

# A Survey on the Size, Scope & Growth of the Electronic Discovery Market

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# Market Scope

- “Born electronic” only
- Processing services, software, consulting
- Computer forensics / investigative services
  - Identification
  - Collection
  - Restoration
  - Conversion
  - Culling / filtering
- Electronic discovery / litigation support
  - Data hosting
  - Filtering / search
  - Data analysis

# Comparison Model

Factor	Explanation
Experience / Reputation	Length & depth of experience in the industry / reputation among customers and competitors
Capacity	Resources dedicated to market: facilities, people & services
Computer Forensics / Investigative	Breadth & depth of services dedicated to forensics & electronic investigation
Electronic Discovery / Litigation Support	Breadth & depth of services dedicated to conversion to more useable formats & to search, retrieval & analysis capabilities
Consulting	Advise on retention & discovery approaches
Revenue	Estimated annual revenues

# Comparison Model

Weight	Factor
20%	Experience / Reputation
10%	Capacity
30%	Computer Forensics / Investigative
20%	Electronic Discovery / Litigation Support
5%	Consulting
15%	Revenue

# Explanation of Services

<b>Computer Forensics / Investigation</b>	
Data identification	Identifying what data should be pursued in discovery
Data collection	Actual collection of data from various sources & media
Data restoration	Restoring collected data for evaluation & processing
Data conversion	Converting restored data to desired media & formats
Culling / filtering	Culling: Reducing amount of data before processing Filtering: Examining subsets of data after processing
Forensic software	Software provided to client, for use in forensics/investigation
<b>Electronic Discovery / Litigation Support</b>	
Data hosting / web	Hosting services of access to discovery data, including on-line hosting
Filtering / search	Examining subsets of data; search, retrieval & display
Data analysis	Working the legal team to discern significant patterns & located relevant documents
Search software	Software provided to client for use in electronic discovery; litigation support
<b>Consulting</b>	
Consulting	Advise on retention & discovery approaches

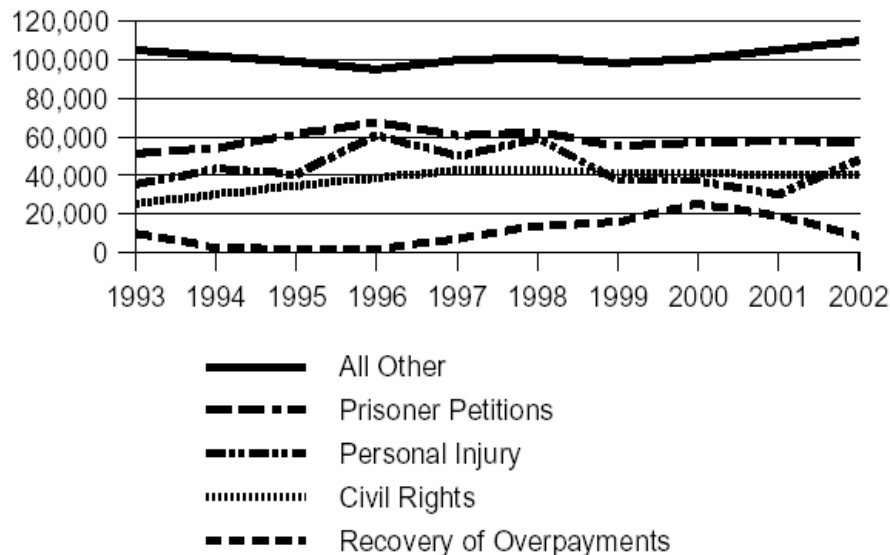
# Total Potential Market: Email Growth

- 1999:
  - 1 trillion email messages per year
  - (UC-Berkeley 2000 magnetic storage study)
- 2001:
  - 3.6 trillion email messages per year
  - (PWC 2002 General Counsel Forum)
- 2006:
  - 22 trillion email messages per year
    - 50% person-to-person
    - 50% spam
  - IM & collaborative tools used as much
    - (IDC 2002 report)

# Total Potential Market: Federal Courts

## United States District Courts – 2002 Data

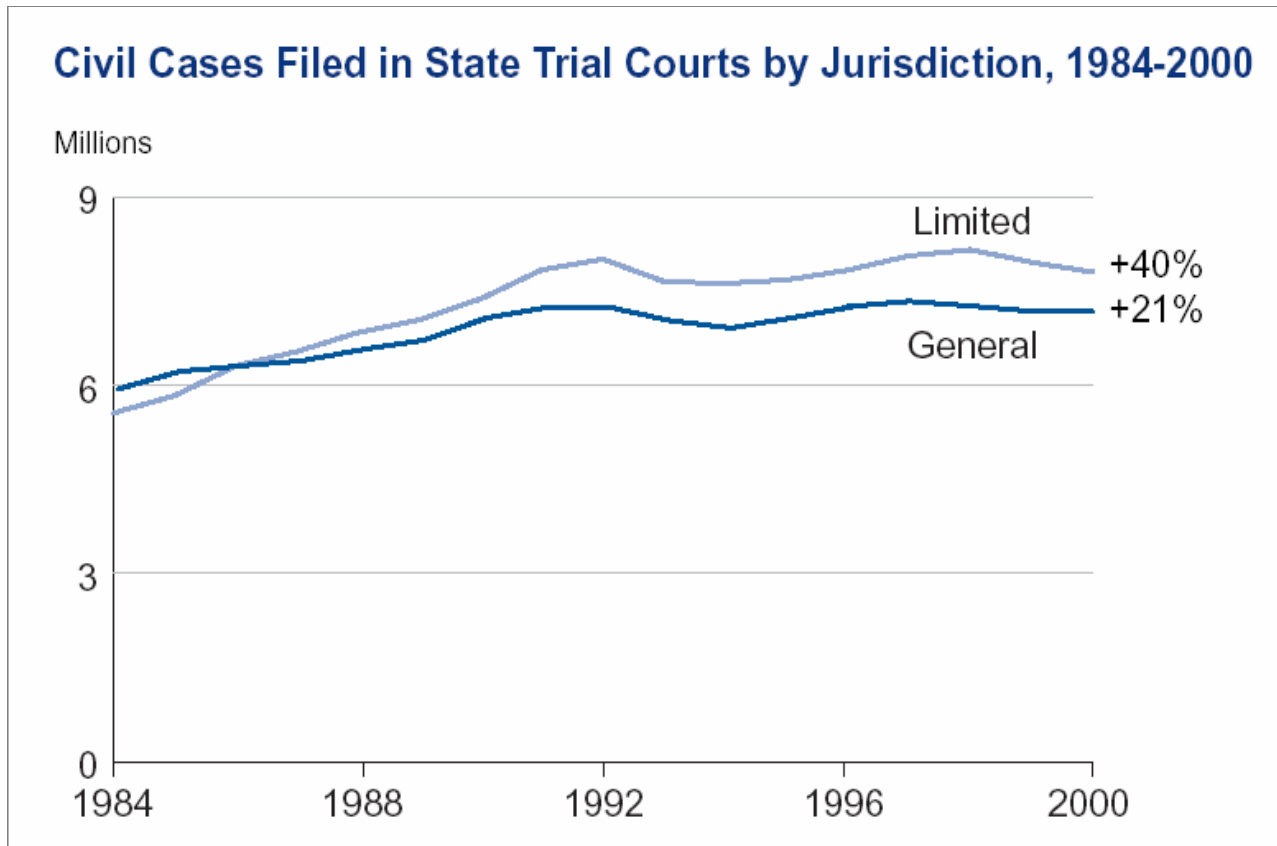
### Civil Cases Filed, by Nature of Suit Years Ending March 31



Actual	
2002 Federal civil filings	265,091
Estimated Potential	
Cases with some discovery	~150,000
Cases with more than a folder of documents & a few depositions	~50,000
Cases with substantial discovery	~5,000
Cases with discovery disputes brought before judges	~2,500
Cases with potential for electronic discovery	~5,000

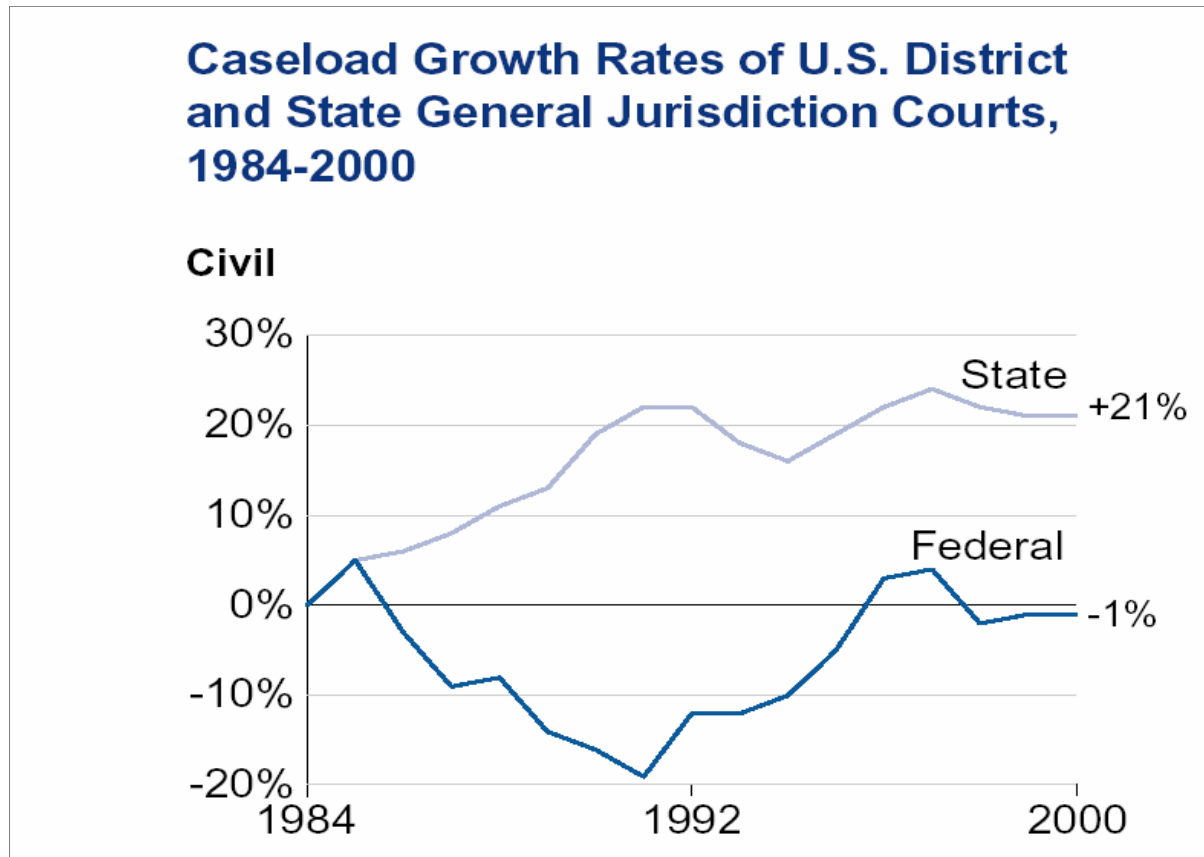
Source: Federal Judicial Center

# Total Potential Market: State Courts



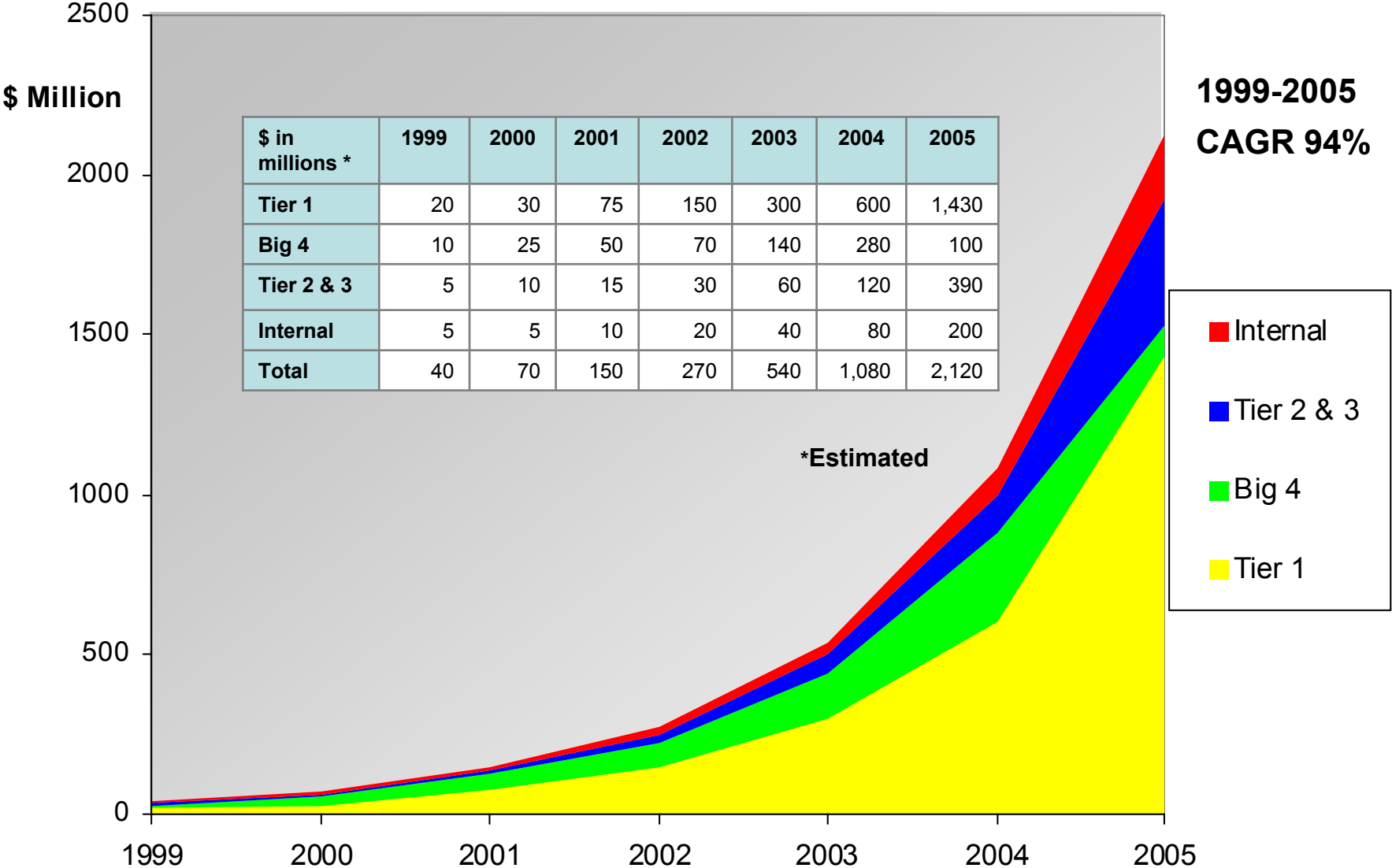
Source: National Center for State Courts

# Total Potential Market: Federal & State Courts

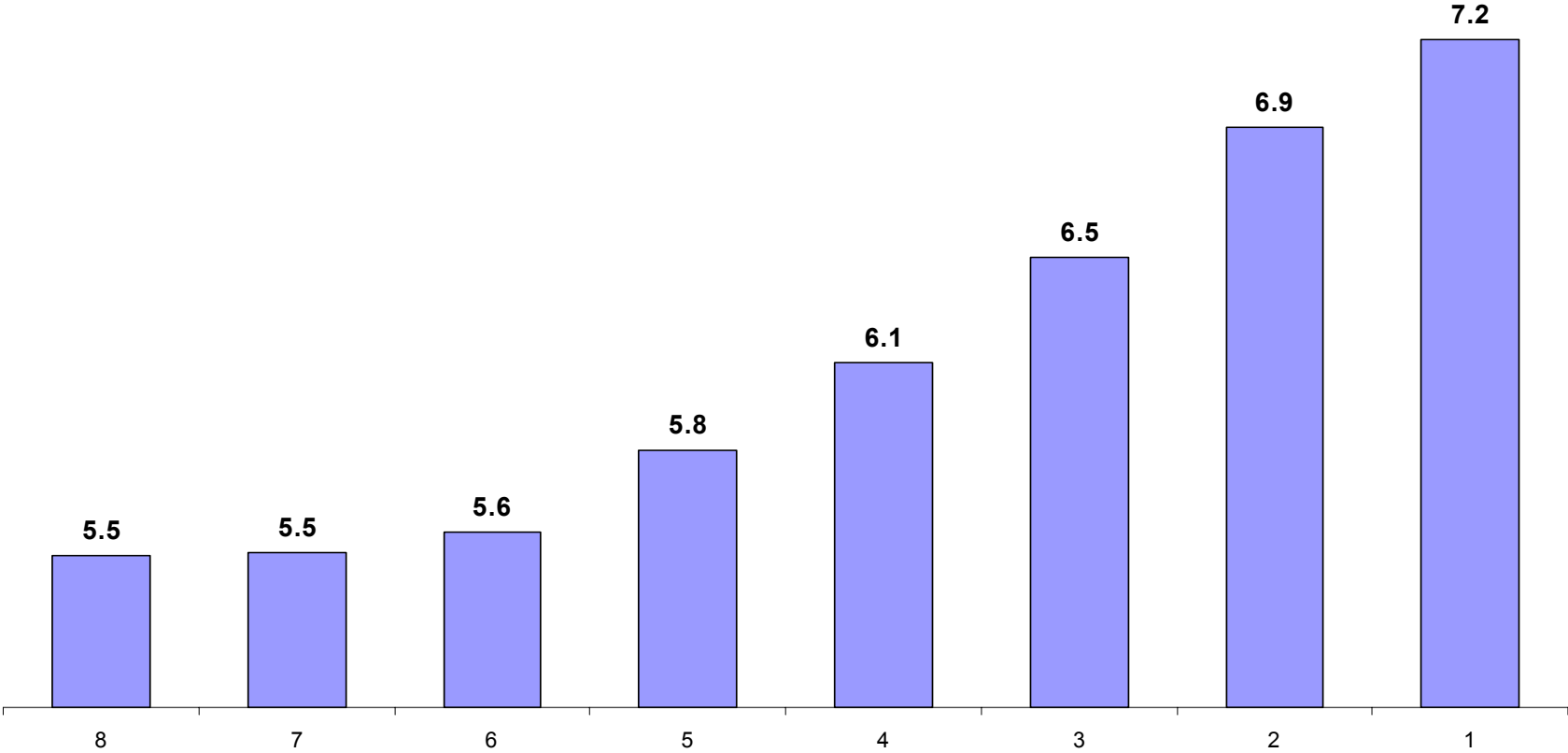


Source: National Center for State Courts

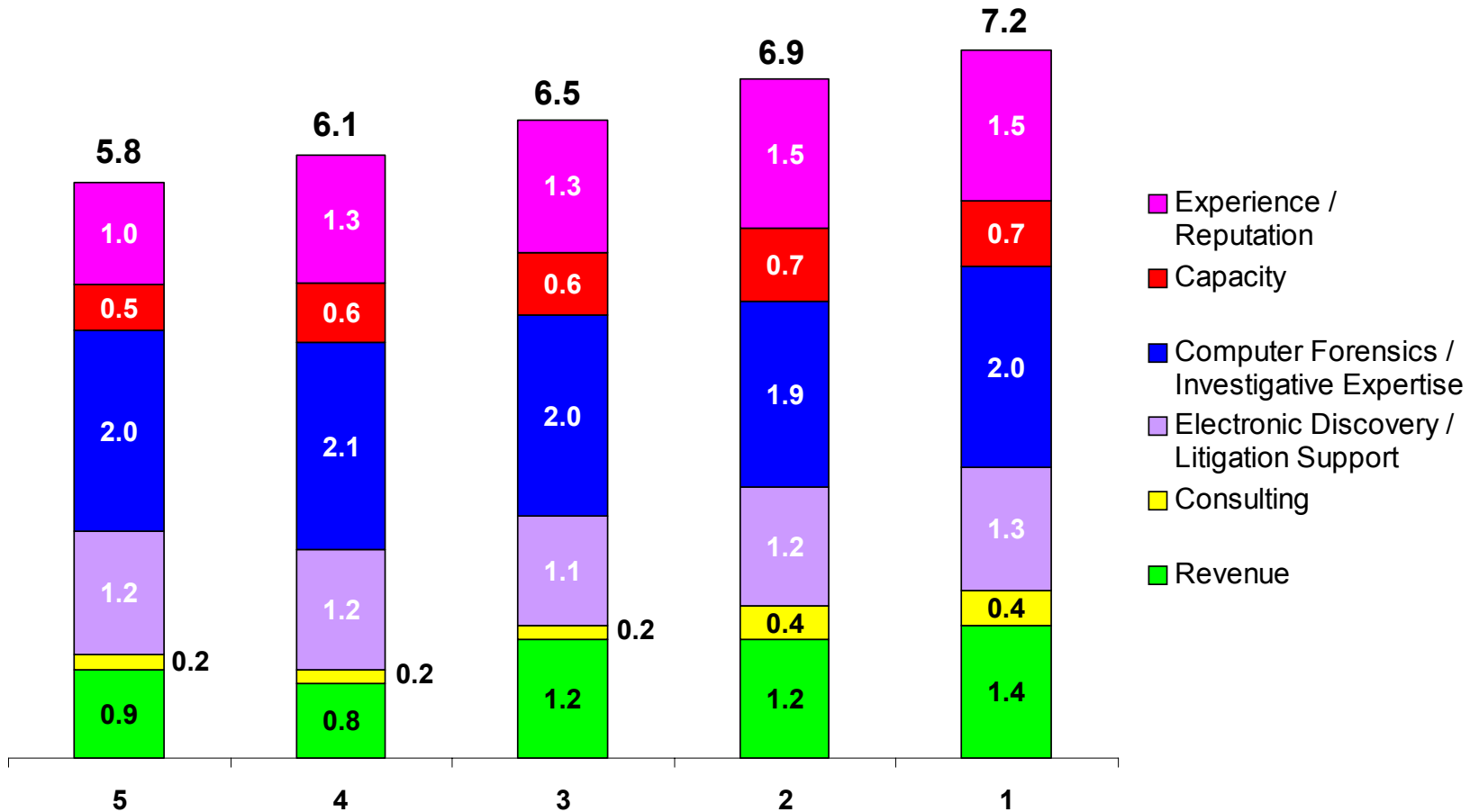
# Total Addressable Market



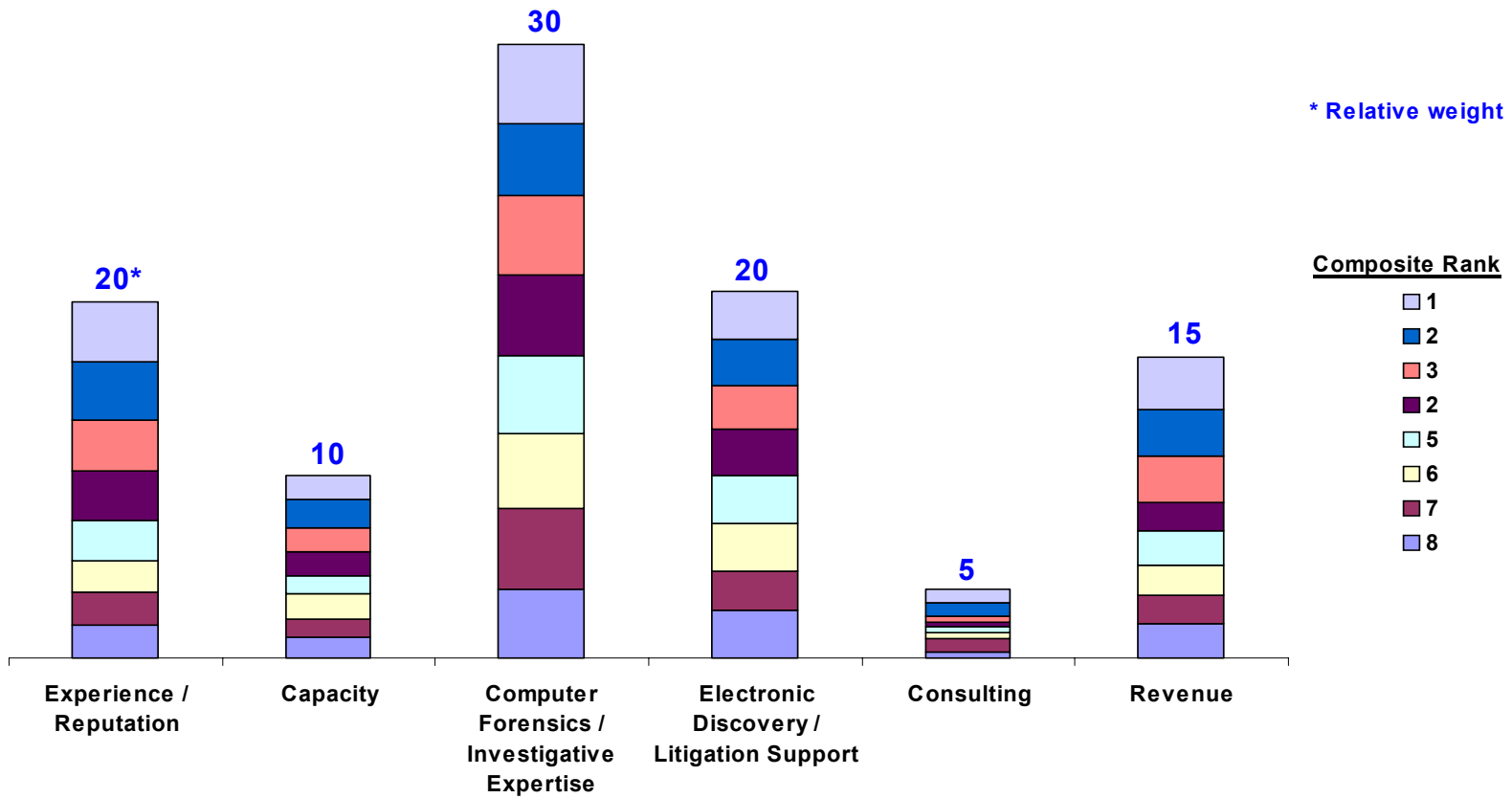
# Market Leaders: Composite Ranking



# Market Leaders: Top 5 Comparison



# Market Leaders: Presence & Position



# Market Leaders: Perceptions of Market Share

