

EXCERPT

IDC MarketScape: Worldwide IT Education and Training 2009 Vendor Analysis

Cushing Anderson

IN THIS EXCERPT

This Excerpt is taken from the IDC Competitive Analysis, *IDC MarketScape: Worldwide IT Education and Training 2009 Vendor Analysis* (document #216830), by Cushing Anderson. All or part of the following sections are included: IDC Opinion, In this Study, Future Outlook and Learn More. Also included are Figures 1 and 3.

IDC OPINION

This IDC study represents 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 are universally strong at integrating a variety of delivery options in their portfolio and are consistently improving their offerings as new approaches become viable.
 - **Education services are generally weak.** Only a few vendors have a robust or credible education services capability. Training LOBs are in a perfect position to be credible advisors to IT departments on staffing, skill requirements, and best practices for IT management.
 - **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.
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IN THIS STUDY

This IDC study uses 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 10 reviewed vendors.

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

Introduction

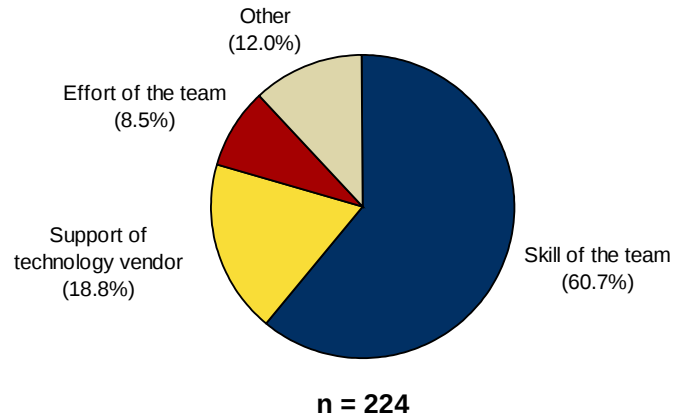
Value of IT Education

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 2008, 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).

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, 2008

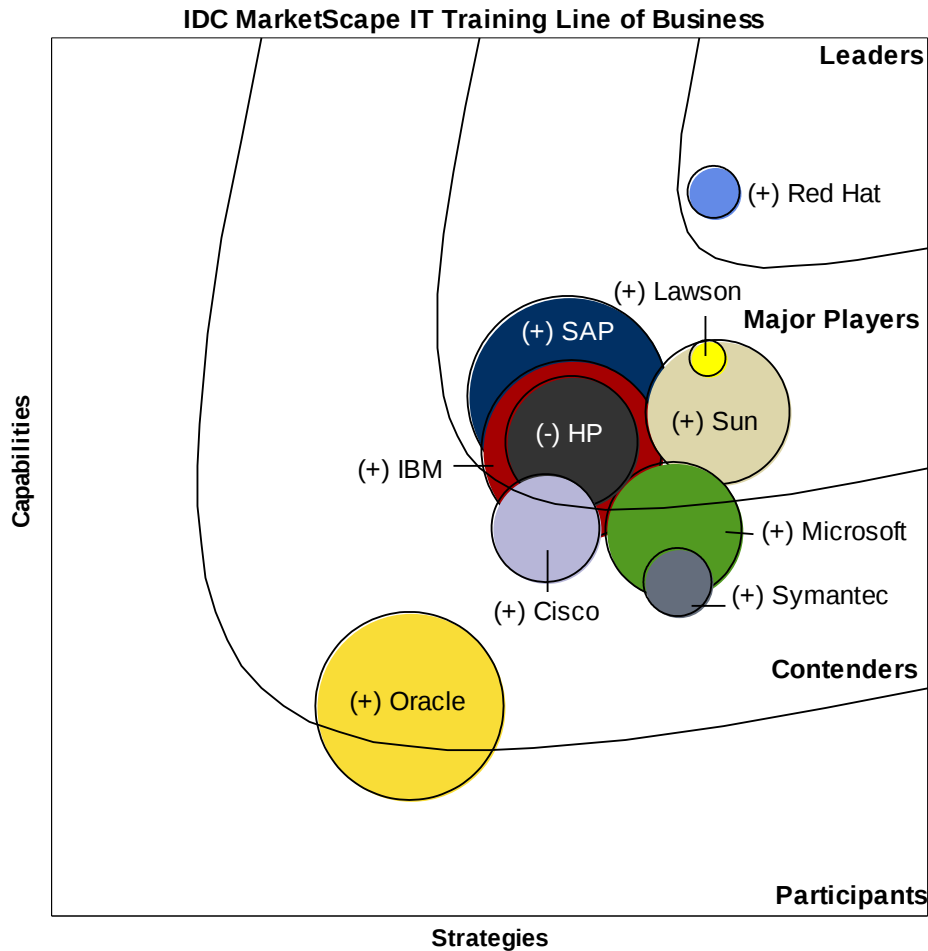
FUTURE OUTLOOK

IDC MarketScape IT Training Vendor Market Assessment

The IDC MarketScape vendor analysis model for the IT training LOB is designed to provide an overview of the competitive fitness of technology vendors in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that result in a single graphical illustration of each vendor's position within a given market. The capabilities score measures vendor product, go-to-market, and business execution in the short term. The strategies score measures alignment of vendor strategies with customer requirements in a three- to five-year time frame. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral, or minus icon next to the vendor name (see Figure 3).

FIGURE 3

IDC MarketScape IT Training Vendor Assessment



Source: IDC, 2009

Market Strengths — Delivery and Portfolio

Vendors are universally strong at integrating a variety of delivery options in their portfolio and are 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

Red Hat is the IDC MarketScape leader for IT education. Consistent with Red Hat's perception that training is a wedge to achieve broader adoption of its offerings, training is available for each release and is updated for every dot release. Uniquely, Red Hat offers broad release of 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). Red Hat leverages advisory boards to help maintain the relevance of its certifications and engages with internal (as mentioned previously) and external communities (such as a Red Hat Certified Engineer [RHCE] focus groups). The process revolves around "DocZilla" — the complete compendium of current Red Hat technical and training data contained in a broadly accessible content management system.

Its certifications are primarily role based, often crossing the functional use of one or more products.

A recent initiative to increase virtual ILT delivery has been successful and popular.

Consistent with its heritage as an open source community, Red Hat Training has developed additional revenue through repurposing content and intellectual property in a variety of ways that are paid for and leveraged by other groups within Red Hat. Red Hat Training impacts future Red Hat deployment: Red Hat reports that in the Fortune 250, enterprises with at least one RHCE on staff result in six times more business to Red Hat than those without any RHCE on staff. IDC believes this reflects the enterprise readiness value of training and certification.

LEARN MORE

Related Research

- *Economic Crisis Response: Worldwide and U.S. IT Education and Training 2008–2012 Forecast Update — Picture Is Clearer and Bleak* (IDC #214700, November 2008)
- *Worldwide and U.S. Business Process Outsourcing 2008–2012 Forecast: Market Opportunities by Horizontal Business Process* (IDC #214605, November 2008)

- *Worldwide and U.S. IT Certification Training and Testing 2008–2012 Forecast* (IDC #213828, August 2008)
- *Worldwide and U.S. Corporate eLearning 2008–2012 Forecast* (IDC #212589, June 2008)
- *IDC's Worldwide Corporate Education Taxonomy, 2008: Framework and Research Guide* (IDC #212334, June 2008)
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Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of a number of vendors participating in the IT education and certification market. The IDC MarketScape is a vendor assessment methodology and tool designed to assess vendors relative to one another and to those factors expected to be most conducive to success in a given market. This evaluation is based on a comprehensive framework and a 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 long term.

"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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