

# Fosway 9-Grid™

## AN INTRODUCTION

EMEA's *only* independent market analysis model for Next Gen HR, Talent and Learning

### Fosway 9-Grid™

**Example**

**2024**

#### Key

##### Type

Suite

Specialist

##### Presence

Higher

Mid

Lower

##### Total Cost of Ownership

Higher

Mid

Lower

Potential



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# Introduction

## What is 9-Grid™

The Fosway 9-Grid™ is a five-dimensional model that can be used to understand the relative position of solutions and providers in a particular learning and talent systems market. It allows you to compare different solutions based on their Performance, Potential, Market Presence, Total Cost of Ownership and Trajectories across the market. It is unique, because it sees value in all of its zones. It 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 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, learning and talent 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).

## Accuracy of Information and Warranties

The analysis and recommendations made in Fosway 9-Grid™ 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.



# The 9-Grid™ Model

## Why a 9-Grid™ Model?

The Fosway 9-Grid™ model has been in evolution since 2008. It is not a flash in the pan. 9-Grid™ is an important iteration of years of thinking and independent analysis of leading vendors and market trends. This is an ongoing process; we continually research vendors and gather real corporate feedback about their experiences of working with vendors.

9-Grid™ was created because of the perceived lack of depth and flexibility provided by alternative market profiling approaches, typically provided by US-centric analysts.

For European and International organisations other analysis models place too much emphasis on a US view of execution and innovation, without providing a practical reference point for those organisations that don't need the most sophisticated solutions, or have to deal with the complexities of pan-European or truly global deployments. These models also fail to provide a sense of what you could buy with different budgets, or a sense of value for any solution outside of the 'top right' of their model.

These inadequacies have led Fosway Group to create a model that is focused on being accessible and understandable to HR, talent and learning professionals, and contains familiar variables that are meaningful to those who need to really drive the adoption of corporate solutions.

## How is the 9-Grid™ Model Different from other Market Analysis Tools?

### 1. It is five-dimensional

Other tools are at best three dimensional, and as such have a limited story to tell. 9-Grid™ gives you five levels of insight into a provider's position in the market, by showing their Performance, Potential, Presence, Total Cost of Ownership and Trajectory.



## 2. There is value in all zones; Top Right doesn't mean it is the best solution for you!

In the 9-Grid™ all of 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 it may not even be desirable. There are many other zones that offer success, especially when contrasted with lower Total Cost of Ownership.

## 3. It is European first

In an analyst world dominated by US-centric commentary, 9-Grid™ is a fresh perspective that should resonate with European-based buyers. The perspectives captured in the model are focused firstly on the experience of customers in Europe and their needs, moderated by the wider global perspective. Some providers may not be shown in the model because they have little European presence or customer relevance.

Note: Within the document we refer to a variety of terms which should be considered similar from a geographical basis. These are UK/Europe or EMEA (Europe Middle East and Africa). Where it makes sense, we will also deep dive into particular regions or countries to develop a more local perspective on solutions providers when those markets are largely country specific, e.g. such as for UK digital learning providers.

## 4. It aims to be accessible to HR professionals

The adoption of a 9-box structure for 9-Grid™ is very intentional – as it is an approach which will be very familiar to HR professionals, who should be used to using it to manage people performance and succession. This familiarity should make it much easier for them to interpret and gain value from the model and analysis. Again, to emphasise, the model isn't about being top right, it's about the best decisions and management approaches that make a solution viable and then more likely to be successful.

# What are the Goals of the 9-Grid™ Model?

9-Grid™ is a market analysis tool and its goals are to enable you to:

- **Understand how solutions compare** – allow you to easily identify the comparative potential, cost of ownership, performance and market presence of solutions



- **Match solutions to your context** – help you to be clear about how your organisational context matches viable vendor options
- **Be a focus for constructive discussions** – help facilitate a discussion of the opportunities that different vendors and solutions offer
- **Identify the trade-offs** – enable you to assess the optimum trade-off between value potential and total cost of ownership
- **Understand the wider opportunities** – help you understand the wider opportunities of choosing particular providers in the market – outside of the top right of the model
- **Recognise the focus for success** – help you surface some of the underlying action points against each of the 9-Grid™ zones to help de-risk your choices and understand the focus for success when working with different vendors

## What Solutions Will the 9-Grid™ Cover?



Fosway Group's main focus for the 9-Grid™ model is key areas of next generation HR and learning, supporting detailed decisions for key solution areas. Fosway will continue to develop new 9-Grid™ analysis where it deems it appropriate, but an initial list of solution segments includes:

- Cloud HR
- Talent Acquisition
- Talent & People Success
- Learning Systems
- Digital Learning



## Suite versus Specialist solutions

Over the years, Fosway has gradually introduced a classification into Suites and Specialists. This is now reflected on all current 9-Grids™, although it is not mandatory. It simply reflects the realities of European companies and the increasing importance of having a strong ecosystem of solutions,

Type	
Suite	
Specialist	

In our model Suites are platforms supporting and integrating a broad range of traditional and next gen approaches within a given segment, aiming to cover all the bases.

Specialists, on the other hand, unashamedly focus on one area of capability with a disruptive high impact agenda. These types of solutions have a focused proposition and want to lead the market in their chosen focus area. They will rarely be the only system for a segment within an organisation as they cannot cover all areas that a company needs to manage or support. Their goal is to disrupt the Suites and to deliver heightened impact in a specific area.

For each of the segments, a more detailed definition of the scope of the Suites is given in the full 9-Grid™ reports. They also contain a more detailed table for the Specialists and the Specialism they are focusing on. The Specialisms that get included in each 9-Grid™ are carefully selected and get continuously updated depending on their relative importance and potential for disruption in that segment.

## How Frequently Will 9-Grid™ Models Be Updated?

9-Grid™ models for different solutions will normally be reviewed and updated *annually*.

Each year a revised diagram and commentary will be released, taking into account the progress vendors and customers have made with their solutions over the year.



# Understanding the 9-Grid™

## Fosway 9-Grid™

**Example**

**2024**

### Key

#### Type

Suite

Specialist

#### Presence

Higher

Mid

Lower

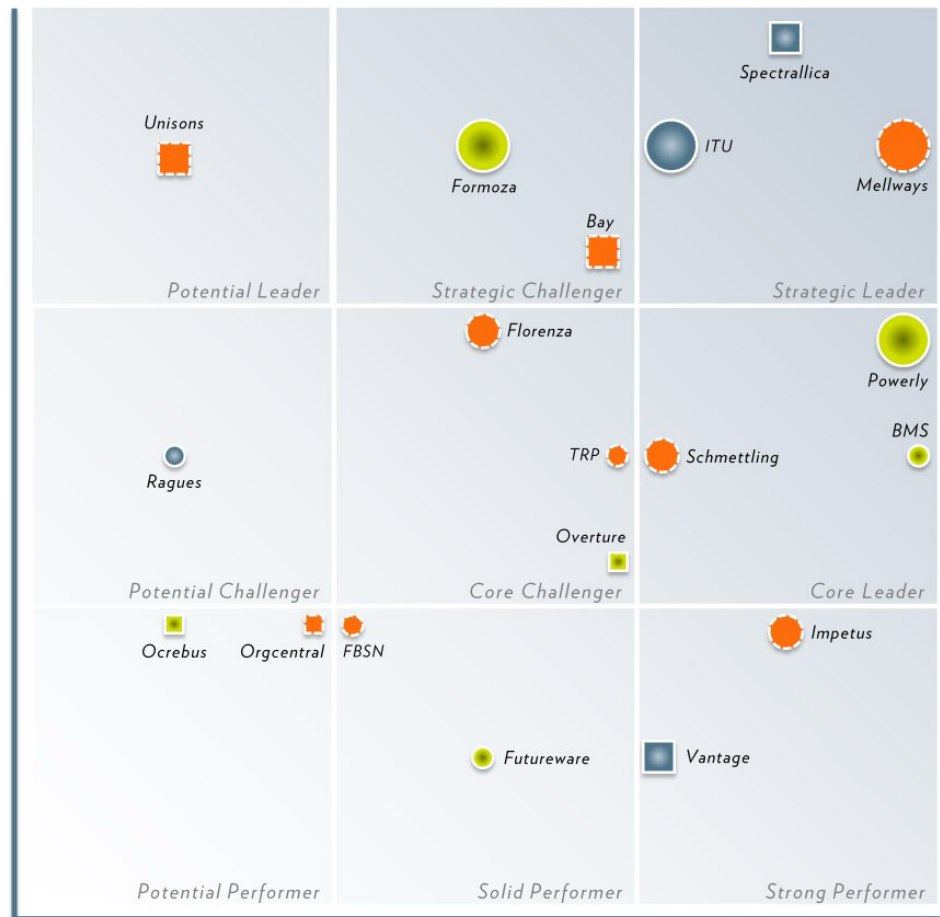
#### Total Cost of Ownership

Higher

Mid

Lower

Potential



Performance

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Essentially the 9-Grid™ model brings together our independent view of solutions providers':

- Potential
- Performance
- Presence
- Total Cost of Ownership
- Trajectory for Potential and Performance



## 9-Grid™ Potential

Potential refers to the solution's scope and sophistication.

- **Scope** – What can it do? What is the solution's breadth and depth of capability? Can the vendor demonstrate ongoing development and innovation of the solution?
- **Sophistication** – How well can it do it? Is the solution able to deal with sophisticated needs within complex organisations to meet multiple and diverse needs?

For the purposes of the 9-Grid™ model **Potential** is rated as being Lower, Mid or Higher band, depending on how they compare to other vendors in the market.

## 9-Grid™ Performance

Our definition of performance is comprised of two elements: Market Performance and Customer Performance.

- **Market Performance** – How often do vendors get short-listed and how often do they win (especially here in EMEA)? Are they growing faster than the market?
- **Customer Performance** – How well do they deliver? How quickly and deeply are customers extracting value from solutions and how much corporate customer advocacy do we see within the people function and across the organisation for the solution?

In the 9-Grid™ model, vendor **Performance** is rated as being Lower, Mid or Higher band, depending on how it compares to other vendors in the market.





## 9-Grid™ Presence

This is their presence in the enterprise market and 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 represents 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.

### Presence

Higher



Mid



Lower



**Presence** is rated as being Lower, Mid or Higher band, depending on how they compare to other vendors in the market.

## Total Cost of Ownership

In the 9-Grid™, TCO is the **full** lifecycle cost of acquiring, implementing and operating the solution (typically over a three-year period).

Importantly, this includes both internal and external costs.

**TCO** is rated as being Lower, Mid or Higher band, depending on the cost of ownership compared to other vendors in the market.

### Total Cost of Ownership

Higher



Mid



Lower



## Trajectory

The final aspect of the model is the positioning of the vendor within each of the nine zones of the 9-Grid™.

This is based on the trends we currently see in the market related to a vendor's Performance and Potential.

We call this Trajectory, which shows *our sense of the rate of change of a vendor solution* in terms of both Performance and Potential. For example, this could be used to indicate a successful provider becoming overstretched by rapid growth and therefore their performance slowing, or one we suspect is likely to fail to keep pace with wider market innovations.

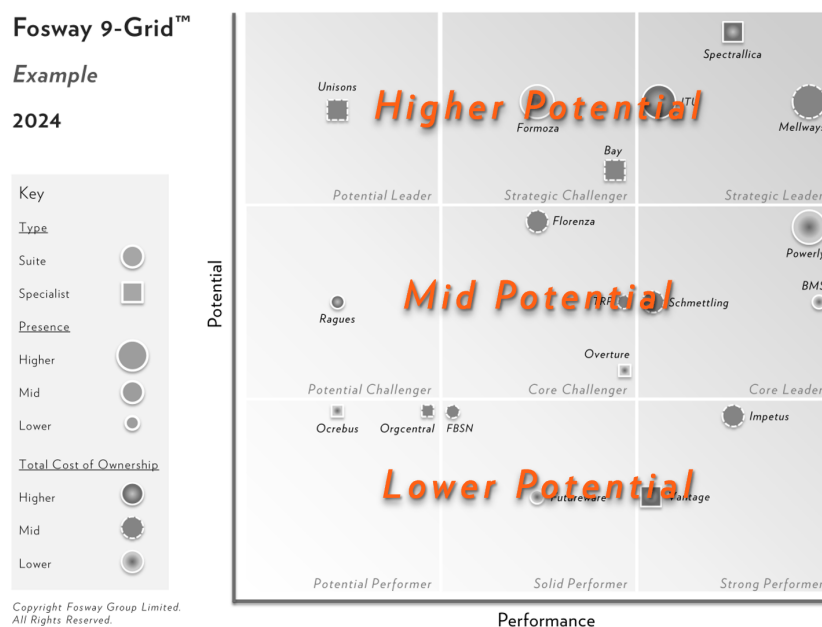
Interpreting the exact position of the vendor in a 9-Grid™ is explained in more detail later in this document.



# Bands of Potential and Performance in the 9-Grid™

## Understanding the Bands of Potential in the 9-Grid™

Potential is defined as a solution's scope and sophistication. In our 9-Grid™ model these are banded into Lower, Mid or Higher Potential. And these provide the vertical positioning in the grid.



## Lower Potential Solutions

Lower Potential Solutions aim to provide a simpler solution, prioritising ease of adoption over sophistication and scope. As a result they tend to address the needs of organisations with simpler requirements, or in simpler ways. Lower Potential Solutions are typically entry-level solutions which can deliver for organisations with lower levels of organisational complexity. With larger enterprises, these solutions often have adoption at a unit or country level rather than enterprise-wide or are used in specific contexts only. Sometimes solutions in this banding are also part of a large vendor portfolio and are not as comprehensively developed as leading Specialist solutions in the market, because they are not a core discipline for the vendor.



## Mid Potential Solutions

Solutions identified in the Mid Potential band are typically solutions with a strong core for mid-enterprise organisations. Whilst lacking the sophistication or scope to meet the needs of the most complex organisations, they are less complex to implement. A Mid Potential Solution might have good depth across all areas, or be highly sophisticated across a more narrow set of capability. Mid Potential Solutions typically appeal to customers who are looking for a broad solution that covers all the bases but may have to compromise slightly on depth. Typically, these solutions are attractive to mid to large enterprise organisations that are more regionally focused, have less complex operations, or that have very specific sector requirements for an important, but narrow set of capabilities.

## Higher Potential Solutions

Solutions in the Higher Potential band typically provide sophisticated solutions with a comprehensive set of capabilities that are well suited to support the needs of large, complex global customers.

Higher Potential Solutions tend to have the richest and most comprehensive capabilities, which can be flexed to meet diverse customer requirements – not only across customers, but even sometimes divergent requirements from within the same customer.



# Understanding the Bands of Performance in the 9-Grid™

Performance has two important factors which can influence the position in the 9-Grid™; namely Market Performance and Customer Performance. These variables are combined to provide the horizontal positioning on the grid.



## Lower Performance Solutions

Lower Performance Solutions typically have lower evidence of market performance and enterprise customer advocacy currently. These solutions are characteristically placed in this band because they have a lower track record in achieving customer advocacy or lower market traction (shortlist and win rate) from enterprise-scale customers. Sometimes they might be new or emergent solutions still building their enterprise track record and often appeal to organisations seeking innovative new solutions with niche or specific needs. In other cases they might be an established US/International vendor with limited customers in Europe. Lower Performance can be the result of customers experiencing poorer levels of execution or customer service. Naturally, where the solution is more established and has a longer historical presence in the market, it is more likely to be placed in this band because it has lower customer engagement as a result of issues with delivery, service or ongoing execution.



## Mid Performance Solutions

Mid Performance Solutions are placed in this band for a combination of reasons that result from their market and customer performance. Mid Performance Solutions typically perform well in the market and are often featured on enterprise short-lists with a good track record of winning. They have a good track record of customer performance resulting in positive customer success and advocacy. They may be strong regional players with many enterprise customers, but are not considered Higher Performance Solutions because they have lower customer advocacy or have yet to achieve the market success of higher performing solutions. Solutions can also be placed in this band because they have higher market adoption, but mid band customer advocacy or customer impact.

Typically, Mid Performance Solutions provide solid performance for their customers, and are the challengers to market leaders. With improved customer advocacy, enhanced execution, customer impact or increased customer short-listing and wins, these solutions could become the higher performers.

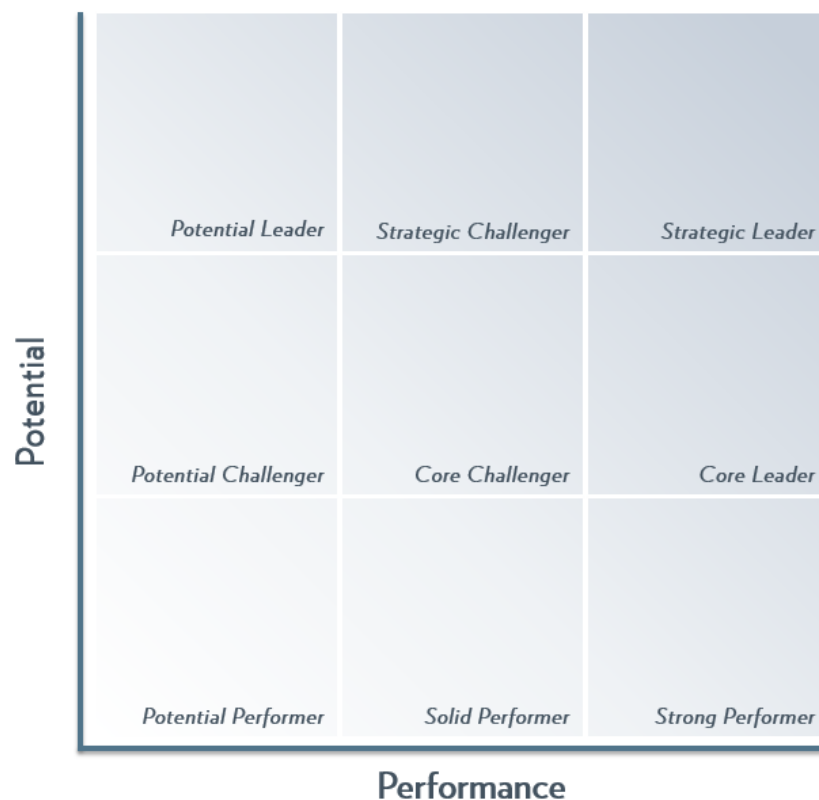
## Higher Performance Solutions

Higher Performance Solutions typically display both higher market and customer performance. These solutions are typically more frequently shortlisted by enterprise scale organisations and they more frequently win competitive tenders from enterprise corporate companies. Importantly, customer of these Higher Performing Solutions also achieve higher levels of customer impact and advocacy compared to other solutions in the market. These solutions consistently make more positive impacts for their customers. This may be through speed of implementation, speed of business return, service quality or recurring customer value.



# Understanding the 9-Grid™ Zones

The 9-Grid™ model uses a similar approach to the 9-box models used in talent management succession planning, so for HR professionals the model should have some real resonance. One of the most important aspects of the model is that **all** positions have merit, just as they do with succession planning.



Each Zone is more than just a rated position; the Zones also provide an underlying agenda for managing vendors. For each Zone, there is a recommended, high-level set of actions, designed to help you to maximise the benefits of working with the vendors from a particular zone. The nine Zones that form the 9-Grid™ model identify the relative potential and performance of the vendor.



## But, what do all the Zones mean?

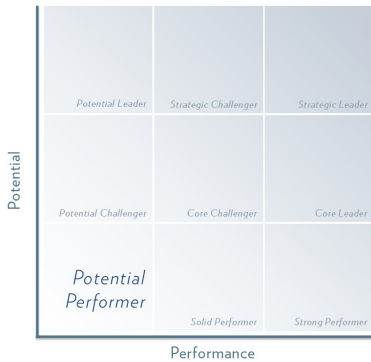
Vendors are placed in a Zone depending on whether they have been assessed as a lower, mid-level or higher level performer and whether they have been rated with higher, mid-level or lower potential.

Each Zone has a label that can be used to identify the vendors within that Zone. The labels are Potential Performer, Solid Performer, Strong Performer, Potential Challenger, Core Challenger, Core Leader, Potential Leader, Strategic Challenger and Strategic Leader. An explanation of each of these Zones is outlined in the table below.


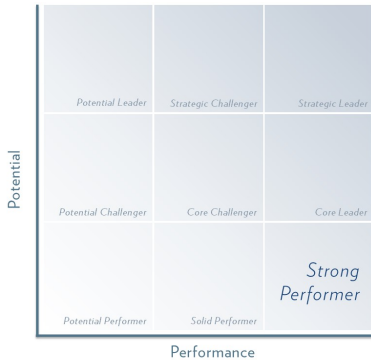
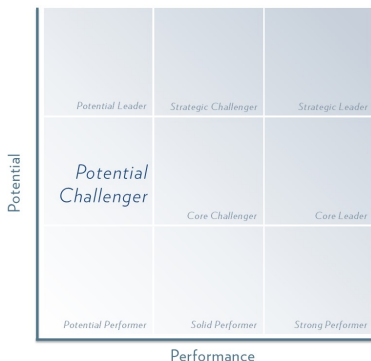
**Note:** All vendors within a Zone are considered as materially equivalent in terms of Performance and Potential. The relative position within a Zone only highlights our view of their Trajectory within the 9-Grid™ (see later).

## What do the 9-Grid™ Zones Mean?

An explanation of each the Zones in the 9-Grid™ model is outlined in the table below.

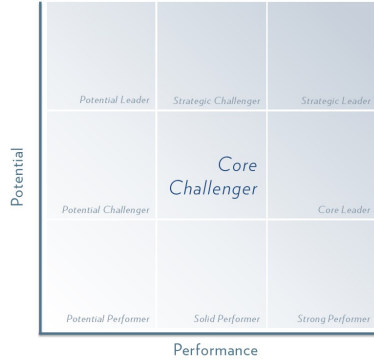
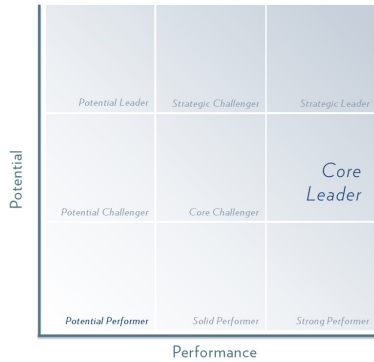
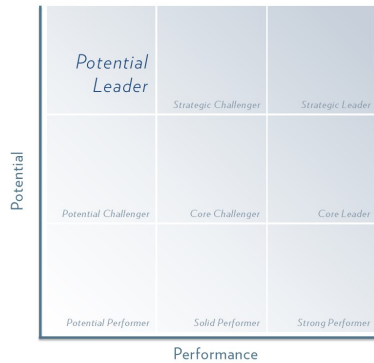
Zone Label	Position	Explanation
Potential Performer		<b>Potential Performers</b> are generally new or emergent solutions with a narrower set of functionality, and are still building their enterprise track record. As such, they currently have lower evidence of market performance and enterprise customer advocacy, too. Potential Performers often appeal to organisations seeking innovative new solutions with niche or specific needs.



Zone Label	Position	Explanation
<b>Solid Performer</b>		<p><b>Solid Performers</b> aim to provide a simpler solution, prioritising ease of adoption over sophistication and scope. They deliver solid performance for their customers and have a track record of market performance and customer advocacy. With larger enterprises, these solutions often have adoption at a unit or country level rather than enterprise-wide or are used in specific contexts only.</p>
<b>Strong Performer</b>		<p><b>Strong Performers</b> typically provide higher levels of market and customer performance, but still prioritise ease of adoption over sophistication and scope. They consistently show significant market performance and higher levels of customer advocacy. They might be deployed at unit or country-level, or across all employees of larger companies with less complex needs and a fast time to value.</p>
<b>Potential Challenger</b>		<p><b>Potential Challengers</b> are typically solutions with a strong core for mid-enterprise organisations but currently have a limited track record of market or customer performance in Europe. They may be newer entrants to the enterprise market or still building their customer advocacy. Sometimes they might be more mature solutions with lower market performance.</p>





Zone Label	Position	Explanation
<b>Core Challenger</b>		<b>Core Challengers</b> are good performing solutions with a strong core of solutions capability for mid-enterprise organisations. Whilst lacking the sophistication or scope to meet the needs of the most complex organisations but are less complex to implement. They have a good track record of market performance and customer advocacy, and may be strong regional players with many enterprise customers.
<b>Core Leader</b>		<b>Core Leaders</b> are higher performing solutions with excellent customer advocacy and market performance. They offer a strong set of capabilities but are less complex to implement or may lack some of the sophistication needed for the most complex organisations. They have an excellent enterprise win-rate, with a proven track of record of customer delivery and strong customer advocacy.
<b>Potential Leader</b>		<b>Potential Leaders</b> provide sophisticated solutions with a comprehensive set of capabilities that are well suited to complex organisations but currently have a limited track record of market or customer performance in Europe. They appeal to complex customers with sophisticated needs and may be highly capable new entrants or an established US/International vendor with limited customers in Europe.



Zone Label	Position	Explanation
<b>Strategic Challenger</b>		<b>Strategic Challengers</b> provide solutions with the scope and sophistication to support the needs of large, complex global customers. They have good market performance and are often featured on enterprise short-lists with a good track record of winning. They have a good track record of customer performance resulting in positive customer success and advocacy.
<b>Strategic Leader</b>		<b>Strategic Leaders</b> 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.

## Vendor Placement within a 9-Grid™ Zone

As we have described, when we place vendors in a particular Zone, this is an absolute label which applies to all vendors in that zone. **We see all vendors within a Zone to be materially equivalent in terms of Performance and Potential.** So, all vendors placed in a Core Leader Zone are all Core Leaders and materially equivalent.

The relative position within a Zone does not denote superiority. Although we talk about Trajectory as one of the dimensions of the 9-Grid™, it is actually itself two-dimensional as it reflects the relative change in both Performance and Potential. To simplify understanding and communication of the Trajectory rating we use nine Trajectory labels, so each Trajectory can be referenced by its level. We place vendors in different parts of the Zone to show our view of their Trajectory in the market.



## What does the Relative Position in a 9-Grid™ Show?

The relative position in a Zone does NOT mean that one provider is relatively better or worse in terms of their performance or potential than the others in that Zone. What it shows is the rate of change (or acceleration or deceleration) of the vendor/solution and is relative to their performance and potential previously, as well as relative to the level of change in the wider supplier market.

Trajectory is rated relative to the vendor themselves and the market as a whole, NOT against the other vendors in that Zone.

- Vendors at the **top** of a box are building their *Potential* through innovation and enhancements
- Vendors at the **bottom** of a box are, in our opinion, potentially going to lose ground in the future in terms of their innovation or solutions capability when compared to the rest of the market
- Vendors on the **right** of the box are trending to increase their win-rate and/or customer advocacy and recognition in the market. Our expectation is that in the future they will be getting short-listed and winning more often, or deliver better
- Vendors on the **left** are decreasing in customer advocacy and market success. Our expectation is that in the future they will be getting short listed and winning less often, or struggle to maintain their customer performance.

Anyone who is in a corner is changing in two directions at the same time. Where a vendor is placed at the **centre** of a zone, we see that vendor as not changing their performance or potential significantly relative to the market as a whole. They are keeping pace with the market in terms of both performance and potential.

### Examples: Vendor Trajectories

To help illustrate how this works it is sharing worth customer, using the diagram below, which focuses on a sub-section of the 9-Grid™. Here we have four vendors placed in four of the 9-Grid™ Zones. These have different Trajectory or different directional acceleration or deceleration. This is relative to the vendor themselves and the market as a whole, NOT against the other vendors in that Zone.



In this example, we see:

- **Vendor A** has is shown as mid-right in a Zone, that implies a relative increasing rate of performance and stable rate of growth in potential – relative to itself and the market as a whole. We call this position an ‘Accelerating’ Trajectory, showing it further improving its market and customer performance, whilst at the same time continuing to demonstrate similar potential in the market.
- **Vendor B** has an ‘Expanding’ trajectory and is increasing their level of innovation and potential to serve enterprise customers more effectively and are maintaining their level of market performance and customer advocacy.
- **Vendor C** has a ‘Realigning’ trajectory as they are decelerating their level of innovation relative to previously and the wider market at this level, thus reducing the velocity at which they expand the scope and sophistication of their solution, and have slowing market growth or customer advocacy.
- **Vendor D** has a ‘Maintaining’ trajectory as they are maintaining their level of innovation and potential to serve enterprise customers as well as their market performance and customer advocacy.

**Remember:** The relative position within a Zone does not show relative difference. In this example, **Vendor C** and **Vendor D** are considered to be materially equivalent in terms of Performance and Potential, but we



believe they may have different Trajectories.

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

## 9-Grid™ Inclusions and Exclusions

The focus of the Fosway 9-Grid™ is European enterprise companies. Whilst we do take global considerations into account, those vendors that have yet to attract a number of enterprise-scale corporates in EMEA are not included in the analysis.

Global to us does not mean a head office in the US and global deployment into regional subsidiaries. It means engaging with the EMEA organisations directly through an EMEA operation and established customers and implementations in EMEA-based companies. This means that there are some US or Asian providers that haven't been included in the grid. As they develop a relevant regional customer base and local operations this will change, but only at the pace that these vendors proactively engage with our target region of the market.



# Next Steps

## Make better HR 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 **Fosway Corporate Membership**.

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.

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*Why start your procurement process from scratch when we already have the research and insight to help you make better supplier decisions much faster?*

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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 in 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](mailto: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](mailto: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 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 and how to succeed.

**Example clients include:** Alstom, Aviva, Boots UK, BP, BT, Centrica, Deutsche Bank, 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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