



**FOSWAY
GROUP**



Fosway 9-Grid™ TALENT ACQUISITION

Eightfold is a **STRATEGIC LEADER** on the
2026 Fosway 9-Grid™ for Talent Acquisition

Fosway 9-Grid™
Talent Acquisition
2026

Key

Type

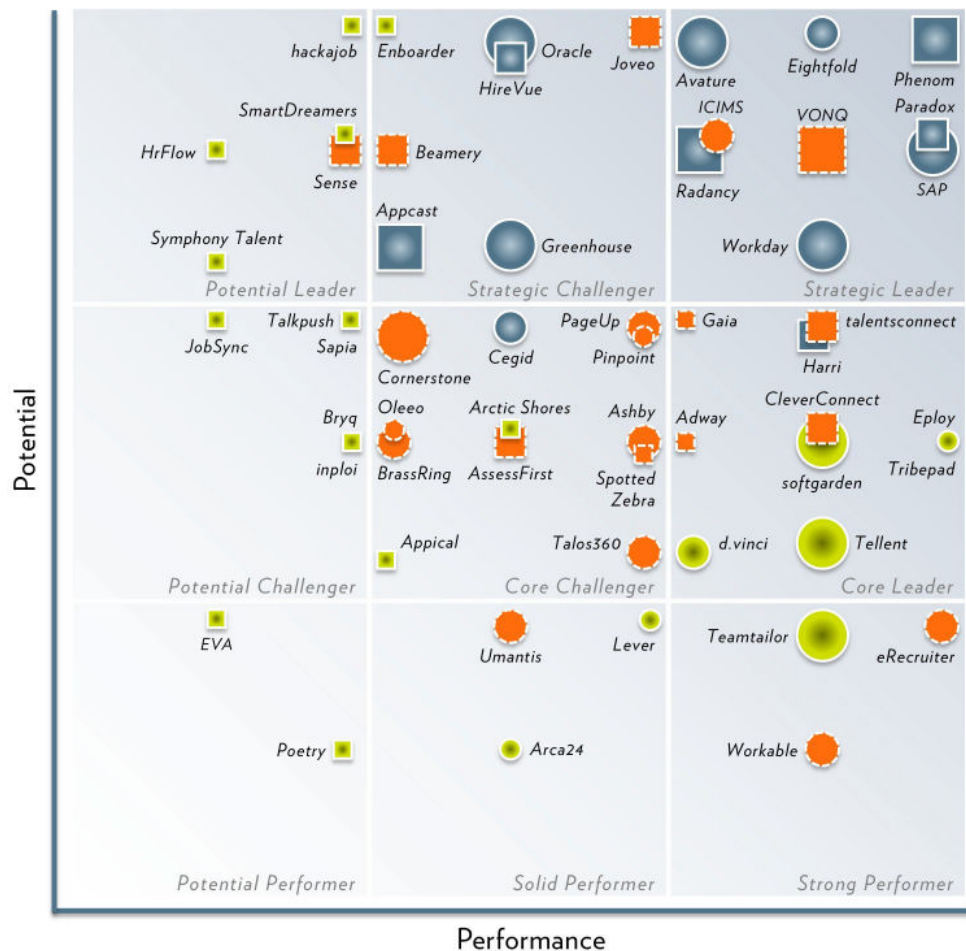
- Suite:
- Specialist:

Presence

- Higher:
- Mid:
- Lower:

Total Cost of Ownership

- Higher:
- Mid:
- Lower:



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Eightfold

Founded in 2016, Eightfold is the provider of an AI-based talent intelligence platform for talent acquisition, skills, opportunity marketplace and internal mobility. Headquartered in Santa Clara, California, Eightfold has a global presence across North America, Europe and Asia. Their talent agents and applications help enterprise organisations harness skill-focused workforce intelligence for critical people processes, including strategic workforce planning, personalised hiring, onboarding, talent mobility, career and people development. Eightfold’s talent intelligence platform also enables and manages people experiences across the talent lifecycle for employees, line managers, HR practitioners and external talent.



What is a Strategic Leader?

Strategic Leaders provide a rich set of capabilities with the scope and sophistication to support the needs of large, complex global customers. They have strong market performance and customer advocacy and often provide a reference point for the wider market. They are frequently selected by market-leading organisations and consistently meet the needs of those organisations on a global basis.

Potential Leader	Strategic Challenger	Strategic Leader
Potential Challenger	Core Challenger	Core Leader
Potential Performer	Solid Performer	Strong Performer

9-Grid™ Rating Summary – Eightfold

Type	Performance	Potential	Presence	TCO	Trajectory
Suite	Higher	Higher	Mid	Higher	Expanding

See later in this report for information on the 9-Grid™ dimensions and rating system. For further information on Type, see *Suites versus Specialist Solutions* on page 22.



Rating Headlines – Eightfold

- Eightfold is a leading provider of AI-enabled talent acquisition, combining talent intelligence, skills matching, automation and a range of talent agents to support enterprise recruiting at scale. It has strong brand presence and momentum in North America and EMEA, and proven success for large and complex enterprises across most major industry segments.
- Eightfold has transitioned from being a TA specialist to becoming a TA suite, building out functional capability and talent agents across the entire recruitment funnel. Many customers also use Eightfold as a specialist talent intelligence layer alongside an existing HCM or ATS to improve candidate discovery, matching, rediscovery, prioritisation and decision support across internal and external talent pools.
- Eightfold AI Interviewer and Interviewer Companion are among the strongest and most sophisticated in the market today. Customers report strong outcomes from use in structured screening, functional and technical interviewing. AI Interviewer can be used alongside an existing HCM or ATS. A recent Oracle partnership now enables it to be embedded into Oracle Fusion Cloud Recruiting workflows, too.
- Eightfold has significantly invested in resourcing their services operations and support processes, which has contributed to a strong track record of implementation success with global enterprise customers. Customer advocacy is high, with a strong reference customer base. Despite some growing pains in earlier years, customers highlight Eightfold’s ‘customer focus’ and partnering as considerable strengths.
- Customers consistently report the solution as ‘good value for money’, and most importantly, that adoption of Eightfold’s AI-powered talent intelligence has delivered significant business impact.

What is Expanding Trajectory?

Trajectory is Fosway’s sense of the rate of change of the solution in terms of both Performance and Potential, relative to the vendor themselves and the level of change in the wider supplier market. Vendors with an **Expanding** trajectory rating are increasing their level of innovation and potential to serve enterprise customers more effectively and are maintaining their level of market performance and customer advocacy.

For more information see the [Fosway 9-Grid™ Trajectory Guide](#).



Eightfold’s position within the 9-Grid™ Zone



Market & Solution Trends



Market Trends

The hiring market is cautious, uneven, and harder to read

Hiring in Europe is polarised and fragmented. Weak business growth, cost pressure and geopolitical uncertainty are making many employers more cautious, but structural shortages remain in many industries and critical technical skills. With AI now adding to the pressure on entry-level and process-heavy work, hiring for historically high-demand roles such as software engineering and marketing is now well below previous peaks. AI-generated applications, easier apply flows and candidate automation are creating fuller funnels without necessarily improving candidate quality or availability. Vendor revenues reflect the same pressure, with growth rates flat or declining in many parts of the TA market. Providers that rely heavily on job distribution or programmatic advertising are more exposed. For TA leaders, the challenge is to separate genuine labour-market constraint from internal demand uncertainty.

The requisition is no longer the starting point for TA

With greater economic pressure on headcount and AI changing how work gets done, organisations are challenging the need to hire more profoundly. This matters more in Europe because headcount decisions are high-commitment decisions, influenced by employment protections, works councils and historically slower growth in most of the continent. The decision is not just whether a role is affordable or value-creating enough to open, but which tasks will remain with humans, where the work should be located, and whether it is a permanent hire at all. Location choices now go beyond labour cost and need to reflect skills availability and geopolitical resilience. This forces TA into a broader workforce conversation before external hiring starts, and TA leaders must be part of that conversation.

Enterprise hiring portfolios are more polarised

The old language of hiring freezes and hiring recovery is too blunt for the 2026 talent acquisition market. Organisations are still hiring where the opportunity cost of a vacancy is immediate, especially for revenue-critical, frontline and scarce-skill roles. At the same time, entry-level, desk-based, process-heavy roles are facing a tougher test. Finance and business leaders are asking harder questions about the value of new hires and AI is making desk-based task substitution easier. This is not just normal prioritisation between job roles:



recruiters need to move fastest on roles where the impact of vacancy is immediate, and slow down where redesigned work has not yet become a clear hiring brief. They also need to keep warm pipelines for roles that may be approved later or shifted to different locations as plans change. The result is a more unstable hiring portfolio. TA impact comes less from processing every requisition equally and more from helping the business decide which requisitions need prioritising, which need more scrutiny and which should not become hires at all.

Quality of hire is the metric TA is least ready to prove

Most hiring now faces a clearer value test, with fewer roles moving through approval automatically. Business leaders still want new hires to perform, stay and ramp quickly, but that is no longer enough where work is changing so fast. For desk-based roles in particular, hiring quality increasingly needs to include digital confidence, adaptability and the ability to keep learning as AI changes workflows and the skills needed to do an evolving job. The big problem is that most quality-of-hire models still look backwards, while the business increasingly needs stronger indicators of future performance and adaptability. TA can measure speed and cost of hire as well as conversion because they all sit within the recruiting process. But future hiring quality depends on post-hire metrics such as time to competence, real-world performance, skills growth and longer-term retention. Most TA functions are not focused on, or ready to prove, this broader view of quality of hire, and most TA solutions still provide only cursory support. This is not just a data problem. In EMEA especially, privacy requirements, works councils agreements, fragmented systems and cultural differences in performance make quality of hire even harder to define and govern, let alone compare. Without a holistic, common model, quality of hire will remain a reporting aspiration rather than a decision standard.

TA buying re-bundles around stronger HCM suites

HCM providers are strengthening TA capability while companies face pressure to consolidate platforms and simplify their HR and talent ecosystem. TA solution providers face a higher proof threshold: buyers need a clearer reason to add capability beyond the HCM suite. In large enterprises, HCM suites generally form the HR backbone while additional TA solutions, including dedicated TA suites and specialists, support complex hiring requirements. Stronger TA capability in HCM suites makes additional TA solutions less necessary, especially when recruiting workflows are relatively standard. Dedicated TA suites and specialists still win where their differentiated capability is outcome-critical, but even then, they need to prove a



significant advantage. AI is now one of the main ways providers are trying to prove that. HCM suite pressure is strongest in mid-enterprise, where IT, HR and TA resources are more limited, and implementation effort and integration costs are very visible. Smaller enterprise and lower mid-market buyers still compare ‘good enough’ HR suite recruiting capability with dedicated TA platforms built for speed and ease of use. For buyers, the real question is whether additional TA capability materially improves hiring outcomes by managing complexity better, or solving problems the HCM suite does not address.

Application friction is back, but it needs to earn its place

For years, talent scarcity pushed TA teams to remove friction from the application process. That logic has now changed as weaker labour-market conditions and AI-amplified application volume create fuller funnels. But higher application volume does not mean stronger candidate supply. It often just makes it harder to find the right candidates fast enough. Many vendors position better AI matching and filtering as the answer, but the emerging corporate response is more early qualification through eligibility checks, suitability questions and earlier pre-screening. This is a rational response to increased candidate volume, but it risks recreating the candidate-hostile application process that employers spent years trying to dismantle. Friction needs to earn its place - it should be transparent, proportionate and role-relevant, improving fit and decision quality rather than simply reducing applicant numbers or weakening trust before a real conversation has happened. AI may help manage volume in high-application roles, but organisations still need to prove that it improves decision quality and candidate fairness, rather than just automating rejection earlier.

TA spend shifts from reach to productivity

In Europe, TA budgets are under pressure, but the pressure is not felt evenly across the TA process model. TA technology investment is more defensible where organisations seek to improve recruiter productivity, decision quality or compliance in the recruiting process. TA leaders are closely scrutinising volume-led spend and cutting back where it creates candidate flow without clear evidence of quality, conversion or time to value. This pressure is also pushing candidate acquisition providers to show how their reach creates productivity gains for buyers. Many are using AI and data to move beyond volume and deliver better-qualified candidate flow into employer TA funnels. Access to candidates is no longer enough to protect TA budget. Suppliers need to demonstrate how they improve productivity, quality and hiring outcomes.



AI hiring accountability lands with the employer

Employers now need to prove how AI in hiring is governed, configured and used. For European organisations, supplier claims about responsible AI and bias testing are not enough. The employer itself must prove how AI impacts its hiring process. This matters most when AI has a direct role in candidate screening, matching, ranking, assessment, interview interpretation or rejection, rather than in lower-risk use cases such as drafting content or scheduling. This puts new operational demands on the TA operating model. It is already slowing some AI adoption, especially in selection, but it will also separate credible deployments from 'AI theatre'. Vendors may provide tooling, documentation, configuration records, and audit logs, but they cannot prove that the employer's end-to-end hiring process is sound, fair or appropriately governed. For employers, the risk is not just poor AI use; it is being unable to explain and justify how AI influenced a hiring outcome when challenged.

Pay transparency makes intake a public control point

The EU Pay Transparency Directive is not just a compensation issue. It makes weak intake meetings visible before a role reaches the market. In many organisations, requisitions are often opened before job level, pay range, location assumptions, skills requirements and approval exceptions are fully agreed. Reward and HR may own the underlying job and pay architecture, but TA exposes any inconsistency when a role goes to market. That was always an issue, but pay transparency now makes it visible to candidates and employees and increases regulatory exposure. This is especially complex in Europe, where collective agreements, works council expectations, internal equity rules and location-based pay can all shape what can be advertised or negotiated. Recruiters will be expected to manage clearer pay information and more consistent candidate conversations. But they cannot fix weak job architecture or compensation governance once the role is already in market. Pay transparency therefore turns intake meetings from process hygiene into a control point for compliance, fairness and employer credibility.



Solution Trends

Structured role intake still needs to be solved

The hiring brief is the last practical point where employers can still fix unclear demand before it becomes a live requisition. With AI increasingly supporting screening and matching, weak or ambiguous briefs create problems later in the hiring process. Vendors have started to recognise this, but most still treat role intake as requisition capture rather than decision support. Employers increasingly want a collaborative workspace linked to the labour market, pay, skills and approval data, so that hiring demand can be tested and the hiring strategy agreed before recruiting starts. Some vendors can guide the recruiter and hiring manager through the briefing questions, but only a few are using AI to capture the intake meeting, infer role requirements and recommend next steps. The harder problem is connecting the results to the real intake decisions: which skills matter, where to hire, and what to pay. Without this, corporates will keep wasting recruiter and manager time on roles, hire the wrong people, and burn AI tokens for screening and matching against a profile that should have been clarified earlier in the process.

Natural language makes configuration faster, but governance harder

Generative AI in TA has moved beyond writing job descriptions and candidate messages. Vendors are now pushing towards natural-language configuration, where users describe the hiring process they need and AI generates a first iteration of the workflow, campaign, application steps and screening logic. The most ambitious version of this is ‘vibe recruiting’: local teams can describe the role and hiring context, and the system sets up much of the recruiting process automatically. For employers, the attraction is clear: local teams can adapt processes faster without relying on system admins or vendor services. But the governance risk is just as clear. An AI-generated workflow may look sensible but might still breach policy, works council agreements, pay transparency rules, accessibility standards or AI governance requirements. Enterprise buyers need controlled flexibility, not uncontrolled local process creation. Vendors must build guardrails into the configuration process, including templates, permissions, policy checks, and audit trails. For corporates, speed is not enough. Locally built TA processes still need to be effective, compliant and defensible.



Pre-apply is a productivity and data-quality problem

The pre-apply layer is where candidate flow either becomes usable data or turns into wasted spend, drop-off and recruiter clean-up. The buyer question is no longer simply whether candidates start and finish their application, but whether relevant candidate applications arrive with usable data, accurate source tracking and fewer manual fixes before a recruiter even sees the record. Vendors are responding with job content optimisation, native apply, simplified career-site apply, partial-apply capture, re-engagement and cleaner hand-off into the system of record. Specialists that focus on this part of the funnel in its entirety can show real benefits here, when fragmented media, career sites, CRM and ATS workflows create spend leakage, abandonment and data gaps. The real value is not a prettier apply flow, but less wasted media spend and fewer abandoned applications with better data fidelity and less recruiter clean-up. In Europe, candidate capture must manage data ownership, consent and auditability from the outset, not just repair them later inside the ATS.

Candidate-facing AI improves service, but human proof builds greater trust

Candidate-facing AI is increasingly prevalent where friction is most obvious, including basic guidance, help to apply, process questions, scheduling and interview preparation. This matters because many candidate journeys still fail through silence, delay and poor visibility. As more candidate interactions become AI-generated, employer brands might look more polished, but they also feel less believable. Employers need AI to improve responsiveness without stripping out human proof. Real employee voices, credible team content and clear escalation to a human being are all important. Localisation, disclosure and consistency matter, but so does authenticity. AI can make the journey smoother, but it cannot replace the trust created by real people explaining what the job and team are actually like.

Conversational pre-screening qualifies candidates earlier

European organisations are increasingly adopting conversational pre-screening, especially in frontline and high-volume hiring. It is now spreading into more role types as application volumes rise. The format — text, voice or video — matters less than the ability to turn pre-screening questions into a more adaptive qualification and engagement step. Many vendors are allowing customers to move conversational



pre-screening further up the funnel so candidates can be qualified earlier. For employers, this changes apply from simple data capture into early fit, eligibility and availability checking before a recruiter sees the candidate. The benefits are fewer low-fit applications, lower recruiter workload and faster movement into the next hiring step. But the corporate risk is clear: qualification can become rejection without enough control. Employers need to be clear which answers qualify candidates in or out, whether the questions are role-relevant and proportionate, and where human review is required.

CVs were never enough, AI makes that obvious

CVs have always been a poor predictor of future job performance. With the cover letter largely dead, candidates now use AI to make the CV/Resume more tailored and relevant to the application, including matching the job description, sharpening their career narrative and optimising for keywords at scale. Vendors with historically weaker AI matching are still backfilling that functionality, but better CV-to-job inference only solves part of the problem. Employers need better validation of capability, ambition, and work potential with role-relevant evidence. That is why more vendors are building, acquiring or partnering to add AI simulations for customer-facing staff, or structured interviews and line manager enablement for professional hiring. Deeper validation and credentialing will be needed where roles involve regulated work or sensitive data. In Europe, this evidence needs clear consent and role relevance, or employers risk replacing weak CV-based judgements with a more robust but no more defensible selection process.

Fraud detection needs proportionality, not paranoia

Candidate fraud is becoming a more serious TA control issue. Fake identity, proxy interviewing, fabricated credentials, deepfakes or bad actors all create access risks to European IP, critical data, or regulated work. Vendors are often testing for more than fraud while still using the fraud label, including looking for AI-polished CVs, privacy behaviours such as VPN use, writing patterns, browser focus tracking or interview assistance. That feels disingenuous, especially when employers frequently use AI to write job adverts, match candidates, or conduct parts of the interview process. Some level of AI parity must be inevitable; not just one rule for employers and a totally different one for candidates. Employers have to separate legitimate day-to-day AI assistance from disclosure-sensitive AI use during live interviews or assessments, or clear misrepresentation such as false identity or proxy candidates. If fraud detection becomes an opaque selection layer, where candidates are flagged or rejected for behaviours that were never clearly prohibited or



explainable, that is a big risk. Employers must ensure fraud prevention in hiring is not surveillance heavy. Otherwise, it will be difficult to defend with candidates, regulators and works councils.

AI interviewers move automation into the selection layer

AI-led interviews can reduce capacity pressure, but they also put AI into one of the most sensitive parts of the hiring process. Adoption amongst European companies is therefore variable. Employers are generally more comfortable using AI when interviews are structured, repeatable or assessment-like, and where high-volume or time-sensitive hiring overwhelms interviewer capacity. Vendors are investing in AI interviewing across skills checks, role simulations, AI-led interviews and interviewer support, adding capability beyond interview administration into capturing evidence. Some are also using synthetic candidate personas to test and tune AI interviewers before deployment, generating data that human reviewers can use to refine questioning, scoring and escalation logic. The critical distinction for buyers is whether AI supports the interview or influences selection. Using AI to ask structured questions, capture answers or support human interviewers is one thing; summarising answers, scoring suitability, or recommending progression or rejection is another entirely. Once AI starts shaping the assessment of a candidate, it becomes part of the selection layer, not just workflow automation. European buyers need to ask how AI interviewers are tested and where humans remain accountable. They also need to ensure disclosure, accessibility, language fairness, bias monitoring and audit trails are handled before AI interviewing reaches live candidates.

Onboarding workflows move to AI-guided journeys

Onboarding has long been workflow-heavy but intelligence-light. Tasks, reminders and hand-offs exist, but the process often remains static once designed. The newer direction is to apply AI across the onboarding lifecycle, not just the new hire's experience. Some vendors are adding AI journey builders that help admins and managers design workflows, forms, communications and role-based plans. Assistants can nudge new hires, managers and HR teams through actions and answer practical questions before and after day one. The most advanced solutions go further, analysing completion rates, bottlenecks and stakeholder engagement to proactively recommend journey improvements. Onboarding is changing from company induction into role-based new-hire enablement, connecting compliance, learning and productivity more directly. Adoption is still early, but the value is clear - fewer missed hand-offs, reduced early attrition and faster time to productivity.



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	Moderating	Mid
Appcast One	Talent Attraction & Engagement	Strategic Challenger	Realigning	Higher
Appical	Onboarding	Core Challenger	Realigning	Lower
Arctic Shores	Talent Assessments	Core Challenger	Maintaining	Lower
AssessFirst	Talent Assessments	Core Challenger	Maintaining	Mid
Beamery	Workforce Transformation	Strategic Challenger	Moderating	Mid
Bryq	Talent Assessments	Potential Challenger	Accelerating	Lower
CleverConnect	Talent Attraction & Engagement	Core Leader	Maintaining	Mid
Enboarder	Employee Lifecycle Orchestration	Strategic Challenger	Evolving	Lower
EVA.ai	Talent Acquisition Automation	Potential Performer	Expanding	Lower
Gaia	Talent Attraction & Engagement	Core Leader	Evolving	Mid
hackajob	Agentic Talent Attraction	Potential Leader	Excelling	Lower
Harri	Hospitality Operations	Core Leader	Expanding	Higher



Vendor	Specialism	9-Grid™ Rating	Trajectory	TCO
HireVue	Talent Assessments	Strategic Challenger	Expanding	Higher
HrFlow.ai	Talent Ranking & Parsing AI	Potential Leader	Maintaining	Lower
inploi	Talent Attraction & Engagement	Potential Challenger	Accelerating	Lower
JobSync	Recruitment Marketing Automation	Potential Challenger	Expanding	Lower
Joveo	Talent Attraction & Engagement	Strategic Challenger	Excelling	Mid
Paradox, a Workday Company	Conversational Recruiting Automation	Strategic Leader	Accelerating	Higher
Phenom	Talent Intelligence & Talent Experience	Strategic Leader	Excelling	Higher
Poetry	Hiring Enablement	Potential Performer	Accelerating	Lower
Radancy	Talent Attraction & Engagement	Strategic Leader	Moderating	Higher
Sapia.ai	Talent Selection	Potential Challenger	Excelling	Lower
Sense	Candidate Engagement & Recruiting Automation	Potential Leader	Accelerating	Mid
SmartDreamers	Talent Attraction & Engagement	Potential Leader	Accelerating	Lower
Spotted Zebra	Talent Assessments	Core Challenger	Accelerating	Mid
Symphony Talent	Talent Attraction & Engagement	Potential Leader	Consolidating	Lower
talentsconnect	Talent Attraction & Engagement	Core Leader	Expanding	Mid
Talkpush	Talent Attraction & Engagement	Potential Challenger	Excelling	Lower
VONQ	Talent Attraction & Engagement	Strategic Leader	Maintaining	Mid



Talent Acquisition Suites

Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Arca24	Suite	Solid Performer	Maintaining	Lower
Ashby	Suite	Core Challenger	Accelerating	Mid
Avature	Suite	Strategic Leader	Evolving	Higher
Cegid Digital Recruiters	Suite	Core Challenger	Expanding	Higher
Cornerstone	Suite	Core Challenger	Evolving	Mid
d.vinci	Suite	Core Leader	Realigning	Lower
Eightfold	Suite	Strategic Leader	Expanding	Higher
Eploy	Suite	Core Leader	Accelerating	Lower
eRecruiter	Suite	Strong Performer	Excelling	Mid
Greenhouse	Suite	Strategic Challenger	Consolidating	Higher
ICIMS	Suite	Strategic Leader	Moderating	Mid
BrassRing	Suite	Core Challenger	Moderating	Mid
Lever	Suite	Solid Performer	Excelling	Lower
Oleeo	Suite	Core Challenger	Moderating	Mid
Oracle	Suite	Strategic Challenger	Expanding	Higher
PageUp	Suite	Core Challenger	Excelling	Mid
Pinpoint	Suite	Core Challenger	Excelling	Mid
SAP - SmartRecruiters for SAP SuccessFactors	Suite	Strategic Leader	Accelerating	Higher
softgarden	Suite	Core Leader	Maintaining	Lower
Talos360	Suite	Core Challenger	Capitalising	Mid
Teamtaylor	Suite	Strong Performer	Expanding	Lower



Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Tellent Recruitree	Suite	Core Leader	Consolidating	Lower
Tribepad	Suite	Core Leader	Accelerating	Lower
Umantis HR-Suite Flex	Suite	Solid Performer	Expanding	Mid
Workable	Suite	Strong Performer	Maintaining	Mid
Workday	Suite	Strategic Leader	Consolidating	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.

2026 Additions and Removals

This year sees the addition of the following new names to the 2026 Fosway 9-Grid™ for Talent Acquisition:

- Ashby, a talent acquisition suite provider.
- EVA, an AI-led talent acquisition automation specialist.
- hackajob, an agentic talent attraction specialist.
- Harri, a specialist for hospitality industries.
- HrFlow, a talent ranking & parsing AI specialist.
- Pinpoint, a talent acquisition suite provider.
- Poetry, an AI hiring enablement specialist.
- Sense, a candidate engagement and recruiting automation specialist.

This year has seen the removal of occy, as they no longer meet the inclusion criteria. Other changes to note:



- Following a rebrand, Infinite BrassRing is now listed as BrassRing.
- Plum has been removed following the acquisition by Phenom in April 2026.
- Following the acquisition of SmartRecruiters by SAP, SmartRecruiters is now the go-forward TA solution for SAP SuccessFactors. To reflect this, the Fosway 9-Grid™ lists the SmartRecruiters for SAP SuccessFactors solution under the company name SAP on the image.

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

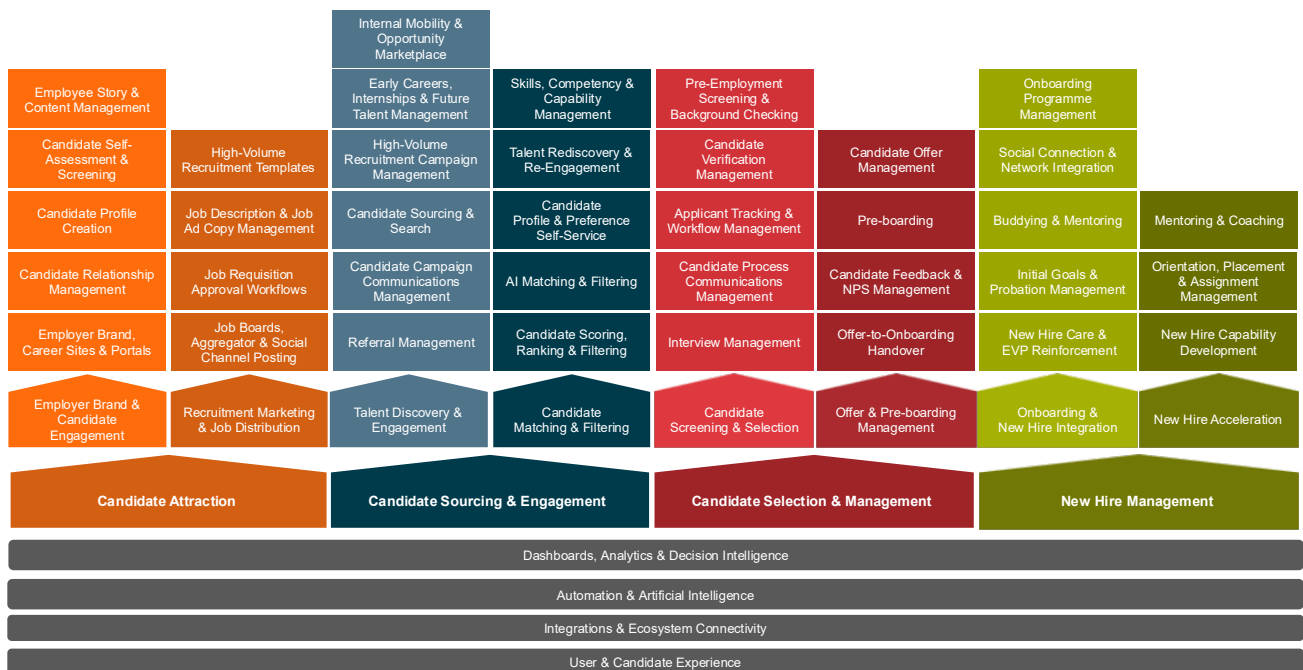
What do potential, performance, presence and total cost of ownership mean in the context of talent acquisition?

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 Candidate Attraction, Candidate Sourcing & Engagement and Candidate Selection & 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 hire management 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 TA 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 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 also 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 to succeed.

Example clients include: Alstom, Aviva, Boots UK, BP, BT, Centrica, 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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About Eightfold

Eightfold is the agentic talent intelligence company that gives every HR leader, recruiter, and people manager the intelligence to see, develop, and deploy the full depth of talent around them.

Our AI Native Talent Intelligence Platform powers a suite of talent agents that execute alongside your people across the full talent lifecycle. The first flagship talent agent is the AI interviewer, the only talent agent built specifically to give every candidate the nine o'clock interview, evaluating one or one million with identical rigor and zero bias.

By combining enterprise data with insights derived from over one billion career profiles, Eightfold Talent Intelligence Platform powers the world's most complete picture of talent. We read adjacent skills and forecast trajectories to reveal the potential legacy systems miss.

For more information visit:

www.eightfold.ai