Fosway 9–Grid™
DIGITAL LEARNING

March 2025

Independent Analysis of the Digital Learning Market

Fosway 9-Grid™
Digital Learning
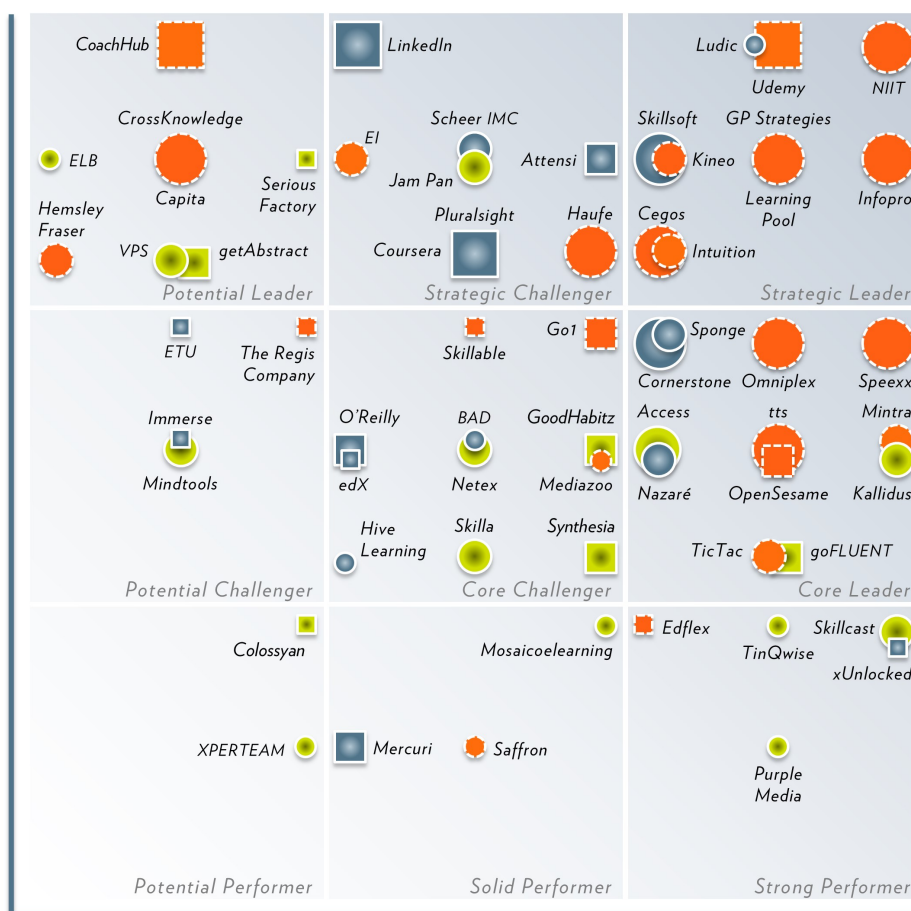### 2025

Key

Type

Suite

Specialist

Presence

Higher

Mid

Lower

Total Cost of Ownership

Higher

Mid

Lower

Potential

Performance

CoachHub

CrossKnowledge

ELB

Hemsley
Fraser

Capita

VPS

getAbstract

Serious
Factory

Potential Leader

LinkedIn

EI

Scheer IMC

Jam Pan

Attensi

Pluralsight

Coursera

Haufe

Strategic Challenger

Ludic

Skillsoft

GP Strategies

Kineo

Cegos

Intuition

Udemy

NIIT

Learning
Pool

Infopro

Strategic Leader

ETU

Immerse

Mindtools

The Regis
Company

Skillable

O'Reilly

edX

BAD

Netex

Go1

GoodHabitz

Mediazoo

Hive
Learning

Skilla

Synthesia

Potential Challenger

Core Challenger

Sponge

Cornerstone

Access

Nazaré

Omniplex

tts

OpenSesame

Speexx

Mintra

Kallidus

TicTac

goFLUENT

Core Leader

Colossyan

XPERTEAM

Mercuri

Saffron

Mosaicoelearning

Potential Performer

Solid Performer

Edflex

TinQwise

Skillcast

xUnlocked

Purple
Media

Strong Performer

Market & Solution Trends

Market Trends

The economy still weighs heavily on the market

Following a difficult previous year, the digital learning market still shows few real signs of recovery, and flat or reduced learning budgets remain an enduring factor for 2024/25. As a consequence, double-digit growth for digital learning vendors is a rarity. New customers are hard to come by, and existing customers often focus more on optimisation of current agreements than expansion of services. Low single-digit growth is common, as is flat or declining sales performance. Buying decision cycles remain elongated and often involve more stakeholders expecting clearly articulated cases for investment at lower budget approval thresholds. What felt like a downshift last year now feels more like a business-as-usual pattern of behaviour. Political uncertainty across many Europe and in the US, further adds to the uncertain mood.

The need to demonstrate value is becoming mainstream

Economic realities continue to encourage a more mature and focused buying behaviour as well as more rigorous management of existing services and resources. Clarity of the role solutions have in meeting business and performance goals has to be matched by the ability to demonstrate success as well as to monitor and communicate progress. Dashboards containing only traditional learning measures such as attendance, completion and satisfaction are increasingly unable to support the evidence-based decisions that learning leaders are expected to make. What started initially as a move to offer learning and performance analytics has gained momentum, becoming a consistent need / roadmap item for vendors. Headcount reductions and hiring freezes are still a reality for many L&D teams whilst expectations continue to grow. Whilst an oversimplification, 'doing more with less', is being thoroughly tested as new priorities are added on top of the business-as-usual requirements of compliance, onboarding and leadership.

Aggregation creates a dynamic partnership environment

Two principal trends are creating more complex and dynamic relationships amongst digital learning providers. First is the demand for simpler supply arrangements from customers as they look for efficiencies and greater value from tighter budgets, making learning aggregators a more attractive proposition. Second

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is the way off-the-shelf content providers are now seeking new partnerships to find new customers in a tight market. Whilst this approach has always been a feature of traditional learning content businesses, many specialists are now following this route too. Aggregators are benefiting from both these developments, further extending the range and depth of solutions they can offer and showing stronger growth as a result. But making content available is only one part of the puzzle. Extracting value from content sources for customers is another. Balancing learner experience with admin features that optimise content coverage and value is needed for strong outcomes for customers and providers alike.

Bespoke solutions providers look to consulting to expand

The need for bespoke providers to deliver effective solutions and demonstrable business outcomes requires a more consultative approach to customer relationships from vendors. As a result, many are now positioning themselves as performance services in addition to learning providers. The presence of the Big Four consulting houses in the learning market is significant too. Vendors that can demonstrate they understand and make an impact on business value have an advantage. In reality though, there are few providers that can genuinely play this role; most focus on learning consulting and advisory services alone.

Will smaller projects return to the market?

One feature of the arduous market has been the sharp reduction, if not drying up, of smaller digital learning projects. These projects, which might previously have gone to the supplier market for rapid turnaround, are now being managed internally with existing resources. Packaging and curating content from internal and external sources meets this need for some L&D teams, but many larger teams are also leveraging internal development resources to author solutions with in-house tools. Sentiment seems mixed on whether these projects will return later in 2025. Some are seeing positive signals, but most are more cautious in their outlook, and as AI tools increasingly automate design and production, it is unlikely that demand for external production for small projects will ever return fully to previous patterns.

And, of course, there is AI...

Last year saw a profusion of marketing activity and hype around AI. This year, there is real evidence of AI application, as well as greater real investment in solution roadmaps. Customer appetite for AI solutions is

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strong but there is still a keen eye on risks to security and privacy. For many though, AI investment decisions lie outside L&D, and adherence to company AI strategy / policy is needed alongside a persuasive business case. Statements of 'responsible AI' were an early move to overcome these barriers. Proof-of-concept projects are also helping customers understand the value and implications of AI better. But early evidence from our analysis of AI roadmap activity shows a story aligned more to process efficiency in existing workflows and tasks, rather than rethinking outcomes or new sources of value. Whilst efficiencies are still transformative for customers and vendors alike, the current focus is still on solving problems within the remit of existing practices and operating models. Further out there are early signals of what might be a more fundamental disruption to what L&D has traditionally been tasked to do. For now, though, the reality is more like 'AI in the human loop' than 'human in the AI loop'.

AI automation in content production goes mainstream

The digital learning market is, in many ways, still a content-focused market. Content alone may not be enough to deliver real change or performance, but it is the staple of the industry and an ever-present component of pretty much all solutions. The trend of the last decade towards quicker and lower cost creation has now been supercharged by the arrival of AI. Synthetic media solutions (explicitly on the 9-Grid™ for the first time this year) have been widely adopted by vendors and corporates alike, as have Gen AI tools for design and authoring tasks in digital learning creation. E-learning production has typically been a repeatable and predictable process; ideal for Gen AI automation. AI-based translation is also transforming time to readiness and costs for international projects. Both these AI use cases have rapidly become commonplace, further eroding the barriers to learning content production as authoring capability is everywhere. Costs of design and production are falling too, with vendors tending to now offer a greater range of solutions than previously possible at comparable price points. AI automation is impacting instructional design also, reshaping the roles needed, as well as productivity and resource planning decisions.

Industry complexity increases as boundaries blur

The digital learning market has always been dynamic and complex, but complexity is increasing as competitive pressure and new technologies encourage vendors to expand their services. Off-the-shelf content services are adding customisation tools and authoring features to enable greater flexibility in their solutions. Learning platform providers are building out content services and authoring capabilities to extend

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their reach and increase share of the learning budget. Synthetic media tools are being added to content studio workflows and platforms whilst also extending their own authoring capabilities. Where one sub-segment of digital learning ends and another starts is getting harder to discern as the boundaries blur and barriers to adding content capability disappear.

Localisation at scale enables international expansion

In the past, smaller nationally concentrated vendors have struggled to reach beyond their national boundaries, limiting their growth potential other than by distribution partnerships. AI has started to lower this barrier significantly. AI efficiency in solution design and production adds scale to studio teams without the need to increase headcount. And use of AI translations and easier editing of localised versions makes market-ready international capability a more achievable reality. As a result, more national vendors are actively seeking growth in adjacent European territories, testing their growth potential at lower risk.

Solution Trends

Differentiating through AI is problematic

The need to adopt and integrate AI has become pressing and universal. But evidence to date suggests that sustainable differentiation might now be harder to achieve. What is revolutionary on the inside can look very familiar from the outside. AI foundation models seem to be tending towards similar capabilities, however remarkable the productivity gains. Model choice itself also limits differentiation, and the models used by vendors are equally available to all. As a consequence, the functionality being introduced, whether for learning experience, administration or analytics, can look very similar. Putting too many eggs into one AI basket is risky. To truly differentiate, vendors need USPs that are hard to replicate beyond these technologies. At this stage of solution evolution, intellectual property ownership, data capability and unique services are more reliable defences against sameness. Access to exclusive, high-quality expertise (not only in content) is also a highly valuable ingredient in differentiating solutions.

Invasion of the AI assistants

One clear example of the differentiation challenge is the prevalence of some form of AI assistant (or copilot, buddy, guide, coach…) in solutions and platforms. These tools feel omnipresent in our vendor briefings. This is not to denigrate their value - they are increasing relevance, personalisation, ease of use, and depth of learning experiences. They are empowering admin users to optimise and target learning at a scale which was unaffordable in the past. But perhaps the greatest value of AI assistants is the use of conversational language interfaces, resulting in more accurate recommendations and better results faster.

The desire to learn together gains momentum

Amongst all this talk of AI, the desire to actually learn together (with other people) remains, arguably, valued more highly. The need for learning solutions for high-value or large-scale transformation programmes is enduring. The best solutions bring cohorts to learn and work together over time. And maybe unsurprisingly, live events are still an important part of the desired blend, as well as virtual and hybrid approaches, led by experts that can interact in real time with their audience. In-group facilitation and collaboration is another core capability. Much of this is missing from corporate learning solutions, and capability to support such programmes is underdeveloped. The real value lies in experience design, facilitation and choreography over time, not in the technology itself. Few vendors can marry these capabilities into one service. Learning system vendors have often claimed to do so, but in reality, the specialists remain some distance ahead. We expect Gen AI and AI agents to play a role here too, allowing providers to scale solutions more cost effectively with personal feedback at a scale not possible before.

Coaching, of all kinds, is a highly valued part of the mix

Much is changing in the coaching world as AI reaches further into the industry. The use of conversational AI tools, trained on coaching models and techniques to offer feedback, reflection and guidance is one area of development. These tools are now present in specific programmes and solutions as well as standalone services for employees. The use of AI coaches is also taking a greater role as a substitute for human coaching too, priced for widespread adoption and aiming to fulfil the promise of democratising coaching for all workers. Improvements in synthetic voice technologies and reduced latency for spoken interactions are improving these tools rapidly. Managing the data gathered from AI coaching sessions needs great care -

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differing fundamentally from the contractual and ethical guarantees expected of a human coach. Personal human coach/coachee relationships are, of course, highly valued and remain popular, particularly for senior leaders. But it is likely that human-led coaching will take a place at the premium end of a new spectrum of coaching solutions, with AI widening the spectrum significantly.

Skills demand signals strategic relevance for L&D

Whilst AI continues to draw in much of the oxygen of discussion, the 'skills imperative' remains a prime driver for L&D teams in corporate settings. Hiring for skills is insufficient alone – there is generally not enough skilled talent available to hire! Upskilling, reskilling and new skills development are now strategic problems for L&D to solve. Skills also offers a platform of relevance to the business that many traditional L&D activities do not. In larger companies, skills is often the domain of the talent organisation, not L&D - a crucial stakeholder for learning leaders. Skills intelligence, enabled by AI, provides the direction for skills development at scale. Mapping unique organisational skill frameworks is a must-have capability to help employees navigate their own route and progress from a personally relevant start point. If it ever were enough, learning content alone falls short. Added to the personal context of role and tasks is the need to practise the application of skills in that context. Provision of safe environments to rehearse skills is important and becoming more realistic at scale as conversational AI tools offer guidance and help learners reflect whilst developing interpersonal skills. Sandboxes and labs are an increasingly common feature of technical skill solutions too. The latter now set the standard for evidence for technical skills validation whilst Gen AI experiences show a similar potential for broader business and personal skills.

Demand for AI skills is endless

The ability to understand, plan for, develop, manage and maintain AI solutions is a pressing strategic challenge for all businesses. AI skills are highly valued and recruiting for them, let alone retaining them, is a headache. Add the rapid pace of AI innovation, with fresh skills demands seemingly arriving every month, and AI skills is a high-demand category for all L&D teams as well as digital learning solutions. Core AI technology skills, AI strategy skills, AI implementation, risks, safety and security are all rich new skills seams to explore. And as with many core business skills categories, the most useful learning solutions require a range of exploratory experiences, hands-on practice, skills validation, feedback and moments of reflection too. In this case, learning experiences built on strong and evident AI expertise and experience have a clear

advantage, favouring providers with a strong technology heritage.

Simulations are in greater demand

The need to develop skills and practise them in context is boosting further growth in business simulations. This corner of the market has historically suffered from an association with the use of gamification techniques to boost learner engagement rather than learner performance. Now, more sophisticated platforms create high fidelity, nuanced business simulations, challenging learners to participate actively in a close-to-real work context and setting. Valuable for skills development, simulations are also useful for transformation initiatives where behaviour change is a significant goal. AI assistants, sometimes via synthetic media avatars, can personalise the experience, added to moments of feedback and reflection at key points. Gen AI is also enabling providers to scale the volume and range of content and experiences in their platforms without driving up prices prohibitively, e.g. by adding deeper interaction whilst also gathering and managing rich behavioural data to monitor and optimise progress. VR remains a niche solution in this area too; an effective option where physical training environments are rendered impractical by cost and logistics.

Data remains the (shaky) foundation for L&D progress

For L&D, beneath this disrupted and disrupting landscape, lies a fragile data foundation. The digital revolution was fuelled by data and connectivity to create enduring change and audience value. L&D never quite grasped this reality, preferring control and the systems that enable it. As the AI revolution accelerates, the data challenge is more urgent than ever. The ability to tell a compelling story of performance value and real business outcomes needs more than narrow or traditional learning metrics. The ability to plan for, design and optimise successful solutions relies on evidence-based decisions. The ability to confidently train AI models rests on relevant, accurate, consistent and up-to-date data sources. Frankly speaking, in L&D these are generally lacking. The industry is more alive to these needs than it has been in the past, but progress will be limited until the nettle is grasped more vigorously.

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9-Grid™
Vendor Ratings

9-Grid™ Vendor Ratings

Notes on interpretation

The Vendor Ratings table is now split by type, Suite or Specialist, and includes TCO ratings. All ratings are banded and not linear scored. Suites in the same 9-Grid™ zone should be considered materially equivalent without more detailed evaluation aligned to customer-specific needs. Trajectory ratings are relative to the vendor themselves and the market, not vs other vendors in the same zone. See later in this report for more detailed description of the assessment process and dimensions of this 9-Grid™. For more information on Trajectory see Fosway's Trajectory Guide. See later in this report for more detailed description of the assessment process and dimensions of this 9-Grid™.

Digital Learning Specialists

Vendor	Specialism	9-Grid™ Rating	Trajectory	TCO
Attensi	Immersive Learning	Strategic Challenger	Accelerating	Higher
CoachHub	Coaching	Potential Leader	Expanding	Mid
Colossyan	Synthetic Media	Potential Performer	Capitalising	Lower
Coursera for Business	OTS Learning	Strategic Challenger	Consolidating	Higher
Edflex	OTS Learning	Strong Performer	Evolving	Mid
edX Enterprise	OTS Learning	Core Challenger	Moderating	Higher
ETU	Immersive Learning	Potential Challenger	Expanding	Higher
getAbstract	OTS Learning	Potential Leader	Consolidating	Lower
Go1	OTS Learning	Core Challenger	Excelling	Mid
goFLUENT	Language Learning	Core Leader	Consolidating	Lower
GoodHabitz	OTS Learning	Core Challenger	Accelerating	Lower
Immerse	Immersive Learning	Potential Challenger	Maintaining	Higher

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Vendor	Specialism	9-Grid™ Rating	Trajectory	TCO
LinkedIn Learning	OTS Learning	**Strategic Challenger**	Evolving	Higher
Mercuri International	Sales Learning	**Solid Performer**	Moderating	Higher
OpenSesame	OTS Learning	**Core Leader**	Maintaining	Mid
O'Reilly	OTS Learning (Technology)	**Core Challenger**	Moderating	Higher
Pluralsight	OTS Learning (Technology)	**Strategic Challenger**	Consolidating	Higher
Serious Factory	Immersive Learning	**Potential Leader**	Accelerating	Lower
Skillable	Skills Validation	**Core Challenger**	Expanding	Mid
Synthesia	Synthetic Media	**Core Challenger**	Capitalising	Lower
The Regis Company	Immersive Learning	**Potential Challenger**	Excelling	Mid
Udemy Business	OTS Learning	**Strategic Leader**	Expanding	Mid
xUnlocked	OTS Learning	**Strong Performer**	Excelling	Higher

Digital Learning Suites

Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Access	Suite	Core Leader	Moderating	Lower
BAD	Suite	Core Challenger	Maintaining	Higher
Capita	Suite	Potential Leader	Maintaining	Mid
Cegos	Suite	Strategic Leader	Realigning	Mid
Cornerstone	Suite	Core Leader	Evolving	Higher
CrossKnowledge	Suite	Potential Leader	Maintaining	Mid
EI (MPSI)	Suite	Strategic Challenger	Moderating	Mid
ELB Learning	Suite	Potential Leader	Moderating	Lower
EXPERTEAM	Suite	Potential Performer	Accelerating	Lower
GP Strategies	Suite	Strategic Leader	Maintaining	Mid
Haufe Akademie	Suite	Strategic Challenger	Capitalising	Mid
Hemsley Fraser	Suite	Potential Leader	Realigning	Mid
Hive Learning	Suite	Core Challenger	Realigning	Higher
Infopro Learning	Suite	Strategic Leader	Accelerating	Mid
Intuition	Suite	Strategic Leader	Realigning	Mid
Jam Pan	Suite	Strategic Challenger	Maintaining	Lower
Kallidus	Suite	Core Leader	Accelerating	Lower
Kineo	Suite	Strategic Leader	Moderating	Mid
Learning Pool	Suite	Strategic Leader	Maintaining	Mid
Ludic	Suite	Strategic Leader	Expanding	Higher
Mediazoo	Suite	Core Challenger	Accelerating	Mid

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Vendor	Suite	9-Grid™ Rating	Trajectory	TCO
Mindtools	Suite	**Potential Challenger**	Maintaining	Lower
Mintra	Suite	**Core Leader**	Accelerating	Mid
Mosaicoelearning	Suite	**Solid Performer**	Excelling	Lower
Nazaré	Suite	**Core Leader**	Moderating	Higher
Netex	Suite	**Core Challenger**	Maintaining	Lower
NIIT	Suite	**Strategic Leader**	Excelling	Mid
Omniplex	Suite	**Core Leader**	Expanding	Mid
Purple Media	Suite	**Strong Performer**	Maintaining	Lower
Saffron	Suite	**Solid Performer**	Maintaining	Mid
Scheer IMC	Suite	**Strategic Challenger**	Maintaining	Higher
Skilla	Suite	**Core Challenger**	Consolidating	Lower
Skillcast	Suite	**Strong Performer**	Excelling	Lower
Skillsoft	Suite	**Strategic Leader**	Moderating	Higher
Speexx	Suite	**Core Leader**	Excelling	Mid
Sponge	Suite	**Core Leader**	Evolving	Higher
TicTac Learn	Suite	**Core Leader**	Consolidating	Mid
TinQwise	Suite	**Strong Performer**	Expanding	Lower
tts	Suite	**Core Leader**	Maintaining	Mid
VPS	Suite	**Potential Leader**	Consolidating	Lower

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Inclusions and Exclusions

Entries into the Fosway 9-Grid™ for Digital Learning are made based on the appearance of those solutions within Fosway's Corporate Research network, which focuses on European enterprise-scale corporates. As a result, there are a number of US-based solutions that are omitted because they do not currently have an adequate international presence for us to provide a relevant commentary. Conversely, there may be providers with little recognition outside EMEA that are included because they have built enough presence with European customers to warrant inclusion.

2025 Additions and Removals

This year sees the addition of the following new names to the 2025 Fosway 9-Grid™ for Digital Learning:

- CoachHub, a German headquartered coaching service and platform
- Colossyan, a UK-based synthetic video specialist
- GoodHabitz, an off-the-shelf content service headquartered in the Netherlands
- Synthesia, a UK headquartered synthetic video specialist

This year has seen the removal of the following vendors: Upside Learning and RMMBR no longer meet the criteria for inclusion.

Accuracy of Information and Warranties

The analysis and recommendations made in Fosway 9-Grids™ are based on the information currently available to Fosway Group from sources believed to be reliable. Fosway Group disclaims all warranties as to the accuracy, completeness or adequacy of such information. Fosway Group will have no liability for errors, omissions or inadequacies in the information contained herein, or for interpretations hereof. Opinions expressed herein, are subject to change without notice. All content is copyright Fosway Group Limited, unless otherwise identified. All rights reserved.

Understanding the Fosway 9-Grid™

Understanding the Fosway 9-Grid™

What is the Fosway 9-Grid™

The Fosway 9-Grid™ is a five-dimensional model that can be used to understand the relative position of different solutions and providers in a selected market segment. It allows organisations to compare different solutions based on their Performance, Potential, Market Presence, Total Cost of Ownership and Trajectories across the market.

9-Grid™ is unique, because the model contains value in *all* its zones – not just the top right.

9-Grid™ not only provides an understanding of the market but also identifies the high-level actions that can help corporate organisations get the best from vendors.

9-Grid™ is based on Fosway Group's independent research in the HR, talent and learning market over the past 25 years, and draws upon the insights and experience of our Corporate Research Network. The Corporate Research Network is a group of HR and learning professionals, who between them represent over 250 of Europe's leading companies. These companies are typically global enterprise-scale organisations with their Head Offices in Europe (or the EMEA HQ of global companies).

Essentially the 9-Grid™ model brings together our independent view of solution providers, including their:

- **Performance** - comprising of two elements: Market Performance and Customer Performance.

- **Potential** - scope, capability and sophistication.

- **Presence** - historic and current presence in the market. This includes the size of the customer base, the number of enterprise customers and the overall size of the business, within the scope of the market segment we are examining.

- **Total Cost of Ownership** - the FULL cost of acquiring, implementing and operating the solution (typically over a three-year period). Importantly, this includes both internal and external costs.

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- **Trajectory** – our view of their direction of travel in terms of Performance and Potential, relative to themselves and the market as a whole (not vs other vendors in the same zone).

Interpreting the exact position of the vendor in a 9-Grid™ zone is explained in more fully in our **Introduction to the 9-Grid™** document available from our website www.fosway.com.

Note: We strongly recommend reading the full document to understand the model in detail.

The Critical Difference Between the 9-Grid™ and Other Analyst Models

There is a very important difference between 9-Grid™ and other analyst models. In the 9-Grid™ all the nine zones have value, and more interestingly, have an associated set of actions that can help you to maximise the value of the relationship with different vendors. This means that being in the 'top right' is <u>not</u> the only valid selection point. For some organisations, top right may not even be desirable. There are many other zones that offer success, especially when balanced against Total Cost of Ownership.

Suites versus Specialist solutions

Fosway classifies Digital Learning vendors into two categories – **Digital Learning Suite Providers** and **Digital Learning Specialists**. These are defined as follows:

Digital Learning Suite Providers support a range of digital learning capabilities and solutions, including bespoke digital learning content, blended learning enablement, coaching, digital learning consulting, digital learning platforms and managed learning services.

Digital Learning Specialist Providers are the opposite. They unashamedly focus on specific areas of capability with a disruptive high impact agenda. Whether that is being the best off-the-shelf content library, or specialising in synthetic media, skills validation or immersive learning, Specialists have a focused proposition and want to lead the market in their chosen focus areas. Specialists will rarely be the only digital learning provider in an organisation. They do not aim to cover all the areas of learning that a company needs to manage or support. Instead, their goal is to disrupt the digital learning suite providers and to deliver heightened impact in a specific area of modern learning.

The 9-Grid™ Variables for Digital Learning

Digital learning includes the full range of solutions available (content, platforms and services), the range of learning experiences and formats offered throughout the corporate learning cycle.

Performance

As usual this still covers the questions of when people make a choice about solutions: do they get selected and short listed by customers, do they win, do they deliver and are customers happy? This is viewed through the lens of large international corporates and the experiences of our Corporate Research Network and general market briefing. This may not necessarily reflect the experiences of smaller and mid-sized organisations.

Potential

Two key aspects are considered: scope and sophistication. The definition of **Scope** includes:

- the range of digital learning, content, consulting, support services and platform offerings a provider can use in order to drive a digital learning strategy for its customers.

- the range of learning content and different learning experiences a vendor can offer.

- the experience of delivering solutions for different learning contexts, which might include induction, product launches, systems training, leadership and management, sales and technical expertise.

- the breadth of sector focus such as Finance, Retail, Telecoms etc.

Sophistication defines a vendor's potential to act as a strategic digital learning partner. It considers:

- the ability to provide strategic digital consultancy to guide effective outcomes.

- the ability to deliver, manage and scale complex digital learning projects.

- the ability to support digital learning software and solutions through implementation and delivery – including offering administration support.

- the capability of their digital learning products and platforms to power a wide range of learning strategies.

Whilst the depth of e-learning design, and ability to blend are important, it's the ability of vendors to bring digital learning to life for an organisation – in its entirety – that is critical to our assessment.

Presence

This is very much about the size of the customer base as well as presence in the enterprise market. Again, this is not a linear scale but represents three bandings that group levels of maturity/distinct groupings we see in the market. Higher Presence solutions will be being used in large numbers of corporate enterprise scale customers and have high numbers of overall end-learners using their digital learning solutions.

Total Cost of Ownership

TCO is about the overall cost of buying and maintaining the services. This is a combination not only of initial cost of project management, design and development, but also the cost of delivery, ongoing innovation, localisation, deployment and ongoing updates and maintenance.

Trajectory

For Digital Learning, Trajectory is our sense of potential direction of travel in terms of both Performance and Potential. Trajectory is measured relative to the current Performance and Potential of that solution and the market as a whole. **It is not a relative positioning compared to other solutions in the same zone.** For more information refer to Fosway's Trajectory Guide.

Understanding Ratings – the Banding system

Each of the dimensions of the 9-Grid™ is rated by Fosway based on our analysis of all the research gathered through the main input cycle each year, as well as supporting evidence throughout the year. Priority weighting is given to the experiences of customer organisations, especially European-headquartered enterprise organisations.

Because of the complex nature of this analysis, Fosway does not believe it is desirable or accurate to reduce to a single score. Instead, each of the 9-Grid™ dimensions is banded into one of three levels – **Higher**, **Mid** and **Lower** reflecting the relative rating for that factor. E.g. Higher TCO solutions cost more than Mid or Lower TCO solutions, and Higher Performance solutions have evidence of greater market and customer success at scale, than Mid or Lower. The combination of the banding for Performance and Potential determines the 9-Grid™ Zone the vendor is placed in. The banding for the other dimensions determines how their TCO, Presence and Trajectory are represented.

See the Fosway 9-Grid™ Introduction Guide for more information on interpretation of the 9-Grid™ dimensions, the banding system, and the 9-Grid™ Zones.

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What to do next

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What to do next

Make better HR and learning 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™, contacts 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.

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

As well as accessing the best existing research and market insight, you also have the security of knowing that we are completely independent and don't have a vested interest the outcome, other than ensuring it's the best decision for your organisation and your people. To find out more, please contact us at corporatemembership@fosway.com or by phone on **+44 (0)20 7917 1870**.

If You Are a Vendor

Fosway Group is constantly researching the market via our research projects, via input from our Corporate Research Network, and through direct vendor tracking and briefing. Vendors interested in engaging with Fosway Group more deeply are encouraged to consider joining our **Fosway Vendor Programme (FVP)**. Please contact vendors@fosway.com or call us on **+44 (0)20 7917 1870** to discuss further.

About Fosway Group

Fosway Group is Europe's #1 HR Industry Analyst focused on Next Gen HR, Talent and Learning. Founded in 1996, we are known for our unique European research, our independence and our integrity.

For over 25 years, we have been analysing the realities of the market, and providing insights on the future of HR, Talent and Learning. Fosway analysts work extensively with our corporate clients to understand the inside story of the challenges they are facing, and their real experiences with next gen strategies, systems and suppliers. Our independent vendor analysis 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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