

# Magic Quadrant for Talent Acquisition (Recruiting) Suites

2 April 2025 - ID G00808556 - 40 min read

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Talent acquisition suites play a crucial role in helping to manage the growing demand for talent, which is resulting from evolving business requirements and a dynamic labor market. HR recruiting leaders can use this Magic Quadrant for guidance in addressing hiring needs through technology.

## Strategic Planning Assumptions

- By 2026, 75% of midsize-to-large, global enterprises will have invested in a cloud-deployed human capital management (HCM) suite for administrative human resources (HR) and talent management. However, they will still need to use other solutions for 25% of their HR requirements.
- By 2027, the recruiting landscape will consolidate further, with 20% fewer providers in the talent acquisition (TA) marketplace.

## Market Definition/Description

Talent acquisition (recruiting) suites are used by recruiting teams to manage the job application selection process. Capabilities include an applicant tracking system, which handles the job requisition, job posting, application, and candidate selection workflows, and a combination of candidate relationship management (also known as sourcing or pipelining) and/or employee onboarding modules. Today's **talent acquisition suites** offer a variety of functions with an emphasis on automation and AI-enabled capabilities to provide a

streamlined, engaging experience for all stakeholders involved in the hiring process, such as recruiters, hiring managers and candidates.

Organizations that do their own hiring require a means to engage, select and onboard would-be employees.

### **Applicant Tracking System (ATS):**

ATS allows recruitment teams to improve operational efficiency by automating workflows for job requisitions, collecting, assessing and interviewing job applicants (screening), as well as extending and signing job offers. They also serve to enhance the applicant's experience through the hiring process by providing enhanced career portals, and streamlining recruiter-applicant communications. As the "core" of a talent acquisition (TA) suite, the ATS may include additional features such as candidate matching and interview scheduling, or these features may be acquired through the vendors' third-party partnerships with point solution specialists. Partnerships are also typically required for assessment and background checking needs.

### **Candidate Relationship Management (CRM):**

When a TA suite includes CRM capabilities, its purpose is to identify and continuously engage potential candidates for future job openings. Ready-now talent pools or candidate pipelines provide a competitive advantage to an organization. CRM features include the ability to send personalized marketing campaigns to maintain a connection with your talent pools until the right job opportunity is available. These capabilities can be an integral part of the sourcing and engagement stage of recruitment.

### **Employee Onboarding:**

When a TA suite includes employee onboarding capabilities, its purpose is to automate the transactional data collection and compliance paperwork necessary to support pre-hire activities leading up to the first day of work, as well as sometimes the first 30/60/90+ days of new-hire readiness. This is intended to accelerate a new joiner's speed to productivity. Features also include the delivery of engaging content to reinforce a new joiner's decision to join the organization and begin relationship building. Onboarding typically begins at the conclusion of the selection process and commonly integrates with an organization's core HR, payroll, learning management and case management systems.

## **Mandatory Features**

All TA suites minimally include an ATS and a CRM module. The mandatory features for this market include:

**ATS:**

- Career sites including branded content pages and job posting capabilities
- Automated job requisition, application and candidate selection workflows to manage job and applicant statuses throughout the recruitment process
- Communication with applicants throughout the hiring process
- Interview management (e.g., feedback collections, candidate comparison)
- Offer management (e.g., approval routing, offer templates, compensation details)

**CRM:**

- Pipeline (aka talent pool) management including tagging and grouping prospective employees by key attributes
- Campaign management to deliver branded, personalized content to maintain connection with talent pools
- Bidirectional candidate engagement (e.g., chatbot, texting, emails)
- Analytics and reporting that includes tracking engagement levels, success of outreach campaigns, and other KPIs for talent sourcing and engagement

## **Common Features**

Additionally a TA suite includes these common features including a distinct onboarding module:

**ATS:**

- Candidate assessment and (AI-enabled) evaluations for screening
- Analytics to support monitoring of key measures such as candidate pipeline conversions and time to hire

**CRM:**

- Advanced career site capabilities for greater personalization and open-position matching

- Event management (lightweight)
- Workflow optimization and automation for talent sourcing and engagement
- Social media integration to broaden sourcing channels and engagement with prospects

#### **Employee Onboarding:**

- Data collection and processing
- Policy review and electronic signature
- Compliance form collection and processing
- Social and cultural assimilation
- Asset provisioning integration triggers/status awareness

## Magic Quadrant

**Figure 1: Magic Quadrant for Talent Acquisition (Recruiting) Suites**





**Gartner.**

## Vendor Strengths and Cautions

### Avature

Avature is a Leader in this Magic Quadrant. Headquartered in London, it is a privately owned talent management company that released its first talent acquisition suite (TAS) in 2008. The majority of its TAS client revenue stems from North America, followed by Europe.

Avature serves clients in an array of verticals. Its top three are government, manufacturing and retail. Approximately 90% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS products are Avature ATS and Avature CRM. Avature is best suited for large organizations with a cloud-based HCM core that require extensive configurations to support complex global hiring.

### *Strengths*

- **Extensive platform configurability:** Avature's platform is fully native, with a disciplined, component-based architecture that supports consistent and extensive configurability. This enables customers to tailor objects, data models, workflows, forms, templates and reports to meet complex business requirements, such as those needed for global hiring at enterprise scale or government-nuanced specifications.
- **Strong CRM capabilities:** Unlike most TA vendors that began with an applicant tracking system (ATS) solution and later added candidate relationship management (CRM), Avature started with CRM, before expanding into ATS and other talent management areas. This has resulted in richer preapply candidate engagement capabilities.
- **Wide geographic coverage:** Avature is geography-agnostic. It attracts buyers with its established CRM roots, extensive platform configurability and local project implementation managers that offer native-language support. It is a technology platform that drives many of the world's largest recruitment process outsourcers.

### *Cautions*

- **Lagging AI capabilities:** Avature has been slow to deliver the range of advanced artificial intelligence (AI) capabilities that buyers increasingly expect in CRM and ATS solutions. Although its 2025 roadmap shows an intent to mature its AI offerings, its current solution has basic skills matching that relies on resume-parsing data extraction.
- **Sluggish market responsiveness:** Avature's investments deliberately align with its own operational goals, but this approach can result in slower progress on buyer-centric priorities, specifically in user experience (UX), AI and reporting. Customer references and Gartner inquiry feedback highlight this limitation, establishing it as a consideration for potential buyers.
- **Shift in focus:** Gartner inquiry feedback reveals concern among tenured clients that Avature's strategy to expand into talent management and broader HCM capabilities, such as integrated human resources service management (IHRS), has diluted its recruiting focus. This could be a detraction from the continued, leading-edge evolution of its TAS offerings.

## Cornerstone

Cornerstone is a Niche Player in this Magic Quadrant. It is a privately owned HCM company, headquartered in Santa Monica, California, and it released its first TA offering more than 20 years ago. Its wider platform, Cornerstone Galaxy, has offerings across the human capital suite (e.g., learning, performance management and core HR), serving users in more than 180 countries and all major regions.

Cornerstone serves clients in an array of verticals; its top three for TAS are manufacturing, retail and engineering. Most sales are made to organizations with between 1,000 and 5,000 employees, although Cornerstone has clients with more than 5,000 employees.

Cornerstone's recruiting offerings are best suited for midsize organizations that have less-complex hiring scenarios, but want to leverage the vendor's market-leading learning and development portfolio.

### *Strengths*

- **Multiple ATS options:** Cornerstone offers more than one recruiting solution. It has one through its acquisition of U.K.-based Lumesse and another through its native integrated talent management platform. Prospective buyers can carefully weigh the best option for their overarching requirements, including ongoing roadmap investment plans.
- **Basic ATS for noncomplex needs:** Cornerstone's simple, clean UX meets basic core capability needs in applicant tracking, rule configuration and offer management. This simplicity can benefit clients looking to streamline their recruitment processes.
- **Transformative learning:** Cornerstone is well-recognized as a market-leading learning platform that extends into areas such as recruiting. Its HCM is centered on robust talent management that uses a skills repository to recommend personalized development opportunities and learning content.

### *Cautions*

- **Fragmented sales experience:** The vendor is enhancing Cornerstone Galaxy to deliver a more unified experience across its combination of native and acquired offerings. However, customer experience (CX) survey feedback reveals frustration with a highly fragmented sales experience that exposes underlying product and vendor inconsistencies.

- **Configurability barriers:** Cornerstone's configuration tools, based on tokens and templates, may create IT dependencies, limiting self-service, flexibility and scalability. Coupled with a dated user interface (UI), these features warrant careful consideration for buyers anticipating growth.
- **Lagging AI capabilities:** Although Cornerstone has some matching and reverse-matching capabilities, it lacks depth (i.e., it's resume-based) and generative AI (GenAI) features. The lack of AI functionality may limit clients' ability to leverage advanced technologies for enhancing recruitment efficiency and decision making.

## Darwinbox

Darwinbox is a Visionary in this Magic Quadrant. It is a privately owned HCM company, headquartered in Hyderabad, India, and it released its first TAS offering in 2017. The majority of its TAS client revenue comes from the Asia/Pacific (APAC) region, followed by North America and the Middle East and Africa (MEA).

Darwinbox serves clients in an array of verticals; its top three for TAS are retail, manufacturing and financial services. Approximately 30% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS product is Darwinbox Recruitment. Darwinbox is best suited for midsize and large organizations, with or without an existing cloud-based HCM core (it offers its own HCM, but stand-alone recruiting sales are supported). It requires strong AI capabilities with an emphasis on candidate and recruiter experience.

### *Strengths*

- **Recruiting-first capabilities:** Unlike most HCMs, Darwinbox actively supports stand-alone recruiting buyers (i.e., you do not have to purchase any other offerings in the portfolio). Darwinbox has successfully built recruiting into its domain of expertise and can support complex hiring needs, along with included bonus capabilities, such as budget headcounts, interview intelligence and an opportunity marketplace.
- **Outcome-focused orientation:** Darwinbox differentiates itself by progressing beyond adoption to focus on outcomes and ongoing business value, as highlighted by supported customer references. Its out-of-the-box dashboards go beyond feature adoption and role engagement/sentiment to include impact tracking, based on customer performance goals.



- **Market-responsive product strategy:** Darwinbox has a solid market understanding that translates into a strong product strategy. It possesses a comprehensive awareness of the needs and desires of its target customers, including AI, candidate and recruiter experience. It is highly efficient in bringing these capabilities to market.

### *Cautions*

- **Limited presence in North America:** Seventy percent of Darwinbox's customers are APAC-based, which is reflected in its customer survey responses and inquiry feedback. Although it is preparing for growth in North America in 2025, its presence there can be characterized as emerging.
- **Smaller-enterprise focus:** Only 30% of Darwinbox's approximately 800 recruiting client organizations have more than 10,000 employees, and its track record is better among midmarket and smaller-enterprise hiring organizations (aligned with HCM strengths).
- Prospective large-enterprise buyers should be thorough in their feature function due diligence.
- **Restricted vendor partnerships:** Darwinbox offers a sizable number of partner integrations, but it could expand its engagements with key vendors to ensure that it covers all global markets with regard to job boards, background checks and other partnerships. Client feedback indicates a need for more investment in API integrations as it continues to grow its market.

### **Greenhouse**

Greenhouse is a Visionary in this Magic Quadrant. It is a privately owned TA company, headquartered in New York. It released its first TA offering in 2012. The majority of its client revenue comes from North America, followed by Europe.

Greenhouse serves clients in an array of verticals; its top three are technology, healthcare and financial services. Approximately 18% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS product is Greenhouse Recruiting. Greenhouse is best suited for small and midsize businesses (SMBs), with cloud-based HCM cores that hire predominantly in North America and put a premium on candidate experience.

### *Strengths*

- **Differentiated user experience:** Greenhouse's TAS platform stands out for its strong candidate and recruiter experience. It is intuitive to use and inclusive across candidate profiles and accessibility. Customer and prospect usability feedback identifies it as one of the market's top direct-to-consumer experiences.
- **Dedicated market responsiveness:** Greenhouse has demonstrated balanced investments across all three overarching roadmap themes of 2024, including AI, UX and reporting. It employs an iterative development approach, keeping clients informed on how their feedback shapes product decisions and using a strong feedback loop to optimize client benefits from continuously refined features.
- **Candidate-first innovation:** It recently released Greenhouse Verified in its TAS to guide applicants on how to evaluate a potential employer, including awareness of the employer's brand. It also has consistently invested in résumé anonymization, name pronunciation and more advanced reporting dashboards.

### *Cautions*

- **Limited advanced configurability:** Although Greenhouse offers a differentiated, clean UX, it lacks advanced configurability features. As a result, complex, larger hiring organizations may struggle to meet all their workflow automation out-of-the-box, which is a weakness mentioned in customer reference survey feedback.
- **Small-to-midsize enterprise focus:** Fifty percent of Greenhouse's client base consists of organizations with 500 to 1,000 employees. Its large sales force and short implementation times suit these clients, but it lacks clear support tiers for complex implementations and allocates fewer resources to development than its competitors.
- **Limited presence outside North America:** Most of Greenhouse's clients are based in the U.S., the U.K., Canada and Germany, with a limited geographic presence outside North America in particular. Although it expects to expand globally, the product's list of supported languages is among the shortest of the vendors evaluated in this research.

### **iCIMS**

iCIMS is a Challenger in this Magic Quadrant. It is a privately owned talent acquisition company, headquartered in Holmdel, New Jersey, and it released its first TA offering in 2000. The majority of its TAS client revenue comes from North America-based multinational organizations.

iCIMS serves clients in an array of verticals; its top three for TAS are healthcare and life sciences, professional and business services, and retail. Approximately 23% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS products are iCIMS Applicant Tracking and iCIMS Candidate Experience Management. iCIMS is best suited for midsize and large organizations, with a cloud-based HCM core that requires extensive configurability to support multinational hiring needs.

### *Strengths*

- **Established ATS pioneer:** iCIMS is one of the most mature, flexible and well-known stand-alone ATSs in the market. It supports complex hiring scenarios with highly configurable workflows that align with regional compliance requirements. Its integrations with leading HCM systems and embedded administration of popular, third-party job sites enable organizations to streamline their hiring processes.
- **Comprehensive one-stop shopping:** iCIMS demonstrates its understanding of the recruitment market through acquisitions that have developed into iCIMS Candidate Experience Management (CXM) and iCIMS Video Studio, enhancing capabilities to meet candidate expectations. Its extensive product portfolio, which is dedicated to talent acquisition, offers a full range of solutions for clients seeking minimal vendor overhead for their recruiting technology stack needs.
- **Embedded analytics:** iCIMS' native recruitment metrics dashboards are extensive and well-embedded, reducing the need for an add-on advanced analytics module or a third-party business intelligence (BI) tool (also available through a partnership with Visier) to accommodate essential hiring team reporting.

### *Cautions*

- **Fragmented platform:** iCIMS has acquired many recruiting-related technologies (e.g., SkillSurvey and Candidate.ID) and has chosen to integrate them into a single solution, while maintaining separate underlying application codebases. This complexity requires careful planning and management to ensure a seamless experience across the platform.
- **Limited geographic staff presence:** Although iCIMS offers support for a wide range of languages and has end users in more than 200 countries, its client base primarily consists of U.S.-based organizations, with a limited multinational presence specific to Western Europe. Companies with moderate or extensive global hiring needs that may include the

MEA and APAC regions should conduct explicit due diligence to ensure that this vendor can meet their country-specific support needs.

- **Complex pricing structure:** Gartner customer inquiry feedback denotes this vendor's inconsistent premium pricing, leading to substantial variations among similar client profiles in a price-sensitive market. Prospects are encouraged to carefully review and compare pricing estimates and ensure inclusivity of terms that better reflect total cost of ownership (TCO).

## Oracle

Oracle is a Leader in this Magic Quadrant. It is a public company, headquartered in Austin, Texas, that offers HCM software. Oracle released its first natively developed TA offering in 2018. The majority of its TAS client revenue stems from organizations based in North America, followed by those in Europe and Middle East.

Oracle serves clients in an array of verticals; its top three for TAS are healthcare, retail and manufacturing. Approximately 25% of its customers come from clients with more than 10,000 employees.

Oracle Fusion Cloud Recruiting is best suited for midsize-to-large organizations that emphasize high-volume and frontline hiring across the globe and are using Oracle's core HCM offering. Oracle Recruiting is not available as a stand-alone product.

### *Strengths*

- **High-volume hiring:** Based on its top three industry focus areas, Oracle has prioritized frontline hiring. It has invested significantly in automation features, including QR code to apply, auto-pre-screen via digital assistant, automated interviews and bulk offers. These interwoven tools highlight its differentiated use of automation and AI in this area.
- **Above average customer satisfaction:** This vendor has garnered strong participation and solid customer experience feedback, as reflected in customer references. This positive reception aligns with favorable reviews on Gartner Peer Insights, highlighting Oracle's commitment to delivering a satisfying experience throughout the hiring journey.
- **Geographic compliance:** Oracle offers expansive embedded global compliance, tailored to each country's specific requirements. This compliance value proposition is further enhanced by a seamless candidate-to-new-hire onboarding experience, which relies

heavily on national and local compliance requirements and is supported by Oracle Fusion Cloud Journeys.

### *Cautions*

- **Lack of stand-alone recruiting:** Although some HCM and ERP suites support the stand-alone sale of recruiting, Oracle does not. One-hundred percent of Oracle Recruiting Cloud customers are on its larger platform, Oracle Fusion Cloud HCM. For an additional fee, many customers purchase the separate Oracle Recruiting Booster for added candidate engagement features. These include event management and other commonly sought capabilities traditionally served by point vendors.
- **Limited integrations:** Although no single vendor can support all of clients' recruiting technology needs, Oracle has a highly selective and relatively limited third-party marketplace of predelivered integrations (now more than 90), with specialized add-on capabilities. Clients should recognize this potential challenge to future-proofing their flexing recruiting needs.
- **Lengthy implementations:** Compared with the other vendors in this research, Oracle has the highest average implementation time — nine to 12 months — for the full Recruiting suite, including Recruiting Booster. Customers with less-complex needs may require four to six months. Although this may be a byproduct of other dependencies, 80% of this vendor's implementations are managed by third-party partners.

### **PageUp**

PageUp is a Challenger in this Magic Quadrant. It is a privately owned talent management company, headquartered in Melbourne, Australia, and it released its first TA offering in 1997. The majority of its TAS client revenue comes from the APAC region, followed by North America and Europe.

PageUp serves clients in an array of verticals; its top three for TAS are higher education, local and state government, and healthcare. Approximately 19% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS products are PageUp Applicant Tracking System and PageUp Recruitment Marketing and CRM. PageUp is best suited to midsize-to-large organizations with a cloud-based HCM core that is seeking strong recruitment marketing and is based in the APAC region, North America and Europe.

## *Strengths*

- **Comprehensive recruitment marketing:** PageUp has a robust legacy in recruiting, despite its talent management suite breadth. In particular, its differentiated recruitment marketing capabilities are found in both its native CRM suite and Clinch acquisition (embedded integration).
- **Targeted geography and industry strategy:** PageUp is a leading TAS vendor in Australia, New Zealand and Singapore, especially in the government and healthcare sectors. It is also well-suited for higher education organizations, which comprise 25% of its customer base and are highly represented in the U.S.
- **Strong customer service:** More than half of customer survey feedback participants highlighted PageUp's customer service experience as the most important aspect to share with prospects and new users. It has also received numerous customer service awards, as well as consistent positive feedback in Gartner inquiries.

## *Cautions*

- **Dated user experience:** PageUp's platform is more than 20 years old and relies on a more static framework for role permissions, lacking the dynamic, rule-based engines of newer platforms, which offer greater flexibility and administrative ease. Organizations with complex hiring rules will want to closely evaluate any overhead impact.
- **Lagging AI capabilities:** PageUp's 2025 roadmap focuses on key AI-related features, indicating a "catch-up" phase, compared with the market. For example, planned enhancements include an AI interview companion, an AI-enabled virtual assistant and AI skills matching.
- **Limited brand presence:** This vendor demonstrates undifferentiated go-to-market strategies, untapped partnership opportunities and fewer than 4% of resources allocated to marketing. PageUp remains a relatively unknown brand outside its targeted verticals and has not fully capitalized on its position as a well-established talent management suite in its home region.

## **Phenom**

Phenom is a Visionary in this Magic Quadrant. It is a private TA company, headquartered in Ambler, Pennsylvania, and it released its first TA offering in 2010. The majority of its TAS client revenue comes from North America, followed by Europe.

Phenom serves clients in an array of verticals; its top three for TAS are healthcare, manufacturing and retail. Approximately 73% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS products are Phenom Hire and Phenom Talent CRM. Phenom is ideal for large organizations with an existing cloud-based HCM core that require basic ATS with high-volume hiring capabilities and put a premium on world-class CRM capabilities.

### *Strengths*

- **Best-in-class CRM:** Unlike most of the vendors in this research, which have recently introduced CRM capabilities, Phenom is already well-known for its external sourcing, career site and overall CRM capabilities. It is a preferred “bolt on” CRM partner for other TAS (e.g., Workday and SAP) when more extensive CRM capabilities are required to meet hiring demands.
- **Leading-edge innovation:** Phenom’s extensive AI investments, no-code automation engine and direct sourcing for independent contractors make it highly competitive. Furthermore, its explorations into such innovative features as voice AI (in beta) and interview intelligence showcase its innovative, product-oriented culture.
- **Strong marketing execution:** Phenom has a well-executed marketing strategy based on four pillars: content machine, unique events, dedicated team and emerging brand. This approach ensures that clients will benefit from a strong brand presence and consistently engaging content, enhancing their experience and connection with the vendor’s offerings.

### *Cautions*

- **Limited ATS capabilities:** Phenom’s ATS capabilities are suitable for low-complexity, high-volume hiring. Its ATS is still maturing its core configuration capabilities, such as workflow administration and offer management (i.e., editing letters and detail capture), which are key to supporting more complex hiring.
- **Customer service challenges:** Half of customer survey participants noted past shortcomings related to Phenom’s customer service. This is further supported by Gartner client inquiry feedback themes. Prospects should evaluate the effectiveness of the provider’s investments in customer-facing areas to meet their service-quality requirements.



- **Complex pricing structure:** Phenom's premium pricing is among the most nonstandard and complex in the industry, often leading to confusion among prospects and clients about what kind of value they are getting, compared with other vendor finalists. Prospects are encouraged to carefully review and compare pricing estimates and ensure inclusivity of terms that better reflect TCO over the length of the contract.

## SAP

SAP is a Challenger in this Magic Quadrant. It is a public company, headquartered in Walldorf, Baden-Württemberg, Germany. It released its first TAS offering in 2009. The majority of its TAS client revenue comes from North America, followed by Latin America; Europe, the Middle East and Africa (EMEA); and the APAC region.

SAP serves clients in an array of verticals; its top three for TAS are healthcare, retail and hospitality. Its TAS product is SAP SuccessFactors Recruiting. Most customers fall in the segment of 1,000 to 10,000 employees.

SAP is best suited for large and public-sector organizations that have global hiring requirements and are using SAP's core talent or HCM solutions. SAP SuccessFactors Recruiting is available as a stand-alone product.

### *Strengths*

- **Extensive partner marketplace:** SAP SuccessFactors HCM delivers an established, scalable and global platform with a consistently rich array of specialized partners to enhance its TAS offering. This expansive marketplace includes such key areas as consulting services, providing clients with versatile solutions tailored to their specific needs.
- **Broad global presence:** SAP SuccessFactors has localization for more countries than any other TAS offering evaluated in this research, providing a distinct blend of global and local expertise. Its well-coordinated local network across the globe — with active involvement of direct sales, resellers, implementation partners and support — all add to this differentiation.
- **Rapid implementation option:** SAP SuccessFactor's popular accelerated implementation services leverage preconfigured content/templates to reduce average implementation time to four months. This provides great flexibility for clients with less complex needs that are seeking a quicker transition.



## *Cautions*

- **Complicated product configuration:** SAP SuccessFactors Recruiting has a bring-your-own data and/or skills go-to-market approach. Based on Gartner inquiry feedback, this strategy can result in more manual administrative work or increased vendor reliance for clients with more complex needs, potentially leading to extra costs and excessive third-party reliance.
- **Limited innovation:** A new alumni experience, guided candidate experience and AI-assisted experiences are market-parity “catch-up” investments made by SAP SuccessFactors Recruiting in 2024. These reflect good market understanding, but they fall short of leading with innovation in AI, relative to recruiting use cases, skills and other key areas of TAS buyer focus.
- **Complex pricing structure:** SAP SuccessFactors Recruiting has historically used a less desirable, per-hire, consumption-based pricing model, which has greater cost unpredictability, rather than the more common per employee/per month. In December 2024, SAP transitioned to a user-based subscription pricing model. Customer feedback also indicates a higher TCO than anticipated, due to unforeseen statements of work (SOWs) required to meet hiring needs.

## **SmartRecruiters**

SmartRecruiters is a Leader in this Magic Quadrant. It is a privately owned TA company, headquartered in San Francisco, California, and it released its first TA offering in 2010. The majority of its TAS client revenue comes from North America, followed by Europe and the APAC region.

SmartRecruiters serves clients in an array of verticals; its top three for TAS are business services, retail and healthcare. Approximately 51% of its TAS revenue comes from clients with more than 10,000 employees.

Its TAS products are SmartRecruit and SmartCRM. SmartRecruiters is best suited for midsize-to-large organizations with an existing cloud-based HCM core that requires extensive configurations for supporting complex, global hiring.

## *Strengths*

- **Focused product strategy:** SmartRecruiters has strategically invested in its configurability-at-scale strengths. Initiatives such as Hire Your Way, ATS Everywhere and

Winston (AI) frame this approach, while the 2025 roadmap plans to integrate more AI for improved scheduling, conversational candidate experiences and advanced screening.

- **Scalable configurability:** SmartRecruiters' single, native unified platform is a highly configurable TAS, which has scaled well for most organizations, regardless of hiring volume and hiring-process complexity. It has an off-the-shelf-friendly integration hub marketplace of complementary point solution, plug-in providers, and serves customers of all geographies, sizes and industries, maintaining balanced relative growth rates.
- **Best-value pricing:** This vendor's pricing structure is clear, consistently applied and often economically compelling. Customer survey and inquiry feedback highlight SmartRecruiters as a "best value for the price" option in providing the best capabilities at the lowest out-of-the-box cost. In addition, proof of concept (POC) trial periods are available.

### *Cautions*

- **Lack of embedded analytics maturity:** Limited embedded analytics has led customers to consider more advanced analytic options. SmartRecruiters has just recently responded with a new partnership with Visier; however, this will add a fee, contributing to an increase in total recruiting costs.
- **Average user experience:** Although SmartRecruiters is highly configurable and scalable with a modern UX, Gartner clients often find it click-intensive to use and challenging to administer. Candidate, hiring manager and recruiter experiences are top market priorities. Thus, buyers should evaluate the platform's UX ability to meet their distinct hiring needs.
- **Low-touch customer support:** SmartRecruiters' product performs well in customer service survey feedback; however, prospective buyers should note that many support mechanisms are automated. In addition, about 70% of its implementations are handled by certified third-party partners.

### **Workday**

Workday is a Leader in this Magic Quadrant. It is a public company, headquartered in Pleasanton, California, and it released its first TA offering in 2014. The majority of its TAS client revenue comes from North America, followed by EMEA and the APAC region.

Workday serves clients in an array of verticals; its top three for TAS are retail, manufacturing and hospitality. It targets its TAS products — Workday Recruiting and Workday Candidate

Engagement — to customers of all sizes, with roughly 40% falling in the segment of 1,000 to 5,000 employees.

Workday is best suited for midsize-to-large organizations that emphasize AI-enabled capabilities, along with a strong partner marketplace and are using Workday's core HCM solutions. Workday Recruiting is not available as a stand-alone product.

### *Strengths*

- **Strategic partners and acquisitions:** On top of a strong partner marketplace, Workday has purposefully supplemented key capabilities in its native platform. Its acquisition of HiredScore adds AI-enabled candidate ranking, while partnerships with Phenom and Paradox provide advanced CRM and virtual assistant capabilities, upgrading its delivery of candidate engagement and experience.
- **Strong customer experience:** Vendor experience surveys resonate with positive customer experience and engagement feedback for Workday. Specific examples clients have provided about how it excels in this area include its access to product owners, collaborative client brainstorm sessions and enthusiastic participation on the community portal.
- **Streamlined sales strategy:** Workday's new "Accelerate with Workday" initiative targets midsize customers (fewer than 6,000 employees) by simplifying sales with industry-optimized packages, instead of complex stock-keeping unit (SKU)-based selling. This approach could potentially address customer feedback around challenges with Workday's bundling practices.

### *Cautions*

- **Limited native TAS functionality:** Although Workday Recruiting covers most TAS essentials, buyers should carefully assess which third-party integrations are necessary to enhance functionality in key areas to meet their needs. For example, it uses partners for popular capability augmentation add-ons in areas such as extended CRM, virtual assistant, advanced interview scheduling and recruiting analytics, which increase vendor complexity and TCO.
- **Sluggish market responsiveness:** Workday is directionally responsive to customer needs (e.g., added partners, new integrations and acquired capabilities); however, feedback indicates it is slow to react/innovate in the native platform.

- **Complex pricing structure:** Customer feedback indicates Workday's practice of bundling multiple applications is challenging, especially when analyzing pricing for individual functionalities such as recruiting. The need to assess additional purchases for advanced capabilities further complicates TCO estimation, particularly for large enterprises.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

This is the first edition of the Magic Quadrant for Talent Acquisition (Recruiting) Suites; therefore, no vendors were added or dropped.

## Inclusion and Exclusion Criteria

To be included in this Magic Quadrant research, each vendor needed to:

- Deliver generally available product capabilities that meet all of the above Market Definition criteria for Mandatory Features, without the use of third-party providers or partner marketplaces. Mandatory Features must have been generally available to the customer base/new customers no less than one year prior to 1 September 2024.
- Serve more than 150 customers that are organizations with unique logos and more than 1,000 employees.
- Support more than 25 paying customers in more than one geographic region (e.g., North America, Latin America, the APAC region or EMEA).

In addition, the vendor is required to meet one of the following:

- Ranks among the Top 10 for the Customer Interest Indicator (CII), as defined by Gartner. CII has been calculated using a weighted mix of internal and external inputs that reflect

Gartner client interest, vendor customer engagement and vendor customer sentiment from the past 12 to 18 months.

- Meets the Market Definition criteria for Cloud HCM Suites for more than 1,000-employee enterprises (see [Magic Quadrant for Cloud HCM Suites for 1,000+ Employee Enterprises](#)).

## Honorable Mentions

Gartner tracks more than 40 vendors in the TAS space. Although this research identifies 11 vendors that have met our inclusion criteria, the exclusion of a vendor does not mean that the vendor and its products lack viability. Described below are several noteworthy vendors that did not meet all of our inclusion criteria (or were not included in this research); however, they could be appropriate for clients, contingent on requirements.

**Eightfold AI** is well-known in the market for its CRM, talent intelligence and talent marketplace offerings and has more recently added ATS capabilities. Eightfold was not included in this research, because it did not meet the qualifying criteria for number of customers using its ATS and geographic representation.

**Employ** has two established TAS brands in its portfolio that are well-known to both SMBs and larger organizations: **Lever** and **Jobvite**. Employ was not included in this research, because it did not meet the qualifying criteria for market growth/momentum.

**Fountain** specializes in end-to-end capabilities specifically for frontline and high-volume hiring. Fountain was not included in this research, because it did not meet the qualifying criteria for number of customers using its ATS and geographic representation.

**Gem** is well-known for its CRM capabilities and has recently added AI-powered sourcing, scheduling and ATS capabilities. Gem was not included in this research, because it did not meet the qualifying criteria for number of customers using its ATS and geographic representation.

**Paradox** is well-known for its AI assistant and candidate experience. More recently, it has added ATS capabilities for frontline and high-volume hiring. Paradox was not included in this research, because it did not meet the qualifying criteria for geographic representation.

**Workable** is a TAS recruiting specialist brand catering to both SMB and larger organization core ATS needs. Workable was not included in this research, because it did not meet the qualifying criteria for market definition.

# Evaluation Criteria

## Ability to Execute

Gartner analysts evaluate providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue and retention in Gartner’s view of the market.

In this Magic Quadrant, product or service, sales execution and pricing, market responsiveness and track record, and CX criteria are particularly important:

- **Product or service:** Core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills, etc. This can be offered natively or through third-party partnerships, as defined in the Market Definition and detailed in the subcriteria.
- **Sales execution and pricing:** The organization’s capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.
- **Market responsiveness and track record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider’s history of responsiveness to changing market demands.
- **Customer experience:** Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups and service-level agreements (SLAs).

### Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (April 2025)

## Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces, as well as how well they map to Gartner’s view of the market.

In this Magic Quadrant, market understanding, offering (product) strategy, innovation and geographic strategy are also particularly important:

- **Market understanding:** Ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market — listen, understand customer demands, and can shape or enhance market changes with their added vision.
- **Offering (product) strategy:** An approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements.
- **Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

- **Geographic strategy:** The provider’s strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the “home” or native geography, directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

**Completeness of Vision Evaluation Criteria**

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	High

Source: Gartner (April 2025)

**Quadrant Descriptions**

**Leaders**

Leaders in this market have a strong capability set and strategic investment vision that addresses complex, multinational hiring needs across the four key use cases. They are well-aligned with industry trends for AI, deployment and/or experiences and are ahead of their peers in integrating GenAI.



Leaders' innovation pace surpasses other vendors. They are often more frequently mentioned in Gartner client inquiries than their peers.

However, leaders are not always the best choice. A smaller, more focused vendor might offer superior support and commitment for specific needs.

Leaders shape the direction of the market by extending their offering coverage further along the hiring/talent pipeline, developing new class-leading automation capabilities and platform extensibility models, and deploying them at scale.

## **Challengers**

Challengers are strong in execution, but narrower than Leaders in their vision for taking market leadership. With a strong legacy presence, they focus more on established products, services and geographies and are typically followers of the market innovations created by Leaders and Visionaries.

Challengers in this market have the operational capability to meet some complex hiring scenarios. However, gaps may be evident in the critical capabilities, whether in depth of product capabilities or keeping pace with innovations in AI.

## **Visionaries**

Visionaries have market-leading plans for the future in terms of geographic expansion and deepening capability maturity in targeted areas. However, their current capabilities are not class-leading in terms of scope and/or quality. Visionaries in this market demonstrate a strong understanding and strategic approach to delivering their solutions to a more narrow range of customer needs.

## **Niche Players**

Providers in the Niche Players quadrant may focus on a particular segment of the market, as defined by characteristics such as size, vertical sector, geographic coverage or technology, and they may be strong providers for those requirements. However, they lack the capabilities to address the needs of the broader range of enterprises or the vision to significantly alter their position in the market.

A Niche Player may offer capabilities for a given use case that are superior to a more general vendor categorized as a Leader.

# Context

This Magic Quadrant provides a snapshot of the current TAS market, and year-over-year comparisons should be avoided. It is designed to assist you in selecting a TAS, but it should not be used as your sole resource. Use the companion Critical Capabilities for TAS to help identify how products compare against functional categories and how well they align with use cases.

Your final selection criteria must reflect your organization's functional and technical requirements, as well as its business objectives. Do not, for example, select a Leader or reject a Niche Player solely based on such a categorization. Assess any vendor that meets your "must have" requirements — a vendor in any of the four quadrants could be the best choice for your needs.

## Market Overview

The recruiting TAS market leads the talent management technology sector, with an anticipated five-year compound annual growth rate (CAGR) of 16.7%. A shortage of skilled workers, increased investments in candidate and employee experience, and AI innovations are contributing to the market's growth.

Conservatively estimated, forecast annual spend for talent management in 2024 neared \$9 billion, with projections reaching \$11 billion in 2025 (see [Forecast Analysis: Human Capital Management Software, Worldwide](#)).

Gartner estimates that enterprise hiring organizations look to replace their TAS vendors every five to seven years. This change often occurs when the technology in use fails to meet hiring demands or when the organization moves to a more comprehensive HCM suite with embedded recruiting.

These scenarios create the need for a thorough review of the TAS market that compares both dedicated specialists and HCM providers. This Magic Quadrant and its companion Critical Capabilities research, which have replaced the Market Guide for Talent Acquisition Technology, support this analysis.

Historically known as ATS, the market features vendors with products launched more than 20 years ago, as well as more recent entries during the past decade. Small and midsize vendors typically require five to 10 years of customer growth and committed roadmap investment to develop a TAS capable of supporting complex hiring scenarios at scale across multiple geographies, worker types and industries.

Favorable market conditions, advances in development speed, and mergers and acquisitions (M&As) will support new entrants in succeeding in the TAS market. Conversely, some providers may fall behind if they do not respond quickly enough to evolving market requirements.

Key trends shaping the TAS market include the following sections.

**Heightened Scrutiny of HCM-Embedded Recruiting Modules:** Recruiting is one of the modules in the HCM technology stack in which point solution depth of functionality can outweigh the cost savings of an integrated, all-encompassing suite. HR technology leaders have observed that compromising by sticking with the talent acquisition module of an HCM suite might optimize the overall HCM tech TCO, but can significantly increase hiring costs, thereby negating the savings.

Consequently, the recruiting module is heavily scrutinized to determine whether a stand-alone solution would be the best option. Using a comprehensive RFP can assist in this endeavor (see [Tool: RFP Questions for Selecting Talent Acquisition Technology](#)).

**Evolving Recruiting Experience Fueled by AI:** Continued cost-cutting pressures are leading organizations to seek recruiting technology to gain efficiency and scale by reducing time to hire (TTH) and cost to hire (CTH), while incrementally improving quality of hire (QOH). The adoption of AI-enabled capabilities has become an imperative, given AI's unique ability to automate and simultaneously elevate (accessibility, personalization, simplification) the UX for each of the three key roles (i.e., recruiter, hiring manager and candidate) in recruiting.

Common examples in which AI is increasingly available across the TAS market include:

- Virtual assistants are improving candidate experience by managing status check-ins and interview scheduling.
- Microsoft Teams integration is streamlining hiring-manager-recruiter communication and automating tasks.
- AI is assisting recruiters with direct sourcing, candidate matching and virtual assistants.

**Orchestrated Recruiting Technology Ecosystem:** Despite larger market consolidation trends, no single recruiting technology platform or vendor can meet all of an organization's hiring needs. TAS, including ATS, forms the operational foundation of an organization's recruiting technology stack. However, organizations still need additional vendor integrations for niche services, such as job advertising, specialized assessments and background checks (see [Hype Cycle for Talent Acquisition \(Recruiting\) Technologies, 2024](#)).

The TAS market responds to this need to orchestrate the technology ecosystem in various ways. Large partner marketplaces are the status quo, while vendors increasingly enhance integration quality/speed/cost with off-the-shelf, third-party integrations, low-code/no-code development and automation tools. HR technology leaders should consider a vendor's integration capabilities, both now and in the future, as these can significantly affect the TCO beyond licensing costs.

This is a first-iteration Magic Quadrant, which replaces a previous Market Guide.

## ⊕ Evaluation Criteria Definitions

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