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TUNGSTEN AUTOMATION

IDC MarketScape: Worldwide Intelligent Document Processing Software 2025–2026 Vendor Assessment

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IDC MarketScape

IDC MarketScape: Worldwide Intelligent Document Processing Software 2025–2026 Vendor Assessment

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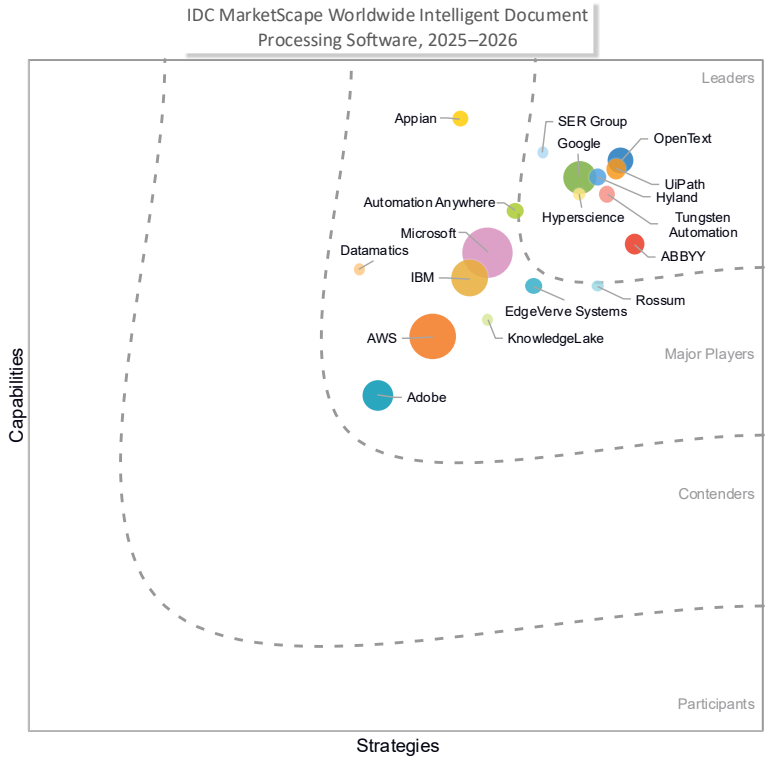
THIS EXCERPT FEATURES TUNGSTEN AUTOMATION AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Intelligent Document Processing Software Vendor Assessment



Source: IDC, 2025

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

December 2025, IDC #US53014125e

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Intelligent Document Processing Software 2025–2026 Vendor Assessment (Doc # US53014125).

IDC OPINION

Intelligent document processing (IDP) software technologies leverage a growing mix of tools — including traditional machine learning and generative AI (GenAI), advanced analytics technologies, business rules, and, increasingly, tools for automation facilitation — to support orchestration and decision-making based on content extracted from documents. At its core, IDP has been focused on the key workflow-driven tasks of classifying, extracting, analyzing, and validating from documents. In the past, there was a clearer distinction between vendors that focused their efforts on unstructured content and those that focused on structured content. However, most IDP vendors today cover extraction across structured, semistructured, and unstructured documents through a single solution or platform.

Although standalone or pure-play IDP software providers deliver considerable value to technology buyer organizations on their own, hyperscalers — and, increasingly, other automation ecosystem software vendors — often pair IDP with adjacent technologies such as intelligent process automation (IPA), robotic process automation (RPA), process mining, and retrieval augmented generation (RAG) to deliver more comprehensive workflow efficiency and an automation suite that can work end-to-end across workflows. Here, we can see three major vendor categories — namely, hyperscalers, automation ecosystem vendors, and standalone or pure-play IDP. In addition, more recently, there has been a push for pure-play IDP vendors to start adding more features to extend their platforms through partnerships or prebuilt connectors.

Over the last several years, IDC's research and discussions have consistently indicated a market evolution and advances in terms of the technology tools developed by vendors and demanded by customers. Advanced AI capabilities, primarily through GenAI, are at the forefront of these developments, with some experimentation occurring in the usage of AI agents. With GenAI capabilities such as automatic document field extraction becoming more common, users are progressively approaching an almost universal aspiration of trustworthy straight-through processing (STP). Looking at AI agents, vendors profiled in this report have begun exploring or releasing agentic solutions to help support the orchestration of IDP workflows and larger content workflows across ecosystems. Despite the recent vendor emphasis on agentic capabilities, customer adoption of these solutions is still lagging as questions around trust, visibility, and clearly defined ROI remain top of mind.

Overall, the emergence of GenAI has already enabled users to handle increasingly complex document types and use cases with historically difficult elements such as large sections of text, tables, and charts. IDC has observed an acceleration in the alignment between these complex use cases and vendor IDP capabilities driven by advances in document-understanding AI — particularly the purpose-built integration of third-party and proprietary large language models (LLMs), in many cases with a multimodal foundation. Increasingly, the AI stack of a modern IDP solution looks more complex, but this is not the whole story. IDP usage of AI has progressed methodically from traditional OCR to more complex ML algorithms, to generative AI and LLMs, and more recently, to agentic AI. An important aspect of this progression is that these AI technologies are not supplanting each other but rather contributing to a more comprehensive AI toolbox that enables the use of different tools and capabilities based on specific use cases and customer needs. A large part of customers' role in today's IDP landscape is identifying which tool is the best fit for each use case, versus trying to apply each AI tool across all use cases.

In addition to the extensive information requested from and provided by the included vendors, IDC incorporated the feedback and perspectives of dozens of end-user organization references, all of whom have deployed IDP software for at least one IDP use case. Furthermore, IDC has incorporated feedback from several vendor partner references to better understand the partner strategies at play. These reference organizations represent a range of business sizes, industry verticals, geographic footprints, and IDP use cases. These vendors represent the broad scope of today's IDP software vendor environment and solution capabilities for processing unstructured, semistructured, and structured documents.

Customer organizations are increasingly looking to IDP technologies to deliver business benefits such as productivity savings, worker upskilling, new products/offerings, and competitive differentiation. Companies IDC spoke with told us their IDP solutions were intended to address challenges with scaling and eliminate cumbersome manual document tasks such as reading, classifying, extracting, normalizing, translating, summarizing, and/or understanding documents, regardless of structure. In addition to these more traditional fixes for challenges, modern IDP has been increasingly targeting improvements to enterprise knowledge bases to build out resources for employees and feed into customized GenAI LLMs. Overall, these customer discussions revealed that nearly all end users aim to deepen the application of IDP within their organizations by extending it to more document types and document-centric use cases while continuing to lean into advanced AI tools.

In this assessment, IDC MarketScape evaluated worldwide IDP software vendors across the included capabilities and strategy criteria outlined in Tables 1 and 2 (see the Appendix of this document).

IDC has selectively included the key trends we believe are critical for technology suppliers and buyers as the IDP market continues to evolve and grow. These trends include the following:

- **The role of LLMs in supporting IDP use case workflows and tasks:** IDP software vendors are increasingly utilizing GenAI and LLMs to power a range of document processing mechanisms and functions. IDP vendors have also incorporated LLMs, leveraging their broad reach and extensive training knowledge to expand the realm of what is possible within their software. This can include powering document capabilities (e.g., summarization, document querying, translation, normalization, text generation, inter- and intra-document comparison, and validation). Vendors understand that identifying the right mechanistic tool — and the right LLM — for the task is one of their key strategic imperatives; many vendors are building (i.e., fine-tuning) in-house models in addition to integrating both open source and commercial LLMs into their IDP workflows.
- **The addition of LLM-powered chatbot/conversational-based interfaces:** Whether they call them agents, assistants, or copilots, vendors in this study have launched conversational interfaces within their IDP solutions. These value-added AI assistants have been introduced in IDP solutions through several methods, primarily as GUI embeddings, separate platform modules, or (in some cases) as net-new standalone products. These assistant tools are designed to help users build workflows, query documents, perform multi-document searches, summarize documents, generate content, or extract knowledge. Conversational AI tools leverage natural language as their primary interface, delivering intuitive insights for line-of-business users and enabling them to be more productive. Another interesting benefit of these natural language copilots is that they can serve as an important resource to abstract away user complexity when building and deploying IDP pipelines. This technology abstraction will be important in enabling broader usage across different organizations and worker personas. In addition, the abstraction layer could be beneficial for larger ecosystem vendors seeking newer, smoother ways to unify workflows and experiences across ecosystem tools or solutions.
- **End-user and vendor expectations around agentic AI developing at different rates:** While most end users interviewed as part of this assessment see the promise of agentic AI, end-user organizations are still working toward fully incorporating GenAI capabilities into their IDP usage. In addition to currently prioritizing the mastering of GenAI capabilities, end users continue to express concerns about the risks posed by agentic solutions, as well as their ability to provide differentiated value. Many customers have heard stories of failed agentic POCs, which have led them to take a step back and slow their evaluation of

agentic capabilities until they can see evidence of tangible benefits with an acceptable level of risk. On the vendor side, they have chosen to pursue agentic capabilities aggressively, seeing agentic workflow automation as the next critical step in extending automation and decreasing reliance on manual user interactions. While this could serve them well in the long run, there will likely be a period during which agentic AI adoption is limited to the most digitally determined customers.

- **Driving business transformation by maximizing STP:** While STP is not the sole benchmark of a successful IDP solution, both customers and vendors recognize that maximizing STP is one of the most critical metrics for achieving real value. Customers see STP as directly translating to lower operational costs and faster business outcomes, but they are also very aware of the risks of getting STP wrong. Recognizing this focus and the associated fears, vendors are aiming to solve this core challenge by leveraging LLMs and agentic validation capabilities, with an emphasis on human in the loop (HITL) for low-confidence areas. This focus on trust and reliability is designed to dramatically reduce the need for consistent and costly manual review, enabling customers to achieve new levels of operational efficiency and reallocate resources to higher-value tasks.
- **The evolution of IDP pricing models:** The conversation about how customers wish to consume IDP products is ongoing, especially considering more recent pricing modifications to account for the consumption of LLM and other advanced AI capabilities. Vendors are utilizing LLMs to process complex documents or in IDP-focused chatbot interfaces. While techniques such as chunking, visual parsing, and layout queues can greatly reduce document-specific LLM pricing by lowering token consumption, vendors have indicated they are currently absorbing additional costs. Customers must determine the cost-benefit of new capabilities — and the impact on budgets. For many customers, this will likely involve a conversation about what use cases really require LLMs. More recently, with the introduction of agentic capabilities, many customers have expressed a desire to move toward value- or outcome-based pricing to address concerns about the true productivity gains introduced by agentic workflows. However, vendors are still determining how to introduce this pricing method effectively.
- **The growth of vertical- and domain-specific solutions:** The IDP software market is becoming increasingly crowded, with vendors from adjacent industries such as enterprise content management (ECM) and RPA entering the space more recently. With this growth of the competitive landscape in mind, vendors are seeking ways to differentiate themselves and stand out from the crowd. Many are doing so with out-of-the-box solutions, connectors, and integrations that target specific verticals and use cases. Vendors have made this a focus area from the beginning, or they are expanding their existing horizontal platforms with

vertical-specific packaging. Most prebuilt models and solutions for IDP use cases are for financial analysis, contract management, claims processing, customer onboarding, and email triage/routing.

- **Addressing security and compliance concerns:** With the growing focus on technology evolution, driven by the introduction of more advanced AI into all stages of IDP pipelines, organizations remain concerned about security and data privacy. Buyers want data privacy assurances and data encryption (whether in motion or at rest), including in terms of the model, user management, auditing capabilities, and data separation/isolation. LLM choice, traceability, audit trails, and vendor security certifications (e.g., IAAIS, ISO/IEC 27001, and FedRAMP) can help build and extend user trust.
- **The overwhelming pace of innovation:** Many SMB-scale IDP buyers are struggling to keep pace with the rate of technological change in this market. The rapid introduction of new AI capabilities has left many SMBs either scrambling to keep up or left behind and trying to chart their own path. While not all the most recent AI capabilities will immediately be necessary or valuable for smaller IDP technology consumers, it will be crucial for SMBs to remain aware of which new capabilities present the greatest opportunities, so that they do not miss out on efficiency gains. IDP vendors will need to focus on education and customer outreach for smaller accounts to inform customers as these rapid changes take place. This education effort will not only help promote customer satisfaction but will also provide an opportunity for vendors to solicit feedback and refine their messaging to properly target the needs and interests of each customer segment.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes an analysis of IDP software providers with a global scale and broad horizontal portfolios spanning IDC's research coverage. The assessment is designed to evaluate each firm's characteristics, as opposed to only its size or the breadth of its services. In determining the group of vendors for inclusion in this IDC MarketScape, IDC considered the following set of criteria:

- Offers IDP capabilities as part of a sustainable business, whether on a standalone basis or as part of a larger technology portfolio
- Had at least $10 million in revenue for 2024, specifically from its IDP software/services offering, regardless of where it is deployed
- At least 20% of operations in North America, with at least one additional region at 5% or more
- Goes to market horizontally or across multiple industries
- IDP solution is deployed as software or a service

ADVICE FOR TECHNOLOGY BUYERS

- **Seek technology suppliers with a clear usage strategy for both existing and emerging AI capabilities:** There is no denying the power of and advances in LLMs over the last several years within the context of IDP, as well as the potential of agentic AI. However, there are still use cases and scenarios in which more traditional OCR or ML-based IDP may be the most cost-effective. End users should prioritize vendors that can weave these different AI technologies into a single platform effectively and do not arbitrarily point users toward the newest or flashiest tools for their needs. Generative AI and agentic AI should be considered complementary to the existing AI features and capabilities of the supplier's IDP technology portfolio, instead of as a full replacement. A balanced, rigorous methodology for determining how and when to use specific AI tools is critical for long-term success.
- **Prioritize vendors that can reliably build trust when positioning their IDP technology abstraction capabilities:** At its core, IDP is about helping technology organizations more effectively automate the processing of their documents. As IDP solutions become increasingly connected to other solutions as part of end-to-end automation workflows, trust and reliability become more important; mistakes can have far-reaching consequences. This is especially important for agentic AI solutions as they gain momentum. Agents' high degree of autonomy carries a large degree of risk, necessitating clear trust mechanisms. Although metrics and reporting are helpful in establishing and extending trust, many use cases need a strong interlock in "showing" the user what is happening and why. This may break down to something conceptually simple (e.g., the enablement of a comprehensive HITL process); however, this is much easier said than done, as organizations need to consider their own risk tolerance on a workflow-by-workflow basis.
- **Consider suppliers that enable LLM choice and model customization/fine-tuning to maximize the impact across IDP use cases and/or domains:** Currently, there is no single, out-of-the-box LLM that can be effectively applied to all unstructured IDP use cases. Although this gap will narrow over time, as better and more capable LLMs emerge, organizations looking to standardize on a single vendor's IDP software should prioritize offerings that include both a selection of pretrained out-of-the-box LLMs and a comprehensive LLMOps portfolio that can build (i.e., fine-tune), monitor, maintain, and update custom models.
- **Aim to establish an open dialogue with your IDP technology supplier:** Due to the rapid rate at which AI technologies change, many AI-focused IDP vendors openly solicit customer feedback and increasingly incorporate it into their product development road map to ensure alignment. Although this may not be

the case for every vendor or every road map item, the constant iteration and communication feedback loop between customer and supplier may lead to the delivery of your custom requirements and feedback into the provider's next or future commercialized, off-the-shelf product release/update. Some of the most satisfied customers IDC spoke to have made it a priority to actively participate in their vendors' road map discussions, citing features or efforts that have stemmed from their conversations. In addition, customers engaging in this mode of active communication are often better informed about emerging capabilities, which allows them to prepare their teams with new training or resources more easily.

- **Pursue IDP software with easy-to-use interfaces:** Embrace low-code/no-code user interface/user experience (UI/UX). IDC views streamlined, easy-to-use UI/UX as critical for embracing and interfacing with nontechnical, part-time developers and line-of-business (LOB) knowledge workers. In fact, technology buyers have told IDC that well-designed IDP software tooling and processes can improve the employee experience and prevent churn.
- **Position IDP as an upskilling tool:** IDP can empower employees and help them contribute to higher-value tasks for the company. Ensure your employees have the right resources and support to advance their careers and skills. Embracing IDP can create new roles; in turn, organizations must have a plan in place to fully understand this shift. IDC's research has shown that organizations struggling with employee buy-in (after deploying IDP software) often lack a clear idea or plan for impacts beyond measuring and maximizing current employee and related task productivity. This lack of foresight into the downstream effects of IDP on a user's role and day-to-day function created distrust and reduced the solution's positive impact.
- **Aim for solutions that emphasize value visibility:** As new features — particularly new AI features — are added to IDP products, customers should be sure their selected vendor has prioritized value and ROI visibility throughout its solution. This high level of value visibility is most imperative with new GenAI features due to the potential for introducing new pricing variables (e.g., AI credits or other model-related costs). Vendors with customizable dashboards for KPIs and SLA compliance will be critical to ensure tangible results are achieved in areas where technology hype may currently outstrip technology value.

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.

Tungsten Automation

After a thorough evaluation of Tungsten Automation's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2025–2026 IDC MarketScape for worldwide intelligent document processing software.

Tungsten Automation was founded in 1985 as Kofax Image Products and rebranded in 2024, based on its 2022 acquisition of Tungsten Network Corporation. Tungsten has long specialized in information and document capture, with its first software solution, Ascent Capture, launching in 1995. Subsequently, Tungsten has continued to evolve its document capture and processing capabilities, as well as its intelligent workflow automation capabilities, culminating in the release of the TotalAgility Platform in 2010. TotalAgility remains Tungsten's primary intelligent document processing solution, but its form has evolved significantly over the last 15 years. Currently, Tungsten TotalAgility unifies IDP, workflow automation, and knowledge discovery to transform unstructured data into actionable insights.

Quick facts include:

- **Year its first commercial unstructured IDP software product was launched:** 2010
- **Company headquarters:** Irvine, California, United States
- **Primary IDP software products evaluated:** TotalAgility
- **Estimated number of global employees (1H25):** 1,900
- **Geographic market focus and traction:** North America, APAC and Australia (excluding China), Europe
- **Vertical industry focus and traction:** Agriculture, defense, education, financial services (including banking, insurance, and investment), government, healthcare (including payer, provider, and pharmaceutical), life sciences, manufacturing, mining and natural resources, professional services, retail, telecommunications, transportation, utilities, wholesale
- **Customer segmentation focus and traction:** Large business, enterprise/very large business
- **Vendor's pricing approaches:** Pricing can be based on volume (e.g., per page or document), user count, and deployment type (e.g., SaaS, on-premises, or hybrid), with volume-based discounts and tiered packaging options available. TotalAgility includes prepackaged task automation workflows and development studio capabilities within its standard IDP fee structure.

- **Deployment options:** Public cloud service, private cloud service, on-premises
- **Main solution integrations:** File/cloud storage, email, scan, message queues, document repositories
- **AI strategy:** Tungsten has positioned TotalAgility not just as a data extraction tool but as a part of a broader automation and knowledge discovery journey: It emphasizes turning documents and unstructured content into actionable insights by leveraging advanced AI. TotalAgility has prebuilt assets and model libraries at its core, offering a large library of previously trained models, templates, and use case accelerators to speed up customer time to value. TotalAgility supports GenAI-powered copilots, agents, and multimodal AI models, giving users a wide range of choices to meet their specific needs.
- **Noteworthy capabilities or strategy elements:** Tungsten's partner network, along with Tungsten Marketplace and prebuilt vertical-specific solutions (e.g., for banking, insurance, healthcare, and logistics), provides tailored automation capabilities to customers. These solutions address specific industry challenges (e.g., compliance and document-heavy workflows), delivering swift deployment and measurable business outcomes. This specialization ensures customers can achieve their goals with minimal customization.

Strengths

- **End-to-end automation platform:** TotalAgility combines IDP with process orchestration, RPA, and analytics in a unified platform. This reduces or eliminates the need for multiple vendors and ensures seamless automation across workflows. Customers benefit from reduced costs, improved compliance, and streamlined operations, enabling them to scale automation initiatives more easily.
- **Range of formats supported:** TotalAgility supports a wide range of media formats for ingestion, including — but not limited to — dynamic websites, images, and messaging and collaboration applications. It has some gaps in native coverage for audio and video, but Tungsten has worked to have these capabilities present through partners.

Challenges

- **Implementation complexity:** Some customers perceive Tungsten TotalAgility implementations as complex and time-consuming, especially for unstructured document use cases. This perception can deter adoption, particularly for organizations with limited IT resources.
- **Integrations:** IDP solutions require seamless integration with customers' existing systems of record (e.g., ERP, CRM, and legacy platforms). This can pose significant technical challenges, especially in environments with diverse or

outdated infrastructure. Tungsten is addressing this by expanding its ecosystem of prebuilt connectors and APIs, enabling smooth interoperability.

Consider Tungsten Automation When

Organizations should consider Tungsten if they are medium-sized to very large enterprises with a high volume of documents/unstructured content in regulated industries such as banking, insurance, healthcare, and the public sector. In addition, organizations looking to integrate document extraction into a broader process orchestration solution may find TotalAgility to be a good fit.

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 it is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. In 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 capabilities.

Market Definition

Document AI Software

Document AI software uses embedded technologies from the conversational AI and computer vision AI tool submarkets (e.g., computer vision, NLP, ontologies, and language analysis), as well as deep learning models for harvesting intelligence from scanned documents and/or images of documents. Documents are often unstructured, which means the content's location or format may vary between two otherwise similar forms.

Document AI uses deep learning neural network algorithms to perform text, character, and image recognition in hundreds of languages with more accuracy than older heuristic methods. The technology also identifies and classifies task-specific clauses, sentences, and sections that occur in business documents (e.g., liability or termination clauses in procurement contracts). With advances in deep learning–based classification technology, these new capabilities can learn from a few samples to identify and process new classifications quickly and easily. These are a new breed of standalone AI software services, which can easily plug into legacy or new business applications and/or integrate with process automation platforms.

LEARN MORE

Related Research

- *Worldwide Intelligent Document Processing Software Forecast, 2025–2029* (IDC #US53702525, September 2025)
- *Worldwide Intelligent Document Processing Software Market Shares, 2024: Market Defined by Accelerated Adoption of Generative and Agentic AI* (IDC #US53701125, September 2025)
- *IDC Market Glance: Intelligent Document Processing Software, 2Q25* (IDC #US53577125, June 2025)
- *IDC's Worldwide Software Taxonomy, 2025* (IDC #US53306525, April 2025)
- *IDC ProductScape: Worldwide Intelligent Document Processing Software, 2025 — Technology Supplier Solution Functionality* (IDC #US53124625, February 2025)
- *IDC MarketScape: Worldwide Unstructured Intelligent Document Processing Software 2024 Vendor Assessment* (IDC #US52121324, May 2024)

Synopsis

This IDC study represents a vendor assessment of the intelligent document processing (IDP) market across structured, unstructured, and semistructured documents/content through the IDC MarketScape model. The assessment discusses both quantitative and qualitative characteristics that explain key methods for success and differentiation within the market. This IDC MarketScape covers a variety of vendors participating in the IDP space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another. It also highlights the factors expected to be the most influential for market success, both in the short term and the long term.

"We are firmly in the GenAI era, with the agentic future rapidly approaching, and IDC has seen a significant evolution in the capabilities and strategies offered by IDP software vendors. Challenges have shifted from addressing the processing of unstructured document use cases to extracting meaningful insights from documents, regardless of structure, and building out end-to-end automation workflows that can fuel enterprise processes with reliable and insightful data. Driven by the ongoing development of new and more sophisticated multimodal generative AI models, the evaluated vendors have been rapidly extending their existing offerings or launching entirely new IDP software products to capitalize on these models' capabilities. With the emergence of so many swiftly advancing AI technologies, many customers are having to race to keep up." — Andrew Gens, senior research analyst, Computer Vision AI Tools and Technologies, 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.).

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