

IDC MarketScape

IDC MarketScape: European IT Training Services 2025 Vendor Assessment

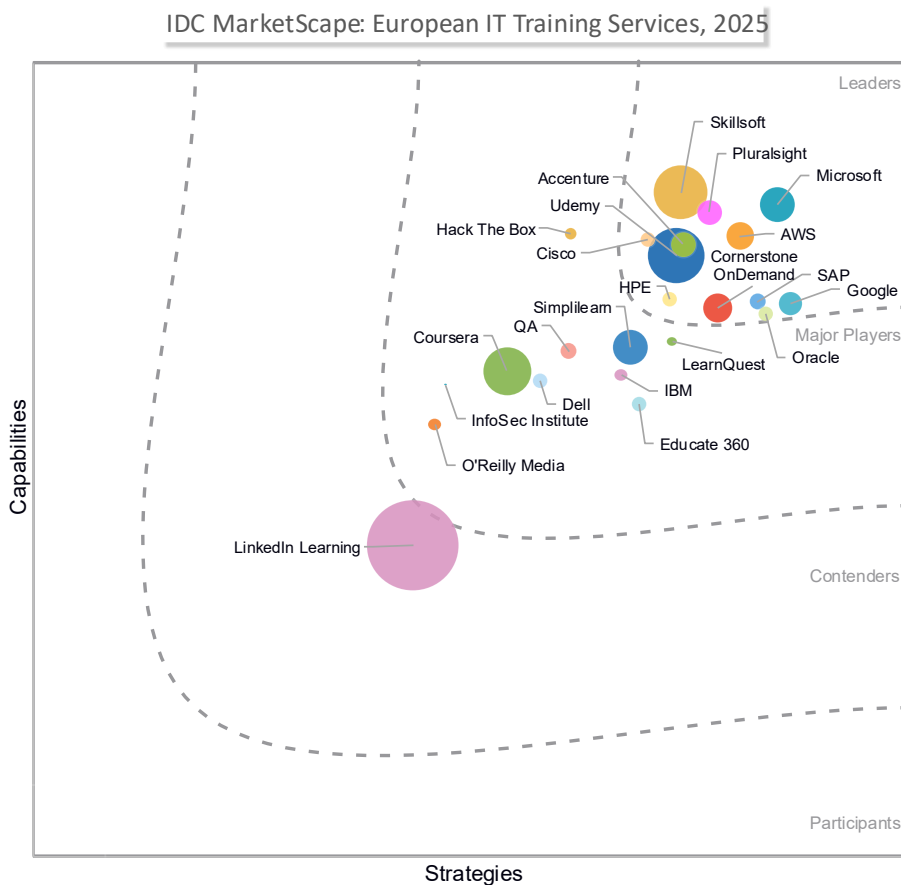
Leonardo Freitas

THIS EXCERPT FEATURES CISCO AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: European IT Training Services, 2025



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: European IT Training Services 2025 Vendor Assessment (Doc # EUR153005625).

IDC OPINION

The European IT training market has undergone rapid evolution in response to rising digital ambitions, widening skill gaps, and an expanding technology landscape. In 2025, the market is being shaped by quantitative and qualitative advances across provider capabilities, learning modalities, and client expectations. This IDC MarketScape combines robust market analysis with in-depth validation of buyer perceptions, prioritizing criteria that have the most significant and sustained impact on learning outcomes and organizational transformation.

Providers are increasingly differentiating themselves by their ability to deliver instruction that is technically comprehensive and deeply relevant to evolving job roles and business innovation. Instructor quality, curriculum relevance, portfolio breadth, and the frequency of impactful, hands-on labs and simulations remain core to effective outcomes. The most effective training programs leverage high-quality instructor-led delivery, powerful digital and mobile content, and immersive experiential learning. The market's leading platforms offer AI-powered content recommendations, real-time skill assessments, role-based personalization, and comprehensive analytics — enabling learning and development (L&D) leaders to measure skill progression, align programs with business goals, and demonstrate tangible return on investment.

The breadth of content, adaptability to local languages and regulatory needs, and platform innovation also rank high among European enterprises' priorities for IT training. While some learners and organizations favor one-stop partners with comprehensive technology coverage, specialist firms continue to excel when their content or methods align with evolving enterprise priorities or specialized roles.

A key distinction among providers is the degree of integration of analytics, adaptive learning, and state-of-the-art experiential labs, which all became key differentiators between next-generation AI-native platforms and traditional approaches. End-user feedback consistently reaffirms the value of robust labs, on-demand refreshers, and high-quality reference materials, as well as flexible access through remote, onsite, or hybrid models. However, as technology stacks evolve and digital transformation continues at pace, the alignment of training content with real-world business use cases, ecosystem partnerships, and strategic consulting services becomes even more critical.

Furthermore, the use of AI for content generation and automation, skill assessment, and personalization is becoming an important feature of scalability for training

courses; it is highly sought after by tech buyers looking to ramp up learning and development programs for their professionals.

There is no universal playbook for success in IT skilling. Buyers should assess the scope and format of offerings as well as strategic alignment with long-term business priorities, the quality of support and instructional staff, the fidelity of labs and simulations, and the robustness of analytics and progress benchmarking. Ultimately, providers best positioned for success are those that can combine technical mastery, experiential learning, and data-driven insights and deliver transformation-ready talent and measurable business value for European enterprises.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The European IT training market is complex and highly diverse, reflecting a broad spectrum of provider types, delivery models, and strategic roles. Three primary categories of training providers are shaping the sector's drive toward digital transformation:

- **Technology vendors.** These are global vendors that deliver proprietary training directly to their customers, equipping IT professionals and technical teams with the expertise required to deploy, operate, and optimize their technologies. These companies offer structured programs aligned with product certifications, role-based skills, and cloud migration, typically leveraging a mix of self-paced digital content, instructor-led courses, and robust labs and simulations. Their authority and direct product support make them vital for organizations undertaking transformation using specific platforms and solutions.
- **Third-party training providers.** These independent firms, whose core business is training, offer portfolios that span multiple technology areas, certifications, and learning modalities. Some training providers combine vendor-authorized curricula with their own immersive bootcamps, blended learning programs, and consulting services. Third-party providers often bring flexibility to address different organizational needs, ranging from rapid certification to ongoing skill development. Their expertise and ability to tailor content for technical, business, and leadership audiences enable them to compete on equal footing with larger multidisciplinary firms and to serve clients where breadth and adaptability are paramount.
- **Software and platform vendors.** Several providers deliver tailor-made learning management systems (LMS), platforms, and software solutions designed to serve as an integral part of organizational talent strategies. These vendors facilitate content customization, analytics, and automated reporting for learning and development leaders, integrating training as part of broader HR, compliance, and skill management ecosystems. Such platforms offer enterprises scalable elearning, virtual classrooms, and social learning

features, often supporting administration, credential tracking, and real-time analytics at scale.

All these providers, whether operating locally, regionally, or globally, contribute substantially to the development of European ICT skills and the acceleration of transformation initiatives.

The assessment criteria for inclusion in this analysis focus on:

- The breadth and relevance of training offerings
- Innovations in training and L&D strategy enablement
- The size and scope of contribution to European digital transformation
- Significant technology expertise needed to support transformation projects

Due to the high number of training providers in the region, IDC set a minimum revenue requirement of \$50 million per year as an inclusion criterion. However, the evaluation intentionally focuses on organizational capabilities and strategic relevance, rather than provider size alone. Enterprises may select broad portfolio partners for diverse training needs, or specialist firms whose brand, depth, or content are critical for specific projects. Specialty and multidisciplinary providers are equally capable of meeting significant transformation objectives.

This analysis is descriptive, not prescriptive. Each enterprise's goals, skill gaps, regulatory context, and transformation ambitions will determine which providers best meet their requirements for a given initiative. The diversity of the European market ensures that organizations can select from an array of partners, finding those with the most suitable expertise and alignment for both immediate and future digital business needs.

ADVICE FOR TECHNOLOGY BUYERS

IT training buyers in 2025 should approach provider selection with a strategic and holistic mindset, reflecting the reality that continuous digital and organizational transformation now demands much more than conventional course delivery. Successful learning investments must directly support both immediate upskilling and long-term talent resilience, tying new capabilities to business outcomes and future-focused digital road maps.

Buyers are advised to evaluate providers along several dimensions. They must consider the breadth of the content and the inclusion of advanced topics such as AI, cloud, and cybersecurity, as well as the following:

- The depth and freshness of the material
- The relevance of learning paths to evolving job roles
- integration of hands-on labs, simulations, and scenario-based assessments

- Instructor quality and support, especially for instructor-led and blended programs

Furthermore, enterprises should look at robust analytics and AI-driven personalization as decisive differentiators, enabling data-driven measurement of ROI, tracking skills progression at scale, and identifying targeted pathways for the organization's future skills needs.

European enterprises should also prioritize convenience and flexibility. They must evaluate a provider's capacity to serve distributed and mobile workforces, deliver content in multiple European languages, and adapt to diverse regulatory and compliance requirements at both the enterprise and regional level. Buyers should examine the ongoing value of training content as a reference source and as a tool for ongoing skills maintenance. They should also explore the scale and quality of labs and immersive learning aids, which have emerged as key drivers of retention and applied business value.

Finally, IDC recommends a long-term partnership approach: select providers that demonstrate continuous innovation, consultative engagement, and a commitment to evolving alongside your organization in its digital journey. No single provider will fit all needs, but those able to combine strategic insight, technology leadership, rigorous labs, and advanced analytics will be best positioned to support enterprise transformation and competition for talent in highly disruptive times.

VENDOR SUMMARY PROFILE

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 criterion outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Cisco

Based on IDC's analysis and buyer perception, Cisco is positioned in the Leaders category in this 2025 IDC MarketScape assessment of IT training services vendors in Europe.

Cisco Learning offers an integrated digital education ecosystem for technical professionals, combining Cisco U., Cisco Networking Academy, Cisco Learning Network, and a well-recognized global certification program. The platform serves the needs of organizations that demand up-to-date expertise in networking, cybersecurity, cloud, automation, and emerging areas such as AI and collaboration. Cisco delivers education through digital subscriptions, self-paced content, instructor-led programs, virtual and physical labs, and tailored professional services. Its ecosystem supports the full talent journey from foundational digital literacy through

to advanced, expert-level specialization, with all content mapped to recognized role-based certifications and aligned with evolving technology domains.

Cisco's learning environment addresses individual and workforce skill needs through a blend of modular video learning, micro-learning, interactive tutorials, gamified courses, and project-based experiences. Unique AI-driven personalization features — including learning recommendations, adaptive feedback, and custom learning paths — support individualized development mapped to organizational roles and skill gaps. Certification preparation is robust and practical, featuring adaptive practice tests, proctored simulations, "lablets" for mini hands-on tasks, and remote as well as physical lab options for high-stakes practical exams. Experiential learning is a core pillar, driven by virtual labs, hardware-based remote labs, realistic network simulations, Capture the Flag (CTF) missions, project-based labs, and regional hackathons.

Cisco maintains a substantial presence in Europe, combining established direct operations with regional learning partners and partnerships with academic institutions and industry bodies. Cisco content is widely localized, serving major European markets in relevant languages and supporting local talent initiatives. European learners benefit from access to recognized credentials (e.g., CCNA, CCNP, CCIE), integration into global certification tracks, and hands-on labs mapped to enterprise infrastructure, AI-ready datacenter infrastructure, IoT, and security deployments found uniquely across European organizations.

Cisco's strategic engagements include significant investment in programs such as Networking Academy within universities and public-private digital skill initiatives in the U.K., Germany, France, Italy, and Spain. Broad ecosystem partnerships, regular content updates relevant to European policy and technological standards, and ongoing outreach to local employers underpin Cisco's regional impact.

Strengths

- Cisco addresses the complete educational journey, from foundational skills through expert credentials, mapped directly to career-stage learning and role requirements for Cisco-related technologies.
- Cisco is recognized for its industry certification preparation and global brand credibility for technical domains, including networking and security.
- Cisco has achieved high customer satisfaction with its professional services as well as for its ability to address tailored organizational needs.

Challenges

- Consolidation of multiple platforms and interfaces (Cisco U., NetAcad, Learning Network) can create usability and tracking complexity for organizations with large, distributed teams.

- Detailed analytics and reporting offer limited real-time customization, with more value reached through enterprise-level integration or export.

Consider Cisco Learning When

Companies in Europe should consider Cisco Learning when their strategic priorities involve building advanced skills in network infrastructure, cybersecurity, and enterprise collaboration using vendor-specific technologies that are recognized globally. The offering is particularly suited for enterprises modernizing their digital infrastructures, implementing cloud and IoT solutions, or seeking certification for teams in regulated or distributed environments with localized content and strong support for European compliance and language needs.

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 represents the market size of each vendor within the specific market segment being assessed.

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 to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market Definition

The IT training market in Europe in 2025 represents a dynamic, innovation-driven environment responding to unprecedented digital transformation, ongoing skills shortages, and rapid technological shifts. Market boundaries continue to evolve, encompassing a wide range of services, methodologies, and digital-first capabilities designed to meet both organizational and individual requirements for upskilling, reskilling, and technology adoption.

IT training and training services encompass all content, processes, and platforms that support workforce and partner development around information technology — ranging from technical deployment and end-user training to certification preparation and consultative learning services. The goal is to ensure that employees, partners, and clients are equipped with the knowledge required to adopt, administer, and maximize enterprise and cloud technologies, and to ensure enterprise, market, and partner readiness for rapidly changing digital landscapes.

Increasingly, providers deliver a portfolio that includes:

- Technical deployment education for IT professionals overseeing new implementations
- End-user and ongoing skills training to ensure sustained adoption and effective use
- Certification programs validating role-based and technology-specific skills
- Advisory and learning consulting services to design, benchmark, and optimize organizational capability development

The IT training landscape in 2025 has moved decisively toward hybrid delivery and modular learning, driven by the need for agility, accessibility, and measurable business outcomes. Solutions comprise a blend of instructor-led training (ILT), virtual and digital modalities, immersive hands-on labs, cloud-based sandboxes, scenario-based projects, and self-paced micro-learning, each supporting engagement for remote, on-premises, and globally distributed teams.

The market is defined by key market features, such as:

- **Breadth and authority of content.** Training must cover a wide variety of technology domains, support role-based requirements, and include vendor-authorized material, ensuring quality and currency.
- **Mobile and remote access.** Mobile-first and offline learning features have become essential, with organizations seeking platforms that cater to the "learn anywhere" workforce.

- **Language and localization.** While English remains dominant, demand for local language training and support is growing—particularly to cover major European markets.
- **Consulting and end-to-end services.** Providers are increasingly valued for their ability to deliver content as well as strategic guidance, adopted practices, analytics services, and integration into talent development and business planning.

Furthermore, training providers were also analyzed on their capabilities to deliver critical underlying features:

- **Data-driven analytics for L&D.** The most differentiating platforms integrate robust reporting, benchmarking, and analytics dashboards for learning leaders and people managers. Capabilities such as skill gap analysis, real-time progress monitoring, adaptive pathway prescription, and ROI tracking have become essential for strategic learning and development. Advanced integrations with HRIS/LMS and business dashboards enable transparent measurement of both input (consumption) and output (skill gain, certification, and direct business impact).
- **Immersive and experiential training.** High-quality hands-on labs, cloud sandboxes, simulations, and AR/VR content are not only common but also expected as critical aids to the application and retention of practical skills. Immersive modalities extend to scenario play, gamified challenges, and virtual group projects, providing a safe environment for experimenting, solving problems, and applying new capabilities to business situations before production deployment.
- **Personalization and AI.** AI-powered platforms dynamically assess learner needs, automatically curate content, and recommend adaptive learning paths. Machine learning supports content recommendation, skill benchmarking, diagnostics, and personalized feedback, making learning more adaptive and outcome based.

The IT training market is being shaped by a diverse range of global and regional providers, from tech vendors, third-party training platforms, and full-suite tailored solutions. With digital transformation and AI adoption at the heart of European business strategy, IT training is now a board-level imperative, integral to talent resilience and organizational success. Providers are judged on their ability to deliver not just technical learning but also true business value — by linking skills development to measurable impact, compliance, and digital competitiveness.

Related Research

- *Agentic AI and Enterprise Skills Training: The Road to 2030* (IDC #US53774225, September 2025)
- *IDC MarketScape: Worldwide End-to-End eDiscovery Software 2025 Vendor Assessment* (IDC #US51573424, August 2025)
- *IT Skills for Digital Business* (IDC #IDC_P41, August 2025)
- *European IT Talent for AI, Cybersecurity, Cloud and Digital Business Success* (IDC #IDC_P46003, July 2025)
- *Cisco Live 2025 Enterprise Networking Announcement Analysis: AI, Security, and Platforms Take Center Stage* (IDC #lcUS53638325, June 2025)

Synopsis

This IDC MarketScape offers a comprehensive evaluation of the European IT training services market in 2025, driven by rapid digital transformation, persistent skills shortages, and the growing need for continuous workforce upskilling. The assessment spans providers with broad and specialized portfolios relevant to organizations pursuing modernization, compliance, and operational excellence. Today, both the breadth of training coverage and its direct applicability to emerging roles are critical for enterprise success — driven by the essential need to balance convenience, scale, and technical depth as organizations respond to the accelerated pace of technology adoption and regulatory demands

"2025 marks a new threshold in IT training; the pace of change means companies must embed strategic, ongoing upskilling into their core business models. Success will be defined by the ability to harness adaptive learning platforms, advanced analytics, and experiential content to keep talent future ready," said Leonardo Freitas, 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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