

EXCERPT

Worldwide IT Education and Training 2008 Vendor Analysis: IDC's MarketScape Model (Excerpt from IDC #209799)

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IN THIS EXCERPT

The content for this excerpt was taken directly from the IDC Competitive Analysis Report, *Worldwide IT Education and Training 2008 Vendor Analysis: IDC's MarketScape Model*, by Cushing Anderson and Susan Lee (Doc#209799). All or part of the following sections are included in this excerpt: IDC Opinion, In This Study, Future Outlook, Vendor Summary Analysis, Learn More and Synopsis. Also included are Figures 1 and 3.

IDC OPINION

This IDC study introduces the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This study assesses a number of technology vendors participating in the IT education market as a line of business (LOB) to support the sale of their technologies. This evaluation is based on a comprehensive framework and set of parameters that assess vendors relative to one another and to those factors expected to be most conducive to success in a given market during the short and the long term. As one would expect of market leaders, overall, these vendors performed very well on this assessment. Key findings include:

- ☒ Delivery and portfolio of offerings are strengths. Vendors were universally strong at integrating a variety of delivery options in their portfolio and were consistently improving their offerings as new approaches become viable.
- ☒ Education services and collaborative development are generally weak. Only a few vendors have a robust or credible education services capability. Additionally, few vendors leverage the collaborative development for their training offerings.
- ☒ Selling education is consistently most weak. Technology vendors have an unsophisticated view of selling education services. Few vendors consider an enterprise sale of education services a "consulting engagement." A small shift in selling focus will likely return dramatic changes in education revenue, customer success, and customer satisfaction.

IN THIS STUDY

This IDC study introduces the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy.

This study assesses a number of vendors participating in the IT education market. This evaluation is based on a comprehensive framework and set of parameters that assess vendors relative to one another and to those factors expected to be most conducive to success in a given market during the short and the long term. The strategies axis represents a three- to five-year span and future perspective, while the capabilities axis represents current product and go-to-market execution. Market share of each vendor is indicated by the size of the circle representing the vendor, and the vendor year-over-year growth rate is indicated by a plus, neutral, or minus icon next to the vendor name, representing growth in excess of, the same as, or at a slower pace than the entire market.

This study is composed of two key sections: The first is a definition or description of what characteristics IDC analysts believe make a successful IT training line of business of a technology vendor. These characteristics are based on buyer and vendor surveys and key analysts observations of industry best practices.

The second part is a visual aggregation of multiple vendors into a single bubble-chart format. This display concisely displays the observed and quantities scores of the 13 reviewed vendors.

The document concludes with IDC's essential guidance to support continued growth and improvement of these vendors' offerings.

Introduction

Value of IT Education

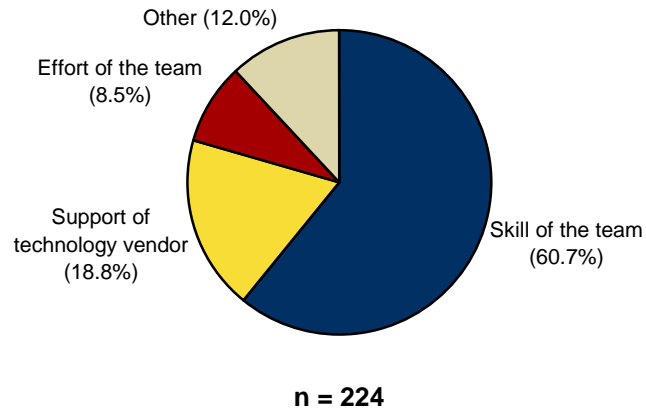
Aside from the technology, the most important factor in determining the success of a particular IT solution is the skill of the IT functional team. In fact, from a survey completed in 2007, we found over 60% of IT managers believe that the skill of their teams is the most important success criterion for critical IT functions (see Figure 1).

When all factors that impact team performance are considered (including turnover, motivation, installed technology, experience, certification), training and team skill have the most significant impact. Consequently, well-trained teams derive more benefit from their technology investments than undertrained teams. When teams are sufficiently trained, their functional performance can be dramatically improved.

FIGURE 1

Key Success Factors for Critical IT Functions

Q. Which of the following factors contributed most to the success of the technology function?



Source: IDC's Performance Impact Study, 2007

FUTURE OUTLOOK

IDC MarketScape IT Training Vendor Market Assessment

IDC's vendor assessment for the IT training LOB market represents IDC's opinion of which vendors are well positioned today through current capabilities and which are best positioned to gain market share over the next few years. Positioning in the upper right of the grid indicates that vendors are well positioned to gain market share. For the purposes of discussion, IDC divided potential key strategy measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

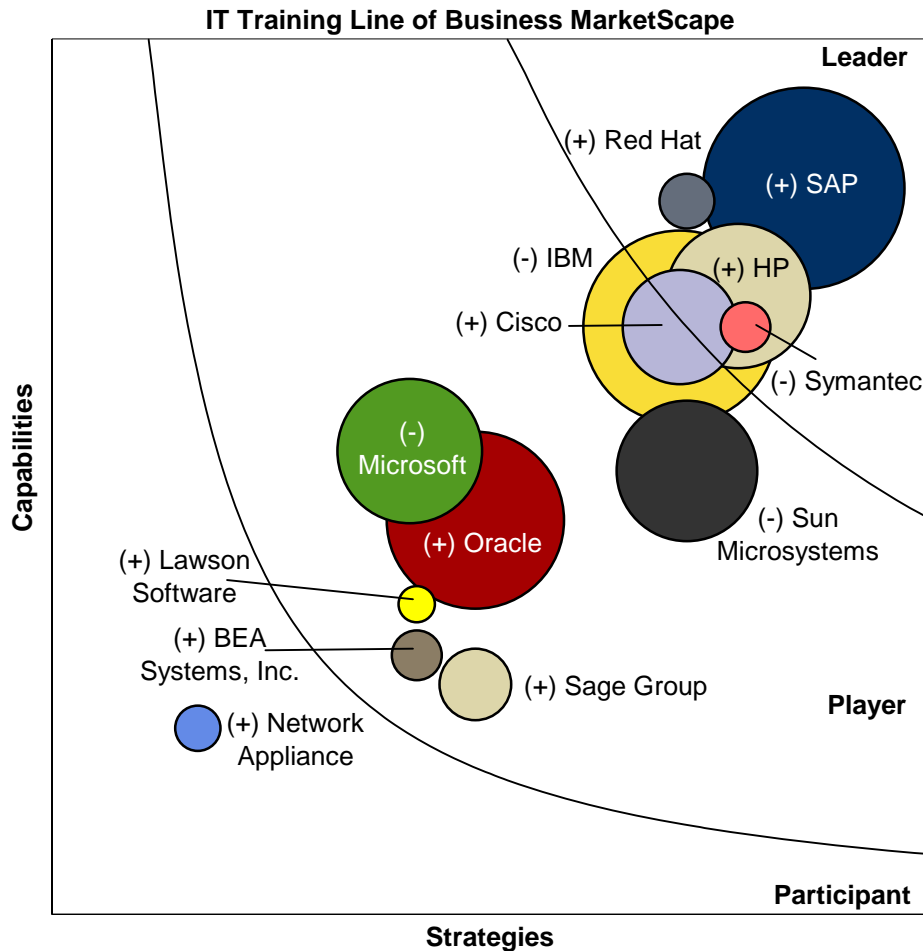
Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans for the future, in this case defined as the next three to five years. Under this category, analysts look at whether or not a supplier's strategies in various areas are aligned with customer requirements (and spending) over a defined future time period.

IDC described above the most critical criteria for positioning on these two axes.

Figure 3 shows each vendor's position in the vendor assessment chart. The vendor's market share is indicated by the size of the bubble, and a (+), (-), or () icon indicates whether or not the vendor is growing faster, slower, or even with overall market growth.

FIGURE 3

IDC MarketScape IT Training Vendor Assessment



Source: IDC, 2008

Market Strengths – Delivery and Portfolio

Vendors were universally strong at integrating a variety of delivery options in their portfolio and were consistently improving their offerings as new approaches become viable. Cisco, Red Hat, SAP, and Sun among others leverage remote labs to provide practical exercises that closely resemble work tasks. And a wide variety of vendors offer certifications for integrators, operators, and end users.

eLearning and instructor-led formats are equally available, though asynchronous eLearning is increasingly giving way to synchronous virtual instructor-led training (v-ILT) for most of these vendors. Content is increasingly being formatted for searchability, though many vendors have yet to expose their content to broader enterprise search engines.

The vendors, too, are nearly universally committed to expanding their offerings to include training relevant to a broader client audience, often including process training in addition to application training.

Vendor Summary Analysis

Red Hat

Training is available for each release and is updated for every dot release. Uniquely, Red Hat offers most training during the beta-test phase of its product release cycle, facilitating user and professional services community input into the quality and format of its training offering. Because of its community-oriented product development, Red Hat is particularly collaborative in its training development and evaluation. Regular knowledge sharing occurs between Red Hat University, services on-boarding teams (early users of most training), engineering/core teams (engineering subject matter experts), and the Red Hat training and certification team (training delivery).

LEARN MORE

Related Research

- ☒ *Moral Monday: Is Rent A Cert a Good or Bad Business Decision ... Discuss* (IDC #lcUS20910807, October 2007)
- ☒ *Worldwide and U.S. IT Educational Services 2007–2011 Forecast: Skill Demand Will Drive Growth* (IDC #208011, August 2007)
- ☒ *Worldwide Virtualization Services 2007–2011 Forecast* (IDC #206724, May 2007)
- ☒ *IT Training Update: Update Forecast and Training Predictions* (IDC #206286, April 2007)
- ☒ *Accenture: Right [Revenue] Momentum, but Wrong [Employee] Trajectory* (IDC #lcUS20630707, April 2007)

Synopsis

This IDC study introduces the vendor assessment model called IDC MarketScope. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. IT presents IDC's analysis of 13 vendors' relative capabilities across 30 dimensions and nearly 80 attributes. It contains three sections. The first is a definition or description of

what characteristics IDC analysts believe make a successful IT training LOB of a technology vendor. These characteristics are based on buyer and vendor surveys and key analysts' observations of industry best practices. The second part is a visual aggregation of multiple vendors into a single bubble-chart format. This display concisely displays the observed and quantities scores of the 13 reviewed vendors. The final section briefly explains the key observations that resulted in a vendor's position in the vendor assessment graph.

"Education customers can be confident that their technology vendors are providing very good instruction in formats that are consistently improving. The vendors are weakest at selling training and position training to ensure their clients maximize the benefits of the technologies they purchase." — Cushing Anderson, program vice president, IT Education and Training services research

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