TALENT TECH LABS

TALENT ACQUISITION TECHNOLOGY

ECOSYSTEM 13 EXPLAINED

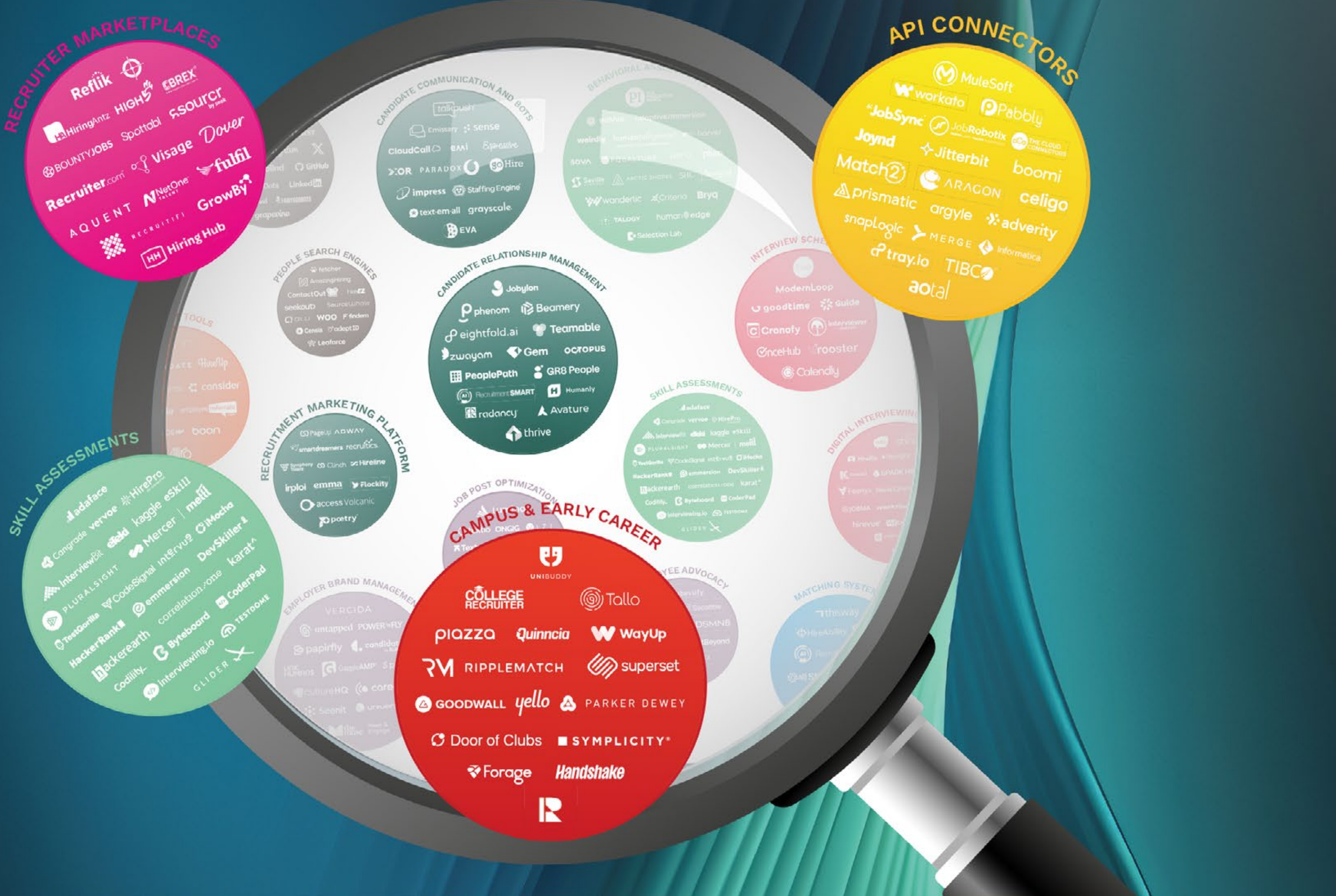


TABLE OF CONTENTS

TALENT ACQUISITION ECOSYSTEM 13

INTRODUCTION

We are delighted to release the 13th version of the Talent Acquisition Technology Ecosystem. Designed to provide clarity and insight for practitioners, the Ecosystem has evolved substantially over the years, from an idea on a whiteboard to the offices of thousands of organizations around the world. It reflects the latest snapshot of an evolving landscape and includes many of the most innovative and influential companies in the industry today.

The Ecosystem is organized by the “stages” that represent the typical steps in a hiring journey - Source, Engage, Select, and Hire. The Talent Acquisition market continues to experience tremendous shifts driven by changes in technology, candidate and client preferences, the economy, and improving AI capabilities.

In this update, the Ecosystem has evolved considerably to reflect the current environment. Many new vendors have emerged, some have pivoted or created different offerings entirely, several have been acquired, while others have become less relevant or shuttered.

Contingent Workforce Gets its Own Technology Ecosystem

The universal workforce is a term we use to describe the entirety of talent that performs work at an organization, whether they are contractually "employed" by the organization or not. Historically, talent acquisition and HR teams are designed around the workflows and processes for attracting internal employees, while non-employed talent - the external or contingent workforce - is managed by procurement. The result is siloed operations and two sets of processes and technology stacks.

For many organizations, their external workforce represents a significant portion of their overall talent footprint - for some it is the majority by headcount. Because of the size and scale of this part of the workforce, there has been a massive shift in how organizations think about leveraging and managing such workers. Practically, this has started with being able to accurately measure and account for contingent workers to provide a holistic or "total talent" view, while leading organizations are beginning to think about how this channel can influence their overall workforce strategy.

Our expectation is that the share of contingent workers will continue to grow as a proportion of the workforce, driven by demographic shifts, candidate preferences, and importantly, new technology. We've historically included Contingent Workforce technologies in our Talent Acquisition Ecosystem. That said, we think this area is important enough to warrant its own, standalone technology ecosystem, similar to how we treat Talent Management. Thus, we've removed all External Workforce-related sub-verticals from Ecosystem 13 and will release a standalone Contingent Workforce Technology Ecosystem in September 2025. This better reflects the importance and nuances of this sector, is aligned with our mission of providing better clarity into how these tools are used, managed, and procured, and will help us more accurately reflect the right vendors for this sector.

Introduction

The employment market of the past few years has been tumultuous, defined most recently by persistent relatively high interest rates, macro-economic and geopolitical uncertainty, and AI-driven disruption and transformation. Most Talent Acquisition teams today are smaller today than they were a few years ago, and average workload has increased across the board as organizations are not backfilling at rates requisite to higher hiring volumes.

> The biggest upheaval in the market is generally available AI, which is transforming enterprise capabilities broadly and will likely change how organizations actually get work done and is proliferating across talent solutions specifically. Many of the changes in TA Ecosystem 13 are related to AI-related solutions such as AI Recruiters and Workers.

Against this backdrop, vendors have continued to innovate, solutions continue to evolve, and clients continue to modernize their recruiting operations at one of the fastest paces we've ever seen. We've made some exciting changes to the ecosystem to reflect the current environment. Many new vendors have emerged, some have pivoted or created different offerings entirely, several have been acquired, while others have become less relevant or shuttered. In this report, we overview each exciting new change in the talent acquisition ecosystem.

100 FIRMS

In Talent Acquisition Ecosystem 13, we've added or removed more than 100 firms and, per usual, could have added many more.

A Closer Look at Key Changes

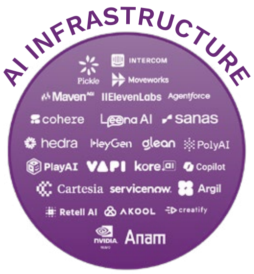
The Contingent Workforce Gets its Own Ecosystem:

As mentioned, because of the importance of this sector and its nuanced supply chain and buying patterns, we are launching a standalone Contingent Workforce Ecosystem in September 2025. The net result for TA Ecosystem 13 is that we've removed all "External Workforce" sub-verticals such as Online Talent Marketplaces and Vendor Management Systems.

By clearly delineating the toolsets designed to service this segment of the workforce, we hope to enable talent leaders to more clearly understand its unique needs, capabilities, and strategic importance to ultimately make better strategic decisions around the use of non-employed workers to drive business results.

New Vertical: AI Solutions: Marc Andreessen wrote in 2012 that "Software is eating the world," and today AI is eating the workforce. We've added four new sub-verticals related to AI in talent applications – AI Infrastructure, AI Workers, AI Recruiters, and Candidate AI Tools – and moved these along with Foundational Models from "Platform Tools" to the newly created "AI Solutions." These categories are unique in their recency (many of the vendors in the categories were launched less than two years ago), their growth, and the transformational impact we expect on how organizations recruit and get work done. As foundational models get better and cheaper, downstream applications used by talent teams and HR will get better and cheaper. We are living in the first time in history when the best AI that's ever existed is broadly available to everyone essentially for free, and we've seen the solution space explode as organizations look at new ways to solve problems with new and better capabilities.

A New Sub-vertical: AI Workers: A new category in Ecosystem 13, AI Workers are verticalized work agents that take on large portions of work tasks previously performed by humans. They typically have pre-built workflows for the "occupations" in which they play (e.g. medical scribes, financial analysts, software development, customer success, sales, marketing, etc.), and use LLMs on the backend to power their work. They are often given systems access, tasks, and "rules" that govern what they can (or can't) do, and can be given defined decision-making authority. Pricing is typically abstracted around some unit of output of work or based on a proportion of salary in targeted occupations. This category is extremely new and only possible because of advances in foundational models, but has been growing extremely quickly as organizations look to use AI to augment their workforces.



A New Sub-vertical: AI Infrastructure: A new category in Ecosystem 13, AI Infrastructure platforms help organizations build and deploy work agents across the enterprise. These are no-code tools where work rules, permissions, and capabilities for agents are defined, and they also provide governance capabilities around deployment and management. Big enterprise tech firms like Microsoft, ServiceNow, and Salesforce have been investing significantly in this area, and their agentic AI revenue growth has been stratospheric. This category also includes vendors that offer voice-AI and AI video avatars as a service, which can be used by clients directly or vendors building recruiting applications. For those interested in the current dynamics of AI use in talent applications, TTL has published in depth research on this this topic in a recent member-exclusive report, **The Evolving World of AI and Agents in Talent Applications**.

Click here to learn more about accessing this research

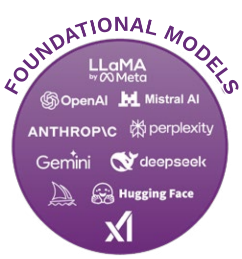
A New Sub-vertical: AI Recruiters: A new category in Ecosystem 13, AI Recruiters are tools designed to take on the whole or parts of the TA recruiting process. Technically, they are a sub-set of the "AI Worker" category, but given our focus on talent acquisition solutions we made it its standalone category. These tools leverage multi-modal AI to offer capabilities such as voice or video AI interviewing, screening, sourcing, assessment, matching, and interview scheduling, and can be enabled to manage workflows and make decisions. Most of the standalone vendors in this category are very new, and we've seen an explosion in the number of companies building some form of an AI Recruiter, driven by the wide availability and cheap cost of extremely performant AI. There are probably 100x more "vendors" in the space than are represented in our Ecosystem subvertical; we've intentionally limited to firms with known traction. Most of the growth to date in this category has been from smaller clients and staffing firms, though we are seeing significant interest and budgets from enterprise clients (and some pretty big pilots) for this category, which is seen as potentially transformational. Many existing TA vendors such as Workday, Phenom, Eightfold, Sense, and Seekout are also adding AI Recruiting capabilities to their suites.

A New Sub-vertical: AI Candidate Tools: AI Candidate Tools have come to prominence on the back of generally available AI combined with what many candidates see as a broken job market. These tools help candidates mass apply to jobs, tailor their resumes and CVs against applied-to jobs at scale, practice interviews with an AI interviewer, and in some cases provide live AI-guided assistance during the interview or assessment process to help candidates answer questions or solve problems. The use of these tools has resulted in larger application volumes for employers, putting pressure on already lean TA teams, and have resulted in a substantial increase in reported incidents of candidate fraud in the application process.

New Sub-vertical: Employee Advocacy: We've added a new sub-vertical under the Employer Branding Vertical. Employee Advocacy platforms combine internal communications and social sharing. There are many use cases for these tools, but they are commonly owned by talent acquisition teams with employer branding (and specifically hiring) being one of the major uses. In fact, we've seen some organizations use these tools as quasi referral platforms with employees tapped to share specific recruiting campaigns with their networks.

Video Interviewing Becomes Digital Interviewing Platforms: While many tools in this category started in video interviewing, most have expanded significantly beyond that. We're updating our naming of this category to better reflect the scope of services typically offered by firms in this space.

Social Search Tools Becomes People Search Engines: We think the name "People Search Engine" is a better reflection of what these companies do and how companies use them: aggregate information on talent across disparate sources into a federated profile for organizations to search for and source passive talent.



Generative AI Models Becomes Foundational Models: The companies in this category are used by virtually every vendor that uses AI in their application (not to mention hundreds of millions of consumers). These tools are foundational in the sense that advances in AI is being driven by the handful of firms in this category, and these firms form the foundation on which all client-facing applications / agents will be built. We updated our naming of the category to reflect the foundational role they play in the AI Solutions vertical.

FOUR TRENDS SHAPING THE ECOSYSTEM

Introduction

The Ecosystem represents a snapshot in time, though like any ecosystem — biological or otherwise — it is constantly evolving, and today change is happening faster than ever. It is useful to step back and consider bigger-picture trends affecting the evolution of the ecosystem itself. Below are four trends we observed when putting this year's ecosystem together.

Operating in an Uncertain Macroeconomic Environment

Organizations today are dealing with a cocktail of macroeconomic uncertainty, relatively high interest rates, technological change and disruption, and geopolitical uncertainty. Listen to pretty much any public company's earnings call from the first quarter of 2025, and you'll hear CEOs talk about how hard it is to make predictions about what is going to happen in the even relatively near future. This environment has resulted in a generally cautious approach to expansion, hiring plans, and investments, with AI being the one area where companies across the board seem willing to deploy capital.

We have no special crystal ball telling us what will happen for the remainder of the year and into 2026. Are we in for a debilitating recession? Are we on the cusp of a generation defining economic expansion? Or might we continue to have modest but steady growth like we've seen over the last three years? No one knows, and neither do we. What we can say is that the rate of change is likely to accelerate, and uncertainty is probably going to be a fixture for the foreseeable future. Having an organizational structure that can respond flexibly to change, scaling up or down quickly to market changes, and redeploying talent opportunistically will be winning talent strategies.

TA Technology Consolidation and Provider Product Expansion

The last two years have been the years of "do more with less." Against that backdrop, we've seen considerable consolidation of TA Technology stacks, with organizations putting a critical eye towards their TA technology investments. Vendors have been busy expanding their offerings, both building deeper functionality in existing categories and also expanding into new categories. At the same time, we've also seen vendors simplifying their commercial offerings. Instead of trying to monetize every module or capability, many vendors are "packaging" solutions together offering more favorable terms across a portfolio of solutions. Our sense is that winning renewals has, for some, become more important than maximizing individual revenue per client.

FOUR TRENDS SHAPING THE ECOSYSTEM

The AI-ification of the Workforce

We think AI is going to transform not just how companies recruit, but how work gets done. Broadly available AI and agents are making entire solution categories possible, and workforce transformation and disruption as a result is going to accelerate.

We've already seen early impacts on the workforce from AI, particularly in early career talent and hiring volumes (many organizations have slowed hiring as they look to "backfill" roles with automated solutions or agents instead of FTEs, and orgs using AI Workers to make their employees more productive have found they don't depend as much on early career talent).

Over the next few years, we think the entire solutions space for TA tech is going to be overhauled dramatically. AI has made it significantly easier to develop applications, and has made new kinds of capabilities possible. We are seeing an explosion of new vendors, and existing vendors are racing to add new capabilities to keep pace.

For practitioners, this is a two-edged sword. On the one hand, organizations should benefit from advances as firms build new solutions and existing vendors invest in product expansion. There's never been more options, and we expect that optionality will continue to increase. At the same time, it is going to be a very noisy couple of years, and separating the noise from the signal may be difficult. Vendor differentiation will also become increasingly difficult, as all firms coalesce around using the (essentially same) foundational AI capabilities to power their solutions.

We think many of the capabilities coming to market offer organizations a catalyst to re-evaluate how they actually do things. We've seen some early examples of enterprises that have rearchitected their processes in light of adopting AI Recruiters, for example.

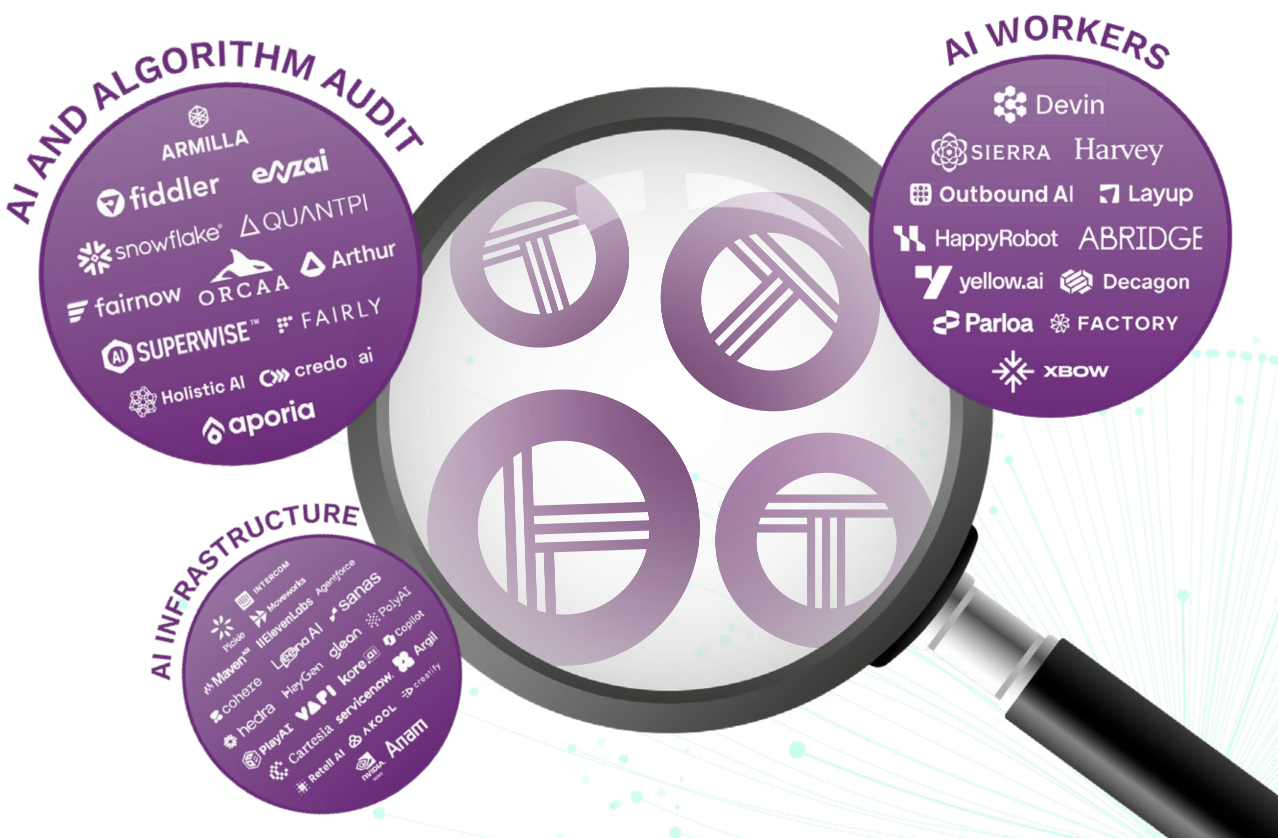
The Evolving Regulatory Environment

While AI solutions in hiring and employment proliferate, governments are racing to keep pace. This is a challenge for employers who must remain in compliance in all jurisdictions they operate (which often have unique and differing legislative requirements), while tool purchases and use tend to be global.

Legislating AI in hiring and employment seems to be an area in which lawmakers are particularly interested. The EU's AI Act has several employment-related callouts, several US states have passed or proposed specific legislation relating to using AI-based hiring systems, and the EEOC weighed in via Amicus Brief in the Workday lawsuit.

We've seen several organizations create AI Governance structures, which tend to be cross-functional leadership teams designed to define the uses, oversight, and deployment of AI capabilities across the enterprise (of which TA is one). We think AI Governance platforms will become a "must-have" for organizations, as the complexity of tracking AI tool use and evolving legislation is likely too difficult to do manually.

One interesting side effect of a governance structure is that it actually can accelerate adoption. Once organizations have defined use cases and comfort levels, it makes it significantly easier to deploy solutions in that context versus needing to build a business case and evaluate risks from scratch for each solution.



SOURCE STAGE

AI SOLUTIONS

AI RECRUITERS

micro1. Lightscreen Bland®
screenify GLYDE StarsHunt
HeyMilo Ribbon SymphonyAI
cykel Talently.ai Classet
apriora WAYFASTER ALPHARUN
Tenzo Tengai Braintrust
tombo.ai CONVERZAI
Purplefish

CANDIDATE AI TOOLS

JobHire.AI LazyApply
Huru Final Round AI
sonara Jobsolv Skillora
Aptico aiApply

CAMPUS & EARLY CAREER

CAMPUS & EARLY CAREER

UNIBUDDY
COLLEGE RECRUITER Tallo
piazza Quinncia WayUp
RIPPLEMATCH superset
GOODWALL yello PARKER DEWEY
Door of Clubs SYMPLICITY®
Forage Handshake

JOB ADVERTISING

JOB BOARD AGGREGATORS

jooble Google
adzuna careerjet
talent.com getwork
jobrapido nexxt
indeed

JOB BOARDS

idealist
CareerVitals flexjobs
JOBBIO LADDERS LENSA
iHire ZipRecruiter wellfound:
seek Wanderly builtin
Jobcase Remotive
snagajob TC capengo.
naukri Dice
goldi

JOB DISTRIBUTION

JOIN
LOGICMELON
JobElephant Recruitment Advertising idibu.
eQuest MITRATECH Circa
datafrenzy jobg8
broadbean

PROGRAMMATIC ADVERTISING

VONQ
Talroo
wonderkind
appcast joveo
JOBTARGET
veritone

ONLINE STAFFING	**E-STAFFING:** arc(), Intro, rolebot, Terminal, hackajob, Talentpair, underdog.io, Taledo, shapr, RAINMAKERS **RECRUITER MARKETPLACES:** Reflik, HiringAntz, HIGH5, BREX, BOUNTYJOBS, Spottabl, sourcr, Recruiter.com, Visage, Dover, AQUENT, NetOne, fulfil, RECRUITIFI, GrowBy, Hiring Hub
PEER TO PEER RECRUITMENT	**REFERRAL TOOLS:** erin, CANDIDATE, HireUp, StaffingReferrals, consider, Teamable, employee referrals, WorkTaps, boon, Alliro
SOCIAL NETWORKS & SEARCH	**PEOPLE SEARCH ENGINES:** WOO, AmazingHiring, ContactOut, hireEZ, seekout, SourceWhale, QLU, fetcher, Censia, findem, Leoforce **SOCIAL NETWORKS:** stackoverflow, facebook, RALLYPOINT, reddit, Instagram, X, TikTok, blind, GitHub, The Dots, LinkedIn, fishbowl, FAIRYGODBOSS, grapevine

SOURCE STAGE HIGHLIGHTS

Campus & Early Career: Organizations are looking for both onsite and virtual campus solutions. The solutions that seem to work best offer both, but vendors tend to excel in one or the other. We're continuing to see client interest in sourcing candidates from non-college alternatives such as trade schools and online training programs. We're also seeing some organizations reinvent their early career programs in light of the workforce impact of AI and AI Agents, focusing more what are seen as "enduring" skills -- such as collaboration and business analysis -- in an age of AI. We think the ability to "grow new talent" will become increasingly critical in the years to come, given demographic trends and rapidly changing skills requirements.

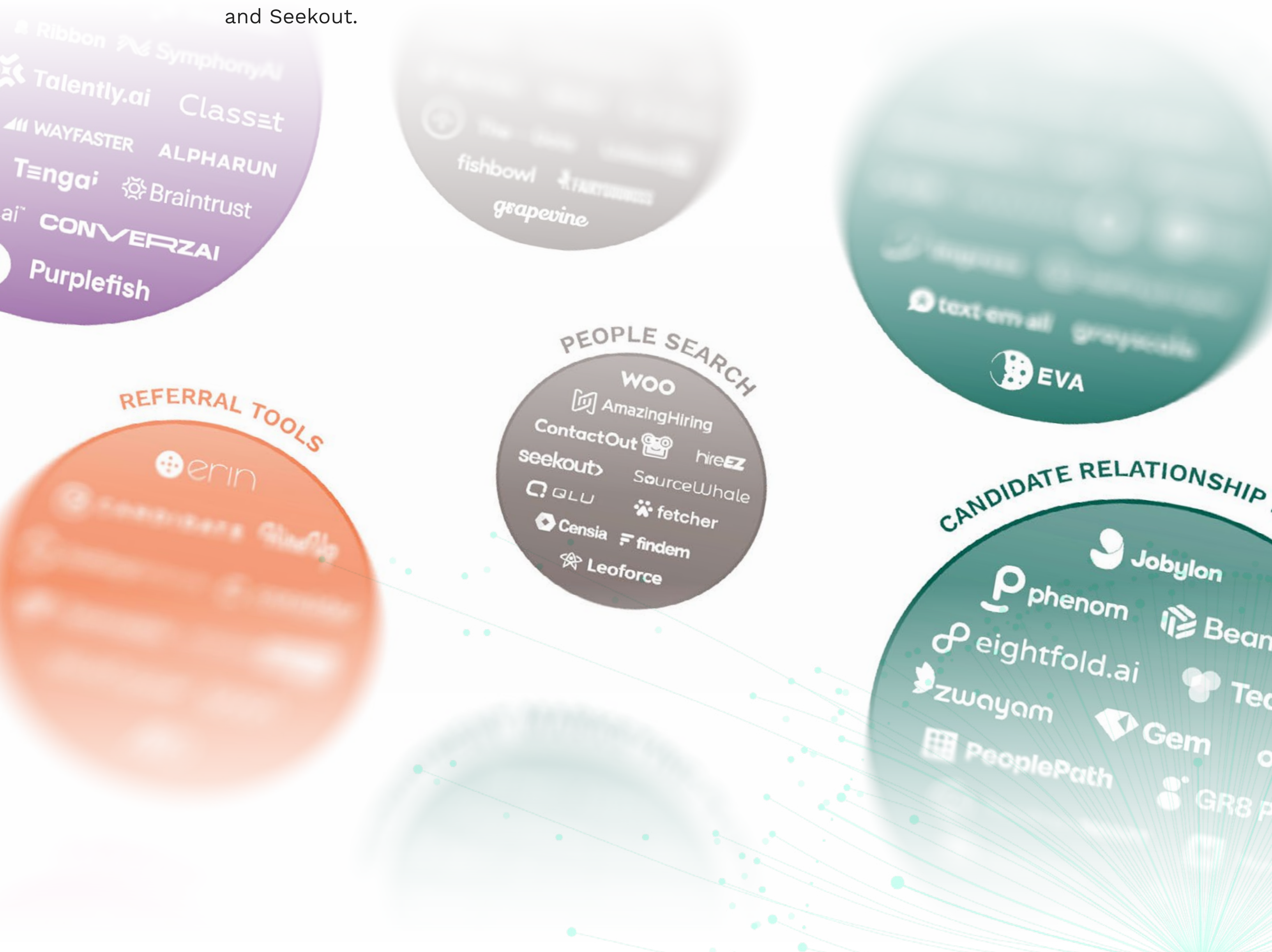
Job Advertising: This is now a $30 billion+ vertical globally, with Linkedin and Indeed continuing to dominate market share. Traditional Job Boards are struggling, with once industry titans such as Monster and CareerBuilder (which merged in September last year) filing for chapter 11 bankruptcy. Programmatic Job Advertising continues to grow as a percentage of job ad spend, though some organizations have reported frustration with how processes work in certain programmatic job advertising networks. Continuing a trend in 2022/2023, we are seeing employers invest more heavily in "going direct" and in employment branding and internal career site capabilities, building out their own talent communities, possibly obviating the need to use external advertising. With the current administration's backlash against DEI, we've seen a corresponding pullback in the number and scale of DEI-focused job boards.

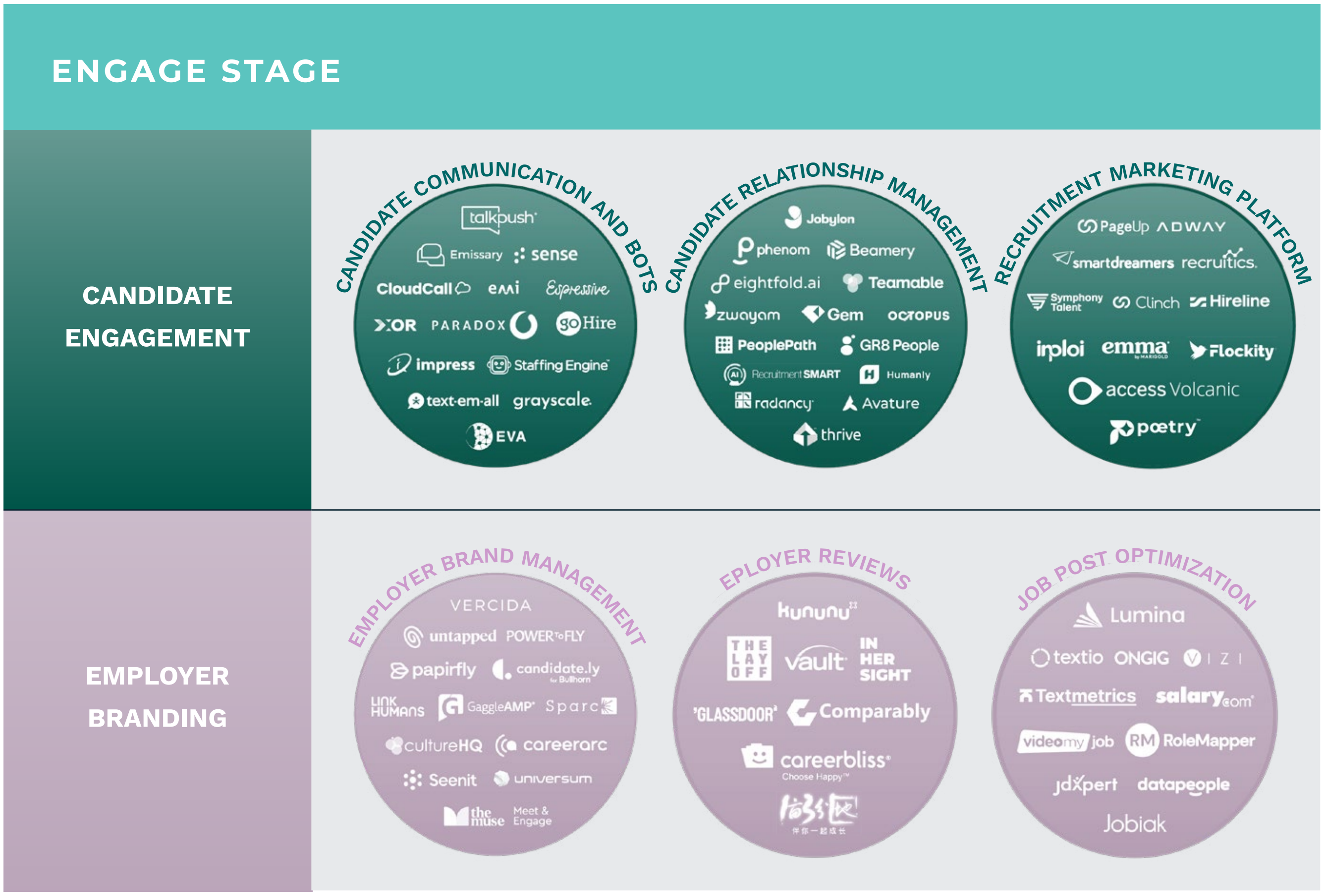
Recruiter Marketplaces: Once just crowdsourced networks of independent recruiters, the Recruiter Marketplace sub-vertical today looks more like VMS for perm placement. These tools have not grown much over the past few years, but continue to be used by organizations looking to fill challenging roles with a flexible, cost-efficient approach.

Referral Tools: This category is increasingly offered as part of a broader recruiting suite such as a CRM or an ATS, though there are some bright spots with tools such as Erin and Boon. We are seeing some clients leverage broader "social communication" platforms as referral tools and a way to share jobs across social channels, turning employer branding and advocacy efforts into referral campaigns.

Social Networks: This sourcing channel continues to grow in use and has expanded far beyond just Meta properties and LinkedIn. Many organizations are leveraging employer brand activities to drive recruiting strategies. Further, we are seeing growth in focused work-related platforms that use user-provided data (often confidential) to give candidates more transparent insight into company information, such as comp structure, work culture, and the recruiting process. We are also seeing some (very) early experimentation with tools that combine social and video with job searches, kind of a "tik-tok meets job board" model.

People Search Engines: This category continues to increase in sophistication and offerings. Initially used as passive candidate search tools by aggregating social data across the web, these tools are increasingly leveraged to power internal career searches and rank inbound applicants, as well as to perform lightweight labor market intelligence powered by near real-time data. The latest innovation has been adding agentic AI workflows on top of the platforms, to enable personalized outreach and natural language search criteria. Providers such as Seekout have launched new offerings where instead of just providing users access to the database, they now can take on end-to-end sourcing responsibility, with clients paying for outcomes versus licenses. Juicebox, a tool launched in 2023, has also shaken up this market, capturing significant market share in what was essentially a category duopoly between HireEz and Seekout.




ENGAGE STAGE
CANDIDATE ENGAGEMENT
CANDIDATE COMMUNICATION AND BOTS
talkpush Emissary sense CloudCall emi Espressive XOR PARADOX goHire impress Staffing Engine text-em-all grayscale EVA
CANDIDATE RELATIONSHIP MANAGEMENT
Jobylon phenom Beamery eightfold.ai Teamable zwayam Gem octopus PeoplePath GR8 People Recruitment SMART Humanly radancy Avature thrive
RECRUITMENT MARKETING PLATFORM
PageUp ADWAY smartdreamers recruitics Symphony Talent Clinch Hireline irploi emma Flockity access Volcanic poetry
EMPLOYER BRANDING
EMPLOYER BRAND MANAGEMENT
VERCIDA untapped POWER to FLY papirfly candidate.ly Link Humans GaggleAMP Sparc cultureHQ careerarc Seenit universum the muse Meet & Engage
EPLOYER REVIEWS
kununu THE LAYOFF vault IN HER SIGHT GLASSDOOR Comparably careerbliss
JOB POST OPTIMIZATION
Lumina textio ONGIG VIZI Textmetrics salary.com videomyjob RoleMapper jdxpert datapeople Jobiak

ENGAGE STAGE HIGHLIGHTS

Candidate Communication & Bots: This sub-vertical describes technologies that use text, voice, and sometimes video to communicate with candidates across messaging apps, mobile, and other channels, often in an automated fashion. Texting capabilities are becoming a standard in modern recruiting suites. This category will likely be subsumed by AI Recruiters in future iterations of the ecosystem, as many vendors are already transitioning to Large Language Model-driven chatbots to enhance and expand capabilities.

Candidate Relationship Management: CRMs have become the candidate experience layer for many organizations. Companies across this sub-vertical are adding AI and Matching capabilities to their platforms, while some such as Eightfold and Phenom are adding AI Recruiting capabilities and other agentic workflows on top. Many vendors continue to expand into Talent Management offerings, including career-pathing and internal mobility. We've observed that many CRMs at client organizations are underleveraged post-implementation, leading to smaller ROI than initially anticipated.

Recruitment Marketing Platforms: This is potentially the next evolution of CRM, combining candidate engagement functionalities (engaging with identified candidates) with the ability to advertise to job seekers (that have not identified themselves). In practice, this typically means companies that offer CRM functionality, employer branding solutions, and a programmatic job advertising solution. Firms in this category such as Radancy differentiate in being able to offer the underlying technology as well as the strategy and services to support employer branding and recruiting strategies.

Employer Brand Management: Many large employers are investing heavily in their employer brand, seeing it as a way to help attract and nurture passive candidates in a supply-constrained environment. As branding becomes more critical to a company's talent attraction and retention strategy, we foresee more employer brand management tools integrating, or even merging with, workforce communication platforms and social intranets.

Employer Reviews: This sub-vertical, once a disruptive business model, is now mature, with players looking for new areas of innovation and growth. We've seen organizations operationalize employer reviews and candidate feedback, with candidates giving a high NPS being subsequently prompted to leave a review on Indeed and Glassdoor. We expect vendors to expand offerings into areas such as sentiment analysis, community surveys, and branding opportunities. We also foresee more employer review platforms overlapping with anonymous social networks, such as what the company Blind has done by hosting topic-based discussion boards, daily polls, and annual surveys.

SELECT STAGE

ASSESSMENT TOOLS	**BEHAVIORAL ASSESSMENTS**: The Predictive Index, wisnio, Adaptive Immersion, weirdly, humantelligence, harver, SOVA, Equalture, pera, plum, Saville, Arctic Shores, SHL, Testgrid, wonderlic, Criteria, Bryq, Talogy, human edge, Selection Lab **SKILL ASSESSMENTS**: adaface, Cangrade, vervoe, HirePro, InterviewBit, eleld, kaggle, eSkill, Pluralsight, Mercer, mettl, TestGorilla, CodeSignal, intervue, iMocha, HackerRank, emmersion, DevSkiller, hackerearth, correlation one, karat, Codility, Byteboard, CoderPad, interviewing.io, TestDome, Glider
INTERVIEW MANAGEMENT TOOLS	**DIGITAL INTERVIEWING PLATFORMS**: Odro, shine, Hireflix, Recright, Shortlister, knockri, Spark Hire, sapia, Feenyx, Taira by myInterview, BarRaiser, JOBMA, workrise, Hinterview, hirevue, VidCruiter, Talview, interviewstream, willo **INTERVIEW INTELLIGENCE**: Honeit, Informed Decisions, Metaview, BrightHire, Pillar by employ **INTERVIEW SCHEDULING**: Evie, ModernLoop, goodtime, Guide, Cronofy, interviewer assistant, OnceHub, rooster, Calendly
RECOMMENDATION & REFERENCES	**BACKGROUND CHECKS**: HireRight, victig, Zinc, certn, First Advantage, Vetty, JDP, Cisive, Intelifi, FAMA, accurate, truework, veremark, checkr, GoodHire **REFRENCE CHECKS**: Vitay, KodiakHR, Referoo, RefNow, Checkmate, HiPeople, Credly, XREF, RefAssured, RefApp
TALENT INTELLIGENCE	**LABOR MARKET INTELLIGENCE**: LinkUp, revelio labs, People Data Labs, Lightcast, TalentBot, draup, Brightfield, Chmura, horsefly, Public Insight, Wagescape, SkyHive, Thinknum, Gartner TalentNeuron, Stratigens, Claro **MATCHING SYSTEMS**: thisway, HireAbility, vettd, Recruitment Smart, Chili, Senseloaf, kleos, adept ID, daXtra, textkernel

SELECT STAGE HIGHLIGHTS

Behavioral Assessments: This sub-vertical remains noisy from a scientific validation standpoint, and recent AI legislation has made gamified assessment vendors more "risky" to enterprise buyers. Nonetheless, interest from companies in understanding the profile both their candidates and internal employees is strong. We are seeing a shift away from game-based psychometric assessments to more holistic job simulation assessments that measure both behavioral traits and domain skills.

Skills Assessments: These remain highly specialized. Technical coding assessments and live coding interviews, which account for the largest segment within this sub-vertical, continue to provide immersive, interactive experiences via problem-solving simulations and conversational AI chatbots. Given the increasing prevalence of fraud and candidates using AI assistants in interviews, vendors are incorporating the use of eye tracking and other anti-cheating mechanisms such as AI proctoring, and we expect this to be a continuing battle. The larger players are expanding their feature sets horizontally to support more of the recruitment process from sourcing to selection, similar to what we've seen over the last two years in the Video Interviewing segment.

Interview Intelligence: These tools provide feedback and data on the interviews that happen across an organization. While market penetration is still relatively low, this is an area where when deployed organizations almost universally report strong feedback and we've seen increased interest and adoption. One tailwind is the normalization of recorded meetings, and so such solutions today are not seen as "intrusive."

Interview Scheduling: Interview scheduling continues to be an extremely painful process for many organizations. This category tends to have immediate and measurable ROI when deployed. Many TA suites now offer some form of interview scheduling, but standalone solutions still win on complex interviewing, user experience, and breadth of capabilities. Over time, we expect agentic AI workflows to be added to these tools to assist where manual intervention is still required by human coordinators (a challenge across the category for things like calendar conflicts), and we are already seeing firms, such as Guide, beginning to build such capabilities.

Labor Market Intelligence: These tools have become increasingly prominent as organizations begin to think of their workforce in terms of skills and as the velocity of change in labor dynamics has accelerated. Tracking market developments in real time has become more important, and some vendors use AI to not just report what is happening now, but forecast labor market trends. Other organizations use it to feed into a business's career pathing data to help companies align their workers' growth to fit long-run trends. Vendors in this category increasingly rely more on publicly available real-time data as opposed to government data.

Digital Interview Platforms: These platforms all seem to provide a suite of hiring tools, including resume screening, interview scheduling, skill and behavioral assessment, structured interviews, and reference checks, often by way of acquisition. Since Hirevue discontinued its facial analysis algorithms in 2020, vendors have been slow to introduce new AI capabilities, but we think the category of AI recruiters (which use a voice-enabled AI to conduct and score conversational interviews or screens) is a new competitive threat. That said, Digital Interviewing Platforms have invested significantly in ensuring their solutions are fair and compliant, and so have a leg up in enterprise experience and adoption.

Matching Systems: With Workday's acquisition of Hiredscore last year and Bullhorn's acquisition of Textkernel & Sovren, we had an open question whether standalone matching was still a category or was it now just a "feature" of a larger TA suite. Thankfully, we've seen a bit of a mini-renaissance in the Matching Systems space, with tools like CandidateSearch that use LLMs as the backend of their matching to power internal ATS and CRM search come to market.

Background Checks: Despite a long history, Background Checks are innovating a great deal, motivated in part by market needs and in part by recent laws. For one, social media screening has become a fundamental part of background checks for many businesses, and technologies have emerged that focus, particularly on candidates' social media profiles. A number of state and local governments have implemented "fair chance" or "ban-the-box" laws that prevent employers from examining candidates' criminal records until an offer has been made. Businesses have begun to shift toward more continuous background checks, which provide an ongoing check on candidates that may no longer have a consistent central workplace, like remote workers. Similarly, businesses are conducting more background checks on their gig workers, which have become a more prominent part of the labor force since the onset of the pandemic.

HIRE STAGE

AI SOLUTIONS

AI AND ALGORITHM AUDIT

ARMILLA, fiddler, enzai, snowflake, QUANTPI, fairnow, ORCAA, Arthur, SUPERWISE, FAIRLY, Holistic AI, credo ai, aporia

AI INFRASTRUCTURE

Pickle, INTERCOM, Moveworks, Maven, ElevenLabs, Agentforce, cohere, Leena AI, sanas, hedra, HeyGen, glean, PolyAI, PlayAI, VAPI, kore.ai, Copilot, Cartesia, servicenow, Argil, Retell AI, AKOOL, creatify, NVIDIA, Anam

AI WORKERS

Devin, SIERRA, Harvey, Outbound AI, Layup, HappyRobot, ABRIDGE, yellow.ai, Decagon, Parloa, FACTORY, XBOW

FOUNDATIONAL MODELS

LLaMA by Meta, OpenAI, Mistral AI, ANTHROPIC, perplexity, Gemini, deepseek, Hugging Face, xAI

PLATFORM TOOLS

API CONNECTORS

MuleSoft, workato, Pabbly, JobSync, JobRobotix, The Cloud Connectors, Joynd, Jitterbit, boomi, Match2, ARACON, celigo, prismatic, argyle, adverity, snapLogic, MERGE, informatica, tray.io, TIBCO, aotal

HIRING ANALYTICS

Qlik, SURVALE, visier, foresight, talentegy, crunchr, INSIGHTSQUARED, starred, CROSSCHQ, Talentech, Prodoscore, beamible, OneModel

ROBOTIC PROCESS AUTOMATION

Akabot, piplex, CEVITR, NICE, cloudpay, Flobotics, FORTRA, DATAMATICS, maruti techlabs, Tangentia, celonis, appian, Power Platform, SS&C, blueprism, xerox, UiPath, Automation Anywhere, SISUA DIGITAL, MuleSoft, UiPath

TRACKING SYSTEMS

ATS CORPORATIONS

Pinpoint, SmartRecruiters, SPARK HIRE, Recruit, cornerstone, Teamtailor, Workable, RIPPLING, Applol, workable, breezy, smplicant, occupop, RIVAL, Applied, fountain, kula, icims, CareerPlug, ClearCo, greenhouse, workday, Trakstar, Oleeo, SAP, bullhorn recruiter, Ashby, JobTrain, Jobvite, Lever, Manatal

AI & Algorithm Audit: As governments around the world seek to ensure AI is used ethically in work applications, employers are tasked with responding to and complying with an ever-increasing amount of legislation, with often significant financial penalties or business risk of not doing so. AI Governance Platforms help organizations track the tools they use, how AI is used in those tools, track legislation in real time and flag risks accordingly. We think this category will become a “must-have” for enterprises, and it has been one of the faster growing categories in the Ecosystem.

Applicant Tracking Systems: In this sub-vertical, we’ve seen growing interest from buyers in systems with open APIs and strong partner marketplaces (likely a reason for Workday’s recent shift in this direction). We’ve seen some ATS vendors aggressively try to monetize 3rd party integrations, which we think is a backward strategy. The enterprise space continues to be dominated by SAP, Workday, and Oracle, while we’re significant innovation in the mid-market to enterprise from firms like Ashby, TeamTailor, and SmartRecruiters.

Foundational AI Models: The companies in this category are building the world’s best frontier large language AI models, and most AI applications built in the last few years use these firms to power their services. The performance of LLMs rivals or surpasses humans in most areas, and today AI can pass the Turing test. These tools also excel at creativity, negotiation, and persuasion. While these firms do not sell directly to TA teams, given they power essentially the entirety of the AI space, we include them in the Ecosystem. As noted previously, TTL’s recent member-exclusive report, **AI Lab Note: The Evolving World of AI and Agents in Talent Applications**, offers deep insights into Foundational AI Models and their impact on talent technology today.

To learn more about accessing this research, click here.

Hiring Analytics: Given the plethora of talent acquisition technologies and strategies on the market today, Hiring Analytics platforms help organizations benchmark their TA function and understand what channels, tools, and strategies are working (or not). Past innovations in this space include recruiter and sourcer-focused dashboards that help users prioritize their work and the use of AI to help determine and predict the quality of hire. Current innovations include LLM-driven conversational interfaces that help users interrogate and interact with data in a conversational manner.

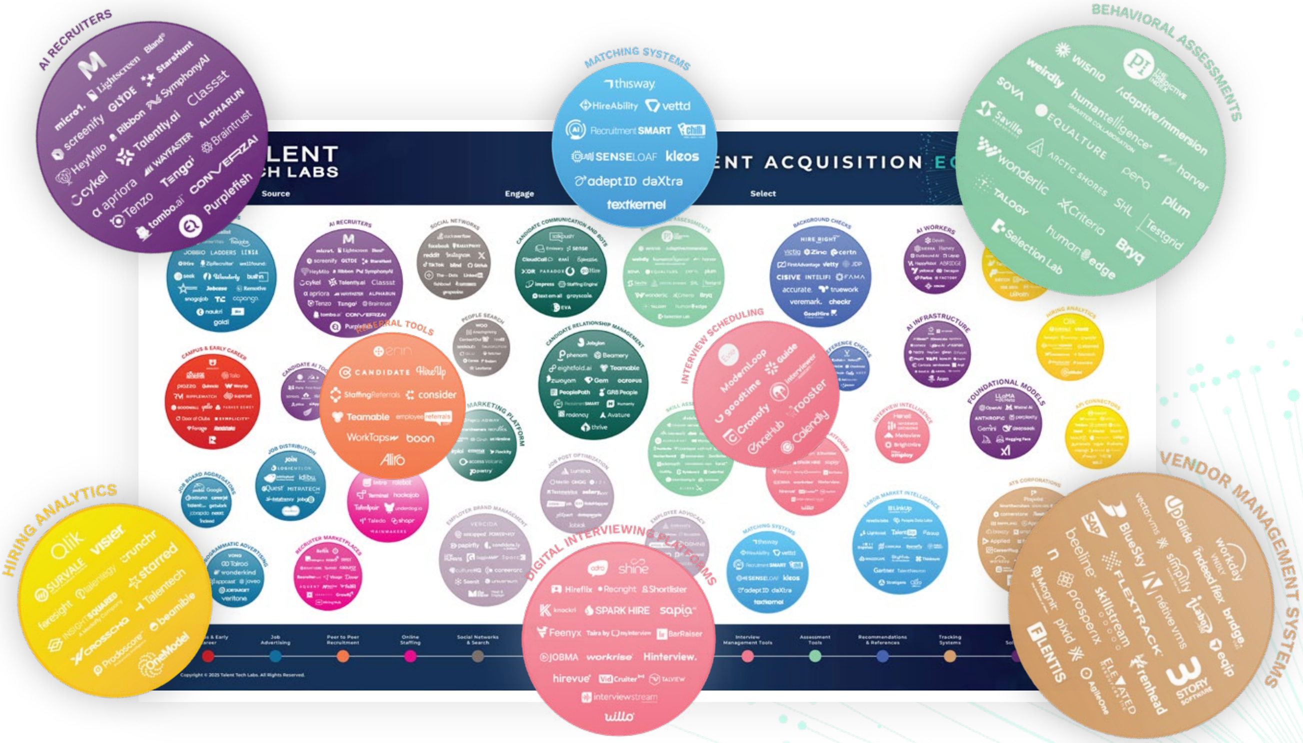
Robotic Process Automation: Robotic Process Automation (RPA) tools automate activities within and beyond recruiting systems. Traditional RPA is becoming more available to the SMB market with a lower entry cost, and solutions offer a more intuitive user experience that does not require a technical background.

Putting it in Perspective:

In putting together this iteration of the Talent Acquisition Ecosystem, we've seen arguably the most vendor activity (both new vendors coming to market and existing vendors adding capabilities) since we started publishing the Ecosystem. It is an incredibly exciting time to be in the talent space as there's never been more opportunity to rethink the art of the possible.

We think we are in the beginning stages of a long-term shift in how work is done and managed, and there will likely be significant shakeup in the vendor landscape over the next few years, and there are probably a few generational companies being built that were started in the last two years. Despite the promising backdrop, many challenges for practitioners persist: how to put together an integrated suite of tools that seamlessly works together and provides a good candidate, recruiter, and hiring manager experience, the difficulty of assessing vendor fit and capabilities (particularly when foundational AI is a commodity), staying compliant in an ever changing regulatory environment, and change management and adoption of new tools and capabilities will continue to be issues that organizations must wrestle with.

As always, we hope the Talent Acquisition Ecosystem helps practitioners as they navigate their organization's talent strategies.



ABOUT TALENT TECH LABS

Talent Tech Labs is an independent, unbiased research and advisory firm focused on analyzing technological developments in the field of Talent Technology. The company was founded a decade ago with a vision to clarify the complex talent technology landscape. Since then, Talent Tech Labs has evaluated thousands of technologies and offers actionable insights into applications at every stage of the employee lifecycle.

The company helps buyers and users of talent technology solutions gain a better understanding of the complex market, learn about future trends and influences shaping the market, and provides them the strategic direction to transform their business through the intelligent use of talent technology today and in the future. To learn more about TTL, visit our website **here**.

ADDITIONAL RESOURCES

ECOSYSTEMS

Talent Acquisition Ecosystem 13 Infographic

Talent Management Ecosystem 2.0

ADDITIONAL REPORTS

- **The Impact of Generative AI on Talent, Technology and Human Capital**
- **Inside the Minds of Global HR Leaders: Top Talent and AI Priorities for 2025**
- **Managing Opportunities and Risks in an AI World**

Join Our Community and Gain Access to Talent Technology Insights and Trend Updates

Sign Up

CONNECT WITH US

/company/talent-tech-labs

hello@talenttechlabs.com

ARE YOU A PROVIDER OF TALENT TECHNOLOGY?

Tell Us About Your Company