



IDC MarketScape

IDC MarketScape: Worldwide Talent Acquisition for Enterprise 2026 Vendor Assessment

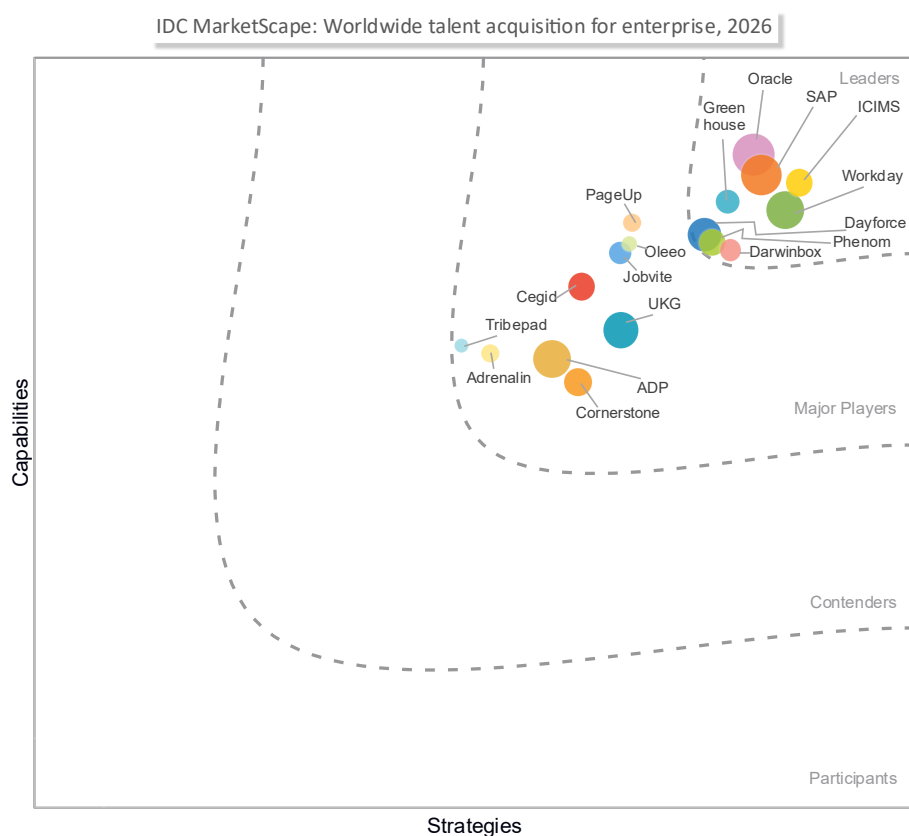
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THIS EXCERPT FEATURES GREENHOUSE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide talent acquisition for enterprise vendor assessment



Source: IDC, 2026

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Talent Acquisition for Enterprise 2026 Vendor Assessment (Doc #US54129026).

IDC OPINION

The worldwide talent acquisition (TA) technology market is steadily expanding, primarily driven by skills shortages, the need for higher recruiter productivity, and increasing usage of AI across the hiring life cycle by both candidates and employers. The market continues to operate with two broad groups of vendors leading the charge: one group is native talent acquisition–focused vendors with applicant tracking systems (ATSs) and TA-focused positioning, and the other group is suite players with talent acquisition offered as part of the larger human capital management (HCM) suite. The decision that buyers face concerns their existing technology footprint and their appetite for platform consolidation. Market scale reinforces the stakes of this choice, with talent acquisition technology spend on a durable, sustained growth trajectory as organizations increasingly treat recruiting infrastructure as a strategic lever for revenue, innovation, business growth, and value.

Underlying much of this shift is a recruiter function stretched thinner than the hiring volumes it is tasked with managing. Organizations continue to expect more output, faster time to fill, and higher candidate quality from the same or shrinking recruiter head count, and this capacity gap is a primary reason enterprises are turning to automation to close it.

Agentic AI is emerging as the dominant force reshaping talent acquisition and the human resources (HR) technology market. However, the real definition of what qualifies as agentic versus what is simpler automation versus what is just plain generative AI (GenAI) remains ambiguous in the market. A wider industry-wide shift observed by IDC is that the market is moving away from counting the number of AI agents in vendor offerings toward how those agents work and deliver outcomes, either independently or through orchestration. With vendors announcing sophisticated AI and agentic AI capabilities, it becomes essential for buyers to ask questions about what an agent actually does end to end, if it operates with clear accountability and auditability, and whether a human retains a defined override role. Failing to get clear answers to these questions can create a gap between agentic ambition and agentic accountability, and this is where most of the real risk in this market currently lies.

Skills-based hiring has moved from a buyer aspiration to a structural approach to talent placement, where the right candidate is matched to the right role based on skills and interests, regardless of whether the candidate is internal or external. Persistent skills

shortages, weakening skill signal quality, and AI-driven changes to job roles are collectively mandating enterprise buyers to seek skills-based hiring and talent placement solutions. This includes using skills ontologies to connect recruiting and internal mobility and positioning talent acquisition solutions for the next phase of enterprise buying. Several TA-focused players have acquired or partnered to build skills intelligence and skills-based hiring capabilities.

Another emerging capability category is skills matching, which helps buyers address challenges related to candidate fraud and authenticity detection. Mass adoption of GenAI has weakened the quality of skill signals and made it easier to fabricate entire job applications. To help solve this, several vendors have introduced dedicated fraud detection features within the same product cycle, which signals that this is no longer a niche add-on but an emerging baseline expectation for enterprise ATS.

In this environment of rising application volume and eroding trust, candidate experience remains an important buyer concern. The quality of candidate experience is measured against the consumer-grade standards set by everyday digital services. Candidates expect transparent status updates, fast responses, and communication that feels personal and specific to them. Employers that fail to meet these expectations lose qualified candidates to drop-off and disengagement before they can reach a hiring decision, and candidates experience genuine competition in the hiring process.

As the range of AI capabilities across vendor portfolios matures and standardizes, the adoption of, value from, and trust in AI remain dependent on buyers' maturity and appetite. Most buyers are accelerating the deployment and scaling of AI capabilities focused on workflow automation. The use and value of AI intended to augment human decision-making are uneven across buyer pools. Responsible AI governance is the clearest fault line separating vendor maturity levels and deserves buyer scrutiny that goes beyond a vendor's stated claims about fairness and transparency. Some back their governance claims with recurring third-party audits and published results, whereas others describe a governance committee or framework without matching evidence that a bias audit specific to their recruiting product has actually been conducted.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

- **Native TA platform:** The vendor offers a native talent acquisition system with a native ATS as the core system of record for candidate data, hiring workflows, and requisitions.
- **Functional breadth:** The platform delivers core capabilities spanning applicant tracking, candidate relationship management, requisitioning, matching and screening, recruitment marketing, internal mobility, career sites, and onboarding links into the HCM ecosystem.

- **AI and agentic AI capability:** The platform delivers AI and agentic AI across the life cycle, including candidate matching and scoring, generative AI, agentic workflow execution, skills ontologies, and responsible AI frameworks.
- **Solution delivery:** The vendor offers either a standalone solution or a genuinely native component of a larger HCM suite.
- **Scale:** The vendor demonstrates a mature, at-scale offering through its requisition volume, TA revenue, enterprise client base, and product maturity.
- **Enterprise segment fit:** The vendor serves organizations with 1,000+ employees, with a client base and product design built for multi-entity, multibrand, or multicountry hiring complexity at that scale. The vendor supports at least three countries or regions in production and offers multi-entity configuration with role-based access across business units.

ADVICE FOR TECHNOLOGY BUYERS

Enterprise buyers are facing a rapidly widening gap between how quickly vendors are shipping agentic AI and how quickly their TA teams can absorb these new capabilities. Evaluations for TA technology should shift from feature checklists to contextualizing a vendor's capabilities against the buyer's own maturity, choosing what works best for where the buyers actually stand:

- **Weigh what an AI agent actually does against your team's readiness to run it:** The number of AI agents a vendor advertises, or a mature-sounding feature set, is only useful if the buyer's TA team can operate it. Buyers should ask what each agent does, if it provides a clear audit trail, and whether a human retains a defined override role, then judge that against how much oversight capacity their TA organization actually has to manage these agentic AI capabilities.
- **Fit the architecture to your organizational complexity:** While choosing between a suite-based ATS provider and a standalone ATS vendor, the former gives a single governance and security review across recruiting and the rest of HR, which matters when the same AI and data practices need to hold up across the talent life cycle and across business units and jurisdictions. With standalone ATS providers, the focus shifts to purpose-built configurability to handle varying hiring complexities, allowing buyers to upgrade recruiting tech based on changes in business needs independently of payroll and other HR systems.
- **Confirm governance applies platformwide:** Bias or compliance issues at enterprise scale are generally not contained within a single hiring process but affect every business unit and jurisdiction the platform touches. Buyers should evaluate the vendors for their data hosting and support model coverage across regions where they hire and manage talent decisions.

- **Treat skills-based hiring and internal mobility as one connected decision:** Persistent skills shortages and weakening skill signal quality have pushed skills-based matching from a nice-to-have to a must-have. Buyers looking to sync their external hiring and internal mobility should evaluate whether a vendor's job and candidate pools can work in tandem with internal employees to create an ecosystem of continuous talent placement.
- **Size fraud detection to your actual hiring volume:** Mass adoption of GenAI has made it easier to fabricate entire job applications, and this risk scales directly with application volume. A weak or absent fraud detection layer creates risk across every role type an enterprise hires for, from high-volume frontline roles to specialized professional roles.

Buyers should also budget for resourcing for setup and ongoing administration, proportional to their own complexity and to how much of that complexity their team can absorb. Configuring a platform for multiple business units, brands, or countries simultaneously is a materially larger undertaking than a single-entity deployment, and underestimating the gap between what a platform can do and what your team can operationalize is one of the more common causes of a stalled or suboptimal enterprise rollout.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each criterion outlined in the Appendix, the description here summarizes each vendor's strengths and challenges.

Greenhouse

Greenhouse is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide talent acquisition for enterprise.

Greenhouse is a cloud-based talent acquisition platform designed for structured hiring, featuring defined role criteria, standardized interview kits, and scorecards that map feedback and hiring decisions to preset, agreed-upon standards. The platform combines an ATS with a CRM layer and offers add-ons such as onboarding, advanced analytics, and AI-enabled modules. Greenhouse provides tiered packages that scale with company size and hiring volume, with features and usage allowances increasing from the core to the plus and pro tiers. Built on a multitenant SaaS architecture, Greenhouse serves organizations ranging from small businesses to large global enterprises. Its customer base spans 140 countries, with the interface available in 6 languages and candidate-facing sites translated into 18.

Greenhouse is offered as a standalone talent acquisition platform, divided into four separate SKUs that can be purchased individually and priced through tiered packages based on

company size and hiring volume. The platform supports both multitenant and single-tenant SaaS deployments hosted on AWS infrastructure. Cross-border data transfers are managed under the EU-U.S. Data Privacy Framework, its U.K. Extension, and the Swiss-U.S. Data Privacy Framework, with a committed uptime SLA of 99.9%. Implementation options range from a self-guided path, which smaller or less complex customers can complete in as little as 4 weeks, to service-led engagements that can last 6, 12, or 16 weeks for larger or more integration-heavy projects. Throughout the process, a dedicated implementation project manager is assigned to each engagement.

Greenhouse offers prebuilt integrations with HRIS systems, background check providers, and collaboration tools. A formal partner ecosystem of program partners supports the platform. For organizations with unique needs, Greenhouse provides an open REST API and webhook support, allowing enterprise IT teams to build custom integrations when a prebuilt option isn't available.

Greenhouse enables recruiters to define role requirements before opening a requisition, including interview plans with preassigned evaluation criteria for each hiring stage and scorecards to capture feedback against those criteria. GenAI tools allow recruiters to generate job descriptions based on this structured foundation, ensuring postings inherit the same role criteria defined at kickoff. This structure carries through the AI feature set, so recommendations and summaries stay anchored to that existing context at every stage. MyGreenhouse, the candidate portal, enables candidates to create profiles, search for jobs, and apply. Recruiters can leverage GenAI tools to draft candidate outreach communications, engaging both active and passive candidates in the pipeline. Greenhouse extends its matching capabilities to an early-stage, employer-facing product called Talent Rediscovery. This tool enables recruiters to search the MyGreenhouse candidate pool and generate outreach content. Candidates can provide feedback at each stage of recruitment, offering a direct peek into the candidate experience and allowing recruiters to adjust their engagement strategy accordingly.

Real Talent integrates talent matching, fraud detection, and identity verification right at the sourcing stage. The platform ranks candidates against predefined criteria, while fraud detection checks objective signals such as email domains, and can trigger IP address verification when stronger checks are needed. If something looks suspicious, the system flags the case for human review, allowing TA teams to verify the details manually.

Building on the criteria established during the kickoff, Voice AI — leveraging technology from Greenhouse's May 2026 acquisition of Ezra AI Labs — conducts structured, on-demand voice interviews. Every candidate responds to the same set of questions, ensuring a consistent evaluation process. The system provides a complete transcript and a transparent, structured score for the hiring team's review. In addition, Greenhouse Notetaker, a native tool, joins live interviews as a participant to record and transcribe

conversations. It automatically maps notes to predefined scorecard questions, helping interviewers streamline their review and feedback process.

Offer letter generation, management, and esignature are built into the platform, while background checks are integrated through Greenhouse's partner ecosystem. Onboarding is handled via a separate product, Greenhouse Onboarding, which customers can use either as a full-service solution with logistics support or as a lighter "Welcome" experience that introduces new hires to company culture, history, and policies. Onboarding workflows are tailored by role and location, and new hires can complete experience surveys that provide valuable input to the talent team. A manager dashboard for tracking new hire tasks is also available, though it currently offers only partial support.

Greenhouse's AI Ethics Committee monitors evolving AI regulations and assesses their impact on the product. The company conducts third-party AI audits and bias testing in line with regulatory standards applicable to TA use cases, supported by documentation on AI bias audits and responsible AI practices. Features for AI explainability and decision transparency are available, though explainable AI scoring and comprehensive compliance tooling with regulatory audit trails are still in partial development. Greenhouse supports GDPR, CCPA, and CPRA compliance, as well as multi-jurisdiction hiring compliance automation. For reporting, Greenhouse's MCP server enables customers' AI copilots to access and act on Greenhouse data based on user permissions, supporting use cases such as flagging candidates who are stalled at a stage or drafting follow-up communications. Greenhouse Analytics (a newly developed reporting layer) sits alongside the platform's established native reporting module, allowing users to build custom charts and dashboards across applications, scorecards, approvals, and Real Talent data. A conversational chart builder is also available, enabling users to generate visualizations from plain language requests.

Strengths

Greenhouse's strength lies in how the company has layered AI capabilities onto its existing structured hiring architecture. AI features such as job description generation, candidate matching, interview question generation, and the interview notetaker all leverage the platform's established framework of job kickoffs, interview plans, and scorecards. Importantly, Greenhouse's AI is designed to keep human decision-makers in control. For example, the Notetaker does not generate ratings or hiring recommendations, and Voice AI provides transcripts and scores for human review. One customer noted that Greenhouse enables their TA team to process hundreds of thousands of applications for a few hundred roles, describing the system as both capable and adaptable to varying hiring needs.

Customer feedback also highlights measurable results from Real Talent, Greenhouse's AI-enabled fraud prevention and identity verification solution. This tool reduces hiring risks and increases recruiter efficiency by automating much of the manual work involved in fraud

prevention and identity checks. In addition, Greenhouse offers prebuilt integrations with HRIS systems, background check providers, and collaboration tools. The platform's open REST API, webhook support, and MCP server enable enterprise buyers to extend functionality without building custom integrations from scratch.

Challenges

Greenhouse offers a structured framework for building TA workflows, but this same structure can present a learning curve for recruiters who are new to the platform. Some of the latest features, such as Greenhouse Analytics, are still in open beta and have not yet fully replaced the platform's legacy reporting module. As a result, buyers may need to validate the value of these new capabilities before widespread adoption. In addition, customers should pay close attention to AI feature allowances, especially for newer AI-driven functionalities where actual usage may quickly outpace initial estimates. For example, one customer reported needing to recalibrate and expand its original AI allowance to match real-world usage, ultimately finding the additional investment worthwhile given the value delivered in terms of both effort saved and cost avoidance.

Consider Greenhouse when

Greenhouse is well suited for enterprise buyers seeking an ATS with structured hiring embedded in its core architecture, as well as those looking for AI capabilities that are natively aligned with this structure. Its talent matching and fraud prevention features are effective for organizations managing high application volumes, especially where signal quality is low or fraudulent applications are prevalent at the top of the funnel. Enterprise IT and security teams aiming to extend AI copilots into recruiting data via permission-aware connections will also benefit from Greenhouse's MCP capabilities. Buyers evaluating a broad set of features, including structured evaluations, on-demand voice interviewing, and interview assistance, will find value in Greenhouse's ability to unify these capabilities within a consistent, contextually aware framework.

Greenhouse's position is anchored in the company's commitment to structured hiring, now extended to include fraud defense, identity verification, voice interviewing, and governed AI connectivity. However, several of the company's newest AI and analytics features are still maturing toward full enterprise readiness.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

- **Applicant pool:** The total group of job candidates who have applied for a specific position within a company
- **Applicant tracking:** The process of managing and organizing job applications throughout the hiring process
- **Candidate relationship management (candidate CRM):** The process of building and maintaining long-term relationships with job candidates to enhance engagement and create a strong talent pipeline
- **Candidate screening:** The process of evaluating job applicants to determine whether they meet the qualifications and requirements of a position
- **Candidate sourcing:** The proactive process of identifying, attracting, and engaging potential job candidates, active and passive, before they apply for a job
- **Internal mobility:** The movement of employees within an organization through promotions, transfers, or lateral moves

- **Job board/job site:** An online platform where employers post job openings and job seekers search and apply for positions
- **Recruiting:** The process of identifying, attracting, interviewing, and selecting candidates for job openings in accordance with a company-defined evaluation strategy
- **Recruitment marketing:** The strategic use of marketing techniques to attract, engage, and nurture potential job candidates before they apply for a job
- **Recruitment process outsourcing (RPO):** A practice where an organization outsources some or all of its recruitment functions to an external provider acting as an extension of HR
- **Talent branding:** The perception of a company as an employer shaped by its reputation, employee experiences, and communication strategies
- **Talent marketplace:** A digital platform or internal ecosystem connecting employees to job opportunities, projects, or roles based on skills and career aspirations
- **Talent pipeline:** A pool of prequalified candidates that an organization proactively builds and maintains for current and future hiring needs
- **Workforce planning:** The process of analyzing, forecasting, and aligning an organization's human resources with its business goals and future needs

LEARN MORE

Related research

- *Market Analysis Perspective: Worldwide Talent Acquisition, 2026* (IDC #US54032226, September 2026)
- *Market Forecast: Worldwide Core Talent Acquisition Technologies Forecast, 2026–2030* (IDC #US53537026, July 2026)
- *AI in Talent Acquisition: Speed Traps, Slow Burns, and Where Buyers Should Start* (IDC #US53536826, June 2026)
- *Talent Acquisition Trends, 2026* (IDC #US53536726, February 2026)
- *IDC Market Glance: Talent Acquisition Technologies and Services, 1Q26* (IDC #US54031926, February 2026)

Synopsis

This IDC study provides an assessment of talent acquisition vendors that primarily serve enterprise buyers. The research finds enterprise buyers dividing along a suite versus standalone architecture choice, where vendors embedded in a broader HCM system are weighed against purpose-built recruiting platforms on configurability and integration depth. Agentic AI has become the dominant vocabulary across nearly every profile, though vendor

maturity varies widely in governance, auditability, and human oversight. Skills-based matching and candidate fraud detection are emerging as baseline enterprise requirements rather than differentiators. Buyers are advised to weigh platform maturity against their own hiring complexity and to treat AI governance evidence as a deployment prerequisite.

"Talent acquisition has moved from a people function to becoming a strategic revenue activation function for enterprises, and the buyers in the segment do not judge talent acquisition vendors by the count of AI agents or features," said Abhinav Shrivastava, research manager, Talent Acquisition and Strategy, IDC. "The vendors that can help buyers drive hiring and talent placement efficiency, empowered by transparent and auditable AI capabilities, will define enterprise hiring for the next cycle."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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