Fosway AI Insights 2025:

AI Market Assessment for Learning Systems

The 2025 Fosway 9-Grid™ for Learning Systems (LS) revealed a market under pressure: innovation is accelerating, but vendor execution is uneven - and corporate expectations are rising fast. Nowhere is this more obvious than in the race to include AI within the learning platforms, which has led to a tsunami of noise, hype, and ambiguity. Generative AI has made it easier than ever for vendors to build some form of AI narrative. But whilst nearly every vendor now positions AI as central to their proposition; there has been very little structured analysis of what this means at an AI feature level. What features are genuinely live? What is still on the roadmap? And what patterns emerge when we look beyond individual claims to the wider market?

This is where Fosway's AI Market Assessment for Learning Systems comes in - delivering a clear, data-led view of AI in LS today; what is real, what is live with customers, and where is AI headed next? In real terms, this analysis draws a clear line between what is operational AI reality and what is aspirational marketing, including:

- *Mapping AI features by actual status, separating substance from spin through feature segmentation.*
- *Highlighting the real areas of innovation, showing where vendor spend is converging across the market*
- *Comparing vendors side-by-side, exposing who is walking the AI talk, and who is not*

Overall, the AI Market Assessment provides European Learning System owners and buyers with the clarity they need to make confident, informed decisions about AI in 2025 and beyond.

July 2025

Background

Fosway AI Market Assessment for Learning Systems

The Fosway AI Market Assessment for Learning Systems provides complementary lenses to give HR and L&D leaders a clear, data-driven view of vendor AI capability and market direction. In particular, this includes:

- A series of **Roadmap Flow Maps** use Sankey charts to trace vendor AI R&D activity across our functional model, revealing where AI development is converging as well as timescales for delivery
- The analysis of every AI feature using the **Fosway AI Feature Segmentation**, comparing AI features by vendor roadmap consensus and what is live, classifying individual AI features as Mainstream, Next Wave, Edge Advantage, Mixed Consensus or Niche Play
- The **Vendor AI Reality Chart** highlights 'Who's walking the talk?' and positions individual vendor AI roadmaps by their current live delivery versus total AI roadmap to show comparative advantage and maturity of AI delivery
- Individual **AI Benchmarking Charts** allow us to compare the functional depth of the AI roadmap for specific vendors vs. market average vs. market best across the LS functional model

Together, these translate raw research data and product disclosures into a cohesive maturity narrative, allowing buyers to benchmark offerings, interrogate vendor claims and time their AI adoption with precision.

Sources of Data

All findings are derived from vendor self-reported data collected by Fosway between late 2024 / early 2025. 'Live' status reflects that a feature is technically available but does not differentiate between full enterprise rollout and limited pilots.

Note: For the purposes of this paper, we also do not differentiate the sophistication of the feature but recommend looking at the corresponding Fosway 9-Grid™ analysis of that segment, where AI innovation is a key part of the analysis, or engaging with Fosway analysts to dive deeper.

AI in LS – hype or reality?

Our first analysis lens is based on an aggregated assessment of the AI roadmaps for the LS vendors to understand both where the primary focus areas for AI innovation are, as well as the status and timescales for delivery of specific features.

Figure 1: Fosway Functional Model for Learning Systems 2025

The following section provides a series of **Roadmap Flow Maps** which use Sankey diagrams to model the distribution of AI features and roadmap status against the main functional categories defined in the Fosway Functional Model for Learning Systems.

Most AI features are vendor promises, not live reality

Despite extensive vendor marketing around AI in learning systems, the narrative is advancing much faster than real-world delivery. Whilst nearly every learning systems vendor claims AI-enhanced functionality, **only 10% of mapped AI features have been delivered and are live** with customers so far.

The following diagram shows a high-level analysis of where the vendors are focusing AI innovation (by category in the functional model) as well as the overall status of all AI features within their roadmaps.

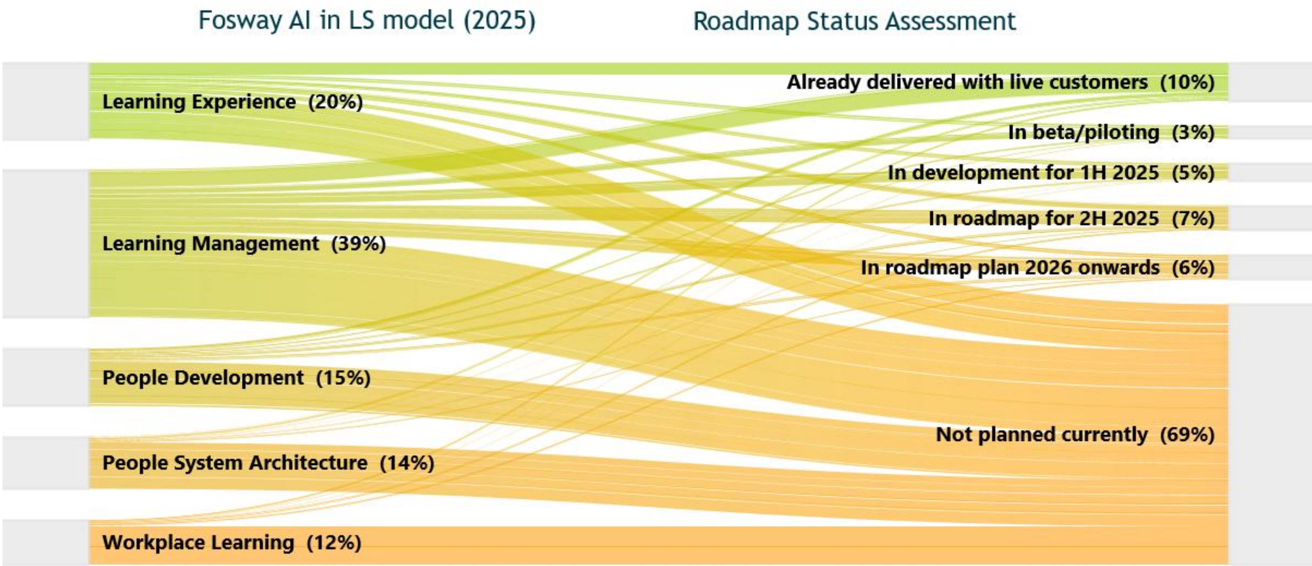

Figure 2: Fosway Overall AI Roadmap Flow Map for Learning Systems 2025

Overall,

- 59% of LS AI roadmaps are focused on either Learning Experience or Learning Management
- 15% is on People Development, 14% on People, Systems& Architecture and 12% on Workplace Learning
- Only 10% of mapped AI features have been delivered and are live with customers, with another 3% in beta/piloting and another 5% in short-term development (H1 2025)
- 13% of AI capabilities are on H2 2025 or on longer term roadmap (2026+)
- 69% of all AI vendor capabilities are not yet within roadmap plans

Although only one in ten AI features is considered by vendors to be already live, that may mean they are only activated in the live instance, not necessarily that they are fully rolled out across customers. This gap between marketing promise and market reality has two implications:

- **Corporates cannot rely on roadmap claims**: Unless a capability is already live or in active piloting, it should not influence immediate platform decisions.
- **Buyers must prioritise visibility and evidence**: Ask for demos, reference clients, and rollout timelines anchored in real deployments, not vague intent.

AI may be the future, but most of it still lives in the future, too. Customers should ground decisions in what vendors can deliver today, not what they hope to develop tomorrow.

AI adoption is focused on two hot zones

AI roadmap investment is far from uniform across the Learning System feature categories. Fosway's Roadmap Flow Maps expose a clear heat map: currently **vendor innovation is highly concentrated in two categories**, whilst large parts of the functional model remain relatively untouched.

As highlighted already, the **Hot Zones** are in the **Learning Experience** and **Learning Management** categories (Figures 3 & 4), where in particular, vendors are deploying AI to enhance search, personalisation, and learning content, provide generative AI authoring tools to create both content and assessments, and introducing assistants tailored to a variety of user personas. These features are widely planned, with many already live, and with strong consensus across the vendors. If you're looking for immediate impact from AI, start here.

The AI functional breakdown for Learning Experience looks as follows. Overall, this shows the heavy concentration of AI features in Personalisation (34%) and Search (27%). It also shows the highest ratio of features live with customers at 15%, with another 10% in pilot or first half 2025 development timescales.

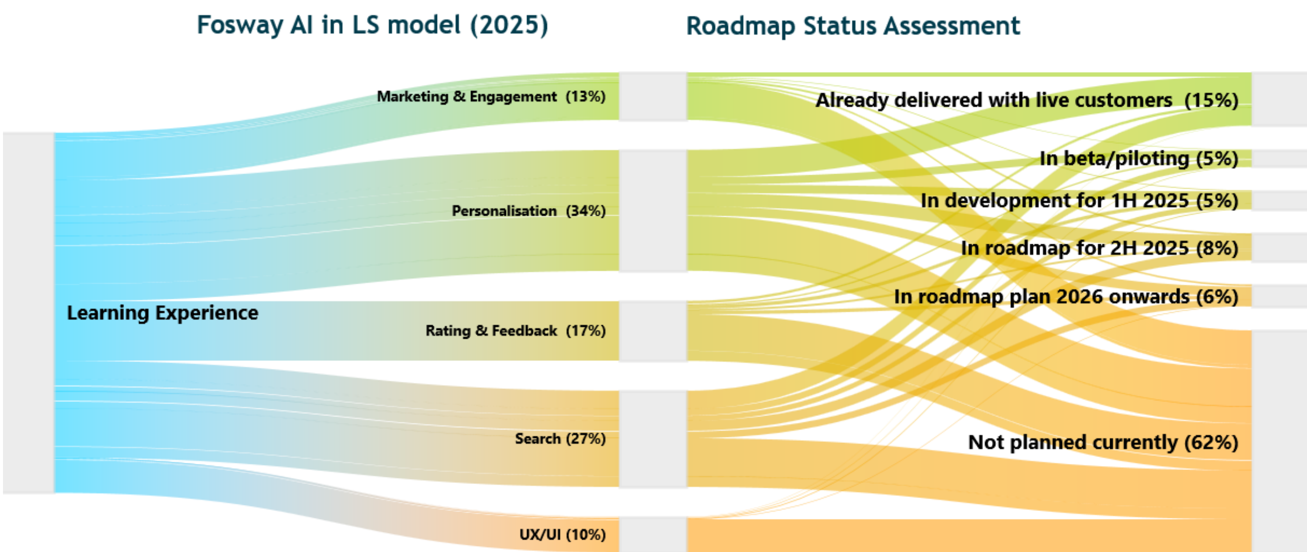

Figure 3: Fosway AI Roadmap Flow Map for Learning Experience (2025)

For Learning Management (Figure 4), clear focus is on Learning Content (with 45% of LM features), and a general spread between Formal Learning Management (17%), Assessment (16%) and Analytics (15%). 12% of Learning Management features are live with customers, and a further 11% in pilot or first half 2025 roadmap.

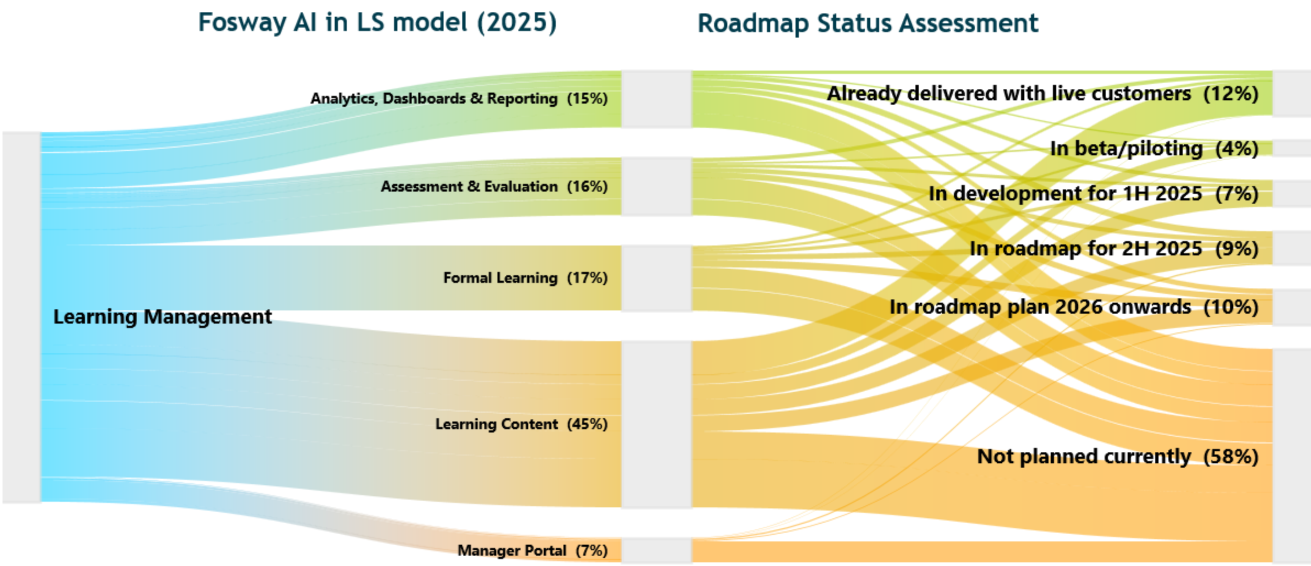

Figure 4: Fosway AI Roadmap Flow Map for Learning Management (2025)

The **Warm Zone** for AI is in People Development (Figure 5). This includes Skills and Development. Surprisingly given the association of Skills with AI approaches, only 8% of People Development AI is live with customers, with 6% more in pilot or first half 2025 roadmaps. With the skills agenda now being a top priority for L&D teams, expect to see vendors offering more enhanced features as AI is the key enabler for progress.

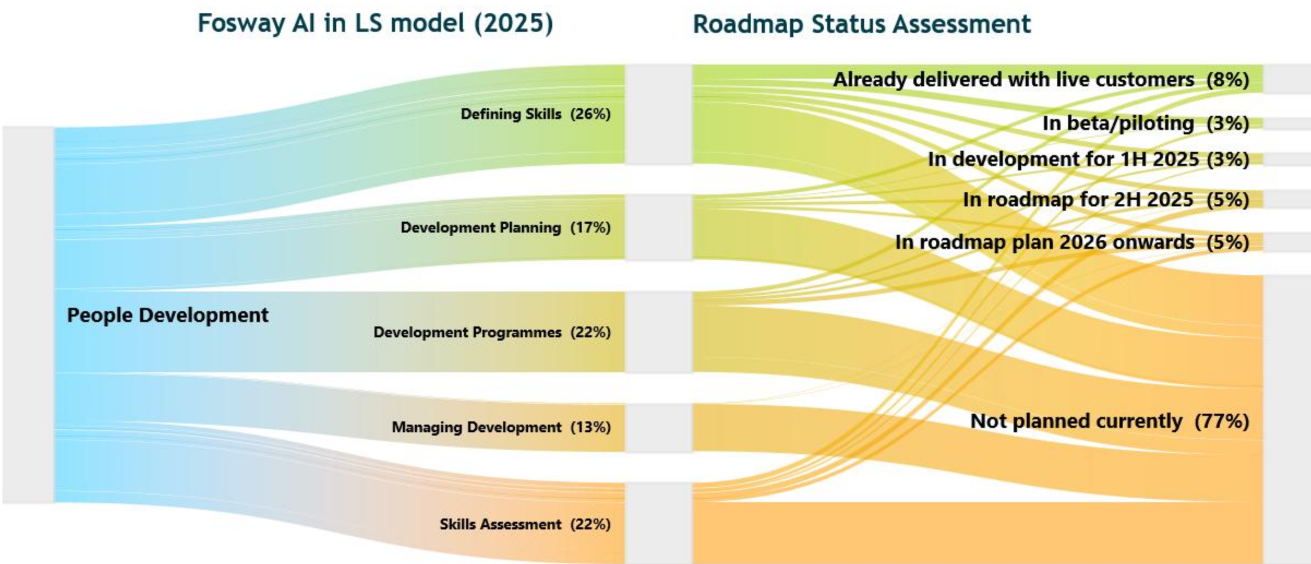

Figure 5: Fosway AI Roadmap Flow Map for People Development (2025)

The remaining two pillars of the functional model – **Workplace Learning** and **People, Systems & Architecture** – are both in the relative **Cold Zone** (Figures 6 & 7), showing much lower focus and activity from Learning Systems vendors. Most AI features (86%/89%) are not even planned. However, we expect this to change, as vendors improve their mobile offerings in line with market trends and as AI functionality develops particularly in the areas of ecosystem integration/connectivity and its agentic capabilities.

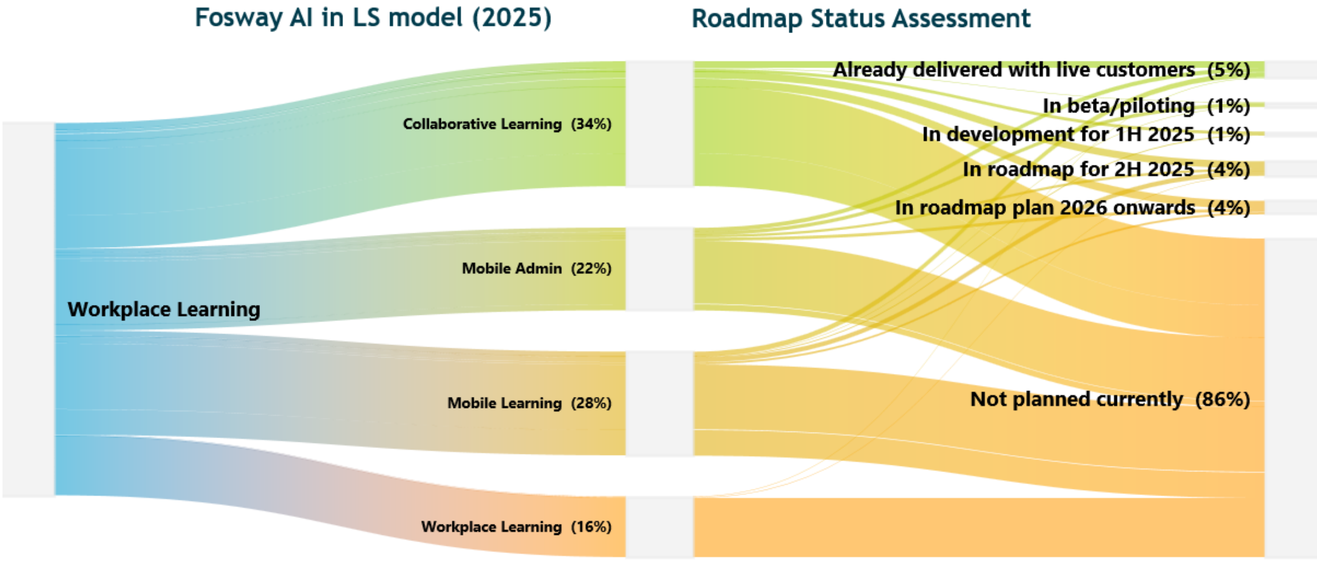

Figure 6: Fosway AI Roadmap Flow Map for Workplace Learning (2025)

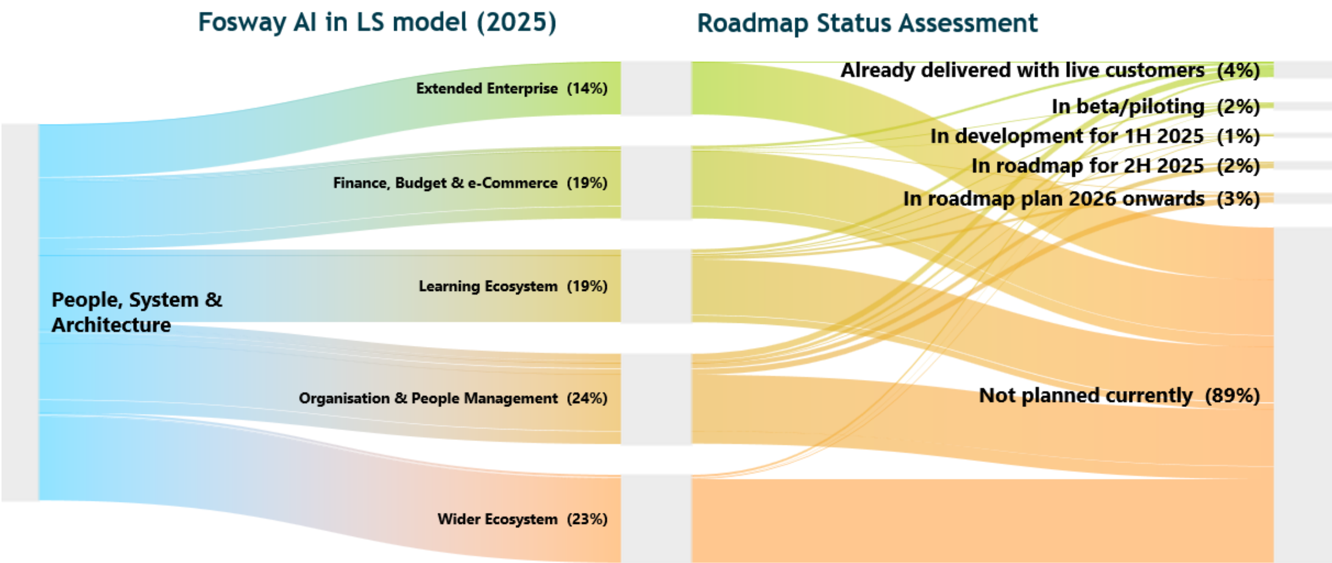

Figure 7: Fosway AI Roadmap Flow Map for People, Systems & Architecture (2025)

AI Feature Assessment: Mainstream or Niche Play?

Our next analysis lens is to examine how specific AI features are making their way into vendor solutions, and with what time priority.

To assess this, Fosway has developed an AI Feature Segmentation model which maps every AI capability in our functional model against two primary factors: **Vendor Consensus** (the percentage of vendors with the feature on their roadmap) and **Live** (the percentage of vendors having this feature live in production).

Because 'Live' can never exceed 'Vendor Consensus', plotting both on a 4 × 4 quartile matrix enables us to recognise **five distinct segments** of AI features – **Mainstream**, **Next Wave**, **Edge Advantage**, **Mixed Consensus** and **Niche Play**. See Figure 8 and the definitions in Table 1.

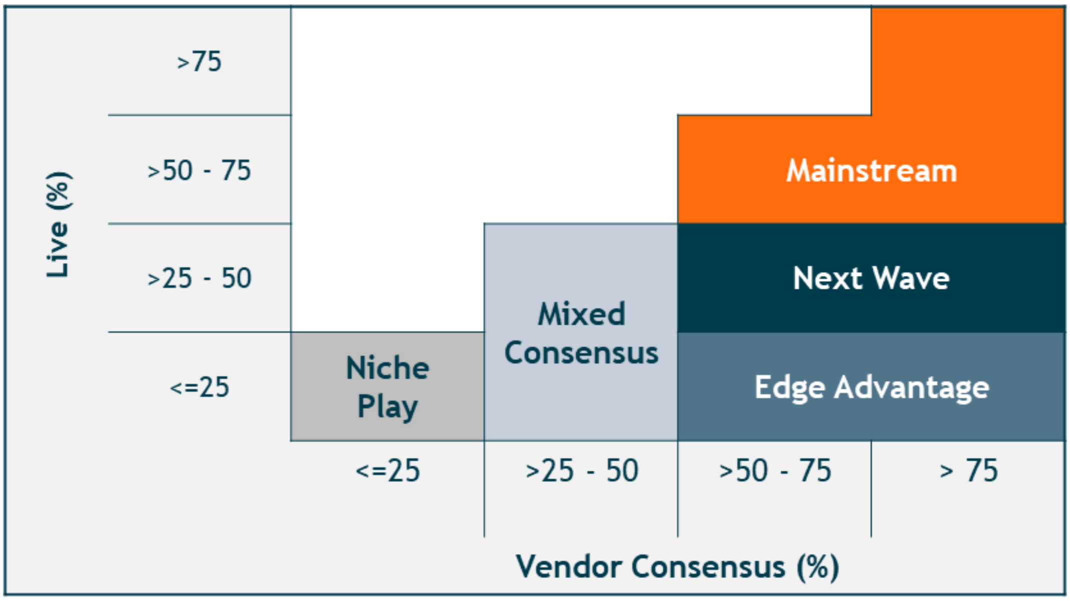

Figure 8: Fosway AI Feature Segmentation Matrix

The following table provides a detailed definition of the AI feature segments.

Feature segment	Definition
Mainstream	Feature is live with > 50% of vendors; considered mainstream functionality by vendors
Next Wave	Feature is on the roadmap for > 50% of vendors and live with 25–50% of vendors; has broad roadmap commitment and is live for use with a significant proportion of vendors
Edge Advantage	Feature is on the roadmap for > 50% of vendors but is live with ≤ 25% of vendors; vendors with live capability may have near-term competitive advantage
Mixed Consensus	Moderate support on 25–50% of vendor roadmaps; vendor opinion divided
Niche Play	Feature is on the roadmap for ≤ 25% of vendors; niche feature being developed by a limited set of vendors only

Table 1: Fosway AI Feature Segmentation Definitions

Understanding where AI features sit on the roadmap maturity curve enables HR and L&D teams to prioritise investment, challenge vendor narratives, and time deployments more precisely. In particular, it helps:

1. **Expose hype versus reality** – separates roadmap talk from operational truth
2. **Signal competitive differentiation** – shows where early adoption yields advantage
3. **Improves vendor accountability** – benchmarks suppliers against market momentum

What are the Mainstream AI features in LS?

As per the segmentation, AI features can be considered **Mainstream** if they are live with a majority of vendors, and buyers should note very significant vendor consensus on them, strongly suggesting the likelihood that other vendors will follow quickly. If your current suppliers cannot demonstrate mainstream features today (or show credible plans to deliver them in the next 6–12 months), they may be falling behind. Corporates should treat these AI features as potentially non-negotiable in RFPs and as baseline operational expectations for your learning platform. Note: This does not mean that every corporate buyer must prioritise them or will require them, as they may be superseded in the Next Wave.

Mainstream means table stakes - not optional extras.

If your vendor isn't delivering them today, it might be falling behind tomorrow.

Surprisingly, given the volume of marketing noise relating to AI in the Learning System market, there is **only one feature that qualifies as Mainstream** currently for LS, i.e. live with more than 50% of the vendors. (Although there is only one, we have still listed it below in a table, as we assume this number will increase by the time we do the next assessment).

Mainstream AI Features – Learning Systems	Vendor Consensus	Live
Smart AI driven personalised recommendations of content and people	91%	61%

Table 2: Fosway's 2025 List of Mainstream AI Features in the Learning Systems Market

Given there is only one mainstream AI feature we have provided some additional commentary.

Smart AI driven personalised recommendations of content and people

It is no surprise that this is a mainstream feature for AI. Learning recommendation engines have been part of the Learning System trajectory for many years, becoming fairly common as vendors focused on providing learners with better experience. Early engines were fairly simplistic, but the increasing use of machine learning (another part of AI), has made these much more effective.

However, whilst this may be true for content recommendations, Fosway's research shows that "smart recommendations of people", such as finding mentors, experts, or peers in a similar role, is far less common. This deserves greater scrutiny and should not be assumed to be available from the majority of vendors.

A second point worth noting is that although recommendation engines are seen as a key enabler of personalisation, they have often struggled in practice to fully deliver against customer expectations. Their effectiveness depends heavily on clean, accurate, structured data, and even then, recommendations are typically historically limited to roles and locations. This is now switching to including skills too, but skills-based recommendations are still in their infancy for many LS vendors; doing skills-based recommendations (including proficiency) well is a real differentiator between vendors.

What are the Next Wave AI features in LS?

Some AI features are not yet mainstream but are on their way to becoming so. These are the **Next Wave** features: capabilities with a broad vendor roadmap commitment and which are live with a significant proportion of vendors. They show rapid commoditisation in the market and are likely going to be added by other vendors too. L&D teams should be aware of these AI features already and seek to understand the value they provide. They should also consider whether their vendor currently provides them or is at least planning to deliver them in the next six to twelve months.

With the Next Wave, there is a much larger number of AI features, so we will only list the top features, sorted by vendor consensus, and showing the live percentage. For LS, there are 23 Next Wave AI features.

Top Next Wave AI Features – Learning Systems	Vendor Consensus	Live
Automated Tagging of Content with Skills on legacy content in LS catalogue to provide awareness of which content will satisfy the requirements for upskilling in a specific area	86%	30%
Generative AI used to support content creation with configurable prompts to ensure good pedagogy by SME's	84%	43%
Intelligent search with answers provided via NLP / chatbot type functionality	84%	25%
Automatically creates questions using AI with answers and distractors based on existing resources	84%	39%
AI-powered Adaptive Engine is used to continuously personalise the experience for each learner	82%	41%
Learning Journey Dynamically Adjusts - macro level pathway of courses in various modalities adapts based on the evidence of demonstrated knowledge (or lack thereof)	82%	27%
AI-generated Assessments based on given content	80%	27%
Automated Content Tagging with Skills AI generated, in LS catalogue and in-platform during content creation	80%	39%
AI-enabled Translation of courses and resources for authors	77%	48%

Table 3: Top Next Wave AI Features in the Talent Acquisition Market

The top 'Next Wave' features share several underlying themes: search, personalisation, and particularly content creation. The table is ordered by the level of vendor consensus, with the most agreed-upon features listed first. However, it's worth noting that the ninth-ranked feature, AI-enabled Translations, has the highest percentage of vendors reporting it as already live (48%). This narrowly missed being classified by Fosway as 'Mainstream' by just 2% and may well be classified as such in the future.

Generative AI is particularly well-suited to learning content and assessment creation, making authoring one of the easiest additions for vendors to integrate AI into their Learning Systems. This trend of including content creation functionality gained significant momentum over the last few years. Whilst some vendors offer AI-powered authoring tools as standalone products, others embed them directly within the wider platform. This authoring functionality is especially appealing to smaller, first-time buyers that want to rapidly populate their systems with company-specific learning content, as well as L&D teams seeking to scale content creation via subject matter experts within the business. AI-driven template creation, assisted in some cases by human instructional designers, helps ensure sound pedagogical principles are followed too!

Despite the popularity of AI content tools, many customers are sceptical of the value of it, and it is unlikely that internally authored content, even if enabled by AI, will be a good long-term solution for most organisations. As a result, some vendors are now shifting focus towards adaptive learning as a more efficient and personalised approach that should also lead to better learning outcomes. But definitions of 'adaptive' vary widely between vendors, and Fosway advises caution when evaluating claims of being 'LIVE' in this area. Unless a vendor is an established adaptive learning specialist (e.g. as recognised on the LS 9-Grid™), these capabilities warrant further scrutiny.

Next Wave isn't about bleeding-edge - it's about leading better.

Pilot pragmatically, scale thoughtfully, and stay ahead of commoditisation.

What are the Edge Advantage AI features in LS?

While some AI features are on their way to becoming Mainstream, others are still on the edge. **Edge Advantage** features have high consensus (more than 50% of vendors) but lower live momentum, with less than 25% of vendors offering the feature live. Therefore, Edge Advantage features come with higher vendor roadmap commitment but are far from being commoditised. Vendors with live features may have a competitive advantage, and because of that, if they are used by corporates, they also have the potential to deliver competitive differentiation in critical areas, such as (so-called) hyper-personalisation, or using AI assistants or adaptive learning. But edge features also carry risk. Vendor maturity typically varies more around the edges, and organisational readiness often lags, too. The best approach is to pilot with purpose: fund tightly scoped use cases, define outcome metrics in advance, and build in exit clauses if these edge experiments do not deliver results.

Edge Advantage AI is not for every team or every situation.

Use it where the ROI is obvious, the problem hurts, and the risks stay on a tight lead.

The following table shows the top Edge Advantage AI features by vendor consensus. There are 28 Edge Advantage features in total, but we have listed just the top six of them.

Top Edge Advantage AI Features – Learning Systems	Vendor Consensus	Live
NLP technology used in chatbot, digital assistant or virtual coach to encourage learning engagement or provide automated responses	84%	23%
Chatbot, digital assistant or virtual coach integrated into business applications encourage learning engagement or automated response	84%	18%
Using AI and Adaptive Learning to deliver personalised learning paths tailored to skill gaps, job requirements and integrated into workforce planning systems	82%	23%
AI Assistant Acting as a Study Buddy or tutor	68%	2%
A Gen AI virtual tutor that can provide content on-the-fly that is personalised and contextualised to the learner asking the question	68%	2%
Adaptive Learning - system data controls every learning intervention delivered based on learners' previous responses and their confidence in their answer	66%	16%

Table 4 Top Edge Advantage AI Features in the Learning Systems Market

Since Table 4 is sorted by descending vendor consensus, the features at the top are prioritised by proportion of vendors with those features in their roadmap, rather than the proportion that are live. The higher the consensus the more likely these are to become Next Wave or Mainstream in the near future. L&D teams should prioritise the list based on relevance for their business and how these AI tools integrate with those in their organisation and across their wider ecosystem. Once your current vendor confirms whether and where your priority items sit on its roadmap, if relevant, you should use the time to create a business case, secure the budget, and begin with piloting and preparing your technology.

A clear theme across the top Edge Advantage features is a deeper focus on personalisation. But there is a tension in defining what 'ultimate personalisation' looks like: is it adaptive content and learning journeys, as offered by adaptive specialists and a few LS Suites with embedded engines, or is it the rise of personal AI assistants generating just-in-time contextually specific learning activities and content in response to specific questions or skills gaps? Most adaptive specialists are taking the first path, but GenAI in general is pushing the latter strategy. Which is most scalable and most effective is yet to be proven.

One other question worthy of note is where virtual assistants should reside within the tech ecosystem. Vendors tend to be very myopic and believe that all roads lead to them. But in the real world, that is rarely desirable, let alone true. Should specific AI features be within the Learning System? Or within the HR suite? Or part of a broader business AI copilot/workflow? Organisations are likely to be unwilling to pay twice for the same AI capabilities. To succeed with larger enterprises, vendors have to demonstrate clear differentiation and long-term value, but they will also need to prove they can co-exist effectively in a wider ecosystem, be non-jealous (not try and exclusively own all aspects of every problem), and increasingly in the future, prove they are able to be orchestrated as part of a wider agentic AI strategy.

What about the rest?

In total, there are 76 different AI features in the Fosway model for Learning Systems, 52 of which are in the top three segments described above. For brevity reasons, we've focused on the main parts of the AI feature segmentation in this paper, but that obviously also leaves a lot of other features (24 to be exact) in Mixed Consensus and Niche Play too. Whilst Mixed Consensus means just that, the Niche Play segment is interesting, as by definition, not many of the vendors have those features in their roadmaps yet. If from a corporate perspective it is very relevant to you, you have a limited supply source for it and other vendors are likely to be slower to add it. Choose carefully. For more information about all of the AI features please contact us to discuss further, including both to understand which features might be relevant, as well as the likely vendors to approach to discuss or pilot them. Read on for more information.

What about your vendors?

The main purpose of the AI Market Assessment paper was to discuss the maturity and segmentation of the AI features and to provide guidance for corporate buyers on how to assess them. But this information has been aggregated across all of the vendors in the research, what about information on specific vendors? This is very interesting as well, especially if we are trying to differentiate between roadmap hype and delivered reality. Despite the level of AI rhetoric and marketing, the Learning System vendors are far from equal in both the scope of their AI roadmaps or the maturity of them – especially, how much is live and available for use by customers.

The final section of this paper is therefore aiming to provide a hint (or indicative view) of the vendor-to-vendor comparison, without naming names or discussing details. The following diagram shows an aggregated (but anonymised) view of the vendors covered in the 2025 analysis of the market.

Figure 9: Fosway AI Roadmap Reality – Learning Systems Market 2025

This reality graph shows how roadmap (feature breadth and ambition) compares with live reality (features live in production). Figure 9 tells a clear story of 'Who's Walking the Talk?'. In this chart:

- X-axis: shows the number of AI features already live with customers

- Y-axis: the breadth and ambition of their total AI roadmap across the LS functional model (including live)

Yet again, despite the AI market story, most vendors are clustered to the middle or left side of the model, showing they have more roadmap intent than current live reality. And out of 44 vendors included in the 2025 analysis, only a small number of vendors (three) show both higher roadmap and higher live delivery.

Where does your current supplier sit in terms of AI innovation,

and where do you want your next vendor shortlist to be?

Clearly, every buyer will have specific needs, but you should pay close attention to three areas, specifically:

- Those vendors who combine strong delivery today with a credible, ambitious roadmap. These are potentially the safest bets for organisations that want to scale AI strategically and quickly
- Vendors having moderate live capabilities but are visibly investing in catching up with an extensive roadmap. They are worth shortlisting - provided roadmap claims are backed by concrete delivery
- Those offering a sound live AI foundation with a slightly less ambitious roadmap than the other two groups. They are unlikely to differentiate your organisation, but they present low risk for buyers prioritising integration or consistency

By contrast, vendors in zones with only a small amount of AI capabilities might carry a higher risk even if they have an extensive story. Some of those are likely to have a 'lot of talk' and 'little walk' and might overstate their readiness or deeper capability to bridge a growing AI roadmap gap. Other vendors just simply lack any convincing AI roadmap at the moment but might be playing the waiting game and will come back stronger.

Note: Information on specific vendors is available on a private basis from Fosway, both for corporates wishing to assess their existing vendor choices or considering new ones.

Benchmarking AI Features across the LS Model

The other (and probably more important) way of assessing individual vendors against the LS model, is not just by looking at the total size of their AI roadmap, but by examining where that roadmap is focused. Vendor roadmap choices will align with specific parts of the LS model or specialist capabilities within the model. Knowing how your vendors are performing and competing in specific parts of the model is, therefore, highly relevant and a key part of the Fosway AI Market Assessment process.

Figure 10, below, is a sample AI Roadmap Benchmarking chart for a real (but anonymised) vendor, in this case shown at the overall level across all areas of the Fosway Functional Model for Talent Acquisition.

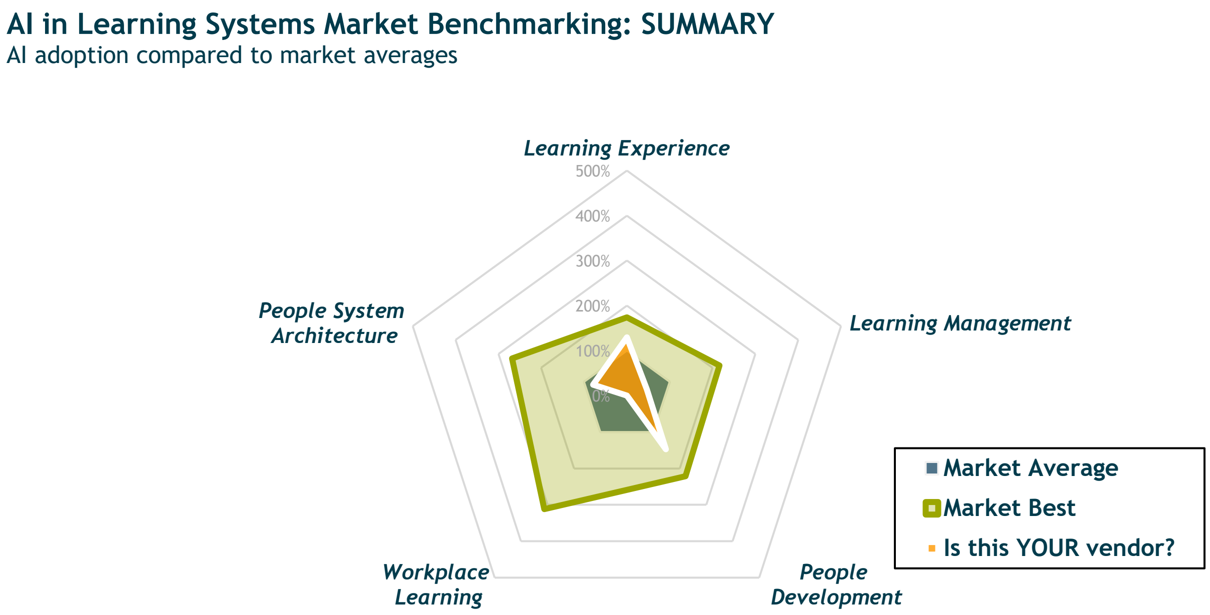

Figure 10: AI Benchmarking Chart – Anonymised Vendor vs. Market Average and Market Best

As you can see, Figure 10 shifts the lens from vision-versus-reality to assessing functional depth. The radar plot benchmarks a weighted vendor score for each element of Fosway's Learning System functional model, plotted against the market average for all vendors (blue, shown at 100%) and the current market best (green), i.e. the best rating from any vendor, capped at 500%.

This chart represents a real (and well-known) major vendor in the market. As you can see, there is a significant gap in most areas versus market best, and several areas where it is below market average too. The closer your provider sits to the bull's-eye of the market average, the more your vendor is operating at or below the competitive AI waterline. The wider the gap between your vendor's line and the green perimeter, the more opportunity cost you might be absorbing in terms of missing AI potential. That might result in ineffective search or personalisation capabilities, or lower grade AI-enabled content creation, curation, translation or tagging. Either way, it could have a significant impact on your future success in adopting AI to accelerate L&D's value to the business.

In Summary

Adopting AI in Learning Systems is no longer a question of *if*, but *what*, *when*, and by *how much*. Our research shows that, whilst vendor AI marketing rhetoric is loud, only a narrow slice of AI functionality is actually truly live or mainstream. A second tier of features is racing toward mainstream, and a third tier includes less common AI features that might yield a decisive edge if piloted with discipline.

In this rapidly evolving AI in LS landscape, L&D leaders will be forced to shift from passive listening or interest, to proactive, evidence-based orchestration of their AI agenda. Here are the five strategic actions that corporate buyers should now consider making as a response:

1. **Mandate delivery of Mainstream AI:** Don't pay extra for Mainstream AI features, as these capabilities are effectively non-negotiable in RFPs and are baseline operational AI expectations for your L&D function. This does not mean that every corporate buyer must prioritise them or will require them, as they may be superseded in the Next Wave.

2. **Plan and budget for Next Wave features:** These will likely become mainstream within 6-12 months. Prioritise pilots, governance readiness, and roadmap enforcement in contracts.

3. **Use Edge Advantage AI only where the business case is clear:** They are likely earlier in their evolution but could be highly differentiating if targeted correctly. Target high-pain, high-gain scenarios and keep rollouts tightly governed.

4. **Demand proof over promise:** Separate vendor AI ambition and marketing from demonstrable capability with demos, reference clients, and milestone-based SLAs.

And finally, and most importantly, get input from the analyst who has already done the research and can validate your thinking. Vendor benchmarking positions, roadmap assessment, and live delivery are all available as outputs of the research, as well as detailed AI feature segmentation and functional assessments.

Contact Fosway to discuss your specific vendor interests, or to help assess the AI readiness of your L&D team, processes and platforms. And join Fosway's Corporate Network to get access to further insights or to engage with Fosway's analyst team to help you accelerate and derisk your buying decisions.

Call to Action: AI Pressure-test your LS Operating Model and your Vendor Choices/Shortlist

The aim of the final section of this paper is to provide an indication of how the Fosway AI Market Assessment is valuable not only to understanding AI innovation and AI roadmap maturity, but also to understanding and comparing the capabilities of different vendors too.

Given the likely importance of AI to the future operating model and platforms for L&D teams, do you want to bet on a vendor that lacks a clear AI vision or appears to be late to the party and slow to deliver new AI capabilities?

The Benchmarking research (e.g. Figure 10 above) is shown at the overall level only, but our analysis looks at each of the main categories within the functional model in detail, too – **Learning Experience, Learning Management, People Development, Workplace Learning and People, Systems & Architecture**.

Contact us at corporateenquiries@fosway.com to discuss gaining access to the deeper data and insights, or to learn more about how your current vendors or your long- or shortlist compare.

About the Series: Fosway AI Insights

Fosway's AI Insights is a dedicated research programme designed to help HR and learning leaders, procurement teams, and technology buyers separate AI fact from fiction. It builds on the Fosway 9-Grid™ model by offering deep, segment-specific analysis of AI maturity, vendor claims, and adoption readiness across key HR domains.

The research programme includes specific research workstreams for each of our 9-Grid™ segments as well as an aggregated analysis model for strategic AI assessment and adoption. Key elements include:

- Detailed vendor AI roadmap assessment and analysis delivered by the AI Market Assessment papers, vendor specific AI analysis and benchmarking reports
- Quantitative corporate AI trends research data including AI readiness, feature adoption intention and the consequence of AI on budgets and operational priorities and teams
- Qualitative insights on corporate adoption of AI from detailed corporate profiling research, exploring corporate experiences, adoption intentions, and consequential actions for governance and risk management
- Segment-specific guidance for Talent Acquisition, Learning Systems, Digital Learning, Cloud HR and Talent & People Success and actionable recommendations tailored to procurement, IT, and HR stakeholders

Fosway's overall goal is to cut through the market noise, exposing what corporates and vendors are really doing with AI, and to provide corporate organisations with the insights, support and advice needed to invest in AI with clarity, confidence, and control.

AI is one of the fastest moving stories in Learning and HR more widely, so we are also continuing to build the research over time too. The AI Market Assessment paper is the first of a series of deliverables, and we have a second phase of the research commencing later this year too. But these papers can only provide a high-level view of the research, so if AI is an important issue for you, please contact us or join our Corporate Network to participate more directly in the research and get answers to your specific questions too.

Recommended Fosway reading

For further Fosway analysis on this topic, please refer to the following papers or resources.

- Digital Learning Realities Research - AI Infographic
- Fosway 9-Grid™ for Learning Systems
- Fosway Disruptive Insights – Large Enterprise Learning
- Fosway Insights: Will AI end the 'Netflix' experience
- Fosway Insights: Differentiating through AI is problematic
- Fosway 9-Grid™ for Digital Learning

Accelerate and De-risk

To talk to us about our research on learning and talent systems, or to discuss what it might specifically mean for your organisation please contact us directly.

We will use our independent expertise to provide you with the guidance you need to accelerate and de-risk your decisions. We have a wealth of experience, tools, research and profiles at our disposal. We don't have any products to sell, and we have no vested interest to bias your outcomes. We concentrate on pragmatic, independent advice.

Accuracy of Information and Warranties

The analysis and recommendations made in this document are based on the information currently available to Fosway and from sources believed to be reliable. Fosway disclaims all warranties as to the accuracy, completeness or adequacy of such information. Fosway will have no liability for errors, omissions or inadequacies in the information contained herein or for interpretations hereof.

What to do next

Make better HR and Learning buying decisions faster

Whether you are validating your requirements, or determining the best vendor shortlist, we have the data and tools you need to get you to the answers faster and effectively. That's what Fosway does.

Transforming HR and changing systems impacts your entire workforce. Now more than ever, these decisions need to be made quickly and to show a positive impact early. Fosway's Analyst team relieves the pressure by leveraging the latest research and decision-making tools, backed by thousands of data points and conversations that go behind every 9-Grid™.

Accelerate your search, de-risk your selection, make better decisions faster.

Our corporate engagement model is designed to help companies rapidly validate their strategy and solution options, as well as the vendors that best meet their needs. As the #1 European HR Analyst, we have the data and insight to provide answers quickly. And unlike consulting firms and vendors, we don't have a vested interest in what you choose – just that you make the best choice! Contact us to discuss becoming a member of the **Fosway Corporate Network.**

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**.

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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