IDC MarketScape: European IT Training Services 2021 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES HPE

IDC MARKETSCAPE FIGURE

FIGURE 1

European IT Training Services

IDC MarketScape: European IT Education and Training 2021

Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition and scoring criteria.

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IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: European IT Training Services 2021 Vendor Assessment (Doc # EUR148400521). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study utilizes the IDC MarketScape vendor assessment model. This research is a quantitative and qualitative assessment of the most important criteria for IT training buyers and how training firms perform against those criteria. This study assesses the capabilities and strategies of the more significant IT training vendors in Europe. This evaluation is based on a framework and set of parameters expected to have the greatest impact in providing training services during the short term and the long term. A significant and unique component of this evaluation is the inclusion of IT training buyers’ perception of the key characteristics and the capabilities of these training providers. As expected, market leaders performed very well on this assessment. Key findings include:

- Instructor quality, quality and relevance of the material, and the training provider’s "authority" are the most important characteristics of successful training services.
- Delivery options did not have a significant impact on training provider success in this evaluation (except the availability of self-paced elearning, which was considered very important).
- Breadth of training content and relevance to role are almost as important as training quality, suggesting that while some training buyers are seeking training services from fewer providers, in other cases, organizations are seeking technical depth and expertise.
- Many firms participate in this market, but a few firms stand out in terms of capability and training strategy.
- Europe has a wide variety of languages and cultures. But in IT training services, the importance of having local delivery and a local base is much less than the quality of instructor and material. Language remains an important factor, and most suppliers in this IDC MarketScape have this capability.
- IT process training has become the most significant area in which the capability of training providers are less than buyers’ expectations.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

There is a large number of training providers in Europe, most of which are operating on a local or regional scale, but all of them are contributing to the development of European ICT skills. This IDC MarketScape analyzes IT training firms with portfolios that are appropriate to organizations considering "significant transformation initiatives." Therefore, the criteria for inclusion are organizations with a) breadth of offering, b) size and breadth of offering that can significantly contribute to European digital transformation, and c) significant technology expertise important to transformation initiatives. This assessment is designed to evaluate the characteristics of each firm as opposed to its size. While some IT training buyers/learners may prefer to select training providers that have broad portfolios spanning multiple technology areas, specialist firms may also be highly valued if their offerings, brands, or content are particularly relevant. It is conceivable that specialty firms can compete with multidisciplinary firms on equal footing.
As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular training initiative. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for a training need.

**ADVICE FOR TECHNOLOGY BUYERS**

Training IT professionals is a challenging activity – there are time and cost pressures; IT professionals have different skill levels, interest levels, and career aspirations; and they work on different combinations of technology. However, there are several elements of IT training that should dominate the selection criteria for IT training selection:

- **Consider importance and priority.** European IT skills are becoming a limited resource, and the lack of skills in specialist roles is a significant threat to areas of digital transformation. IT training will serve two purposes – it will improve the skill levels in the organization and tie them better to the business strategy, and it will improve employee engagement. Buyers of training services should consider both aspects and tie the training strategy to the business strategy.

- **Choose convenience.** Training must be attended or taken by willing (or at least not distracted) students; therefore, training convenience for the team or individual must be a primary consideration. Convenience may imply more instructor-led training, more self-paced elearning, more onsite or more offsite training, or a particular combination of delivery options. Thus, strongly consider the selection of training based on the preferences, work schedules, and availability of target learners.

- **Compare the quality of instructors.** For instructor-led programs, whether online or classroom based, instructor quality is essential. Request evidence of quality instructors and understand which instructors will teach each specific class.

- **Evaluate training content quality.** Training material "authorized" by the technology vendor or third party is often of higher quality and more current than material developed by other sources. If training on specific technology equipment, seek training provided by authorized training providers. However, some "unauthorized" providers provide exceptional training services, so in addition, consider how the training content is developed and how it is maintained before making a final decision.

- **Evaluate training content for reference value.** Because of the complexity and breadth of most IT infrastructures, leveraging training material after training is complete as a reference for routine or exceptional administration of gear is essential. Examine training and supporting material to assess its value as a reference source for IT professionals while they perform the tasks related to their respective roles.

- **Explore availability and breadth of labs and simulations.** Labs and simulations are critical training aids. The use of high-quality labs after a course is complete to refresh skills or to experience unfamiliar situations can dramatically increase retention and IT professional competence.

- **Evaluate the need for IT process training.** IT process training is in high demand, and buyers should evaluate whether the capability is a necessity for the organization, and consider providers' capabilities.

- **Evaluate the need for local language.** English is still a dominating language in European IT. Training providers typically have the capability to provide courses in local language, but the IT employer and employee market is becoming increasingly European. Moving IT training and certification to one of the more widely spoken European languages improves accuracy and timeliness of training.
VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

HPE Education Services

According to IDC analysis and buyer perception, HPE Education Services is positioned in the Major Players category in the 2021 IDC MarketScape for IT training services in Europe.

HPE Education Services provides innovative, live, and on-demand training learning. HPE Education training and certification courses are designed for IT leaders, teams, and administrators across all industries and cover an array of subjects including HPE technologies, IT topics (cloud, cybersecurity, AI, DevOps), and personal development and productivity. Training can be personalized and packaged by individual, group, or company. HPE Education offers flexible continuous learning options, a broad catalog of course offerings, and world-class instructors.

HPE offers three primary certifications in Hewlett Packard Enterprise products and solutions – Sales, Technical, and Product certifications – along with Workload Specialist credentials. Certifications verify that a professional has achieved a baseline level of competence in the topic. HPE's Workload Specialist credentials help learners build solution skills and give learners the ability to display competency with HPE solutions. HPE certifications are achievable through partners, unaffiliated consultants, and customers.

HPE Education is a division of Hewlett Packard Enterprise (HPE), an American multinational enterprise information technology company based in Houston, Texas.

HPE Education Services' features and solutions include:

- Multiple delivery formats, including continuous learning through HPE Digital Learner subscriptions, vILT, ILT, and individual eLearning courses.
- HPE training credits. HPE Education Services offers three types of HPE training credits. Learners or learning administrators can buy training units for a particular technology (for example, cloud or security), so learners/administrators don't have to plan upfront about which specific courses they will need or who should attend.
- HPE certification or credentials. HPE offers three primary certifications – Sales, Technical, and Product certifications – along with Workload Specialist credentials. Learners with certification or credentials can promote their skills and knowledge online using HPE’s digital badges.
- Self-study materials. HPE Press offers a variety of self-directed learning materials to help learners prepare for certification (Study Guides, Self-Directed Labs, and Practice Tests).
- HPE Tech Pro. HPE Tech Pro provides access to HPE assets, tools & team members, skills development, and expanded professional networks.
- Personalized learning paths based on job role and expertise level.
- Customized training for companies. HPE Education can design a custom curriculum either virtually, online, or in-office.

HPE Education offers topics including hybrid IT with cloud, mobile & IoT, IT for data & analytics, cybersecurity, data analytics, Microsoft, Linux, servers, storage, VMware, and HPE GreenLake.

In Europe, HPE Education offers courses in English, French, German, Italian, Spanish, and Russian, or it relies on its local learning partners to deliver the training.
**Strengths**

Clients think HPE Education produces authoritative content, and they appreciate the breadth of its content coverage. The company is often a preferred provider for its clients, particularly regarding its certification test preparation offering around HPE technologies, but also due to its partnership with other technology vendors.

Clients appreciate HPE Education's offering of additional training services such as helping clients assess training needs and customizing content or learning paths. The company integrates labs into a range of its content and instructions that vary by length.

Part of HPE Education's strength is that it offers content for specific vertical industries, for which it leverages external experts. Its refresh and update process and content improvement programs are robust, its packaging and pricing approaches are varied, and it is seen as reasonable by clients.

**Challenges**

While HPE Education has a strong portfolio of technology training, its IT process training offering could be approved. Similarly, when looking at training modalities, its vILT approach in Europe is overwhelmingly in English with some selected local language offerings. In addition, it could expand its self-paced learning offering, and there is also room to strengthen its end-to-end service offerings, particularly outside the largest European countries (e.g., the U.K., Germany, and France).

**APPENDIX**

**Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key 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 decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed. For this evaluation, we are measuring "student contact hours" as an indication of market share. We asked vendors to estimate the number of students who took a course in the past year times the average length of the course. For self-paced courses, we also asked them to consider the average time a student spent in an elearning course. The result is a "share of IT training" consumed that each vendor represents.

**IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and
interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor’s characteristics, behavior and capability.

**Priorities of IT Training Buyers’ Perception as an Input**

A significant and unique component of this evaluation is the inclusion of the perception of IT training buyers of the content and delivery quality of these training providers. This insight is captured in a broad-based random survey and reveals key insights into the capabilities of the individual firms.

The broad survey also provides key insights into the priorities of IT managers and IT training managers of what makes excellent training experiences. We asked IT training buyers to describe the importance to their organizations of a series of training characteristics, asking them to assign a rating from 1 to 5, with 1 being “not a factor” in their selection decision and 5 being a “very significant factor” for their decisions. Using the mean averages for each driver, we ranked the drivers by relative importance.

We also asked IT training buyers about how well each of their training providers performed on each characteristic. When combined, this illustrates both the importance and general performance of IT training providers.

The results are shown in Figure 2.

**FIGURE 2**

**IT Training Selection Criteria and Performance in Europe**

Q. How important are each of the following characteristics of the training provider? (x-axis)
Q. How would you evaluate your training vendor on the following characteristics? (y-axis)

Source: IDC, 2021
Market Definition

Generally, IT training and training services include the content processes or structures that support employee, client, or supply chain development to meet identified business requirements related to developing, administering, or using information technology.

The IT training market is predominantly focused on teaching customers (and partners) about products and processes. A well-trained user base or ecosystem benefits IT vendors along three dimensions. First, it helps assure that learners understand the product's capabilities (and limitations) and ensure the learners and their companies receive the expected benefits from the installed technology. Second, a skilled ecosystem helps maximize technology utilization that each customer IT organization can access skilled employees (or can train readily train them). The third dimension of IT training is to support technology partner skills during the selection, implementation, and management of a given technology. These three legs can be seen as "enterprise readiness," "market readiness," and "partner readiness" for a technology. While technology adoption can be severely impacted by the degree of market readiness, of most immediate value to technology vendors is a focus on enterprise readiness. At the same time, some activities help a vendor simultaneously support market, partner, and enterprise readiness.

To maximize enterprise readiness to achieve the benefits of systems and technology, an organization's workforce must be well skilled. Deploying, managing, and repairing a technology or solution without sufficient skills reduce the benefits organizations receive from their technologies. Training vendors have developed training lines of business to provide training services to their clients. These training lines of business have several functions that the vendors leverage to varying degrees:

- Technical deployment education (project team training)
- End-user training
- Certification preparation
- Learning services supporting IT organizational development

Technical Deployment Education

Technical deployment education supports the technical implementation and integration of a product into a technical environment. The audience is typically IT professionals who will deploy or install the technology. This type of training is important before the software is available within an enterprise and often involves unique technical capabilities that are only important during the deployment phase of a product implementation. From a vendor's perspective, technical education for an individual client has a peak-and-valley profile in which each client either is or is not in a deployment phase. This type of education supports initial enterprise readiness.

End-User Training

End-user training focuses on the use and management of the technology. The audience is typically larger than the deployment training. The audience may be either IT professionals — in the case of infrastructure technologies, IT management software, or application development software — or it may be any other user of applications such as financial management or inventory control software. This type of education is critical at the early stages of a deployment to ensure the appropriate population is prepared to use the new capabilities or functions the software enables. This type of training is also important during the ongoing life cycle of the application as new users are exposed to the application because of promotion, hiring, or the expanding use of the application within the enterprise. While ongoing training often occurs at a much lower volume or intensity than rollout training, the audience and the content are often very similar. The timing profile for end-user training is at a high intensity during an organization's deployment and then at a much lower intensity.
between upgrades, but clients almost never have "zero" training needs. End-user training almost exclusively supports ongoing enterprise readiness, but over sufficient time, trained users represent a market readiness for technology dominance.

**Certification Preparation**

Certification preparation is most focused on user or technician readiness and attestation to capability. While consultants and partners leverage technical certification training, individual employees are the largest and most dynamic portion of the audience for certification training. Certification training occurs throughout the product life cycle – early in the release and late – depending on type of product and the market demand for skill attestation. Because the largest portion of the audience are individuals, the degree of certification demand and adoption, often measured by the related preparation training, is used by technology vendors to indicate market readiness for a product.

**Learning Services**

Learning services, supporting IT organizational development, require a more complex relationship between the technology vendor and its clients. These services include a consultative relationship in which the technology vendor performs an analysis of the client's IT organization to help determine the optimal staffing and training requirements necessary to effectively deploy and leverage the new technology. This relationship is typically available at the early stages of technical deployment, and it may even occur as part of a technical readiness evaluation prior to a system design. Learning services exclusively support enterprise readiness by focusing on a particular organization's ability to absorb and leverage a new technology.

**Related Research**

- *What Skills Matter to IT Professionals in Europe?* (IDC #EUR148158221, August 2021)
- *How Well Do IT Training Vendors Do What Training Buyers Value in Europe?* (IDC #EUR148072521, July 2021)
- *European IT Education and Training Services Forecast, 2021-2025* (IDC #EUR147704921, May 2021)
- *IDC MaturityScape: Technology Skill Development 2.0* (IDC #US47596821, April 2021)

**Synopsis**

This IDC MarketScape assessment focuses on the market for IT training services in Europe. This research includes analysis IT training firms with portfolios that are appropriate to organizations considering significant transformation initiatives. Therefore, we included organizations with both wide breadth of offering and those with specific technology expertise important to transformation initiatives. This evaluation found that both breadth of training content and relevance to role are almost equal in importance in terms of training quality, suggesting that while some training buyers are seeking training services from fewer providers, in other cases, organizations are seeking technical depth and expertise.
"IT training and technology skills development has become a priority as European organizations start to realize that for many technologies, the lack of appropriate skills has become the main challenge in successful implementation. We have already seen considerable delays in digital transformation projects – the average delay in DX due to lack of skills is 8.1 months," said Martin Sundblad, research manager and European Skills Practice lead.
About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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