IDC MarketScape

IDC MarketScape: Worldwide Extended Detection and Response Software 2025 Vendor Assessment

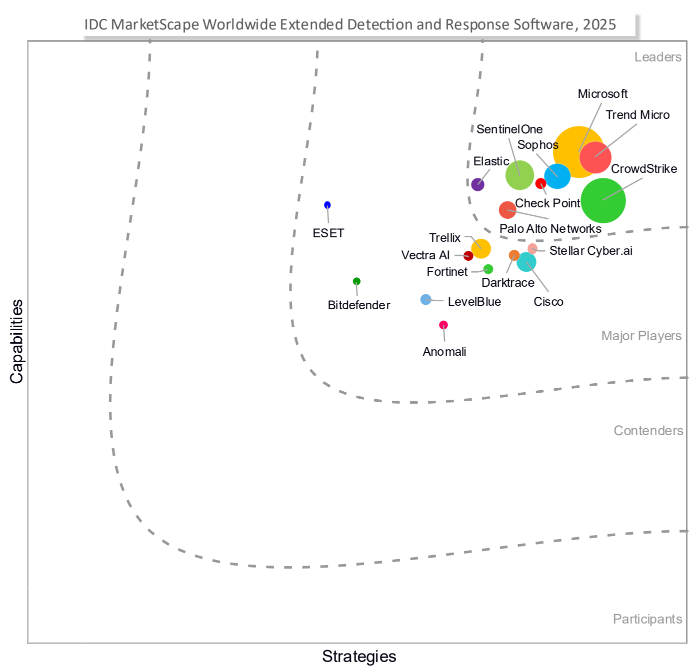
Christopher Kissel   Monika Soltysik

THIS EXCERPT FEATURES LEVELBLUE AS A MAJOR PLAYER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Extended Detection and Response Software Vendor Assessment



Source: IDC, 2025

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

September 2025, IDC #US52997325e

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Extended Detection and Response Software 2025 Vendor Assessment (Doc # US52997325)

IDC OPINION

The concept of extended detection and response (XDR) started to gain traction in late 2017. This was a specific time in cybersecurity as user behavioral analytics (UBA) became an enhancement to machine learning. UBA had a profound effect on endpoint platforms and on network detection and response (NDR) concepts. UBA meant indicators of compromise (IoCs) aside from static malware signatures and explicit rules violations established in detection and response filters became possible. This also meant that far greater context about an alert was possible.

This history has a powerful impact on what XDR is and where it is going. At first, XDR was designed to reduce the number of alerts and provide the proper context for investigations. Now the expectation is to identify a campaign, create countermeasures, and respond quickly and appropriately. The types of activities an XDR solution is expected to monitor include:

- **Ransomware.** As one vendor puts it, ransomware starts slowly, imperceptibly, but then happens all at once. XDR solutions should be able to pick up on high-entropy events such as registration wipes, file name changes, and new egress ports opening.
- **Advanced persistent threats (APTs).** XDR should detect the subtle signals associated with APTs that traditional security systems may miss. In addition, an XDR solution should include early identification of abnormal behaviors, lateral movement, and privilege escalation spanning on-premises and cloud networks.
- **Identity-based attacks.** XDR should find sophisticated high-speed campaigns that start with account compromise and escalate to privileged access abuse to progress their attacks. Examples of identity-based attackers include Scattered Spider, Midnight Blizzard, Volt Typhoon, and Black Basta.
- **Living off the land (LOTL) attacks.** These occur when attackers can exploit legitimate tools and software present within the target's environment to conduct malicious activities, blending in with normal network activity and bypassing traditional security measures.
- **Cloud control plane attacks.** An adversary creates the opportunity to modify access and configuration — allowing them to inflict material damage. These

attacks can occur across virtual machines, containers, and serverless infrastructure, leading to both data loss and impactful attacks.

XDR is at an inflection point. The adversary works at the speed of AI and businesses expand their IT profile horizontally for new ways to deliver applications and store data. XDR is changing with this. Strategies need to evolve to find indicators of compromise earlier, to offer immediate response and then permanent remediation, and then to ultimately determine the overall health of the network to not only solve the potential exploit/breach but also improve the network posture over time.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The following are how vendors were selected and what the "rules of the game" were:

- A vendor has to offer a commercial, do-it-yourself, XDR solution. Endpoint detection and response (EDR) vendors could get to an XDR solution by offering modules. However, other vendors offer an XDR solution that was used to augment EDR. Several managed detection and response (MDR) vendors obviously have platforms they use internally that collect telemetry, generate alerts, and start the response and remediation process. However, if these platforms were used only by that company and not commercially available, they were not considered for this study.
- The study only considered enterprise-licensed software and SaaS deployments. Hardware solutions have their place, but software solutions are the predominant form factor anyway.
- One could make the argument that security information and event management (SIEM) vendors could be included. In addition, IDC realizes that the XDR vendors are increasingly identifying themselves as next-generation (next-gen) SIEM. However, for this study, that which is rendered under SIEM should stay with SIEM.
- A company needed to do either $20 million in cloud-native XDR revenue or at least $100 million in detection and response revenue overall.
- IDC decided that the vendor should have global reach. In addition, we asked vendors to provide scenarios for midsize businesses through small enterprises (somewhere in the range of 1,500–10,000 employees) and then midsize enterprises to large enterprises (more than 10,000 employees).
- The XDR solution should have detection and response for on-premises as well as public cloud environments. IDC also placed an emphasis on an open XDR approach.
- Last, IDC only considered features and capabilities that were generally available (GA) as of July 4, 2025. In this era of agentic AI development, new capabilities are

evolving every day. Given that it took time to edit and refine this study, some of the material may be dated.

ADVICE FOR TECHNOLOGY BUYERS

A key strength of the IDC MarketScape process is the integration of feedback from customer references provided by participating vendors. These firsthand perspectives offer actionable guidance for prospective buyers and highlight common challenges and opportunities in XDR adoption. Complementing this input, IDC recently conducted an XDR end-user survey, which provides additional validation of buyer perceptions. This section provides some of the impactful advice.

Disclaimer: The broad IDC survey data shall remain separate from this evaluation, which is grounded in vendor-provided and verified inputs.

Some of the impactful advice are:

- **Be transparent about total cost and deployment effort.** Budget and deployment complexity were the most frequently cited XDR challenges. It is important for suppliers to be upfront about what is included in the cost — licensing, onboarding, integration, and support — so customers do not encounter surprises later. Packaging deployment guidance helps reduce friction and sets realistic expectations from day one (see Figure 2).
- **Position XDR as a proactive defense platform — not just a detection layer**. Despite the acronym's emphasis on detection and response, buyers rank threat prevention and protection as the most important XDR use case (see Figure 3). Suppliers should emphasize how their platforms contribute to early-stage threat disruption — through capabilities like automated containment, policy enforcement, and integrated controls across endpoints, identity, and network.
- **Design for measurable, outcome-driven security performance**. XDR buyers most commonly assess effectiveness through detection accuracy, major incident prevention, and response metrics such as mean time to detect (MTTD) and mean time to respond (MTTR) along with risk-based prioritization (see Figure 4). Suppliers should build platforms that demonstrate tangible gains in these areas backed by built-in analytics and KPI reporting (e.g., dashboards that track MTTD/MTTR, alert conversion rates, risk reduction over time, and automated response actions tied to specific outcomes). Capabilities such as risk-based alert scoring, contextual correlation, preemptive containment, and workflow automation should be tied directly to reducing business impact. Vendors that

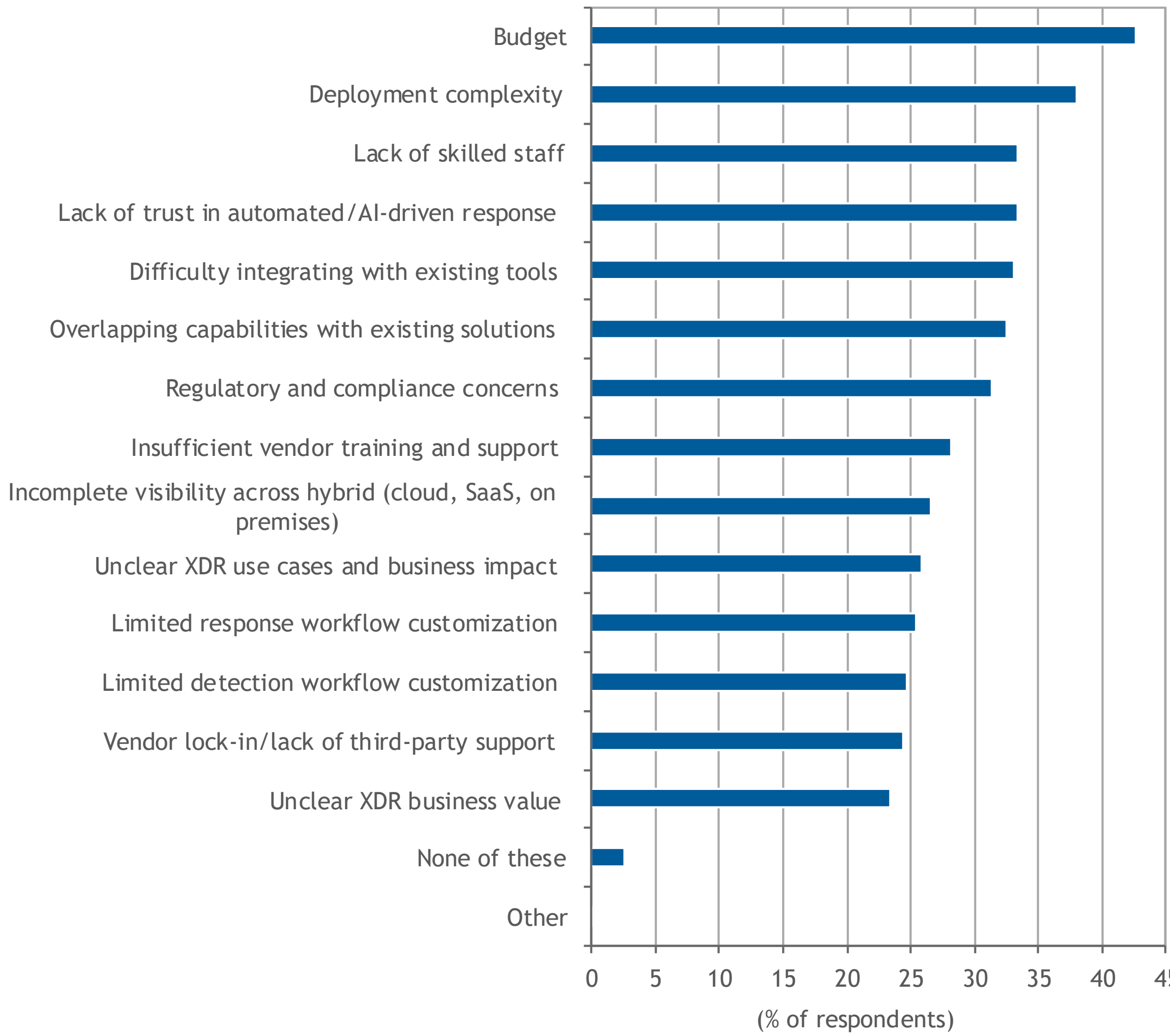
position XDR as a performance-enhancing platform — rather than just a telemetry aggregator — will better align with how buyers define success.

- **Develop integrations that bridge detection and resolution.** Buyers rank integrations with network detection and response, IT service management (ITSM), firewalls (FWs), and threat intelligence (TI) platforms as the most important to XDR success (see Figure 5). Suppliers should prioritize bidirectional, context-aware integrations that go beyond data ingestion to support enrichment, automated response, and alignment with IT operations workflows. *Why?*
- **Note that operational connectivity is critical.** ITSM and security orchestration, automation, and response (SOAR) integrations reflect buyers' desire for XDR to align with incident response and ticketing workflows — not remain in a detection silo. Integrations with platforms like ServiceNow and Jira help teams take faster response actions and close the loop between security and IT operations.
- **Ensure that response is grounded in network visibility.** NDR and firewall integrations are foundational to understanding lateral movement, detecting covert activity, and enforcing containment. Buyers value XDR solutions that can act — not just observe — across key traffic and control points.
- **Expect enrichment to improve decision confidence.** Threat intelligence integration supports detection fidelity and faster triage. Buyers expect enrichment with reputation data; threat, tactics, and process (TTP) mappings; and threat campaign context to improve prioritization and reduce false positives.

FIGURE 2

Top Barriers to XDR Adoption

Q. *What are the biggest challenges your organization faces in adopting extended detection and response?*



n = 624

Base = all respondents

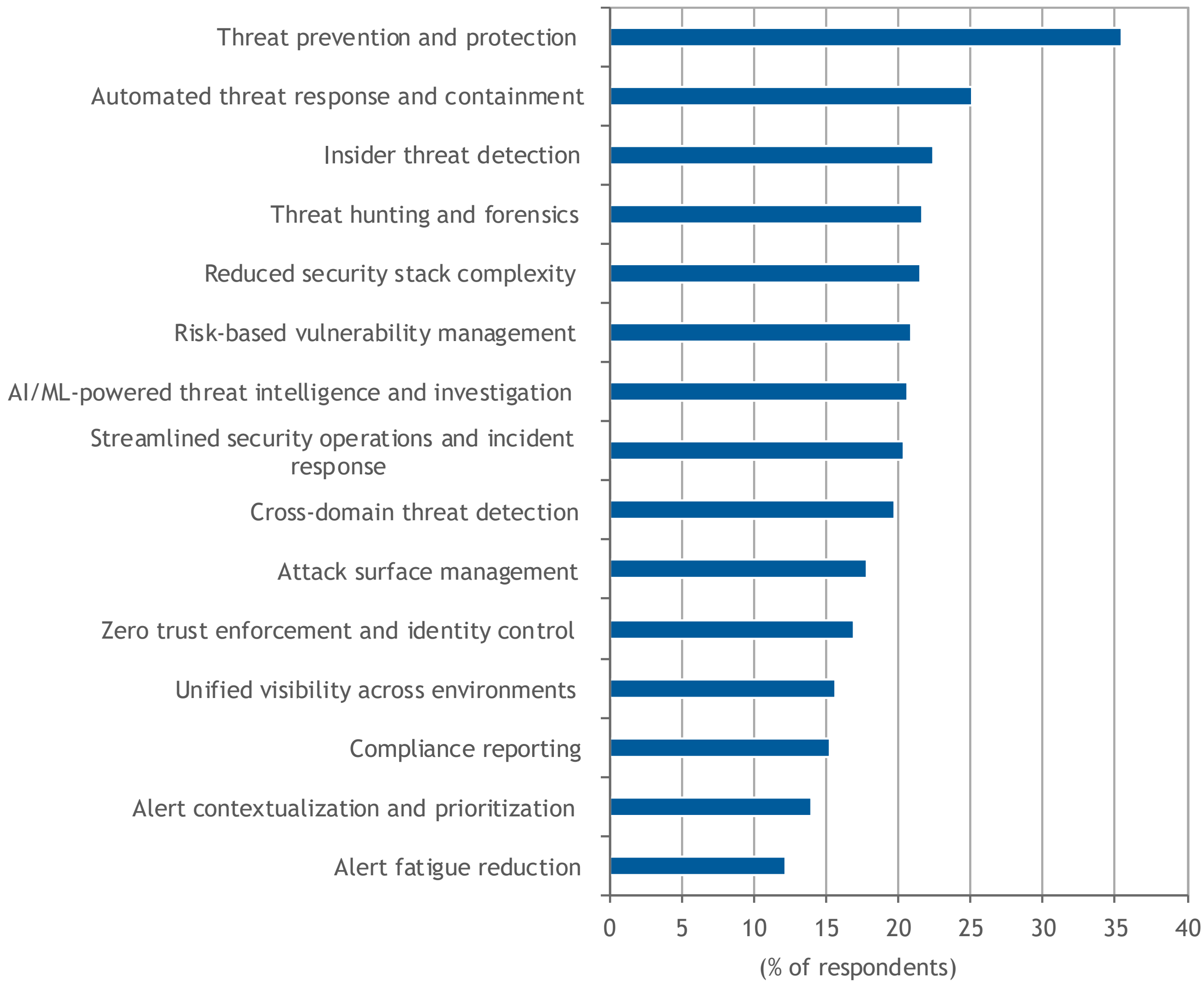
Note: Multiple responses were allowed.

Source: IDC's *End User XDR Perception — Cloud-Native XDR and Artificial Intelligence Security Analytics Survey*, June 2025

FIGURE 3

Most Important Use Cases for Extended Detection and Response Solution

Q. What are the most important use cases for your organization's extended detection and response solution?



n = 624

Base = all respondents

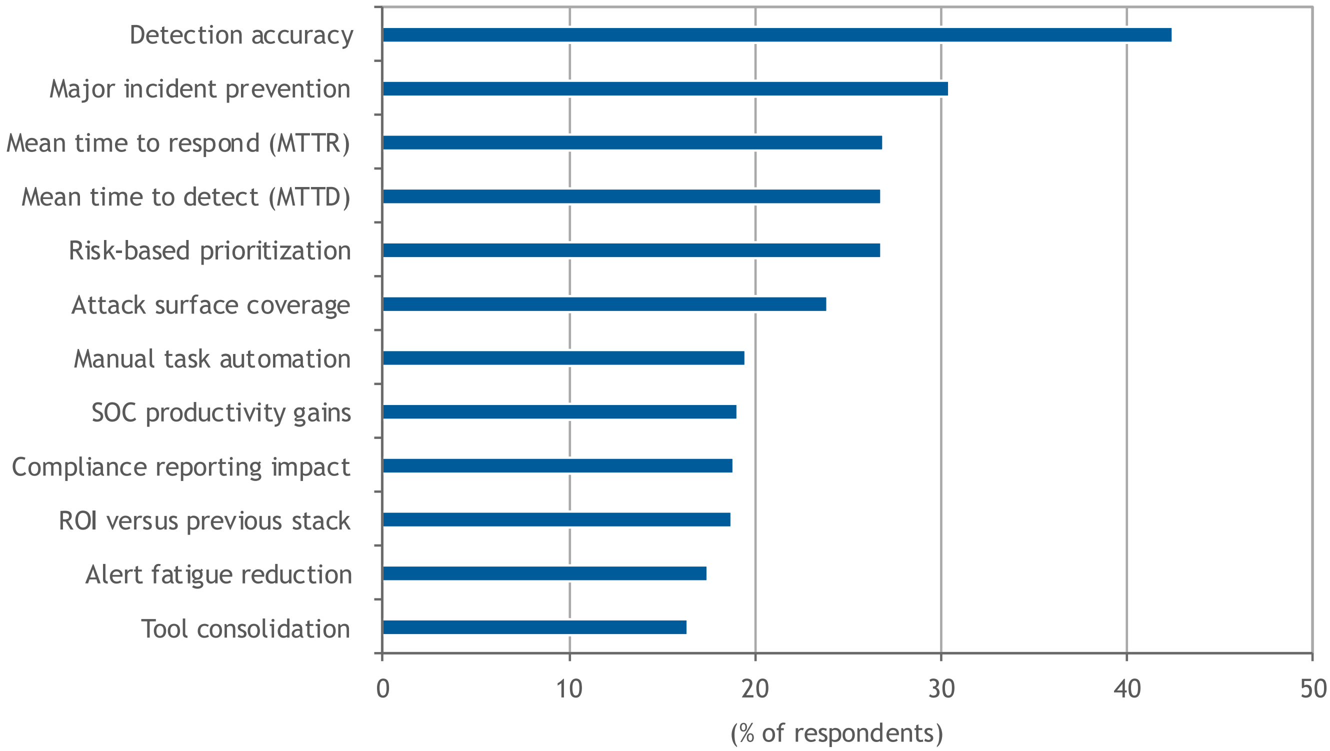
Note: Multiple responses were allowed.

Source: IDC's *End User XDR Perception — Cloud-Native XDR and Artificial Intelligence Security Analytics Survey*, June 2025

FIGURE 4

Design for Measurable, Outcome-Driven Security Performance

Q. How does your organization measure the effectiveness of your extended detection and response solution?



n = 624

Base = all respondents

Note: Multiple responses were allowed.

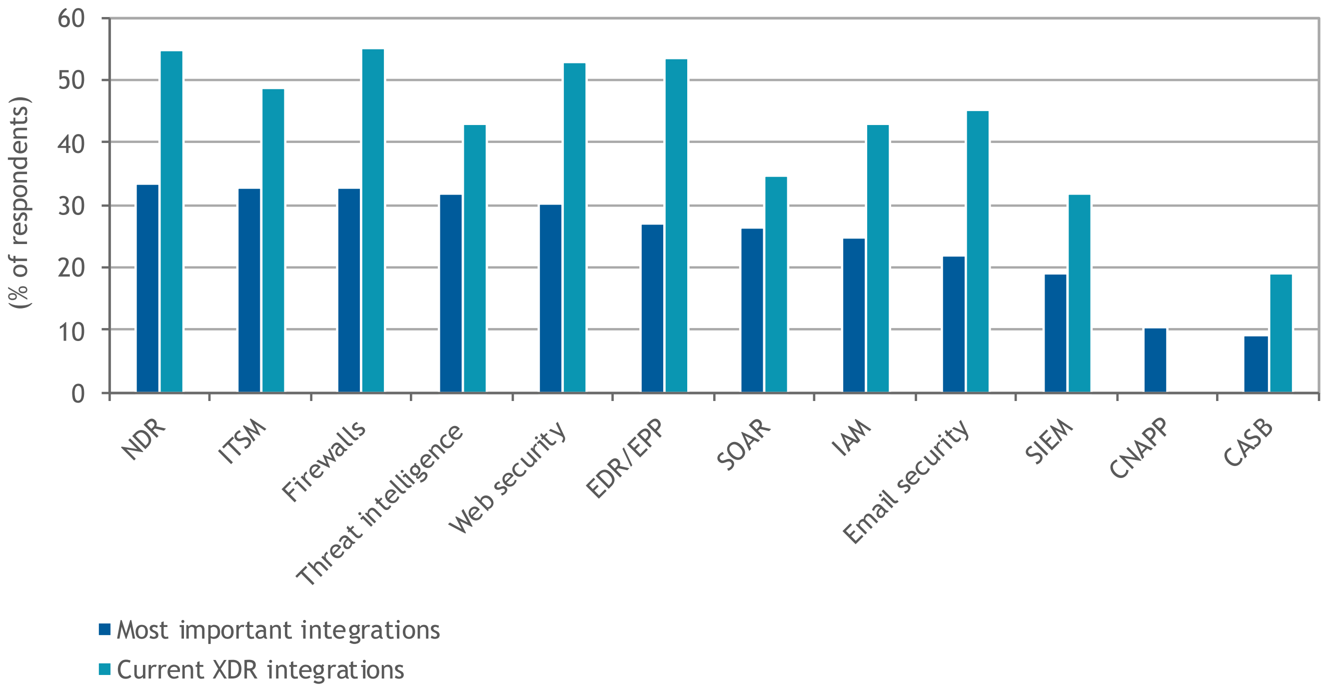
Source: IDC's *End User XDR Perception — Cloud-Native XDR and Artificial Intelligence Security Analytics Survey*, June 2025

FIGURE 5

Security Tools Integrations: Most Important Versus Current XDR Integrations

Q. *Which of the following security tool integrations are most important for your organization's extended detection and response solution?*

Q. *Which security tools does your current extended detection and response solutions integrate with?*



n = 624

Base = all respondents

Note: Multiple responses were allowed.

Source: IDC's *End User XDR Perception — Cloud-Native XDR and Artificial Intelligence Security Analytics Survey*, June 2025

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.

LevelBlue

LevelBlue is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide extended detection and response software.

LevelBlue is a new company founded as a spin-off of AT&T Cybersecurity. WillJam Ventures launched the business at the RSA Conference in May 2024, and the bulk of the business is as an MSSP. However, LevelBlue, which uses the LevelBlue platform for its own MSSP service, offers the platform to other MSSPs, managed security providers (MSPs), MDRs, and a few commercial clients as well.

The LevelBlue USM Anywhere platform is the direct descendent of the former AlienVault USM Anywhere Open XDR platform. The USM Anywhere platform served as an AlienVault on premises and SaaS unified security management product, with SIEM at the heart of the platform. Its differentiation from other SIEM and XDR products was its inclusion of vulnerability scanning and the integration of LevelBlue Labs Open Threat Exchange (OTX), formerly Alien Labs Open Threat Exchange, telemetry into its threat detection and response capabilities. These central tenants are still a part of the LevelBlue USM Anywhere.

Strengths

LevelBlue USM Anywhere has the following strengths in XDR:

- **The LevelBlue USM Anywhere is multifaceted.** Owing to its AlienVault legacy, the platform includes an asset scanner, a device vulnerability scanner, user scanner, network and host (Windows/Linux/Mac) intrusion detection and response (NIDS/HIDS), global compliance reporting, a rules correlation engine, a centralized investigations panel, and visibility into on-premises and multicloud environments. All of these capabilities are included in the XDR solution and do not require additional modules.
- **LevelBlue has strong integration partnerships.** LevelBlue has 895 integrations and includes free builds — 60 of these integrations are bidirectional. Perhaps the most important of these integrations is with SentinelOne for endpoint EPP/EDR. This integration with LevelBlue provides identity protection with one-click device rollback capability but also adds LevelBlue detection rules and NIDS/HIDS detection for better alert granularity.
- **To support integrations, LevelBlue offers webhooks and other multiple data collections for both integration into LevelBlue USM Anywhere and the creation of BlueApps.** The platform offers different methods of integrations, including APIs, syslog-esque forwarded data, webhooks, and cloud connectors. API authentication schemes supported include Basic Auth, OAuth, HMAC, and API Keys and return formats include JSON, XML, and CSV. If taken as a whole, the various forms of interconnectedness allow LevelBlue USM Anywhere to include use cases for network monitoring, risk assessment, and additional telemetry such as firewall, application, and identity and access management logs to be

included in detection and response rules. BlueApps are types of pre-integrations that are available such as BlueApps with Qualys and Tenable for vulnerability management and Akamai and Cloudflare for aspects of network security.

- **The LevelBlue USM Anywhere offers over 2,500 detection and response rules.** An advantage of being an MDR is that it has developed extensive in-the-field detection and response capabilities. User behavioral analytics may also find anomalies even before a threat is formally defined. The LevelBlue USM Anywhere platform tracks "alarms by intent." The alarm types are classified by system compromise, exploitation and installation, delivery and attack, reconnaissance and phishing, and environmental awareness.
- **The end user receives high-fidelity alerts.** LevelBlue maps to the MITRE ATT&CK framework encompassing 14 tactics and 135 subtechniques. The LevelBlue USM Anywhere platform includes the ability to customize detection and response rules. Drop-down menu options for rule creation include fields such as source name, destination name, and event activity. The rules can be implemented discretely or chained together. In addition, the end user can add suppression rules to reduce noise.
- **Threat intelligence is an important component of the LevelBlue USM Anywhere.** LevelBlue maintains the 15-year legacy of both LevelBlue Labs (formerly Alien Labs) and the OTX threat exchange. The open source OTX has 450,000 subscribers, and roughly one-third of those are from cybersecurity vendors. Roughly 20 million threat indicators, 400,000 threat artifacts, and 250,000 suspicious files are contributed or investigated daily. Threat intelligence libraries include charting industry-specific threats and mapping threats to malicious actors.
- **USM Anywhere detection and response capabilities include on premises, AWS, Azure, and GCP.** The same dashboard/platform provides visibility and actions in on-premises and the major cloud environments.
- **AI and security automation turn insights into actions.** The AI engine includes behavioral analytics that makes detections such as lateral movement and impossible travel possible. Response actions enable an agent to create an action, initiate a scan from an event, add a blocklist from an alarm, and disconnecting an asset from the network are automation ready.
- **A tiered pricing model provides value for end users.** There are four different types of pricing: Essentials, Standard, Premium, and Threat Detection and Response for Gov. The important differentiators between services include the number of days that hot storage is available, physical storage itself from gigabyte to terabyte, and access to BlueApps. For the Response for Gov service, FIPS 140-2–encrypted sensors are included, and it is U.S. FedRAMP authorized, with data

storage in the AWS GovCloud (U.S.-West region) to address specific regulatory requirements.

Challenges

Both LevelBlue and its USM Anywhere do have challenges to address:

- **It has taken some time for LevelBlue to divest from AT&T.** This is an understandable consequence of a divestiture. LevelBlue starting as its own entity needed to consolidate its internal data collection and storage and decouple proprietary software created for AT&T or customized for specific AT&T clients for its own usage. The vast majority of this work has been done, but it did cost time in terms of further development of USM Anywhere.
- **While key integrations bolster what USM Anywhere can do, key responses do require integration.** IDC just cited LevelBlue for using integrations for extensibility but pushes back a little here. Is it fair to expect similar results from an API call to an endpoint vendor such as Microsoft Defender as opposed to a more dedicated solution such as with the SentinelOne integration occurs?
- **The LevelBlue Platform does not include basic SOC metrics such as MTTD and MTTR.** In terms of running security operations, MTTD and MTTR are akin to a diagnostic test on a car. The platform itself does not provide other IT metrics such as device and application availability/capacity or network uptime. While not always crucial to threat detection, understanding IT can provide insights into the best course of remediation.
- **Certain prevention technologies that are now synonymous with XDR are missing.** Currently, the LevelBlue Platform does not natively have attack surface management, nor does it monitor configuration drift. However, it does have advanced BlueApps integrations with Qualys and Tenable to bring this capability to the platform.
- **Although imminent, LevelBlue USM Anywhere did not have a digital assistant at the time of writing this document.** While there may be differing viewpoints about GenAI digital assistants, the most important thing that it does is simplify search into NLP prompts. This capability is critical for tier 1 analysts.

Consider LevelBlue When

LevelBlue is an evolution of both AT&T Cybersecurity approaches and a neat legacy company in AlienVault. AT&T (and now LevelBlue) historically competed as an MSSP against standalone cybersecurity providers and AlienVault targeted midsize businesses. While BlueApps can help add depth to LevelBlue Platform, the platform itself is solid designed to be extensible, but it could provide greater depth in terms of security operation metrics tracking, automation, and out-of-the-box detection and response capabilities.

Often, an XDR platform can be used to displace other tooling, and LevelBlue does offer some capabilities that may do this. However, where LevelBlue may be better implemented is where a client already has specific tooling like Qualys, Okta, or Akamai and a BlueApps exists. Often these are deep integrations, and LevelBlue can add insights without adding noise to the environment.

The LevelBlue USM Anywhere Platform is both highly customizable and easily personalized as well. The tiered pricing makes sense as midsize businesses vary from auto painting shops to online retailers that require a varying degree of digital presence. In addition, the attention that LevelBlue pays to FIPS 140-2 helps its partners offer products to the U.S. federal government. Midsize businesses, managed SPs, and MDRs are the sweet spot for LevelBlue.

APPENDIX

Reading an IDC MarketScape Graph

For 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 does not separate XDR revenue from EDR revenue if the product has the same SKU. To estimate XDR revenue, IDC used one-third of EDR/EPP revenue and/or any dedicated revenue reported as XDR.

Please keep in mind that IDC extended a request for information (RFI) in late March, asked for customer references and vendor demos in April through June and set a cutoff date of July 4, 2025, toward counting capabilities as generally available. Vendors were free to discuss road map items but if these were not GA, they did not count toward the formal scoring. (Note: The 18 vendors did have a chance to review content and make formal editing suggestions; as did the Vendors to Watch section.)

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 to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

On how this research came about, in October 2024, IDC was almost certain it would create an XDR vendor assessment. IDC developed an XDR Survey Kit for vendors and then asked them their opinion of what XDR was and how we should develop the survey. Different syndicated research firms believe that XDR is exclusively an endpoint detection and response and endpoint protection platform providers with technology. In forming this study, EDR technology is wildly important to the fabric of XDR, however, the ability to find threats as they emerge in the cloud or on premises provides an opportunity for platforms/solutions that combine multiple sources of telemetry to chain alerts and find solid indicator of compromise. In addition, there is a certain pragmatism in this study. Vendors like Cisco and Darktrace are competing for the same dollars and clients that CrowdStrike and other EDR/EPP vendors try to win by expanding to an XDR solution.

In March 2025, the vendor list was further narrowed for formal inclusion into the study. In May 2025, IDC sent a survey to XDR end users in the United States and priority markets in Europe.

IDC asked vendors to provide a live demo session, provide two customer references, and fill out a formal request for information. Not every vendor was perfect, but the demands on the vendors are intense in this process. IDC could not be more thankful to the vendor community.

Market Definition

The definition for XDR is evolving. Concisely, IDC defines XDR as an API-enabled platform that ingests and correlates telemetry from various sources to detect cyberattacks.

As of now, the following features are found on an XDR stack:

- IDC never thought it would say this, but we could make the argument that the acronym should be pXDR (prevention and XDR). For XDR, IDC does not expect a comprehensive suite of vulnerability and exposure management capabilities. However, ASM and some detections based on policy or zero trust principles provide higher-quality alerts and help reduce the blast surface.
- The platform must have continuous visibility of endpoints through either a direct agent on the machine and a runtime executable or an OpenAPI connection to the platform for endpoint detection and response. The EDR is needed for the most rapid visibility possible, which is IOC of PowerShell commands, memory corruption, or performance issues that are not network related.
- The platform must include a log management backplane. EDR results must be aggregated and sent to the rest of the network through either SIEM and private cloud or an IaaS (public cloud) to match IoC across the hybrid network and then for forensic investigation.
- Becoming increasingly more important is search capability that extends into SIEM, various data lakes, and public cloud containers. While XDR vendors' search capabilities do not have to match that of SIEM, an XDR platform should be able to match and analyze what they see as either malware or compromised domains from a specific environment with what is on other environments across their entire digital estate.
- Security orchestration automation and response (SOAR) is necessarily included on the platform. The SOAR generates a workflow and advises or initiates ephemeral and permanent responses to incidents.
- The platform must provide contextual awareness including detection, containment, and recovery strategies. The platform must be able to describe what prompted an alert, what the blast radius is, and provide strategies on how to reduce the attack surface.
- User behavioral analytics is an essential part of the platform. UBA is designed to be self-learning and consistently wizening. UBA establishes statistical baselines for every entity within the network and the baseline relationships between devices within the network. UBA is one way to understand how devices are

connected and provides the ability to reset devices back to the network if devices need reimaged.

- Network detection and response is a component piece. NDR is the set of technologies that look for user port anomaly, impossible travel and other IP and domain connectivity irregularities, evidence of C2C beaconing activity, unusual routing, and other internet session anomalies.
- Web/email is ingested as another way to correlate anomalies. Phishing remains an important access method for the adversary.
- External threat intelligence has become a valued feature of XDR. The proliferation of cybergangs and the soft layer between them and adversarial nation-states is necessitating that when the context is added to full packet collection or, more likely, metadata collection, there is a way to cross-reference the discovered adversarial tactics, techniques, and common knowledge (ATT&CK) against who most likely is the threat actor.
- Extensibility to hybrid architecture is universal. An XDR platform must include visibility for on-premises networks as well as for the leading public cloud environments such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP) and virtual private clouds (VPCs).
- For each detection capability, response is its necessary complement. An XDR solution should have immediate response and adaptive defenses that rise to the conditions caused by an exploit and against an active breach.
- Last, IDC believes an XDR solution should have two post-detection and response process mechanisms. First, an automation should occur that tells the IT/security team if a patch did get installed or a firewall rule was adopted. Second, the XDR solution should be able to tell if a security environment is getting safer and more efficient over time.

In this IDC MarketScape, consideration was given to specific capabilities around detection and response of use cases such as ransomware, phishing, and tools evasion. In addition, visibility and ingestion options that lead to detections from firewall logs, data loss prevention concepts, file-integrity management, or other ITSecOps platforms that could lead to better visibility, detection, or quicker responses were also considered in the scoring.

Market Analysis

Often cybersecurity improves when specific point products could make detections that were otherwise invisible. However, these point products often revealed the same insight. With point products such as web/email defense, NDR, EDR, and other types of defenses, the number of alerts themselves became problematic (and, of course, remain problematic).

For instance, an endpoint detection and response platform found that 30 servers have generated an alert. At this point, we do not know if this alert is based on temporary conditions such as a power fluctuation, a specific application, a type of OS or user group.

To better understand the alert, security teams would incorporate the perspective and context of NDR to help determine what type of threat is occurring. Threat intelligence could also be included to determine what the motivation of an attack is or at least what type of damage an exploit could cause. Therefore, XDR was conceived as a quick detection technology that could find IoC before formal processing in the SIEM (noting the concept of the SIEM will come up again).

This facile idea of XDR is reasonable, and it constitutes the core of what XDR is today — however, XDR was going to expand in two ways. The first area of expansion was the integration of other technologies into XDR. Web/email security is now considered an important part of XDR because web/email is still a point of ingress/egress for the adversary. Security orchestration automation and response capabilities are necessary for artifact collection and alert correlation capabilities. Certain inputs such as firewall logs are useful, but optional. The Market Definition subsection includes a comprehensive list of capabilities that an XDR platform/solution should have.

The second area of expansion is visibility into public clouds. Public cloud is how Amazon Web Services, Microsoft Azure, Google Cloud Platform, IBM Cloud, and Alibaba are referred to although these cloud service providers can also offer private data clouds. Public cloud hosts applications can be used for storage, host DevOps containers, and be used for virtual servers. Heterogeneous networks are common; most businesses use two or more public clouds. Businesses gain efficiency by using a combination of on-premises and public cloud resources; however, its attack surface becomes that much larger. The modern attacker knows this and can gain a foothold anywhere in each network and daisy-chain their way across different parts of the network. With time and persistence, an adversary, for instance, could find their way into an unexposed S3 bucket and advance to an on-premises directory.

As a technology platform, XDR has three challenges. The first is that it has to offer value that EDR, SOAR, and next-gen SIEM cannot. The second challenge is that it has to be scaled with the horizontal and vertical development of a business' network — if networks include more OT, IoT, and various cloud environments, the XDR has to create a visibility and detection and response plane. The last challenge is that XDR has to be the final guarantor that a remediation successfully took place and did in fact improve the hygiene of the network.

LEARN MORE

Related Research

- *How Does Agentic AI Adoption Vary by the Size of the Organization and Overall* (IDC #US53747025, August 2025)
- *Worldwide SOAR and Firewall Automation Forecast, 2025-2029: Automation at the Intersection of AI, Integration, and Zero Trust* (IDC #US52051225, August 2025)
- *Worldwide Network Detection and Response Forecast, 2025-2029: Providing Protection for the Network Proper and the Network Edges* (IDC #US52051025, July 2025)
- *Microsoft's SFI: Shedding the Old (Attack Surfaces) to Prepare for the New (Threats)* (IDC #IcUS53367525, May 2025)
- *Vishal Rao Will Lead Both Trellix and Skyhigh Security — Marking Yet Another Strategic Shift for These Companies* (IDC #US53213225, March 2025)
- *Microsoft Security Copilot Takes Its First Steps into Autonomy: AI Agents Are Both Boring and Appropriate* (IDC #IcUS53281425, March 2025)
- *Sophos Plans to Acquire Secureworks: The Bid for the Mid and Big Time* (IDC #IcUS52693524, October 2024)
- *North American Security Tools and Vendor Consolidation Study: NDR, SOAR, TI, and XDR* (IDC #US52303824, June 2024)
- *Elastic AI Assistant Shows What an AI Assistant Can Become* (IDC #US50211623, August 2023)

Synopsis

This IDC study discusses the concept of extended detection and response (XDR) that started to gain traction in late 2017. This was a specific time in cybersecurity as user behavioral analytics (UBA) became an enhancement to machine learning. UBA had a profound effect on endpoint platforms and on network detection and response (NDR) concepts. UBA meant indicators of compromise (IoC) aside from static malware signatures and explicit rules violations established in detection and response filters became possible.

XDR expanded in two different ways. The first area of expansion was the integration of other technologies into XDR. Web/email security is now considered an important part of XDR because web/email is still a point of ingress/egress for the adversary. Security orchestration, automation, and response (SOAR) capabilities are necessary for artifact collection and alert correlation capabilities. Certain inputs such as firewall logs are useful, but optional.

The second area of expansion is visibility into public cloud. Heterogeneous networks are common; most businesses use two or more public clouds. Businesses gain efficiency by using a combination of on-premises and public cloud resources; however, its attack surface becomes that much larger. The modern attacker knows this and can gain a foothold anywhere in each network and daisy-chain their way across different parts of the network.

This has a powerful impact on what XDR is and where it is going. At first, XDR was designed to reduce the number of alerts and provide the proper context for investigations. Now the expectation is to identify a campaign, create countermeasures, and respond quickly and appropriately.

"XDR gathers and correlates telemetry from multiple security appliances. However, EDR, NDR, and threat intelligence remain the staples of XDR," notes Chris Kissel, vice president, IDC's Security and Trust Division. "XDR though is called upon to find the first point of origin of a potential attack, determine what the best ephemeral reply and formal remediation is, and begin the process to make the network whole again. This is a tall order, but the promise of agentic AI should continue to improve all aspects of prevention, detection, and response in business networks."

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