

# IDC MarketScape: U.S. IT Training 2021 Vendor Assessment

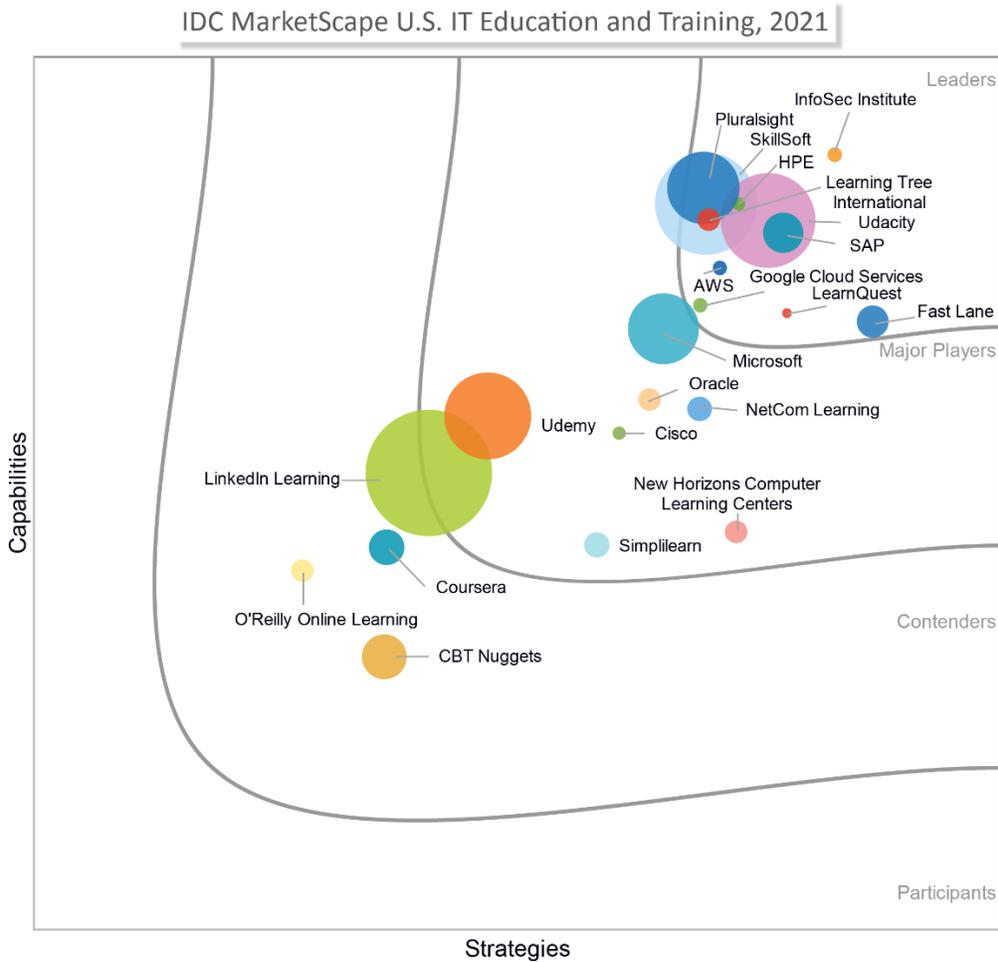
Cushing Anderson

THIS IDC MARKETSCAPE EXCERPT FEATURES INFOSEC INSTITUTE

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape U.S. IT Training Vendor Assessment



Source: IDC, 2021

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: U.S. IT Training 2021 Vendor Assessment (Doc # US47541121). 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 and Figure 2.

## IDC OPINION

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This IDC study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that are most significant to IT education buyers and how specific training firms perform against those characteristics. This study assesses the capabilities and strategies of many of the most well-known IT training vendors in the United States. This evaluation is based on a framework and set of parameters expected to most impact the success in providing training services during both the short term and the long term. A significant and unique component of this evaluation is the inclusion of IT education buyers' perception of both the key characteristics and capabilities of these training providers. As one would expect of market leaders, overall, these firms performed very well on this assessment. Key findings include the following:

- Instructor quality, the quality and relevance of the material, and the "authority" of the training provider are the most significant characteristics of successful training services.
- Delivery options generally did not have a significant impact on training provider success in this evaluation – with the exception of availability of self-paced elearning, which was considered very important.
- Both breadth of training content and relevance to role are almost equal to training quality in importance – 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 IT training market, but a few firms seem to stand separate from the others in terms of both capability and training strategy.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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There are dozens, even hundreds, of training providers that can offer training services in this area including specialists and generalists, both large and small. This research includes an analysis of the most well-known IT training firms with portfolios that are appropriate to organizations considering "significant transformation initiatives." Therefore, we included organizations with a wide breadth of offerings and those with a specific technology expertise that is 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 offering, brand, or content is particularly relevant. It is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an 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

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Training IT professionals is a challenging activity, as 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 education selection:

- **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 (ILT), more self-paced elearning, more onsite or more offsite training, or a particular combination of delivery options. So strongly consider the selection of training based on the preferences, work schedules, and availability of the target learners.
- **Compare the quality of instructors:** For instructor-led programs, either online or classroom based, instructor quality is essential. Request evidence of quality instructors, and understand which instructors are going to teach the specific classes.
- **Evaluate the training content quality:** Training material "authorized" by the technology vendor or third party is often of higher quality and more current than the material developed by other sources. If training on specific technology equipment, seek training provided by authorized training providers. However, some "unauthorized" providers offer exceptional training services, so in addition, consider how the training content is developed and how it is maintained before making a final decision.
- **Evaluate the training content for reference value:** Because of the complexity and breadth of most IT infrastructures, leveraging training material after the training is complete as a reference for routine or exceptional administration is essential. Examine the training and supporting material to assess its value as a reference source for IT professionals while they perform their work.
- **Explore the 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.

## VENDOR SUMMARY PROFILES

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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 challenges.

### Infosec Institute

According to IDC analysis and buyer perception, Infosec Institute is positioned in the Leaders category in this 2021 IDC MarketScape for IT training in the United States.

Infosec Institute is a cybersecurity education provider that offers skills development and certification preparation for a company's entire workforce. Infosec Institute has helped organizations upskill and

certify security teams and boost employee awareness on cybersecurity for over 16 years. The company offers cybersecurity training solutions to corporate, government, and educational organizations as well as managed SPs and resellers.

As a cybersecurity education company, Infosec Institute empowers people to be cybersafe at work and home and helps IT and security professionals achieve their career goals. A large majority, 70%, of the Fortune 500 have trained their security staff and teams with Infosec Skills.

The company's mission is to equip all organizations and individuals with the know-how and confidence to outsmart cybercrime. It does this by providing role-guided, hands-on security education solutions for all individuals in an organization but most particularly for cybersecurity professionals, IT staff, and developers. The company has two main product offerings: Infosec Skills and Infosec IQ. Infosec Skills offers boot camps, training, and certification for security, IT, and engineering teams. Infosec IQ provides personalized security awareness and antiphishing training for individual employees.

Jack Koziol is the CEO and founder of Infosec Institute, which is located in Madison, Wisconsin.

Infosec Institute's features and solutions include:

- **Role-based technical skills development:** All cloud-hosted cyber ranges and role-guided training are mapped to 52 work roles in the NICE Workforce Framework for Cybersecurity and MITRE ATT&CK Matrix for Enterprise.
- **Hands-on learning experiences:** Beginners can opt for guided lab experiences with step-by-step instructions, hints, and video tutorials, while advanced learners can dive in and assess their cyber skills with little to no instruction. As learners work through labs, Infosec Skills inspects their inputs to provide real-time feedback and guide them toward learning objectives that accelerate skill development.
- **Measurable results:** In addition to assessments and practice exams measuring individual learner aptitude and certification readiness, Infosec Skills provides team leaders with reporting metrics to effectively inventory team skills, assess progress against training goals, and effectively report training ROI to management.
- **IT and security certifications:** There are over 100 Infosec Skills boot camps and hundreds of additional hands-on cyber courses and cyber ranges within Infosec Skills to choose from.
- **Compliance and framework adoption:** Compliance can be built into the cybersecurity education program by mapping every course to established frameworks such as the NIST Cybersecurity Framework and the NICE Workforce Framework for Cybersecurity as well as industry-specific compliance standards.
- **CMMC certification:** Infosec Institute is an approved CMMC-AB Licensed Training Provider and Licensed Partner Publisher.
- **Security awareness:** There are 800+ training resources in different lengths, styles, and languages to inspire security behavior change within an organization.
- **Phishing simulator:** There are 1,000+ customizable phishing simulation templates that mimic the attack vectors targeting employees and trigger in-the-moment training as soon as learners click a phishing link.
- **Additional content and resources:** Other offerings include the weekly Cyber Work Podcast, the TechExams community, a blog, webcasts, cases studies, and white papers.

Infosec Institute offers training in technologies and frameworks including: (ISC)<sup>2</sup>, AWS, CERT, CertNexus, Cisco, CMMC-AB, CompTIA, EC-Council, IACRB, IAPP, and ISACA.

Infosec Institute offers training to the IT/security staff, the C-suite, and every employee. Specific IT/security staff members include cybersecurity specialist, IT auditor, cybersecurity manager, cybersecurity architect, cybersecurity engineer, penetration tester, cybersecurity analyst, cybercrime investigator, incident analyst/responder, and cybersecurity consultant.

## **Strengths**

Its strongest attributes include clients appreciating:

- Its certification test preparation offering
- Its content focus
- Its instructors' quality
- Its integration of labs into instruction
- Its partnerships with technology vendors
- The easy approach to purchasing
- The quality of materials and content
- The variety in lengths of courses

Its strongest attributes also include the following:

- Producing authoritative content
- Students appreciating the relevance of its material to their roles
- Clients saying that they will use Infosec more often next year

## **Challenges**

To improve its opportunities and market position, it can improve:

- Its integration with the client's LMS
- Its approach to delivering to mobile devices
- Its cost competitiveness
- Its course catalog navigation
- Its self-paced learning option

The company can also:

- Improve or offer mentoring services
- Reconsider the length of some of its courses
- Create stronger relationships with its best clients

## **APPENDIX**

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### **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 this IDC MarketScape represents 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 multiplied by 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 education" 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 education buyers on 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.

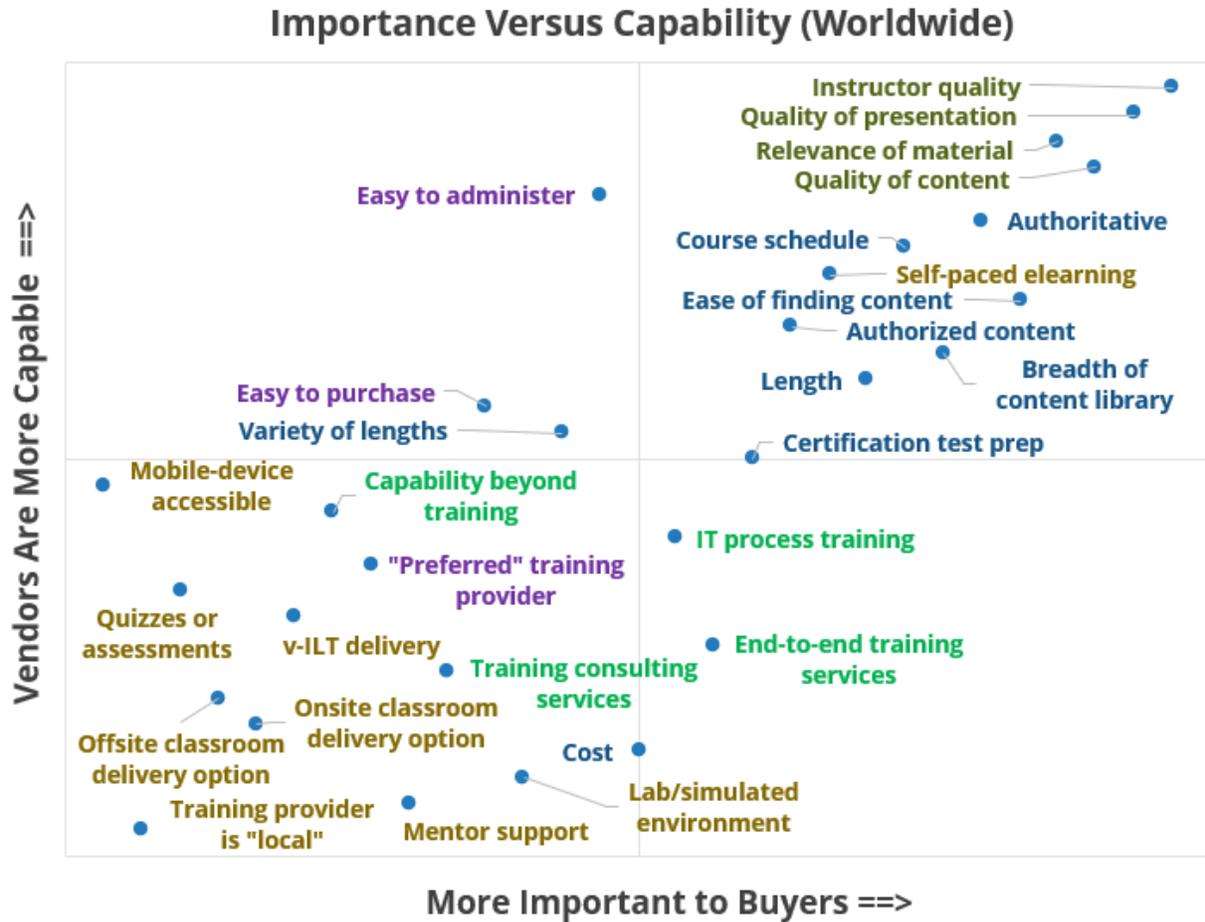
The broad survey also provides key insights into the priorities of IT managers and IT training managers regarding what makes excellent training experiences. We asked IT training buyers to describe the how important a series of training characteristics is to their organization, then asked them to assign a rating from 1 to 5, with 1 being "not a factor" in their selection decision and 5 being a "very significant factor" in their selection decision. 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

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)



Legend: Quality measures (blue), Offering characteristics (purple), Available services (green), Delivery options (yellow), Other Factors (orange)

Note: See *How Well Do IT Training Vendors Perform Worldwide?* (IDC #US46605821, July 2021) for more details.

Source: IDC, 2021

Market Definition

Generally, IT training includes the content processes or structures that support employee, client, or supply chain development to meet identified business requirements related to developing, administrating, 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 the IT vendors along three dimensions.

First, it helps ensure that learners understand the product's capabilities (and limitations) and that learners and their companies receive the expected benefits from the installed technology. Second, a skilled ecosystem helps to maximize technology utilization so that each customer IT organization can access skilled employees (or can 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 that 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 – where 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 is focused 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 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 that the appropriate population is prepared to use the new capabilities or functions that 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 where 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 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.

## LEARN MORE

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### Related Research

- *IDC MaturityScape Benchmark: Technology Skills Development Worldwide, 2021* (IDC #US48113421, August 2021)
- *What Skills Matter Overall to IT Professionals in the United States* (IDC #US48132921, August 2021)
- *How Well Do IT Training Vendors Perform Worldwide?* (IDC #US46605821, July 2021)
- *What Skills Matter to Data Management Professionals* (IDC #US47837821, June 2021)
- *What Skills Matter to Cybersecurity Professionals* (IDC #US47837721, June 2021)
- *Worldwide and U.S. IT Education Services Delivery Forecast, 2021-2025* (IDC #US46606221, May 2021)
- *Worldwide and U.S. IT Education Services Forecast, 2021-2025* (IDC #US47677921, May 2021)
- *IDC MaturityScape: Technology Skill Development 2.0* (IDC #US47596821, April 2021)
- *IDC's Worldwide Corporate Education Taxonomy, 2021* (IDC #US47597021, April 2021)

### Synopsis

This IDC MarketScape assessment focuses on the market for IT training in the United States. This research includes analysis of the most well-known IT training firms with portfolios that are appropriate to organizations considering "significant transformation initiatives." Therefore, we included organizations with a 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 to training quality in importance – suggesting that while some training buyers are seeking training services from fewer providers, in other cases, organizations are seeking technical depth and expertise.

"While training providers are generally perceived as capable, this analysis and the opinion of buyers of training services are clear that several providers provide better, more consistent, and more valuable training services than others." – Cushing Anderson, vice president, IT Education and Certification research

## 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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