

Fosway 9-Grid™ TALENT ACQUISITION

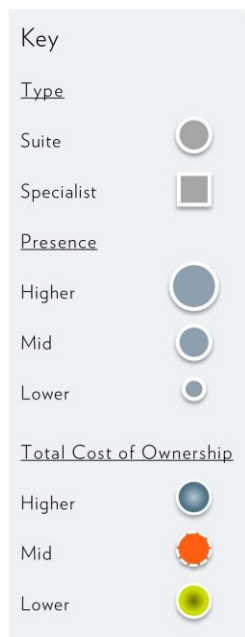
June 2025

Independent Analysis of the Talent Acquisition Market

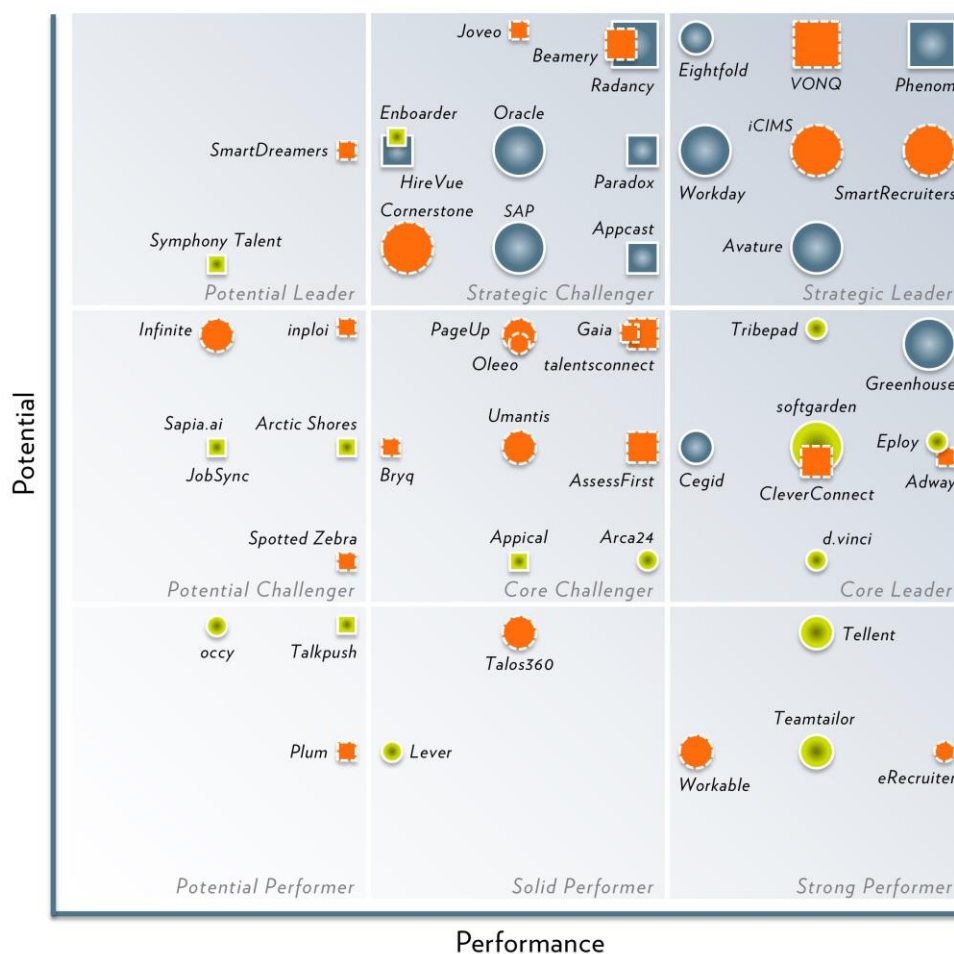
Fosway 9-Grid™

Talent Acquisition

2025



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Market & Solution Trends



Market Trends

The economy has chilled and TA feels it first

Across Europe, hiring has shifted away from growth-driven urgency to defensive caution. Hiring volumes have dropped in many industries and headcount plans are in flux, often frozen. Layoffs, restructuring, and cost-control measures have hit not just on opportunities and candidates, but also the talent acquisition teams. In the UK, this downturn is especially sharp in sectors such as Fintech and Logistics, where post-Brexit talent gaps have collided with frozen budgets. In Germany, hiring slowdowns are more controlled, as co-determination laws and works council oversight limit fast restructuring. Overall, budgets are tighter, external agency use has been reined in, and workforce strategies have a shortened horizon. At the same time, recruiters face a flood of noise, not just because the market has tilted back toward employers, but because candidates now use AI to tailor CVs and auto-apply to hundreds of roles in their sleep. Application volumes are spiking, and much of what reaches recruiters is low-signal, AI-polished, and often system-gaming. Talent acquisition is turning into a needle-in-a-bigger-than-ever-haystack problem - where the signal is shrinking, and the workload expanding. Under these conditions, TA teams are under pressure to identify quality amid greater noise but with fewer resources and less clarity about the future than ever.

Talent acquisition's role is being rewritten in real time

The pressure on talent acquisition teams is structural, not just operational. Attraction and sourcing continue to see major automation gains, with AI now able to surface and engage talent at scale. But most corporates still optimise for volume, not for quality - delivering too many candidates that are poorly matched, wrongly skilled, or unlikely to convert. As a result, the role of TA is shifting from pipeline generation to intelligent filtering, which in turn pushes it further upstream. Teams are expected to shape criteria on who gets hired and why - often before a role and req is even opened. TA teams need to build new capabilities to cope and redesign processes to rewire hiring for efficiency and quality. TA teams also need greater cross-functional influence to align with the business earlier, AI fluency to evaluate and manage emerging tools, and data interpretation skills to feed clearer insights into planning.



TA moves into workforce strategy and internal mobility

TA teams are also increasingly required to contribute to workforce intelligence, helping answer fundamental workforce planning questions, such as should we build, buy, or borrow talent? This need is partly a response to growing uncertainty on future hiring volumes but also reflects a deeper structural change. Workforce planning is becoming more capability driven. Technology now informs job architectures in real time, revealing emerging skills within both internal and external talent pools. As a result, TA is also assuming increasing ownership for internal mobility too. For example, in Nordic markets, tight labour pools and strong retention cultures push employers to think inside-first. Talent Mobility, a once siloed initiative, is now becoming integral to closing capability gaps and reducing external talent dependencies. As skills-based approaches gain traction, especially for early-career roles and hard-to-fill positions, there is a resulting shift from experience-based requisitions toward skills-based hiring. TA teams are now expected to help map skills, assess potential, and surface internal candidates, as a primary lever to meet business needs not just as a secondary channel. The next big question is whether TA will also weigh in on the classic, 'Buy, Build, or Borrow' model of workforce planning with a fourth 'B', Bots?

Many TA platforms were not built for this market

The day-to-day realities of hiring in 2025 have now exposed some of the functional limits of legacy TA solutions. Most providers have added generative AI features, e.g. for job description writing, interview question generation, CV summarisation, or content tools for candidate communications. But these updates offer mainly marginal efficiency gains, not structural advantage. Newer AI matching layers, retrofitted into systems, provide useful filtering, but they only partly address the real issue, the need for intelligent control over how pipelines are shaped and filled. Whether by limiting volume and raising pre-qualification standards for easy-to-fill roles, or accelerating engagement for scarce, high-value profiles, most platforms still cannot adapt to the new context. Matching alone is not enough, especially when platforms respond the same way to every requisition, regardless of the talent reality behind it. Most systems were never designed to operate at that level of nuance. For multi-country TA teams, these gaps are even more visible. AI tools often lack support for local sourcing or multilingual parsing, especially in Southern and Eastern Europe.



The new TA tech stack has arrived

With every advancement in AI, the limitations of traditional TA platforms have become harder to ignore, and a new generation of solutions is ready to step in. AI-native platforms are no longer fringe, but they are setting the pace for organisations willing to lead. The technology is maturing rapidly, improving month by month. Adoption in Europe is progressing cautiously. Some organisations are exploring the deep waters of agentic AI, though few have moved beyond small-scale pilots. Instead, early adopters are deploying discrete solutions such as automated pre-screening or interview scheduling. These tools are already beginning to reshape day-to-day TA operations, reducing manual loads, assisting recruiters with repetitive tasks and enabling more informed decisions. The most advanced platforms are also introducing autonomous or collaborative AI agents, which corporates are now exploring in relatively low-risk environments where they can test, learn and refine. As experimentation plays out, the vendor landscape is starting to split between those adapting fast, and those falling behind. This is where the future of TA is being quietly shaped; not in the mainstream, but at the edges, where innovation defines what ‘good’ will look like next. For organisations sitting still on the sidelines, the cost of inaction is rising fast.

AI solutions for real transformation are gaining ground

Vendor growth across the segment has widely slowed or declined, driven not just by macroeconomic uncertainties, but also by shifting buyer expectations. Organisations are under increasing pressure to consolidate systems and simplify their HR ecosystem. The ‘modern TA suite’ is now squeezed from all sides: HCM platforms continue to absorb core capabilities, and vendors with proven AI capabilities are raising the bar on speed, quality, intelligence, and experience. Only the TA suite providers actively rebuilding parts of their stack to embed specialist capabilities or to open up to deeper integrations, will stay competitive. Many vendors remain reactive, either held back by suddenly aging architectures, rigid commercial models, or a lack of urgency. Meanwhile, vendors with a strong AI track record and proven customer impact continue to outperform the market. They are not just winning deals – they are winning mindshare.

Pricing models are being rewritten

Economic pressures are forcing a shift in how TA solutions are being priced and sold. At the lower end of the market, vendors with rigid entry-level pricing, are losing customers as hiring freezes or nears zero



activity. Traditional SaaS pricing, anchored to annual hiring volumes or fixed user tiers, is also proving brittle in such a volatile environment. With fewer new projects or system replacements underway, many vendors have turned to upselling existing clients on new modules, or inflation-adjusted pricing or bundling strategies. But a more flexible pricing logic is now emerging. Lower base fees are combined with consumption-based elements, allowing customers to reduce fixed costs but still scale usage when demand returns. This approach shifts risk but also preserves access. AI is further accelerating this pricing shift as vendors introduce credit-based billing or usage-linked pricing for AI agent interactions. Some are even experimenting with pricing tied to qualified outcomes – such as delivering pre-vetted applicants directly into the ATS. For many buyers, especially in Europe, spend flexibility is attractive, but only if pricing can be forecasted, tracked, and managed. Procurement teams will innovate, but not at the cost of control.

Is TA overlooking the cheapest sources of quality talent?

In a cost-sensitive environment, many TA teams continue to default to paid media and outbound spend, whilst ignoring the most obvious low-cost, high-quality sourcing channels. Employee referrals, silver medallists, and past applicants often outperform job boards and paid media in both conversion and retention - yet remain underutilised. With budgets under pressure and hiring teams stretched thin, revisiting these approaches isn't just efficient, it's strategic. The question is not whether organisations *can* afford to invest in new pipelines, but why they continue to spend before exhausting the ones they already have.

Regulation is shaping the rules of AI adoption

With the EU AI Act approaching enforcement, hiring technologies are now formally treated as high-risk systems, putting them under serious regulatory oversight. In many European organisations, legal, data protection, and security teams are shaping adoption timelines, often well before the TA teams assess functionality. Vendors are responding by pursuing ISO 42001 certification, which provides a framework for risk governance and AI system management, much like ISO 27001 and SOC 2 did for IT security. For buyers, this provides operational reassurance. But even with certified vendors, corporate teams will face a growing burden to ensure human oversight, candidate transparency, decision traceability, and data control. In Europe's compliance-first environment, vendor certification does not just enable adoption, it allows it, but only if organisations are operationally ready to meet the new bar. For US startups that still treat GDPR as a feature request, it will be a hard lesson to learn.



Solution Trends

The ecosystem is split, even as consolidation grows

Across EMEA, most TA teams are under pressure to consolidate systems and simplify their tech ecosystem. But operational reality doesn't wait for clean architecture, and buyers are prioritising what delivers impact now, even if the core ATS is not good enough to handle certain operational issues well. Four solution strategies are driving this shift: AI-enhanced specialists that plug into legacy systems to augment gaps; AI-native point solutions that solve discrete problems, e.g. in sourcing, engagement or scheduling; early agentic platforms testing wider workflow orchestration; and talent intelligence systems focused on planning, mobility, and internal data. Rarely do these solutions come from the same vendor, so integration is still patchy. But the pressure to improve time-to-hire, pipeline quality and recruiter productivity still outweighs the need for architectural consistency.

Innovation is now almost entirely AI-driven

In prior years, specialist providers had been making land grabs across all areas of the market. But outside of AI, the only area seeing consistent product development now is career site infrastructure, with more vendors upgrading content management capabilities, adding personalisation, and improving design flexibility. Even here though, AI is increasingly driving content creation, localisation, and personalisation. Beyond that, most non-AI innovation is just catch-up: backfilling gaps and rolling out features buyers already expect. The only real acceleration is coming from AI, including in how jobs are created and distributed, or in how teams evaluate and decide who to hire. AI isn't just part of the story now - it is the whole innovation agenda.

TA is moving up the AI maturity curve

In Europe, TA remains the front-runner for AI adoption in HR. But progress is measured. Most corporates have started with low-risk use cases like job description or content generation, partly because they are easy to adopt and, in markets like Germany, easier to get past works councils. What's changing now is how vendors approach the AI opportunity. The more advanced vendors are moving beyond isolated features and are building systems that support each persona across the hiring process — recruiter, hiring manager,



and candidate. That means turning basic content tools into dynamic workflow assistants, skill engines, and evaluation guides. That isn't easy. It requires handling wide variation between industries, roles, and organisations, whilst putting it all into a consistent configurable product model. Corporates wishing to advance forward will need to separate the vendors chasing AI hype from those that have a clear framework for value delivery, and a roadmap for how they take customers up the AI maturity curve.

Structured intake is where AI starts to show real value

A clear sign of growing sophistication is the way more advanced vendors are redesigning the process behind job description creation. Basic platforms will offer a prompt-based generator to produce draft text from inputs such as role, level, industry, location, and benefits. But more advanced systems go much further - providing multiple outputs with real value for recruiters. The most sophisticated approaches start by preparing the intake with market research, internal talent pipeline analysis and competitor role analysis, then guide the intake meeting itself. Here, AI will capture the virtual conversation between recruiter and hiring manager, extracting required skills, linking skills to assessments, and generating interview questions. This approach also improves internal awareness about skills availability, defining quality criteria right from the start, as well as optimising for SEO performance and downstream hiring consistency. AI isn't just drafting content - it's listening, structuring, and preparing the team to act. Buyers should look for platforms built around consistent skill models, editable intake flows, and role-specific outputs that connect job description, evaluation, and interview prep in a single sequence. Intake agents are beginning to facilitate this process from end to end — and that's where real benefits start to show.

The top of the funnel is breaking away from the ATS

Job discovery is becoming channel-native, AI-optimised, and increasingly candidate-led. Jobs are pushed to where candidates already are – e.g. social feeds, aggregator apps, messaging platforms - and interaction starts the moment they respond. A growing class of AI-led specialists now handle everything from programmatic distribution to the application itself: generating ad content, selecting or creating visuals, localising language, and qualifying candidates based on hard role criteria. Chatbots on WhatsApp, SMS or browsers, screen for work permits, driving licences, or required certifications before the candidate even sees an ATS. In parallel, large job platforms such as Indeed and StepStone are moving down-funnel, adding pre-screening, interview scheduling, and routing logic, aiming to reshape themselves into full conversion



engines. The benefits are clear: pre-vetted candidates, faster time to hire, and less manual work. But one trade-off is control. Employers are losing ownership of early-funnel performance and are often left to accept the pricing and candidate flow vendors choose to set. Most specialists now provide the dashboards and visibility corporates need – but the shift in where the power lies is underway. TA suites were not built for this level of reach or responsiveness, and whilst some are adapting, most still treat it as a ‘partnership play’. For many frontline and high-turnover roles, the application has already been replaced by activation.

Voice agents are entering the prequalification flow

AI voice agents are now starting to augment and replace manual screening, particularly for frontline and distributed hiring in high-volume, time-sensitive environments. Some agents are embedded directly into the application workflow for clearly defined roles across voice or chat, whilst others work as outbound tools, calling candidates to confirm certifications, shift availability, location, or language requirements. Adoption is growing in the UK and Southern Europe, with uptake in emerging markets outside of Europe already well ahead. Corporates are also piloting voice-based scheduling and reminders workflows, reminding candidates to attend interviews, trial shifts and day-one onboarding. The quality of AI voices and the ability to handle well-structured conversations is already sufficient for wider adoption, but less so in companies in Germany and France, as they assess where voice adds value without adding risk.

Human-centred automation reshapes selection

AI is starting to support the interview process rather than replace it. Most platforms can now generate interview questions based on intake data or job descriptions, often aligned to key skills. Some vendors go further with prompts for hiring managers in real-time, as well as capturing and summarising feedback and discussions post-interview. A few vendors are testing co-interview agents to participate in structured interviews, log responses, and flag inconsistencies or missing coverage. Uptake remains cautious though, especially in Europe, where decision accountability and works council sensitivities limit how far (and fast) automation can go. The benefits are showing in improved consistency, better documentation, and decision support. The risks are not just of bias, but also of negatively impacting candidate experience and trust. There are also questions about the readiness of hiring managers to rely on machine-generated inputs.



AI assistants are starting to shape onboarding

Whilst offer workflows remain mostly driven by templates and rule-based automation, AI is starting to show value in the onboarding experience itself. Natural-language assistants can now guide candidates through their onboarding journeys, answering questions, collecting documents, and surfacing role- or location-specific content. Some AI assistants go further by nudging hiring managers to follow up or prompting IT or facilities team to act. As a consequence, there is a shift from process automation to experience orchestration, something especially valuable in distributed or high-turnover environments. But not every interaction can or should be digital. The best onboarding journeys still blend digital support with timely, real-world, human connections.

AI provenance is becoming a buying factor in Europe

For many EMEA-based organisations, especially those in regulated sectors, the question is no longer whether to use AI — but where that AI comes from. Procurement, legal, and security teams are increasingly scrutinising not just the vendor, but the underlying models too. Key considerations include where the models were built, who owns them, where data is processed, how usage is logged, and who can access that data. This is not just driven by compliance, but also by real concerns about long-term risk, digital sovereignty, and even potentially, geopolitical exposure. Some European corporates are therefore now actively seeking European-hosted models too, as well as open-weight architectures, and at minimum, full disclosure of third-party AI integrations. Most TA vendors are underprepared for this conversation. Many vendors still route prompts through US-based APIs without meaningful transparency, assuming GDPR or ISO compliance is enough. For an increasing number of buyers in France, Germany, and the Nordics, this is not an acceptable response, especially in defence industries, or in finance, pharma and public sector.



9-Grid™ Vendor Ratings



9-Grid™ Vendor Ratings

Notes on interpretation

The Vendor Ratings table is now split by type, Suite or Specialist, and includes TCO ratings. All ratings are banded and not linear scored. Suites in the same 9-Grid™ zone should be considered materially equivalent without more detailed evaluation aligned to customer-specific needs. Trajectory ratings are relative to the vendor themselves and the market, not vs other vendors in the same zone. See later in this report for more detailed description of the assessment process and dimensions of this 9-Grid™. For more information on Trajectory see Fosway's [Trajectory Guide](#).

Talent Acquisition Specialists

Vendor	Specialism	9-Grid™ Rating	Trajectory	TCO
Adway	Talent Attraction & Engagement	Core Leader	Accelerating	Mid
Appcast One	Talent Attraction & Engagement	Strategic Challenger	Capitalising	Higher
Appical	Onboarding	Core Challenger	Consolidating	Lower
Arctic Shores	Talent Assessments	Potential Challenger	Accelerating	Lower
AssessFirst	Talent Assessments	Core Challenger	Accelerating	Mid
Beamery	Talent Lifecycle Management	Strategic Challenger	Excelling	Mid
Bryq	Talent Assessments	Core Challenger	Moderating	Mid
CleverConnect	Talent Attraction & Engagement	Core Leader	Maintaining	Mid
Enboarder	Onboarding	Strategic Challenger	Moderating	Lower
Gaia	Talent Attraction & Engagement	Core Challenger	Excelling	Mid
HireVue	Talent Assessments	Strategic Challenger	Moderating	Higher
Imploi	Talent Attraction & Engagement	Potential Challenger	Excelling	Mid
JobSync	Recruitment Marketing Automation	Potential Challenger	Maintaining	Lower



Vendor	Specialism	9-Grid™ Rating	Trajectory	TCO
Joveo	Talent Attraction & Engagement	Strategic Challenger	Expanding	Mid
Paradox	Conversational Recruiting	Strategic Challenger	Accelerating	Higher
Phenom	Talent Intelligence & Talent Experience	Strategic Leader	Excelling	Higher
Plum	Talent Assessments	Potential Performer	Accelerating	Mid
Radancy	Talent Attraction & Engagement	Strategic Challenger	Excelling	Higher
Sapia.ai	Talent Selection	Potential Challenger	Maintaining	Lower
SmartDreamers	Talent Attraction & Engagement	Potential Leader	Accelerating	Mid
Spotted Zebra	Talent Assessments	Potential Challenger	Capitalising	Mid
Symphony Talent	Talent Attraction & Engagement	Potential Leader	Consolidating	Lower
talentsconnect	Talent Attraction & Engagement	Core Challenger	Excelling	Mid
Talkpush	Talent Attraction & Engagement	Potential Performer	Excelling	Lower
VONQ	Talent Attraction & Engagement	Strategic Leader	Expanding	Mid

Talent Acquisition Suites

Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Arca24	Suite	Core Challenger	Capitalising	Lower
Avature	Suite	Strategic Leader	Consolidating	Higher
Cegid Digital Recruiters	Suite	Core Leader	Moderating	Higher
Cornerstone	Suite	Strategic Challenger	Realigning	Mid
d.vinci	Suite	Core Leader	Consolidating	Lower
Eightfold	Suite	Strategic Leader	Evolving	Higher
Eploy	Suite	Core Leader	Accelerating	Lower
eRecruiter	Suite	Strong Performer	Accelerating	Mid



Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Greenhouse	Suite	Core Leader	Excelling	Higher
iCIMS	Suite	Strategic Leader	Maintaining	Mid
Infinite BrassRing	Suite	Potential Challenger	Expanding	Mid
Lever	Suite	Solid Performer	Moderating	Lower
occy	Suite	Potential Performer	Expanding	Lower
Oleeo	Suite	Core Challenger	Expanding	Mid
Oracle	Suite	Strategic Challenger	Maintaining	Higher
PageUp	Suite	Core Challenger	Expanding	Mid
SAP	Suite	Strategic Challenger	Consolidating	Higher
SmartRecruiters	Suite	Strategic leader	Accelerating	Mid
softgarden	Suite	Core Leader	Maintaining	Lower
Talos360	Suite	Solid Performer	Expanding	Mid
Teamtailor	Suite	Strong Performer	Maintaining	Lower
Tellent Recuitee	Suite	Strong Performer	Expanding	Lower
Tribepad	Suite	Core Leader	Expanding	Lower
Umantis HR-Suite Flex	Suite	Core Challenger	Maintaining	Mid
Workable	Suite	Strong Performer	Moderating	Mid
Workday	Suite	Strategic Leader	Moderating	Higher

Inclusions and Exclusions

Entries into the Fosway 9-Grid™ for Talent Acquisition are made based on the appearance of those solutions within Fosway's Corporate Research network, which focuses on European enterprise-scale corporates. As a result, there are a number of US-based solutions that are omitted because they do not currently have an adequate international presence for us to provide a relevant commentary. Conversely,



there may be providers with little recognition outside EMEA that are included because they have built enough presence with European customers to warrant inclusion.

2025 Additions and Removals

This year sees the addition of the following new names to the 2025 Fosway 9-Grid™ for Talent Acquisition:

- occy, a talent acquisition suite provider,
- Sapia.ai, a talent selection specialist, headquartered in Australia,
- Spotted Zebra, a skills assessment specialist, expanding also into interview intelligence,
- Talkpush, a specialist in talent attraction and engagement.

This year has seen the removal of the following vendors: HireRoad, HRFlow.ai, Jobvite, Kallidus, Onlyfy, Rival, Vervoe as they no longer meet the inclusion criteria. Other changes to note:

- Clinch, eArcu, and PageUp are subsumed under PageUp, following a group brand consolidation,
- the former Recruitee solution is now labelled as Tellent, following a rebranding to Tellent Recruitee,
- Socially Recruited is now known as Gaia, following a rebrand.

Accuracy of Information and Warranties

The analysis and recommendations made in Fosway 9-Grids™ are based on the information currently available to Fosway Group from sources believed to be reliable. Fosway Group disclaims all warranties as to the accuracy, completeness or adequacy of such information. Fosway Group will have no liability for errors, omissions or inadequacies in the information contained herein, or for interpretations hereof. Opinions expressed herein, are subject to change without notice. All content is copyright Fosway Group Limited, unless otherwise identified. All rights reserved.



Understanding the Fosway 9-Grid™



Understanding the Fosway 9-Grid™

What is the Fosway 9-Grid™

The Fosway 9-Grid™ is a five-dimensional model that can be used to understand the relative position of different solutions and providers in a selected market segment. It allows organisations to compare different solutions based on their Performance, Potential, Market Presence, Total Cost of Ownership and Trajectories across the market.

9-Grid™ is unique, because the model contains value in *all* its zones – not just the top right.

9-Grid™ not only provides an understanding of the market but also identifies the high-level actions that can help corporate organisations get the best from vendors.

9-Grid™ is based on Fosway Group's independent research in the HR, talent and learning market over the past 25 years, and draws upon the insights and experience of our Corporate Research Network. The Corporate Research Network is a group of HR and learning professionals, who between them represent over 250 of Europe's leading companies. These companies are typically global enterprise-scale organisations with their Head Offices in Europe (or the EMEA HQ of global companies).

Essentially the 9-Grid™ model brings together our independent view of solution providers, including their:

- **Performance** - comprising of two elements: Market Performance and Customer Performance.
- **Potential** - scope, capability and sophistication.
- **Presence** - historic and current presence in the market. This includes the size of the customer base, the number of enterprise customers and the overall size of the business, within the scope of the market segment we are examining.
- **Total Cost of Ownership** - the FULL cost of acquiring, implementing and operating the solution (typically over a three-year period). Importantly, this includes both internal and external costs.



- **Trajectory** – our view of their direction of travel in terms of Performance and Potential, relative to themselves and the market as a whole (not vs other vendors in the same zone).

Interpreting the exact position of the vendor in a 9-Grid™ zone is explained in more fully in our **Introduction to the 9-Grid™** document available from our website www.fosway.com.

Note: We strongly recommend reading the full document to understand the model in detail.

The Critical Difference Between the 9-Grid™ and Other Analyst Models

There is a very important difference between 9-Grid™ and other analyst models. In the 9-Grid™ all the nine zones have value, and more interestingly, have an associated set of actions that can help you to maximise the value of the relationship with different vendors. This means that being in the ‘top right’ is not the only valid selection point. For some organisations, top right may not even be desirable. There are many other zones that offer success, especially when balanced against Total Cost of Ownership.

Classifying Suites versus Specialist solutions

Fosway classifies Talent Acquisition solutions into two categories: **Talent Acquisition Suites** and **Talent Acquisition Specialists**. These are defined as follows:

Talent Acquisition Suites are platforms supporting and integrating a broad range of traditional and next-gen recruiting approaches – from talent attraction, through to talent acquisition and onboarding. Solutions in this category may also provide wider functionality for talent management (although this has not been a primary factor in our analysis).

Talent Acquisition Specialists are the opposite. They unashamedly focus on one area of capability with a disruptive high impact agenda. For example, Recruitment Marketing, Candidate Relationship Marketing or Employee Onboarding. Specialists have a focused proposition and want to lead the market in their chosen focus area.



The 9-Grid™ Variables for Talent Acquisition

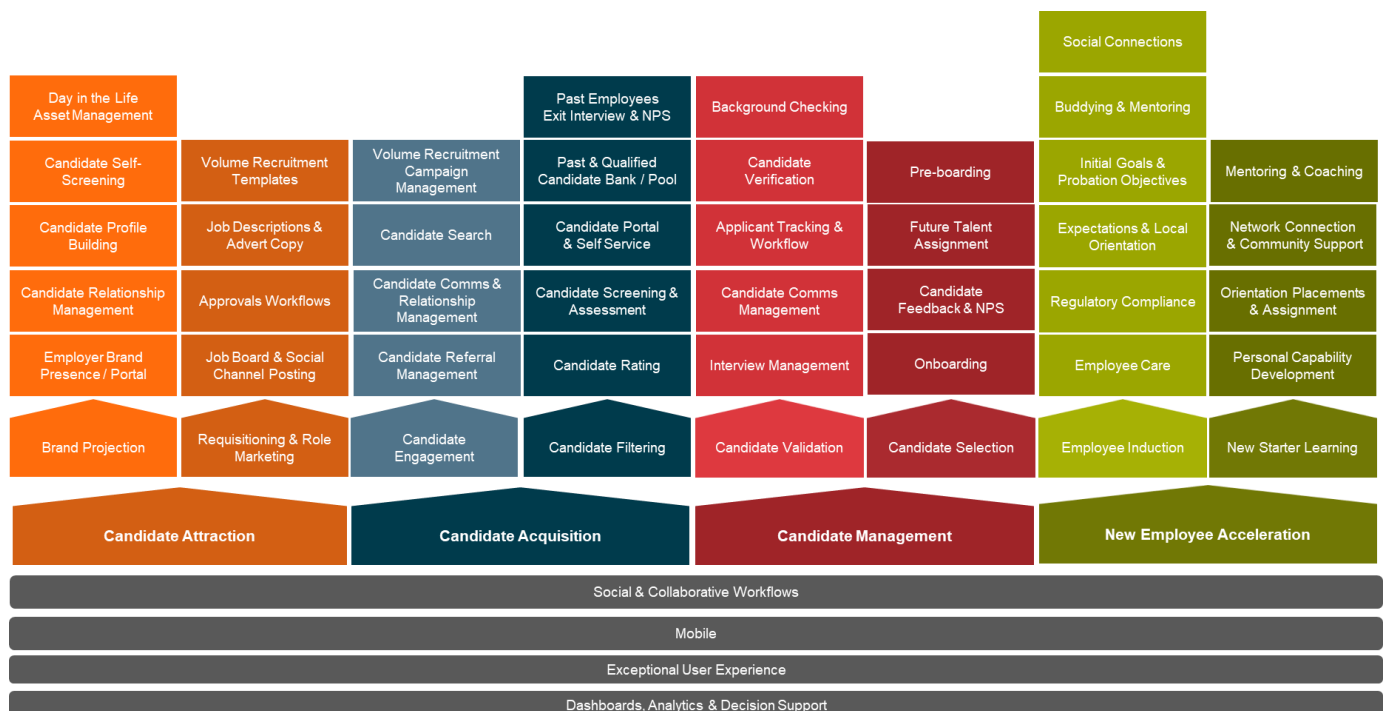
What do potential, performance, presence and total cost of ownership mean in the context of talent acquisition?

Performance

This focuses on customers' choices: does the solution get short-listed, does it win, does it deliver and are customers happy? This is viewed through the lens of large international corporates and is taken from the experiences Fosway Group has gleaned of its Corporate Research Network and general market briefing. This may not, therefore, necessarily reflect the experiences of smaller and mid-sized organisations.

Potential

In the talent acquisition context, *Scope* covers the pillars of candidate attraction, candidate acquisition, candidate management and new employee acceleration. See the following diagram for a more detailed breakdown of functional areas.



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We should stress that Fosway's analysis has been weighted towards the segments of attraction, acquisition



and candidate management. This is in recognition that these areas are currently the main priorities for most enterprise organisations when they engage with the talent acquisition marketplace. The phase of new employee acceleration has not been a point of emphasis of our assessment of talent suite solutions. As we deepen our commentary into this section of the market, we will also begin to further highlight the importance of new employee acceleration, candidate referrals and social relationship management as critical future themes.

Sophistication defines the functional depth of the processes and the level of complexity that can be managed within solutions. Mid-market tools tend to have wider scope but lack sophistication or functional depth. High sophistication implies a high degree of control on how each of the processes can be configured, as well as the ability to support different processes.

Presence

This is the solutions presence in the enterprise market. This is very much about the size of the customer base, as well as presence in the overall market. Again, this is not a linear scale, but represent three bandings that group the levels of maturity/distinct groupings we see in the market. Higher Presence solutions will have large numbers of corporate enterprise scale customers and high overall user numbers.

Total Cost of Ownership

TCO is about the overall cost of buying, implementing and operating the talent acquisition solutions. This is a combination not only of initial cost of buying the platform, but also the cost of operating the solution – namely the hosting, maintenance and upgrade overheads as well as the cost of resources, i.e. the team, to run it.

Trajectory

For talent acquisition solutions, Trajectory is our sense of potential direction of travel in terms of both Performance and Potential. Trajectory is measured relative to the current Performance and Potential of that solution and the market as a whole. **It is not a relative positioning compared to other solutions in the same zone.** For more information refer to Fosway's [Trajectory Guide](#).



Understanding Ratings – the Banding system

Each of the dimensions of the 9-Grid™ is rated by Fosway based on our analysis of all the research gathered through the main input cycle each year, as well as supporting evidence throughout the year. Priority weighting is given to the experiences of customer organisations, especially European-headquartered enterprise organisations.

Because of the complex nature of this analysis, Fosway does not believe it is desirable or accurate to reduce to a single score. Instead, each of the 9-Grid™ dimensions is banded into one of three levels – **Higher**, **Mid** and **Lower** reflecting the relative rating for that factor. E.g. Higher TCO solutions cost more than Mid or Lower TCO solutions, and Higher Performance solutions have evidence of greater market and customer success at scale, than Mid or Lower. The combination of the banding for Performance and Potential determines the 9-Grid™ Zone the vendor is placed in. The banding for the other dimensions determines how their TCO, Presence and Trajectory are represented.

See the [Fosway 9-Grid™ Introduction Guide](#) for more information on interpretation of the 9-Grid™ dimensions, the banding system, and the 9-Grid™ Zones.



What to do next



What to do next

Make better HR and learning buying decisions faster

A key difference of the 9-Grid™ to other analyst models is that all the nine zones have value. Top right is not always best! The key question you should be asking is ‘what is best for you?’ i.e. your organisation, your budget and resources, and your real needs and requirements. Referencing the 9-Grids™ is a great place to start when evaluating current suppliers or looking for new solutions.

But what you see here is just the tip of the iceberg. If you are seeking deeper insight on the data behind the 9-Grid™, contact us to discuss becoming a member of the **Fosway Corporate Network**.

Corporate members get direct access to the most experienced HR industry analyst team in Europe. We provide you with a ‘critical friend’ for independent expert advice and feedback, access to the best research on HR, talent and learning in Europe, and analyst services to make the best decisions faster and deliver successful people strategies.

Why start your procurement process from scratch when we already have the research and insight to help you make better supplier decisions much faster?

As well as accessing the best existing research and market insight, you also have the security of knowing that we are completely independent and don’t have a vested interest in the outcome, other than ensuring it’s the best decision for your organisation and your people. To find out more, please contact us at corporatemembership@fosway.com or by phone on +44 (0)20 7917 1870.

If You Are a Vendor

Fosway Group is constantly researching the market via our research projects, via input from our Corporate Research Network, and through direct vendor tracking and briefing. Vendors interested in engaging with Fosway Group more deeply are encouraged to consider joining our **Fosway Vendor Programme (FVP)**. Please contact vendors@fosway.com or call us on +44 (0)20 7917 1870 to discuss further.



About Fosway Group

Fosway Group is Europe's #1 HR Industry Analyst focused on Next Gen HR, Talent and Learning.

Founded in 1996, we are known for our unique European research, our independence and our integrity.

For over 25 years, we have been analysing the realities of the market, and providing insights on the future of HR, Talent and Learning. Fosway analysts work extensively with our corporate clients to understand the inside story of the challenges they are facing, and their real experiences with next gen strategies, systems and suppliers. Our independent vendor analysis provides a vital resource when making decisions on innovation and technology.

And just like the Roman road we draw our name from, you'll find that we're unusually direct. We don't have a vested interest in your supplier or consulting choices. So, whether you're looking for independent research, specific advice or a critical friend to cut through the market hype, we can tell you what you need to know and how to succeed.

Example clients include: Alstom, Aviva, Boots UK, BP, BT, Centrica, Deutsche Bank, Faurecia, HSBC, International SOS, Lloyds Banking Group, Novartis, PwC, Rolls-Royce, Royal Bank of Scotland, Sanofi, Shell, Swiss Re, Telefonica, Thomson Reuters, Toyota Europe, and Vodafone.

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