



# 2025 Fosway 9-Grid™ for Cloud HR Ask the Analyst

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# Europe's #1 HR Industry Analyst

Founded 1996

In-depth corporate research on Next Gen HR, Talent and Learning

Analyst & advisory services to more than 3,000 European & International HQ multi-nationals and corporates

Independent vendor research and EMEA market commentary



## Get the inside story ... Fosway Corporate Membership

- ▶ Private Fosway network for corporate HR, Learning and Talent Leaders
- ▶ Deeper access to data and insights behind the 9-Grids™ and Realities Research
- ▶ Monthly virtual roundtables on key topics
- ▶ Private analyst time to address specific questions and decision input
- ▶ Priority for deeper input, workshops and accelerated buying support



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interest now**



**David Wilson**  
**CEO**



**Sven Elbert**  
**Head of Analyst Services**

## Session overview

- ▶ Click on the ‘**chat**’ button at the bottom of your screen
- ▶ Post your **questions within the chat** - send to ‘Everyone’
- ▶ Play nicely!
  
- ▶ We will start with some introductory content
- ▶ Jon will ask David and Sven your questions throughout
- ▶ A recording will be made available afterwards

## Research behind each 9-Grid™

*Creating a new 9-Grid™ is normally a 3+ year process on top of pre-existing background research:*

- ▶ Corporate research network members / roundtables
- ▶ Corporate enquiries and private advisory insights
- ▶ Public research process/surveys
- ▶ Structured data capture - functional and non-functional
- ▶ Independent vendor briefings/demonstrations
- ▶ Meetings at user conferences and industry events
- ▶ Formal customer reference process

## 9-Grid™ Inclusion Criteria

- ▶ Vendors included in the end 9-Grids™ are aligned to relevance to corporate buyers (EMEA HQ enterprise)
- ▶ Based on:
  1. The main vendor options in **active use** in Fosway's corporate research network
  2. The main vendor options in **active consideration**/buying process in above
  3. Innovator companies Fosway believes have the **potential to achieve** 1 or 2

*No 'pay to play' - Vendors cannot buy onto the 9-Grid™  
(or decline to be included)!*

## Research behind each 9-Grid™

- ▶ Primary analysis point of view is shaped by **what customers say about vendors** and how they perform
- ▶ **Vendor input is secondary**, and used to cross-validate assumptions and to deepen insight re vendor strategy and their roadmap etc.

### IN SUMMARY:

- ▶ We have lots of customer insight, hard data, and validated assumptions from the market!

# More than a diagram ...

## Market Trends

Cloud HR grows steadily, as suites sell deeper and capture AI budgets

HR market growth across EMEA is slower and steadier than before. Vendors are leaning into their installed bases and expansion comes from attaching adjacent modules, activating underused features and tightening

cross-suite even as AI time pays adjacent investment HCM suite

## Solution Trends

AI in Cloud HR solutions provides vendors edge advantage

Across Cloud HR, most providers are still slower to release generative AI features than the market hype suggests. Large HCM suite providers invested early and more deeply, but most smaller players follow their own pace. Given the complexity and scale of HCM, even embedding basic generative AI across a main sub-processes is a major undertaking. Fosway's upcoming AI Market Assessment for Cloud HR will provide further details, but today there is far less vendor consensus on where to apply AI in Cloud HR than there is in both talent acquisition and learning systems. Despite this, a small number of providers have created an 'edge advantage' for themselves, leaving others to play catch-up. For buyers not already with these AI leaders, the choice is not simple; do they switch horses or wait for their current vendor to close gap and be seen as lagging on AI adoption? For most though, 2025 was not the year to replace their current HR system. Even if you feel you can wait, you should ensure you have clarity on which AI capabilities you most need. Think about stress testing your current provider's roadmap to be confident that they will deliver within the next 12 to 18 months; if not, maybe it is time to look elsewhere.

## 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 relative to the market. Suites in the same 9-Grid™ zone should be considered materially equivalent. Suites in the same 9-Grid™ zone should be considered materially equivalent to the market, not vs other vendors in the same zone. See later in this report for more information on the assessment process and dimensions of this 9-Grid™. For more information see the [Trajectory Guide](#).

### Specialists

Solution	9-Grid™ Rating	Trajectory	TCO
Advanced HCM and Workforce Agility	Strategic Challenger	Consolidating	Medium
HR Analytics	Potential Challenger	Excellent	Medium
Country Payroll and Global HCM	Core Leader	Consolidating	Medium
Internal Delivery	Core Challenger	Excellent	Low

## 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 Future Trajectories across the market.

9-Grid™ is unique, because the model contains value in all of 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 and talent management markets over the past 20+ 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

## The 9-Grid™ variables for Cloud HR

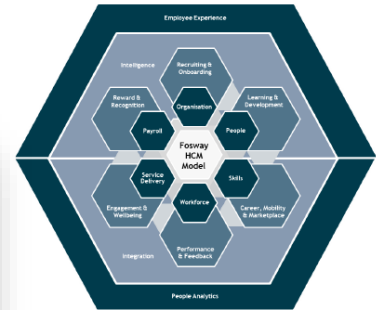
What do potential, performance, presence and total cost of ownership mean in the context of Cloud HR?

### Performance

This focuses on customers' choices: does the solution get short-listed, does it win, does it deliver and are customers happy? This is viewed through the lens of large international corporates and is taken from the experiences Fosway Group has gleaned of its Corporate Research Network and general market briefing. This may not, therefore, necessarily reflect the experiences of smaller and mid-sized organisations.

### Potential

In the Cloud HR context, Scope covers both core HR and transformational talent processes, as well as enabling enterprise services as represented by the Fosway HCM model below.

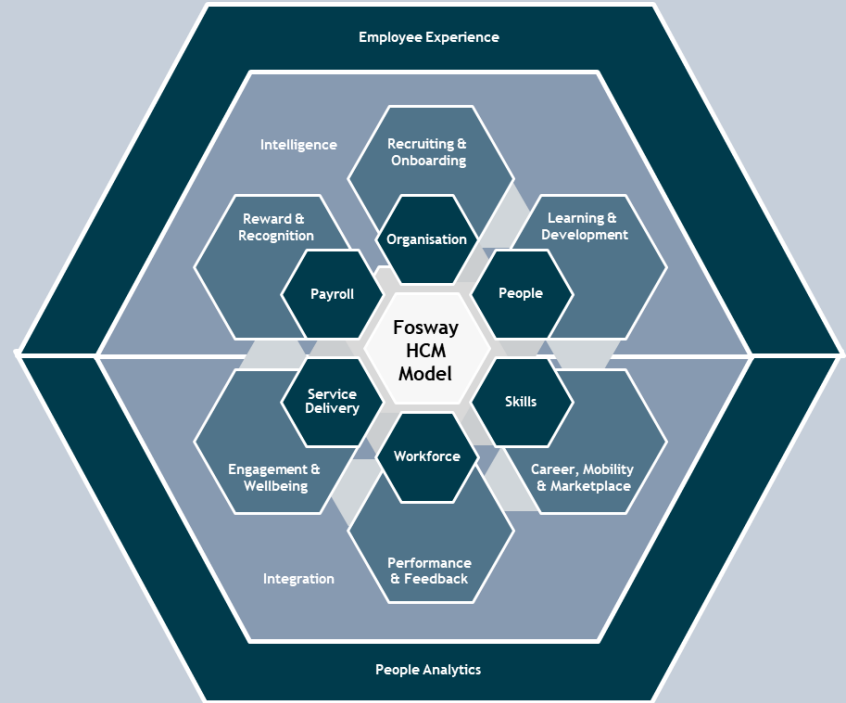


Fosway HCM Model 2020  
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**We always recommend you download and read the full reports**

# Understanding Cloud HR

- ▶ **People Operations & People Management**
- ▶ **Talent & People Success**
- ▶ **Enterprise Context**
  - Integrations
  - Intelligence
  - Analytics
  - Experience

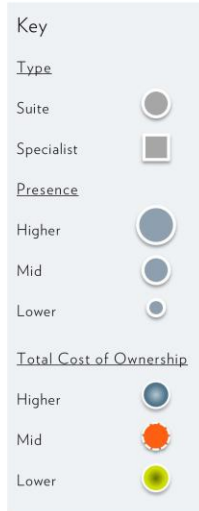


*Fosway HCM Solution Model*

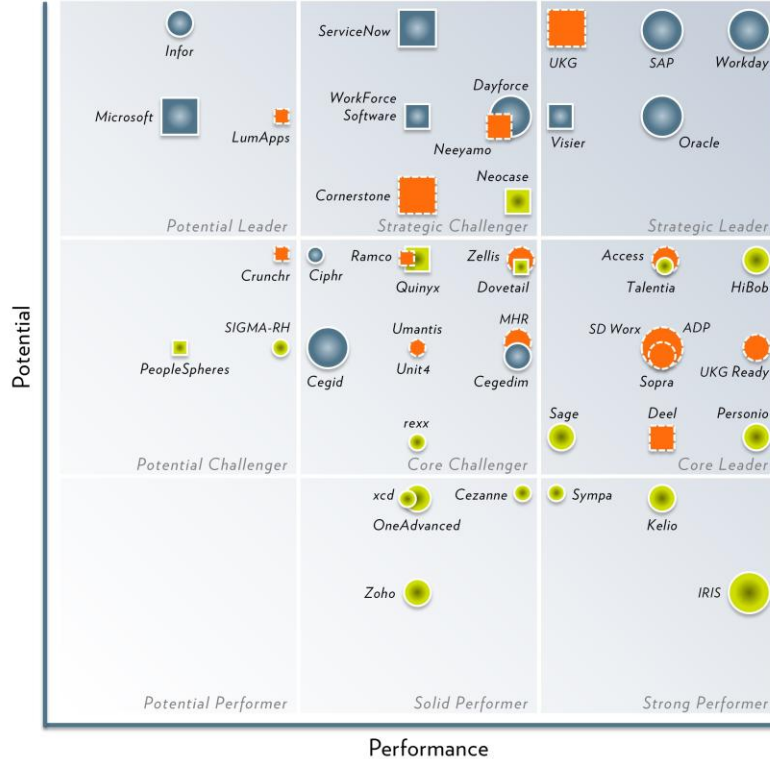
## Fosway 9-Grid™

### Cloud HR

2025



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## Key Headlines

Suites sell deeper and capture AI budgets

HR shifts to work design

AI in Cloud HR provides vendors edge advantage

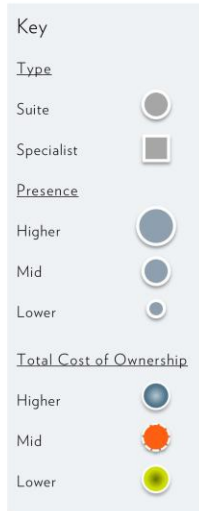
AI agents emerge as next test for HR

Payroll becomes low touch

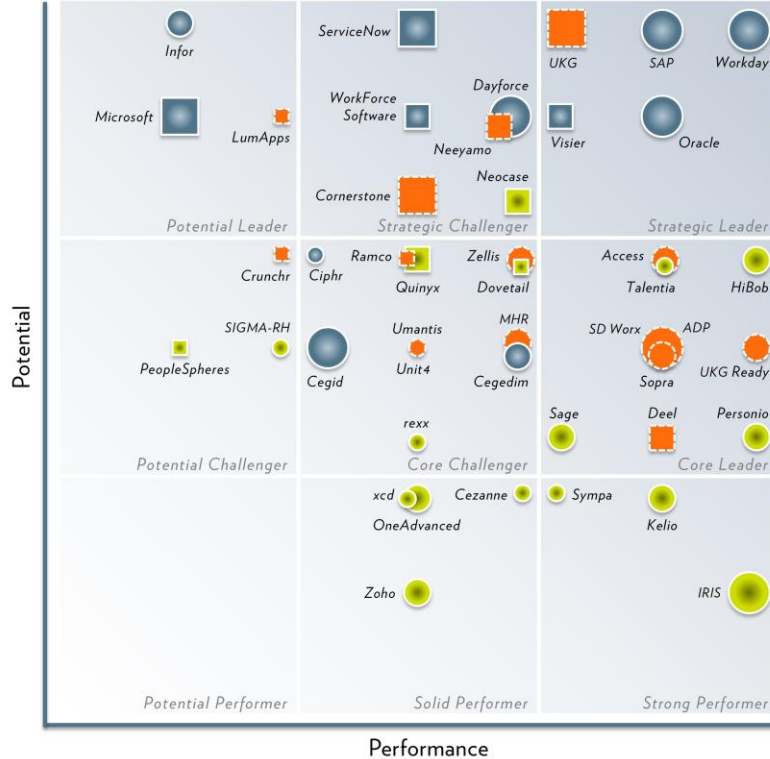
# Fosway 9-Grid™

Cloud HR

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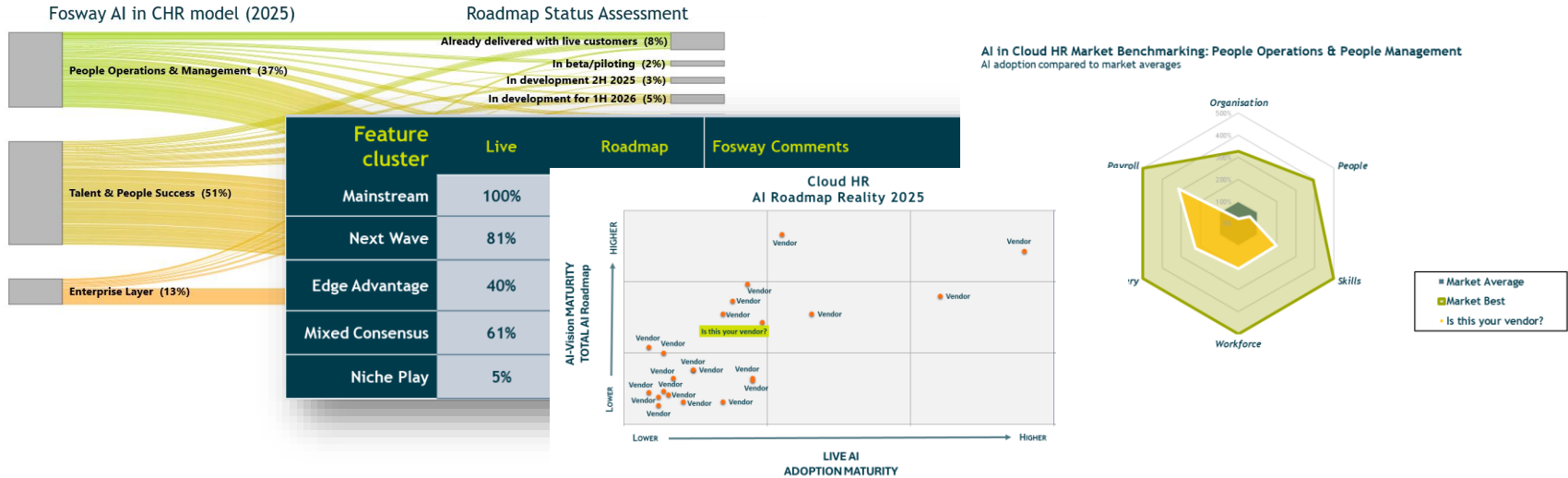


Ask the Analyst ...

So what would YOU like to know?

# Strategic research project: AI in HR, Talent & Learning

*Get beyond the hype: A deep research project looking at the reality of AI in HR, and the benefits that HR teams are realising from AI.*



For corporates interested in deeper insights or input, contact [jack.smith@fosway.com](mailto:jack.smith@fosway.com)

## And remember ... the research is just the start ...

- ▶ Join **Corporate Membership** for inside access to more detailed research, benchmark reports, private corporate roundtables, and analyst time
- ▶ Fosway's **Accelerated Buying Support** to align stakeholders, validate solution strategy, shortlist vendor options, and accelerate and derisk buying decisions



**Register your  
interest now**

*Our research shows that through standard procurement processes, only 50% of HR Tech buyers feel they chose the right vendor solution, and only 50% of those implement well and achieve clear success*

## Get involved:

- ▶ Read the full report for the 9-Grid™ for Cloud HR  
<https://www.fosway.com/9-grid/cloud-hr/>
- ▶ Meet the Analysts at UNLEASH World, 20-22 October
- ▶ Scan the QR code to take part in our HR REALITIES survey  
<https://www.surveymonkey.com/r/HHR2025FW>
- ▶ Visit the Fosway Knowledge Centre  
<https://www.fosway.com/knowledge-centre/>
  - Trajectory Guide
  - Introduction to the 9-Grid™
  - Search by category/topic/media type
  - Fosway analyst knowledge curated in one location





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