products in this market generally support functionality in several feature categories (see Note 3 for more details). Figure 3 illustrates e-discovery software vendor’s level of support offered and their focus on future product development.

Figure 3: E-Discovery Feature Categories

<table>
<thead>
<tr>
<th>Feature Categories</th>
<th>Review</th>
<th>Data Analysis</th>
<th>Collection and Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Tagging and Annotation</td>
<td>Native File Format Review</td>
<td>Search and Filtering</td>
<td>Semantic Analysis Features</td>
</tr>
<tr>
<td>Redaction</td>
<td>Communication Threading</td>
<td>Early Case Assessment After Collection</td>
<td>Image/Video Analysis</td>
</tr>
<tr>
<td>Categorization, Classification, Clustering</td>
<td>Metrics and Reporting</td>
<td>Data Visualization</td>
<td></td>
</tr>
<tr>
<td>Technology Assisted Review</td>
<td>Workflow Assignments</td>
<td>Machine Learning</td>
<td>Security, Mobility, Integration, Certification</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virtual Assistants or Chatbots</td>
<td>Platform Extensibility</td>
</tr>
</tbody>
</table>

Note: Box sizes reflect the number of products supporting the corresponding feature.

Legend for Figure 3:
Feature categories and subcategories: The boxes in gray represent the main feature categories. The boxes in white and in different shades of blue represent subcategories for each main feature. (For more details on specific functionality that relates to each subcategory, see Note 3).

Common and differentiating features: The size of the boxes represents the number of products in our survey that support each feature category. Larger boxes represent common features, whereas smaller boxes represent differentiating features.

Features in development: The blue shading in each box represents the number of vendors that have that feature on their roadmap. Darker blue boxes represent features of more-intensive product development. White boxes represent features that no vendor is reporting further plans to develop.

The size of these feature categories suggests that the most developed and mature products in this market involve review, collection, processing and data analysis activities. Most products support general-purpose services, including search and filtering, user tagging and annotation, native file format review, redaction, data deduplication, and internationalization.

Figure 3 also indicates that vendors are providing sporadic, additional support for virtual assistants, extracting data from mobile devices, IT environment data map and forensic software. The most active areas of development are:

- Interoperability with legal hold
- Custodian-led identification and preservation
- Legal hold notification and automation
- Semantic analysis features
- Early case assessment after collection
- Early case assessment before collection
- Platform extensibility

I&O leaders — in partnership with legal department specialists — should use the analysis in Figure 3 to identify the areas in which there are functional differences among the available products in this market. Depending on their organization’s requirements and priorities, they should delve more deeply into how each vendor supports specific feature categories.

The companion research Toolkit: E-Discovery Solutions Vendor and Product Data provides more details on the support of each feature category in each product (see Note 2). The Toolkit also provides insights on software vendors’ geographic presence; pricing models; and the number, size and delivery model of e-discovery deployments.
E-Discovery Software Vendor Solutions Are Predominantly Deployed in North America

Figure 4 shows the regional presence of e-discovery software vendor deployments. I&O leaders must consider the geographic presence of a vendor and their service partners when selecting e-discovery solutions — especially for organizations outside North America (see Toolkit: E-Discovery Solutions Vendor and Product Data).

Figure 4: Percentage of E-Discovery Solution Deployments by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>79.15%</td>
</tr>
<tr>
<td>Western Europe</td>
<td>12.54%</td>
</tr>
<tr>
<td>Central/Eastern Europe</td>
<td>1.48%</td>
</tr>
<tr>
<td>Latin America</td>
<td>0.78%</td>
</tr>
<tr>
<td>Middle East/Africa</td>
<td>1.24%</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>4.81%</td>
</tr>
</tbody>
</table>

Source: Gartner 731953_C

Combined Deployments of Hosted and As-a-Service Solutions Now Exceed On-Premises

In aggregate, the majority of e-discovery solution deployments are delivered via hosting by a third party. This large proportion of hosted deployments indicates that more buyers are willing to store sensitive, e-discovery information off-premises to offload the management of these environments from I&O teams. This trend also reflects the growing requirement to support remote e-discovery as organizations shift resources to work-from-home staffing.

I&O leaders should evaluate deployment options (see Figure 5) based on their corporate and geographic data residency requirements. For organizations with special data sovereignty concerns, the lack of on-premises options can be problematic.
Subscription Pricing Is the Most Common Option and Can Be Complex

Vendors use a wide range of pricing models with various levels of complexity. Subscription-based licensing options have become the most common, although pricing can be based on TB processed; TB stored; or the number of matters, users or custodians (or a combination of these factors). However, less-complex subscription pricing models are trending to provide more-predictable, transparent structures to mitigate unexpected costs. I&O leaders must engage with each vendor to obtain a detailed, accurate breakdown of all costs.

Most Deployments Have Fewer Than 100 E-Discovery Users

All vendors in this research have achieved some level of market presence. Although the size of e-discovery deployments varies by vendor, most e-discovery solutions are quite small, in terms of active users. Approximately 55% of the solutions deployed have fewer than 100 users.

The prevalence of small deployments reflects the specialized nature of the professional staff in legal departments focused on e-discovery efforts. Deployments that exceed 100 users (and certainly deployments with more than 500 users) can be attributed to large law firms and legal service providers.
I&O leaders should prioritize products provided by vendors that have experience in providing deployment sizes that match their requirements (see Figure 6).

**Figure 6: Percentage of Deployments by Size Range**

<table>
<thead>
<tr>
<th>Deployment Size Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid Deployments With More Than 500 Users</td>
<td>21.7%</td>
</tr>
<tr>
<td>Paid Deployments With 100-500 Users</td>
<td>23.0%</td>
</tr>
<tr>
<td>Paid Deployments With 50-100 Users</td>
<td>25.4%</td>
</tr>
<tr>
<td>Paid Deployments With Fewer Than 50 Users</td>
<td>29.9%</td>
</tr>
</tbody>
</table>

*Source: Gartner 731953_C*

Social Media Trending Topics: COVID-19 Is Accelerating the Move to the Cloud

Gartner’s Social Media Analytics Service conducted a social media listening analysis to supplement the vendor-supplied data in this research. Figure 7 shows changes in “trending topics” on social media in relation to this market since 2018.
The social top trends since 2018 include:

- **Cloud Migration** — Expansion of e-discovery on cloud was the key topic in 2018; however, many users expressed concerns about security and other complications. In 2020, discussions stated that the disruption caused by the pandemic forced leaders to rethink their cloud and SaaS strategies. In addition, discussions highlighted that law firms are accelerating cloud adoption as part of their digital transformation. Comments also stated that centrally stored data is more efficient and effective to collect, process, host, review and produce ESI in a secure cloud environment.

- **COVID-19** — Discussions highlighted how COVID-19 has driven the urgency for remote e-discovery, as employees are increasingly dispersed and data is stored more centrally.

- **Artificial Intelligence** — Conversations highlighted predictive coding, an artificial intelligence (AI)-based e-discovery document review technology. Predictive coding can automate the focus to information that is relevant to the claims and defenses of a case, which can save time and money and reduce the chance of human error.

- **Cost-Effective** — Discussions stated that advanced data analytics techniques, such as data visualization, social network analysis, conceptual clustering and AI model sharing, have helped legal organizations move from linear document review to automated based document review. These techniques provide a significant reduction in level of effort and promote efficiency.
Representative Vendors

Market Introduction

The vendors listed below represent the e-discovery solutions market, because their products are marketed and sold specifically for this purpose (see Note 1).

Our methodology allows us to include a limited number of vendors to provide an overview of the market (as opposed to a comprehensive review of all available products). For this reason, our survey focused exclusively on e-discovery software providers, because their solutions often serve as the foundation for the service providers’ offerings.

Buyers should not necessarily limit their options to the vendors detailed in the below profiles. They may also consider software vendors, such as Aureus Tech Systems, Cellebrite, Cicayda, Congruity360, Disco, Lexbe, Nextpoint, Onna and Venio Systems.

Table 1 lists the 18 representative e-discovery software vendors that are covered in detail in this research. Table 2 provides an overview of representative e-discovery service providers.

- **Productivity/Intuitive User Experience** — Discussions highlighted that platforms with intuitive user interfaces for e-discovery help IT and legal teams refine their search efforts, and provide scalability and real-time dashboard for reporting and greater productivity.
<table>
<thead>
<tr>
<th>Software Vendor</th>
<th>Product Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakwater</td>
<td>StoredIO for Legal (formerly IBM StoredIQ for Legal)</td>
</tr>
<tr>
<td>Casepoint</td>
<td>Casepoint eDiscovery</td>
</tr>
<tr>
<td>CloudNine</td>
<td>CloudNine Collection Manager, Data Wrangler, Explore, Law, Review and Concordance</td>
</tr>
<tr>
<td>Everlaw</td>
<td>Everlaw</td>
</tr>
<tr>
<td>Exterro</td>
<td>Exterro Orchestrated E-Discovery Suite</td>
</tr>
<tr>
<td>iPro</td>
<td>iPro for Enterprise</td>
</tr>
<tr>
<td>Knowos</td>
<td>eZReview</td>
</tr>
<tr>
<td>Logikcull</td>
<td>Logikcull</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Microsoft 365 Content Search, Microsoft 365 eDiscovery, Microsoft 365 Advanced eDiscovery</td>
</tr>
<tr>
<td>Nuix</td>
<td>Nuix Discover, Nuix Workstation, Nuix Enterprise Collection Center and Nuix Investigate</td>
</tr>
<tr>
<td>OpenText</td>
<td>OpenText Accelerate, OpenText Accelerate Investigation, OpenText Insight, OpenText Legal Hold</td>
</tr>
<tr>
<td>Relativity</td>
<td>RelativityOne, Relativity Server, Relativity Trace, Veriqu Hydra, Veriqu Phoenix, Veriqu Hive</td>
</tr>
<tr>
<td>Reveal</td>
<td>Reveal</td>
</tr>
<tr>
<td>Thomson Reuters</td>
<td>eDiscovery Point</td>
</tr>
<tr>
<td>Veritas Technologies</td>
<td>Veritas eDiscovery Platform</td>
</tr>
<tr>
<td>X1 Discovery</td>
<td>X1 Distributed Discovery</td>
</tr>
<tr>
<td>Zapproved</td>
<td>ZDiscovery Suite: Legal Hold Pro, Cloud Preserve, Cloud Collect, and Digital Discovery Pro</td>
</tr>
<tr>
<td>ZyLAB</td>
<td>ZyLAB ONE</td>
</tr>
</tbody>
</table>

Source: Gartner (April 2021)
Table 2: Representative E-Discovery Service Providers

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ankura</td>
<td>eDiscovery</td>
</tr>
<tr>
<td>Compliance</td>
<td>AppHQ, Discovery-as-a-Service (DaaS) Solutions</td>
</tr>
<tr>
<td>Conduent</td>
<td>Viewpoint Integrated Analytics</td>
</tr>
<tr>
<td>Consilio</td>
<td>sightline</td>
</tr>
<tr>
<td>Deloitte</td>
<td>Discovery</td>
</tr>
<tr>
<td>Driven</td>
<td>ONE Discovery</td>
</tr>
<tr>
<td>Epiq</td>
<td>Epiq Discovery</td>
</tr>
<tr>
<td>EY</td>
<td>Discovery data services</td>
</tr>
<tr>
<td>FRONTEO</td>
<td>KIBIT Automator, Lit i View</td>
</tr>
<tr>
<td>FTI Consulting</td>
<td>E-discovery Managed Services</td>
</tr>
<tr>
<td>HaystackID</td>
<td>Forensics First, Early Case Insight, ReviewRight</td>
</tr>
<tr>
<td>Integreon</td>
<td>Litigation Services</td>
</tr>
<tr>
<td>KPMG</td>
<td>eDiscovery/Evidence &amp; Discovery Management</td>
</tr>
<tr>
<td>KLDisccovery</td>
<td>Nebula, KLD Analytics, KLD Processing</td>
</tr>
<tr>
<td>Lighthouse</td>
<td>Lighthouse Prism</td>
</tr>
<tr>
<td>Modus</td>
<td>Modus 4C ECA, e-Discovery Services, Information Governance</td>
</tr>
<tr>
<td>PwC</td>
<td>Discovery Solutions</td>
</tr>
<tr>
<td>Ricoh</td>
<td>RemloX Remote ESI Collection, Ricoh eDiscovery On Demand</td>
</tr>
<tr>
<td>UnitedLex</td>
<td>Litigation and Investigations</td>
</tr>
</tbody>
</table>

Source: Gartner (April 2021)

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Profiles

Breakwater

As of 16 February 2021, Breakwater entered into a partnership agreement with IBM to provide ongoing support, and investment into the former IBM e-discovery solutions.

Web Address: https://breakwatersolutions.com/

Headquarters: Austin, Texas
Founded: 2020

Private/Public: Private company

Product Name: StoredIQ for Legal (formerly IBM StoredIQ for Legal)

Package Options: Stand-alone product

Notable Customers: J.B. Hunt

Customer Case Studies: Not provided

Services Offered: Proof of concept (POC); implementation services; migration services, including migrations from competitor products; services through partners; working hours support in at least two geographic regions; 24/7 global support; managed services; consulting; process; organizational change management; and cost optimization

Pricing Guidance: Authorized user

Typical Use Cases: Sending, tracking and managing hold notification and custodian interviews; managing complex workflows for data requests; identification, preservation and collection of potentially relevant matter data; DSAR response; and FOIA requests

Casepoint

Web Address: http://www.casepoint.com

Headquarters: Tysons, Virginia

Founded: 2008

Private/Public: Private company

Product Name: Casepoint eDiscovery

Package Options: Part of a suite


Customer Case Studies: Casepoint
Services Offered: E-discovery consulting, e-discovery project management, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Transactional (project-based) — per gigabyte; managed services (12- to 60-month agreement) — per terabyte; no user fees: all tech (end-to-end) included; professional services are billed hourly

Typical Use Cases: End-to-end e-discovery (litigation); internal investigations; data breach/cyber incident response; data privacy (CCPA, GDPR); FOIA/PRR for government agencies

CloudNine
Web Address: https://www.cloudnine.com

Headquarters: Houston, Texas

Founded: 2002

Private/Public: Private company

Product Names: CloudNine Collection Manager, Data Wrangler, Explore, LAW, Review and Concordance

Package Options: Stand-alone product

Notable Customers: Not provided

Customer Case Studies: Not provided

Services Offered: E-discovery consulting, e-discovery project management, legal process outsourcing (including attorney review), POC, implementation services, certified training and education, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Multiple license options including annual subscriptions, pay per use/per GB

Typical Use Cases: End-to-end e-discovery, including collections, ECA, processing, culling, review and production; search term testing, first-pass review e-discovery, investigation and compliance; processing, imaging and productions; O365/OneDrive collection and preservation; staged data inventory and prioritization
Everlaw

Web Address: https://www.everlaw.com

Headquarters: Oakland, California

Founded: 2010

Private/Public: Private company

Product Name: Everlaw

Package Options: Stand-alone product

Notable Customers: Benesch, Brooks Kushman, Covington & Burling, Juniper Networks, Orrick, Hilton, Pure Storage, Lime, Indiana Attorney General’s Office

Customer Case Studies: https://www.everlaw.com/resources/success-stories/

Services Offered: POC, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, region-specific, data center hosting services, seven-day-a-week access to customer support

Pricing Guidance: https://www.everlaw.com/everlaw-pricing/

Typical Use Cases: E-discovery: find and act on the most critical case information; case preparation, depositions, testimony, internal investigations; data privacy (FOIA/DSAR/CCPA); matter management; Everlaw for Good

Exterro

Web Address: https://www.exterro.com/

Headquarters: Beaverton, Oregon

Founded: 2008

Private/Public: Private company

Product Name: Exterro Orchestrated E-Discovery Suite

Package Options: Part of a suite
Notable Customers: UnitedHealthcare, Verizon Media, Hanover Insurance, Lockheed, United Technologies, Siemens

Customer Case Studies:  https://www.exterro.com/about/clients/

Services Offered: Implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Subscription pricing based on a number of factors, depending on which individual products/modules are included, litigation profile, number of users or data volume

Typical Use Cases: Full e-discovery, identification/information governance through production; corporate investigations, incidence and breach response; specific phases of EDRM; FOIA/PRR; Data Subject Access Request; internal investigations

Ipro

Web Address:  https://ipro.com/

Headquarters: Tempe, Arizona

Founded: 1989

Private/Public: Private company

Product Name: Ipro for Enterprise

Package Options: Stand-alone product


Customer Case Studies:  Netgovern information governance case studies and  Ipro e-discovery case studies

Services Offered: E-discovery consulting, e-discovery project management, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services
Pricing Guidance: Unlimited enterprisewide subscriptions, usage- and volume-based, case- or matter-based and pay-as-you-go models

Typical Use Cases: Internal investigations (fraud, IP theft, discrimination, etc.); responding to third-party subpoena, second requests and FOIA requests; compliance with privacy laws and regulations; complex litigation matters with large e-discovery process; legal hold and preservation with early data assessment prior to litigation

Knovos
Web Address: https://www.knovos.com

Headquarters: Washington, D.C.

Founded: 2002

Private/Public: Private company

Product Name: eZReview

Package Options: Stand-alone product

Notable Customers: Not provided

Customer Case Studies: https://www.knovos.com/case-studies/

Services Offered: E-discovery project management, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Number of concurrent users and number of processing, production analytics (PPA) nodes; hosting/infrastructure: Only actual cost is paid by clients; per deployment ranges: from $126,000 to $450,000

Typical Use Cases: E-discovery, data analysis, data breach review, data processing, productions and disclosures

Logikcull
Web Address: https://www.logikcull.com

Headquarters: San Francisco, California
Founded: 2004

Private/Public: Private company

Product Name: Logikcull

Package Options: Stand-alone product

Notable Customers: Veolia, Cardinal Health, Coinbase, City of Baltimore, Baker Donelson

Customer Case Studies: https://www.logikcull.com/resources/casestudies

Services Offered: E-discovery consulting, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), working hours support in at least two geographic regions, 24/7 support globally

Pricing Guidance: Publicly available; pricing is based on the number of matters (i.e., projects) hosted and the GB uploaded and processed (one-time); all customers receive unlimited storage, unlimited users and unlimited productions

Typical Use Cases: ECA, third-party subpoenas, internal investigations, litigation document review, M&A due diligence document review

Microsoft

Web Address: http://www.microsoft.com

Headquarters: Redmond, Washington

Founded: 1975

Private/Public: Public company

Product Names: Microsoft 365 Content Search, Microsoft 365 eDiscovery, Microsoft 365 Advanced eDiscovery

Package Options: Part of a suite

Notable Customers: The Linde Group, Cerner, Invest in Canada

Customer Case Studies: https://customers.microsoft.com/en-us/home
Services Offered: POC, implementation services, on-site training services, remote training services, services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Not provided

Typical Use Cases: Request for production of documents (litigation, third-party subpoenas, regulatory requests) timely; internal investigation; FOIA; data privacy regulations, such as GDPR/data subject requests and CCPA; SecOp assessments/forensic investigations/postbreach assessments

Nuix

Web Address:  https://www.nuix.com/

Headquarters: Sydney, Australia

Founded: 2000

Private/Public: Public company

Product Name: Nuix Discover

Package Options: Part of a suite

Notable Customers: Not provided

Customer Case Studies:  https://www.nuix.com/search?query=case+studies

Services Offered: POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: On-premises instances and users; SaaS: Data under management and users; range from $4/GB to $15/GB, depending on the term and the amount of data and payment status (e.g., prepayment)

Typical Use Cases: Managed review services with heavy emphasis on analytics and technology-assisted review (TAR); rapid assessment and response; ECA; case template-driven experience; high-stakes litigation tool

OpenText

Web Address:  https://www.opentext.com/
Headquarters: Waterloo, Ontario

Founded: 1991

Private/Public: Public company

Product Names: OpenText Axcelerate, OpenText Axcelerate Investigation, OpenText Insight, OpenText Legal Hold

Package Options: Stand-alone product

Notable Customers: Switch, Pillsbury Winthrop Shaw Pittman, Kutak Rock LLP, Serious Fraud Office, Sidley Austin LLP

Customer Case Studies: OpenText

Services Offered: E-discovery consulting; e-discovery project management; legal process outsourcing, including attorney review; POC; implementation services; on-site training services; remote training services; migration services, including migrations from competitor products; services through partners; working hours support in at least two geographic regions; 24/7 global support; region-specific, data center hosting services; and investigation services

Pricing Guidance: For e-discovery products, licensing models include server with volume limits for on-premises, annual subscription (on-demand or private cloud), by volume per gigabyte (on-demand or private cloud)

Typical Use Cases: Legal hold; collect data directly from ECM systems, data repositories, mobile devices on-premises and in the cloud; machine learning (ML) and analytics; ECA; investigations; review and production

Relativity

Web Address: https://relativity.com

Headquarters: Chicago, Illinois

Founded: 2001

Private/Public: Private company

Product Names: RelativityOne, Relativity Server, Relativity Trace, Verqu Hydra, Verqu Phoenix, Verqu Hive

Package Options: Stand-alone product
Notable Customers: Not provided


Services Offered: On-site training services; remote training services; services through partners; working hours support in at least two geographic regions; 24/7 global support; region-specific, data center hosting services; and data migration services

Pricing Guidance: Not provided

Typical Use Cases: End-to-end e-discovery in litigation, litigation strategy; corporate investigations and legal hold; FOIA; data migrations; communications content capture

Reveal

Web Address:  [http://www.revealdata.com](http://www.revealdata.com)

Headquarters: Chicago, Illinois

Founded: 2009

Private/Public: Private company

Product Name: Reveal

Package Options: Stand-alone product

Notable Customers: Epiq, UnitedLex, DLA Piper, Berkeley Research Group (BRG), Balfour Beatty, McDermott Will & Emery, Alix Partners, KPMG, Pillsbury

Customer Case Studies: Not provided

Services Offered: E-discovery consulting, e-discovery project management, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Subscription basis charged on a per-activated-GB basis, with a minimum commitment; pricing ranges from $3 to $12 subscriptions, and there are three-year contracts; transactional pricing is charged on a per-GB processed rate, ranging from $15 to $40 per GB and then monthly hosted per GB, thereafter ranging from $8 to $25 per GB
Typical Use Cases: Build compelling stories for litigation or investigation; discover important unknown facts about matters; find critical documents and information quickly; reduce data volumes; tag documents as relevant or privileged leveraging AI and predictive scoring

Thomson Reuters

Web Address: https://www.thomsonreuters.com

Headquarters: Toronto, Ontario

Founded: 2008

Private/Public: Public company

Product Name: eDiscovery Point

Package Options: Stand-alone product

Notable Customers: Not provided

Customer Case Studies: Not provided

Services Offered: E-discovery consulting, remote training services, migration services (including migrations from competitor products), services through partners

Pricing Guidance: Not provided

Typical Use Cases: Not provided

Veritas Technologies

Web Address: https://www.veritas.com/

Headquarters: Santa Clara, California

Founded: 1989

Private/Public: Private company

Product Name: Veritas eDiscovery Platform

Package Options: Part of a suite

Notable Customers: Not provided
Customer Case Studies:  https://www.veritas.com/customer-success

Services Offered: E-discovery consulting, e-discovery project management, POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 support globally

Pricing Guidance: E-discovery platform and legal hold — number of custodians; identification collection — number of custodians; processing analysis and review — capacity processed; Discovery Accelerator — per user, per month with archive; Discovery Archive — per user, per month with archive

Typical Use Cases: Minimize datasets in ongoing litigations; respond to regulatory requests, such as FOIA or GDPR; investigate fraudulent or unethical employee behavior; collect data from multiple sources; automate the legal hold workflow

X1 Discovery

Web Address:  https://www.x1.com

Headquarters: Los Angeles, California

Founded: 2003

Private/Public: Private company

Product Name: X1 Distributed Discovery

Package Options: Stand-alone product

Notable Customers: PwC; CDS; Compliance; Wachtell, Lipton, Rosen & Katz

Customer Case Studies:  https://www.x1.com/about/case-studies/

Services Offered: Pilot, Implementation services, Services through partners, Working hours support in at least two geographic regions

Pricing Guidance: Subscription per custodian per year; $495 per custodian per year

Typical Use Cases: Legal Teams/Law Firms — Defensible, enterprisewide technology solutions for ESI preservation and/or collection; investigative work and forensic examiners use; CFIUS audit compliance; personally identifiable information (PII)

Zapproved
Web Address:  http://www.zapproved.com

Headquarters: Portland, Oregon

Founded: 2008

Private/Public: Private company

Product Names: ZDiscovery Suite: Legal Hold Pro, Cloud Preserve, Cloud Collect and Digital Discovery Pro

Package Options: Stand-alone product

Notable Customers: AIG, Sprint, Scripps Health

Customer Case Studies:  https://go.zapproved.com/guides/cs001-labcorp;
https://go.zapproved.com/guides/cs002-tibco

Services Offered: POC, implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, and region-specific, data center hosting services

Pricing Guidance: Not provided

Typical Use Cases: Legal hold management and data preservations; e-discovery data processing, culling, and review; early case assessment; internal investigation management; data exports and document productions

ZyLAB

Web Address:  https://www.zylab.com

Headquarters: Tysons, Virginia

Founded: 1983

Private/Public: Private company

Product Name: ZyLAB ONE

Package Options: Stand-alone product
Notable Customers: KPMG, AkzoNobel, FICO, Seagate, Campbell, 1st Bank, Executive Office of the President (EOP) White House, City of Los Angeles, City of Scottsdale

Customer Case Studies: Not provided

Services Offered: Implementation services, on-site training services, remote training services, migration services (including migrations from competitor products), services through partners, working hours support in at least two geographic regions, 24/7 global support, and region-specific, data center hosting services

Pricing Guidance: Volume, number of users per month

Typical Use Cases: U.S. e-discovery under the FRCP rules; answering regulatory investigations (competition/antitrust, fraud, bribery, etc.); answering public records requests (aka PRR or FOIA); internal investigations; answering privacy related data subject access requests (CCPA, GDPR)

Market Recommendations

I&O leaders and all other stakeholders involved in investigative or legal cases must:

- Select e-discovery software and service provider solutions by aligning the maturity of in-house e-discovery processes and teams to the complexity of e-discovery efforts. Determine whether best-of-breath or end-to-end solutions are most suitable:
  - Identify your e-discovery needs:
    - Number of cases per year
    - Average size of cases
    - Data sources
    - Internal resources and capabilities
  - SaaS options that are managed by in-house teams are a good fit for small, less-complex and low-risk investigations
  - Eliminate multiple e-discovery solution purchases by creating a cross-functional team of IT and legal personnel to ensure technology selection aligns with infrastructure strategy and enhances legal workflow process and user experience:
    - The team must establish numerous buying criteria: scalability, data source support, deployment options, end-user features, ease of use and related application criteria
Select solutions that align with requirements to support work-from-home complexities:

- Determine which vendor solutions support requirements that enable appropriate security and access for all aspects of the e-discovery process
- Prioritize vendor offerings that capture full fidelity of workstream collaboration communications, such as Microsoft Teams and Slack

Use e-discovery solutions to establish proactive information governance practices:

- Use e-discovery software and solution providers offerings that enable insights to data in-place to provide improved inventory and visibility to data subject to privacy requirements

Engage service providers to handle one-off or high-stakes cases:

- Retain multiple service providers based on your needs
- Review contractual terms carefully, and, in particular, clarify costs associated with retrieving data, including coding data from service providers’ repositories
- Request updates from service providers on data encryption, protection and handling of privileged data

Leverage enterprise information governance and data management solutions that augment efforts of e-discovery using built-in tools to search, collect and apply legal holds to ESI:

- Use the e-discovery features of enterprise information archiving solutions
- Leverage capabilities of data center backup and recovery, and backup as a service offerings to discover data on protected workloads

Evidence

From August Through September 2020, Gartner conducted a survey among representative software vendors in this market that are profiled in this Market Guide. Unless otherwise stated, the charts and tables in this research are based on the self-reported survey data provided by these vendors. As required by Gartner’s research methodology, vendors received a copy of the information for factual review prior to publication.

¹ Gartner Secondary Research Services conducted a social listening analysis leveraging third-party data tools to complement the vendor supplied data presented in this document. Due to its qualitative and organic nature, the results should not be used separately from the rest of this research. No conclusions should be drawn from this data alone, as it may not be entirely market representative. Social media data in reference is from 1 January 2018 through 31 July 2020 in all geographies (except China) and recognized languages.
Note 1 Representative Vendor Selection

The vendors included in this research were selected to represent those with products as described in the Market Definition section. In addition, their products are marketed, sold and used specifically as stand-alone collaborative work management products or as modules in larger suites. Finally, the listed vendors have achieved some degree of visibility and traction in this market.

Note 2 Accompanying Toolkit With Detailed Vendor and Product Data

The accompanying research Toolkit: E-Discovery Solutions Vendor and Product Data provides I&O leaders with detailed vendor and product data to align their e-discovery requirements with the available software offerings in this market. This vendor-supplied data can help to construct vendor shortlists and RFPs.

Note 3 Product Feature Categories

Electronic Discovery Reference Model (information governance [products that create, maintain, and enforce records management policies to proactively manage data])

Electronic Discovery Reference Model (identification [products for locating, inventorying and determining scope of potential sources of electronically stored information])

Electronic Discovery Reference Model (reservation [products that ensure that electronically stored information, ESI, is protected against inappropriate change and/or deletion])

Electronic Discovery Reference Model (collection [products that collect data for use in processing and review stages of e-discovery])

Electronic Discovery Reference Model (processing [products that reduce e-discovery data (e.g., deduplication) and converts it, if necessary for review])

Electronic Discovery Reference Model (review [products that facilitate culling of data to the applicable relevance or its privileged nature in an investigation])

Electronic Discovery Reference Model (production [products that allow distribution of ESI in applicable forms and delivery options])

Electronic Discovery Reference Model (presentation [products to display data in native or near-native forms])

Capabilities Beyond EDRM (file analysis [products that analyze, index, search, track and report on file metadata and file content stored on-premises and cloud file storage services])
Capabilities Beyond EDRM (enterprise information archiving [products for archiving user messaging and other unstructured data, including email, IM, SMS, collaboration, files, etc.])

Capabilities Beyond EDRM (content services platforms [products for managing document life cycle, including workflows, check-in/out, etc.] to support the content- and process-related needs of operational business functions)

Capabilities Beyond EDRM (subject rights request automation [products for identifying and continuously tracking the information held on each individual, maintaining the capacity to act on that knowledge to inform the user, correct the data or restrict processing. Tracking the workflow and holding detailed records to assess and demonstrate compliance])

Capabilities Beyond EDRM (forensic software [products for forensic examination and analysis of applications, data, networks and endpoint systems])

Capabilities Beyond EDRM (public records request management [products for managing the Freedom of Information Act (FOIA)/PRR requests, including receive request, tracking progress, reporting, release management])

Capabilities Beyond EDRM (legal hold notification and automation [products that send and track hold notices and maintain audit trail])

Identification and Preservation (IT environment data map [maintains a data map of the company's IT environment])

Identification and Preservation (custodian-led identification and preservation [generating legal hold notification, tracking acknowledgment and responses of custodians])

Identification and Preservation (in-place preservation holds [providing the ability to leverage storage and/or application features to prevent alterations in-place])

Identification and Preservation (litigation hold in repository [collect data from data source to apply legal hold])

Collection and Processing (agentless server extraction [performs agentless extraction of data on corporate or cloud assets])

Collection and Processing (extracts data from mobile devices [enable collection of data from mobile devices])

Collection and Processing (file type filtering [enable culling of data to filter/remove applicable data based on file type])
Collection and Processing (processing during collection [enable the ability to perform processing, while collecting data from source systems])

Collection and Processing (data deduplication [apply technology to reduce redundant copies of data moved to review stage, duplicate, and near-duplicate detection and deletion options])

Data Analysis (search and filtering [search all data including attachments, filtering based on multiple criteria such as dates, document types, topics, authors, deadlines and events; Boolean search, proximity search, saved searches, drag-and-drop query builders])

Data Analysis (semantic analysis features [features would include classification/categorization, entity extraction, content analytics, clustering, taxonomy creation and management])

Data Analysis (image/video analysis [optical character recognition, automatic tagging of image/video, pattern recognition, facial recognition, speech to text])

Data Analysis (NLP [document summarization, data-driven document generation, guided document assembly, automatic document classification, metadata extraction, natural language search queries, automatic translation, automatic transcription of audio/video, natural-language generation, text to speech, speech to text])

Data Analysis (early case assessment before collection [ability to analyze data, in place, before collection has been performed])

Data Analysis (early case assessment after collection [ability to analyze data, while still in collection, before processing is performed])

Review (native file format review [displays content in application specific, presentation format, unaltered view])

Review (TAR [or predictive coding is an ML process that uses software to reduce the number of nonresponsive or irrelevant documents that must be reviewed manually])

Review (ML [applies supervised, unsupervised ML techniques, including deep learning using customer data as input in order to perform metadata extraction, data classification or to build causal explanatory or predictive models])

Review (data visualization [creates visual maps of relationships between case data, encompasses everything from a simple bar chart to the most advanced types of multivariable, interactive displays])

Review (virtual assistants or chatbots [complex process support via an interactive, conversational natural language experience])
Review (categorization, classification, clustering [methods to group review content together using manual or automated processes])

Review (communication threading [threads email, collaboration, instant message and other conversations, i.e., organizing by topic])

Review (redaction [ability to hide information from view in review, at time of production])

Review (workflow assignments [establish process flow of content through review process, assigning applicable resources to particular stages in the review process])

Review (metrics and reporting [prebuilt, role-based, interactive reports that can be scheduled and automatically distributed. Summarizing status of e-discovery process, including operational and KPI dashboards])

Review (user tagging and annotation [ability to add commentary via tags and annotations to content in review])

Security, Mobility, Integration, Certification (security [single sign-on based on Active Directory, Azure AD, Google authentication, SAML; integration with third-party single sign-on providers, such as Okta and ONeLogin; multifactor authentication; data-at-rest encryption; client encryption keys])

Security, Mobility, Integration, Certification (internationalization [can handle at least 10 languages including Asian languages])

Security, Mobility, Integration, Certification (platform extensibility [programmatic API access to content and data for technical professionals including REST APIs; offers app-store for third parties to publish apps that integrate with your system; have published apps that provide access to your system in third party app stores; bulk import/export of system data in a structured format including spreadsheets or CSV files])

Security, Mobility, Integration, Certification (certification [accreditation or attestation with respect to product and infrastructure security or compliance standards such as SOC 1, SOC 2, SOC 3, ISO 27001, ISO 27017, PCI DSS, HITRUST, HIPAA, FedRAMP, FISMA Attestation; relevant certificates are available for inspection])

Security, Mobility, Integration, Certification (regional data centers [regional data centers that are run by you or for you by your partners in all geographic regions including the U.S., Latin America, Europe, the Asia/Pacific region, the Middle East and Africa, with assurances that no customer data will cross regional boundaries])

Security, Mobility, Integration, Certification (accessibility [compliance with the Americans with Disabilities Act, WCAG 2.0, and Section 508])
Collection and Processing (agent-based data collection [performs collection utilizing deployment of agent to applicable data sources])

Collection and Processing (interoperability with legal hold [integration with legal hold notification solutions to automate tracking and actions of collection])

**Document Revision History**

Market Guide for E-Discovery Solutions - 27 June 2019

Market Guide for E-Discovery Solutions - 24 October 2017


**Recommended by the Author**

3 Best Practices to Maximize Cost Savings When Using Alternative Legal Service Providers

3 Strategies to Overcome Legal Technology Adoption and Implementation Challenges

Magic Quadrant for Enterprise Information Archiving

Critical Capabilities for Enterprise Information Archiving

Market Guide for File Analysis Software

Defining Your E-Discovery Process Will Lower Costs and Reduce Risks

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Table 1: Representative E-Discovery Software Vendors

<table>
<thead>
<tr>
<th>Software Vendor</th>
<th>Product Names</th>
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<tbody>
<tr>
<td>Breakwater</td>
<td>StoredIQ for Legal (formerly IBM StoredIQ for Legal)</td>
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<tr>
<td>Casepoint</td>
<td>Casepoint eDiscovery</td>
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<tr>
<td>CloudNine</td>
<td>CloudNine Collection Manager, Data Wrangler, Explore, LAW, Review and Concordance</td>
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<td>Everlaw</td>
<td>Everlaw</td>
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<tr>
<td>Exterro</td>
<td>Exterro OrCHEstrated E-Discovery Suite</td>
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<tr>
<td>Ipro</td>
<td>Ipro for Enterprise</td>
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<td>Knovos</td>
<td>eZReview</td>
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<td>Logikcull</td>
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<td>Thomson Reuters</td>
<td>eDiscovery Point</td>
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<td>Veritas Technologies</td>
<td>Veritas eDiscovery Platform</td>
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<td>ZDiscovery Suite: Legal Hold Pro, Cloud Preserve, Cloud Collect, and Digital Discovery Pro</td>
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<tr>
<td>ZyLAB</td>
<td>ZyLAB ONE</td>
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Source: Gartner (April 2021)
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<tr>
<th>Service Provider</th>
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<tr>
<td>Ankura</td>
<td>eDiscovery</td>
</tr>
<tr>
<td>Compliance</td>
<td>AppHQ, Discovery-as-a-Service (DaaS) Solutions</td>
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<td>Conduent</td>
<td>Viewpoint Integrated Analytics</td>
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<td>Consilio</td>
<td>Sightline</td>
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<td>FRONTEO</td>
<td>KIBIT Automator, Lit i View</td>
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<td>KLDiscovey</td>
<td>Nebula, KLD Analytics, KLD Processing</td>
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<td>UnitedLex</td>
<td>Litigation and Investigations</td>
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