



HCM Suites with a European Focus

Harness the power of globalization and overcome its challenges

2025 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research. This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

ABOUT THIS SHORTLIST

A human capital management (HCM) suite is a collection of key HCM functionality covered by a single vendor across multiple capabilities. Regarding functionality, Constellation looks for strong HR core and payroll capabilities as the main areas of functional necessity, but vendors equally must have substantial talent management, workforce management and benefits functionalities. As for geographical focus, vendors must operate in at least 2/3 of the EU member states as well as substantial support beyond the EU members. Middle East and North Africa should start to show up on 3-5 year roadmaps.

Artificial Intelligence is changing enterprise automation substantially and HCM is no exception. Vendors need to have enabled AI based automation in at least three of the five key HCM automation areas – with tangible success. To enable customers to uptake AI as well, vendors need to upgrade their Enterprise Application Platform (EAP) capabilities with respect to AI.

To ensure vendors are compliant with legal and statutory requirements, they need to have employees in countries in which they operate with the dedicated purpose of monitoring legislation and best practices. Partnerships for this purpose are acceptable and included but don't score as strong as native/in-house expert access.

LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email ShortList@ConstellationR.com for more info.

To learn more about Constellation Research Shortlists visit: www.constellationr.com/ShortList

11 SOLUTIONS TO KNOW

Constellation evaluates more than 30 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share, and internal research.

-  **META4 (A CEGID COMPANY)**
-  **PERSONIO**
-  **P&L LOGAHR**
-  **SAGE PEOPLE**
-  **SAP SUCCESSFACTORS**
-  **SAP HCM (BASED ON ECC)**
-  **SDWORX**
-  **TALENTIA HCM**
-  **UNIT4**
-  **VISMA HRM & PAYROLL**
-  **ZALARIS PEOPLEHUB**

THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Over 90% of customers in the SMB segment from 100+ to 3000 FTEs)
- Full support for 2/3 of EU member states
- Substantial support beyond the EU members
- Middle East and North Africa should start to show up on 3-5 year roadmaps
- HR core
- Payroll
- Most of talent management (4 out of the 5: Recruiting, Onboarding, Performance Management, Succession Management and Learning)
- Substantial workforce management (needs to support payroll at a minimum)
- Substantial benefits management (in this area, partnerships are the acceptable)
- Demonstrable ROI from using AI in at least 3 of the 5 key HCM capabilities.
- An updated platform architecture that enables AI in out-of-the-box and customer-built AI applications
- Enterprise Application Platform (EAP) support for Integrate, Extend and Build use case (see Shortlist for EAP platforms), that allows to build and operate agents
- Support for more than four continents
- 500+ customers with at least 15+ countries live and 50%+ being suite level customers (HR core, payroll, talent management and workforce management)
- Cover at least two-thirds of Europe's GDP via country-based localizations
- 12+ languages supported in system

BUSINESS THEMES



Future of Work



New C-Suite



Technology Optimization

ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.



Holger Mueller

Vice President & Principal Analyst

Holger Mueller focuses on the synergies between people and software. As the hand-to-machine ratio radically changes over the next decade (primary factors: age dynamics and technology innovation), enterprises need to find the appropriate balance between changes in a dynamic workforce and the creation and adoption of next-generation applications, all determining the Future of Work and helping enterprises accelerate. Mueller provides strategy and counsel for key clients, including CTOs, CHROs and CIOs as well as investment analysts, VCs, PE firms and technology buyers.

