



G-Cloud 15

eDiscovery Software – Relativity: Search Review and Disclosure Services

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Transforming Business using the Cloud

We have worked with many Central and Local Government clients to support the implementation of their business objectives using cloud technology. Enabling business and enterprise transformation using cloud is a complex, strategic challenge facing many private and public sector organisations, that requires organisations to rethink not only their technology landscape, but also their operating model, governance and ways of working.

Cloud technology and services have the potential to reduce cost, remove technology bottlenecks, and facilitate rapid business innovation. As a result, for most organisations globally, adopting cloud technology has become a question of “when and how” rather than “if”.

Opportunities for enterprises generally include a combination of one or more of the following:

- Implementing private and/or hybrid clouds for infrastructure and applications
- Smarter use of public cloud infrastructure for optimising existing business functions
- Using cloud for implementing new business services or digital operations
- Reducing cost by moving to consumption-based pricing models that only charge for the actual IT capacity and services used.

Migration to the cloud must be carefully planned and executed. We understand the practical business and technical risks involved and ensure these are identified, understood and mitigated before any move is made. Key considerations include:

- **Alignment of business and technology objectives.** This is essential to fully realise the benefits of cloud transformation and the efficiencies it enables. Too often, cloud solutions are implemented to mirror existing ways of working, rather than using the opportunity to improve, standardise and simplify processes. We help clients make informed design decisions by balancing business, customer and technology requirements
- **Availability and reliability of services.** The avoidance of operational downtime to mitigate lost revenue, unnecessary operational cost, or reputational damage that can disrupt business operations
- **Decentralised support structures.** The need to tailor and revise the approach to operational security to cover the support structures employed by cloud service providers that will have a different risk profile for sensitive information

- **Data handling practices.** Data classification and data-handling practices that reflect the data flow within a cloud environment must be understood and tailored accordingly to protect customer data
- **Data privacy.** Compliance with GDPR to understand where and how information can be stored or processed. Cloud services can be configured to support UK data residency, with access and processing configured to meet public sector and regulator expectations
- **Future Technology Trends.** Cloud applications are the stated direction of travel for the major application vendors, but any upgrade path must also cater for the future technology needs of the organisation and seek to minimise technical debt where possible.

A careful assessment of an organisation's needs and different cloud service provider's controls is required, enabling concerns to be addressed and the correct path to the cloud to be selected.

PwC provides frameworks and public sector delivery experience to support the implementation, operation and ongoing support of cloud-based services, to consider the combination of Business, customer experience and technology activities outlined above. There is no single answer that covers each and every client organisation and we tailor our frameworks to client circumstances to support them as a partner through the complete lifecycle of strategy to execution and support.

eDiscovery Software – Relativity: Search, Review and Disclosure Services

PwC provides access to and configuration of Relativity eDiscovery software (RelativityOne or Relativity self-hosted) to support search, review and production activities across civil, criminal, regulatory, public inquiry and investigation matters.

This service focuses on the provision and operation of the software platform itself, enabling clients to manage document review and disclosure workflows efficiently and securely, supported by PwC's technical expertise.

eDiscovery Software - Relativity: Search, Review and Disclosure Services

The service provides a secure, scalable document review platform that supports keyword searching, advanced analytics and Technology Assisted Review (TAR). Relativity enables organisations to identify relevant material, manage review workflows and produce documents in formats that meet UK and international legal and regulatory standards.

The software supports the review of electronically stored information (ESI) including emails, documents and other digital material, and provides detailed audit trails to support defensibility and oversight.

eDiscovery Software – Relativity: Search, Review and Disclosure Services Features	eDiscovery Software – Relativity: Search, Review and Disclosure Services Benefits
- Secure, auditable role-based user access and permission controls - Scalable, customisable solution for privilege workflows and entity resolution Support for conceptual searching, document analytics and RelativityOne aiR - Identification of sensitive / personal data for GDPR data breach compliance - Electronic redaction capabilities supporting a consistent and auditable approach Support for Audio/Video, Image, Transcription, Teams and Chat data - Advanced visualisation analysis of communications and relationships within datasets	- Secure workspace separation to support evidence segregation - Resilient cloud infrastructure supporting data recovery and continuity - Processes hard copy, email, SharePoint, OneDrive and other system data - Improved case management through standardised workflows and playbooks - Supports defensible and consistent processes for public inquiry disclosures - Greater management of costs through transparent usage-based licence model - On call and in person service support and training - Implementation of the latest version of leading eDiscovery software

- Document disclosure features meeting legal and regulatory standards
- Processing, deduplication, OCR and email threading for unstructured data
- AI (Artificial Intelligence), machine learning and Technology Assisted Review (TAR).

- Efficient filtering and culling to prioritise relevant documents
- Real time visual reporting dashboards tracking document review progress.

Our view on the service features and benefits within this service definition document is presented below:

1. Bespoke Document Review Platform

PwC configures and administers Relativity to meet client-specific review and disclosure requirements. The platform is web-based, fast, fully scalable and includes all of Relativity's advanced features such as Technology Assisted Review (TAR), email threading, near-deduplication and foreign language identification. These all come together to ultimately make the search and review process more efficient and cost effective.

Our cloud review software allows for effective management of large volumes of data through prioritising key stages in the processing and review stages.

2. Advanced Data Profiling and Gap Analysis

PwC supports early case assessment through data profiling and gap analysis, helping organisations understand the scope, composition and completeness of their data before full review commences.

Visualisation and reporting tools are used to identify key custodians, time periods, data types and potential gaps, reducing the risk of incomplete disclosure and unnecessary downstream review effort. You may, for instance, find that you're missing two months of a key custodian's email data and we can help you to address this before it becomes an issue.

3. Technology Assisted Review, Advanced Analytics and AI (Artificial Intelligence)

With Technology Assisted Review (TAR) and advanced analytics, we can help you to filter out the noise to focus on what's important, support decision-making and execute effective review strategies within the platform. These capabilities are applied with appropriate human oversight to ensure review decisions remain transparent, auditable and defensible. Our TAR review platform utilises Relativity Analytics, which provides a number of features including Assisted Review, Keyword Expansion, Concept Clustering, Categorisation, Email Threading, Textual Near duplicates, Domain Analysis, and Primary Language Identification.

Assisted Review: This is a feature of Relativity that supports document grouping and review prioritisation based on predefined criteria. The functionality uses supervised learning to reflect reviewer decisions and assist in identifying additional documents of interest as the review progresses.

Keyword Expansion: This may be useful when the search topic has not been explored well, and you are not sure what you are looking for. This tool will suggest additional keywords based on a keyword you know is important to you. For example, when using the keyword “money”, Keyword Expansion can suggest the most commonly used keywords found in documents containing the keyword “money”.

Concept Clustering: Using clustering we can look for concepts that exist in your data based on how words are used together. Concept clustering groups your documents together by shared concept and is not dependent on dictionary definitions; it relies on the context it finds within your data.

Clustering can be combined with more traditional methods like keyword searching, for example, you may choose to cluster the results of a keyword search for “price” to gain a quick overview of the results and get a feel for its quality.

Categorisation: We use categorisation for documents that have already been issue coded. We compare them against a second document set to apply established issues or categories based on conceptual content. For example, we can use categorisation to quality check documents flagged as privilege against the rest of the database to ensure nothing was missed.

Email Threading: We use email threading to display emails in the same chain. This feature allows us to help the review team maximise their review throughput by grouping all emails in a threaded conversation together in one review window. This feature will significantly increase efficiency and accuracy of the review.

Textual Near Duplicate: Relativity Analytics gives us the option to identify those records where most of the text appears in other similar records. This option returns a percentage value indicating the level of similarity between documents. Doing this allows us to optimise the way in which the review team will work as it helps them to increase the total number of documents they can review in one day. We help them by batching the near duplicate documents together for a speedier review process.

Domain analysis: This will help you determine who is communicating with who and how frequently. It can help you to link custodians and identify organisations which may be of interest from the email address domain. It will also allow you to find email addresses that key custodians are using to give you a complete picture, especially if you subsequently use these as keyword search terms.

For example, you may see that a custodian regularly emails a Hotmail address. You drill down on these emails and notice that one of them contains business sensitive information which he or she is sending

outside of the company. You, therefore, decide to target this individual as part of your investigation into data leakage.

You can also quickly filter out organisations that you know are not important. For example, in your review you may have identified a set of marketing emails from a travel agency. You may decide to exclude all emails from this domain from your review if these emails are not relevant.

Primary Language Identification (PLI): PLI analyses all of your data and determines the main language for each document from a choice of eighteen. With this, you can make appropriate decisions on keyword strategy, the language requirements for your review team and whether you require translation services.

For example, where a government department holds correspondence involving international engagement or cross-border programmes, PLI can identify non-English material to ensure it is appropriately included in search and review activities.

Machine Translation: Relativity Translate enables the translation of individual or multiple documents written in various languages into a chosen target language. This tool offers functionalities such as automated or assisted translation, language detection, and support for multiple languages.

Auto Redactions: Relativity Redact allows for the markup and redaction of native Excel files. It can also be run to identify content and automatically redact documents in RelativityOne. It allows reviewers to create rules for consistent application of redactions at high speed and volume.

Audio and Video Transcription: Built into Relativity, this tool specialises in making audio files searchable. It does this by automatically transcribing the audio into text that can then be searched, or by searching the audio phonetically. It also supports redaction.

Contract AI (Relativity Contracts): Relativity has Contract capabilities that utilise machine learning, automated data extraction and smart-compare functionality to enable a more efficient review of material.

Relativity aiR: This is Relativity's evolving suite of AI-powered capabilities designed to support and accelerate document review, privilege assessment and early case understanding all with the RelativityOne platform. Relativity continues to develop and enhance the aiR suite as part of the wider platform roadmap, with new capabilities and improvements introduced over time in line with platform updates.

- **aiR for Review** supports document review by summarising documents and highlighting relevant concepts to assist reviewers with prioritisation and consistency. Rationales and considerations are also given for the reviewer to consider all sides of the argument for relevancy

- **aiR for Privilege** supports privilege review by analysing documents to identify indicators of potentially privileged content, such as legal communications or advice-related language. It provides explanations to help reviewers make informed decisions, allowing for consistent and defensible privilege review
- **aiR for Case Strategy** supports early case assessment and understanding by helping users quickly identify key themes, issues, timeline and relationships within large datasets. By surfacing patterns insights, this assists legal and investigation teams in refining review and disclosure approaches.

4. Driving efficiencies through technology

We have developed several add-ons to our document review platform to help you drive further efficiencies during a review.

Accelerated Discovery: We developed cloud-based integration with RelativityOne. This integration streamlines technical steps such as data ingestion, processing and workspace preparation, helping users reach a review-ready state more quickly. The approach includes configurable reporting and dashboards in the platform to provide visibility of progress and data volumes throughout the lifecycle of a matter.

Search management tool: Provides functionality to create, import and export saved searches outside of the platform as well as schedule them to run at specific times and in a defined order. The output of any of the searches can be sent via email to the user.

Calendar view: Displays a group of calendar appointments for one or more custodians in an Outlook style calendar view, helping to easily visualise a set of results.



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