

IDC MarketScape: Worldwide End-to-End eDiscovery Software 2025 Vendor Assessment

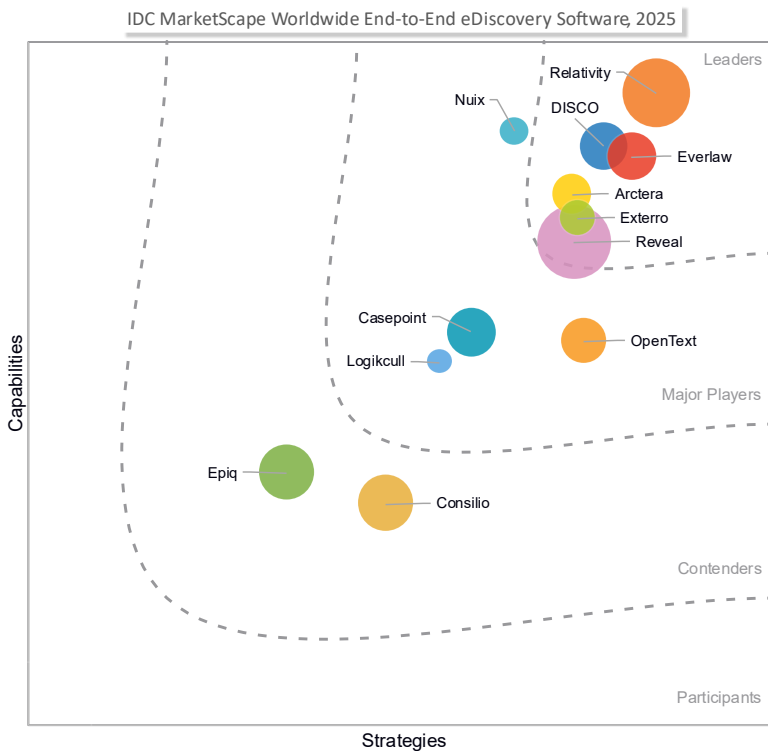
Ryan O'Leary

THIS EXCERPT FEATURES ARCTERA AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide End-to-End eDiscovery Software Vendor Assessment



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide End-to-End eDiscovery Software 2025 Vendor Assessment (Doc # US51573424).

IDC OPINION

The market has evolved since the first iteration of the Electronic Discovery Reference Model (EDRM) was created. eDiscovery vendors must now provide capabilities across the EDRM to be successful instead of narrowly focusing on one aspect. This IDC MarketScape covers several vendors in the worldwide ediscovery software market with a focus on end-to-end functionality. This vendor evaluation is based on a comprehensive criterion expected to be most conducive to success in providing tools to enable tagging, analyzing, searching, and producing data in conjunction with investigations and litigations. The evaluation criteria emphasize capabilities and strategies that enable speedy and accurate document review and production.

IDC expects critical success factors for end-to-end ediscovery software to be:

- Robust project management capabilities and dashboards to enable efficient review projects
- Artificial intelligence/machine learning (AI/ML) capabilities to enable predictive coding, relevance-based batching, and so forth
- Easy-to-use consumerized user interfaces (UIs) with vigorous searching capabilities
- Strong focus on cybersecurity capabilities to ensure that client data is protected and secured
- Global footprint to enable large organizations to review their documents in the appropriate jurisdictions
- Cloud-to-cloud data ingestion connectors that enable customers to ingest cloud-native data with the click of a button
- Transparent and predictable pricing
- Strong analytics and machine learning functions that enable deduplication and culling of data
- Comprehensive ability to collect and process data from a wide variety of devices and applications

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

To be included in this IDC MarketScape, vendors must have at least \$10 million in yearly revenue related specifically to selling ediscovery software to the enterprise and/or legal operations. IDC defines the ediscovery software market as ediscovery applications that span the 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.

ADVICE FOR TECHNOLOGY BUYERS

The ediscovery market may seem settled to the untrained eye. However, there are a plethora of solutions out there. Buyers should evaluate every solution with an open mind as many "legacy" ediscovery tools have evolved quite a bit in recent years. As ediscovery moves into the generative AI (GenAI) era, it is important to reevaluate partners and find the tool that fits your organization in 2025. It is important to get it right and find the solution that works for your organization and not just follow the crowd. It is time for buyers to make sure they get it right for the next era of ediscovery.

While GenAI promises to automate document review on a massive scale within a few years, this is not a robots taking jobs scenario. There is still a significant need for humans in the loop. Organizations need to invest in training their employees for this new future. Prompting ediscovery tools will become a necessary skill for every practitioner to develop and may make or break the effectiveness of the chosen ediscovery tool.

In addition, continuing to shift ediscovery left within your organization and continuing to focus on the early case assessment will still yield dividends. Culling data will still be necessary. Yes, GenAI can process and summarize large volumes of data, but that doesn't mean it has to. There is a temptation to return to brute force ediscovery techniques and over collect and just let the AI tools review it. This is a slippery slope. Buyers still need to focus on tools that allow them to slice and dice the data as well as cull as much of the data as possible before ingestion. GenAI is expensive. Vendors may not currently be pricing it as expensive as it should be but end users need to prepare themselves.

Currently, GenAI ediscovery functionality is priced to move and garner adoption. Much like smartphone companies used to give away handsets to foster adoption, GenAI ediscovery tools are priced to create reliance. If end users revert to brute force

ediscovery, they could find their costs uncontrollable in a few years. Further, the modern data attachments and hyperlinks within messages still require some finesse to process and review. Relying too much on GenAI could be dangerous. eDiscovery will remain as much of an art as it is a science.

VENDOR SUMMARY PROFILES

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.

Arctera

Arctera is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide end-to-end ediscovery software.

Arctera is a technology company focused on delivering data management solutions that address challenges in compliance, data protection, and data resilience. With its roots in the Veritas family of products, Arctera has built on a foundation of enterprise data expertise and now operates through three main business units: Data Compliance, Data Resilience, and Data Protection. The company's offerings are designed to help organizations manage information governance, digital surveillance, disaster recovery, and cyberdefense in an increasingly complex regulatory environment.

A key area of Arctera's portfolio is its Insight eDiscovery platform, which supports organizations throughout the entire EDRM life cycle. The platform provides end-to-end workflows for legal hold, data collection, review, and production and is capable of ingesting data from more than 120 content sources, including modern collaboration tools. Leveraging artificial intelligence, Arctera's Insight eDiscovery solution features advanced search, document review, and analytics capabilities, enabling users to surface relevant information quickly, reduce manual effort, and streamline the review process.

Arctera's Insight eDiscovery platform also offers collaborative case management, allowing multiple reviewers to work together securely, assign privileges, and maintain robust audit trails for defensibility. Flexible export options and comprehensive reporting further support organizations in meeting legal, regulatory, and investigative demands. Through these solutions, Arctera aims to help enterprises efficiently manage their data, maintain compliance, and respond effectively to legal and regulatory requests.

Strengths

- **Robust ediscovery and legal hold capabilities:** Customers consistently praise Arctera's seamless ediscovery features, particularly its legal hold and data retrieval functions. These capabilities simplify compliance processes and make it easier for organizations to respond efficiently to regulatory requirements. The platform's end-to-end workflow and automation are highlighted as key factors that reduce manual effort and ensure defensibility in legal and investigative contexts.
- **Comprehensive integration with communication platforms:** Users value Arctera's ability to capture and manage information from a wide range of communication platforms. This broad integration enhances the completeness and reliability of discovery and compliance efforts, setting Arctera apart from those with more limited connectivity. Customers note that this strength is especially important for organizations with complex data governance needs and diverse communication channels

Challenges

- **Rebranding effort:** Arctera has spun off from Veritas, which had a lot of name recognition in the space. The good news is that Arctera is now able to focus on innovation and driving its own destiny. However, the company will have to reestablish its brand identity and prove that it has the same product and reputation it has always had.

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 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.

LEARN MORE

Related Research

- *Worldwide eDiscovery and Forensics Applications Software Forecast, 2025–2029* (IDC #US53529925, June 2025)

- *Global Relay Analyst Summit: eDiscovery Led Archiving* (IDC #lcUS53563225, June 2025)
- *IDC Innovators: Data Intelligence Platform Software, 2025* (IDC #US52935725, June 2025)
- *IDC MarketScape: Worldwide Data Clean Room Technology for Advertising and Marketing Use Cases 2025 Vendor Assessment* (IDC #US52035625, May 2025)
- *IDC MarketScape Criteria: Worldwide Print Security Solutions and Services Hardcopy 2025 Vendor Assessment* (IDC #US52334025, May 2025)

Synopsis

The IDC MarketScape: Worldwide End-to-End ediscovery Software 2025 Vendor Assessment evaluates major vendors in the ediscovery software market, emphasizing end-to-end functionality across the Electronic Discovery Reference Model (EDRM). Key success factors include AI/ML capabilities, robust project management, cybersecurity, global reach, and transparent pricing. This study highlights vendor strengths, challenges, and strategies, offering insights for technology buyers navigating the evolving ediscovery landscape, particularly in the GenAI era, where human expertise remains critical alongside automation advancements.

"Success in ediscovery demands AI-driven precision, global reach, and human expertise — reshaping investigations and compliance in the GenAI era," says Ryan O'Leary, research director, Privacy and Legal Technology, 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

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

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.