

IDC MarketScape: North America IT Training Services 2025–2026 Vendor Assessment

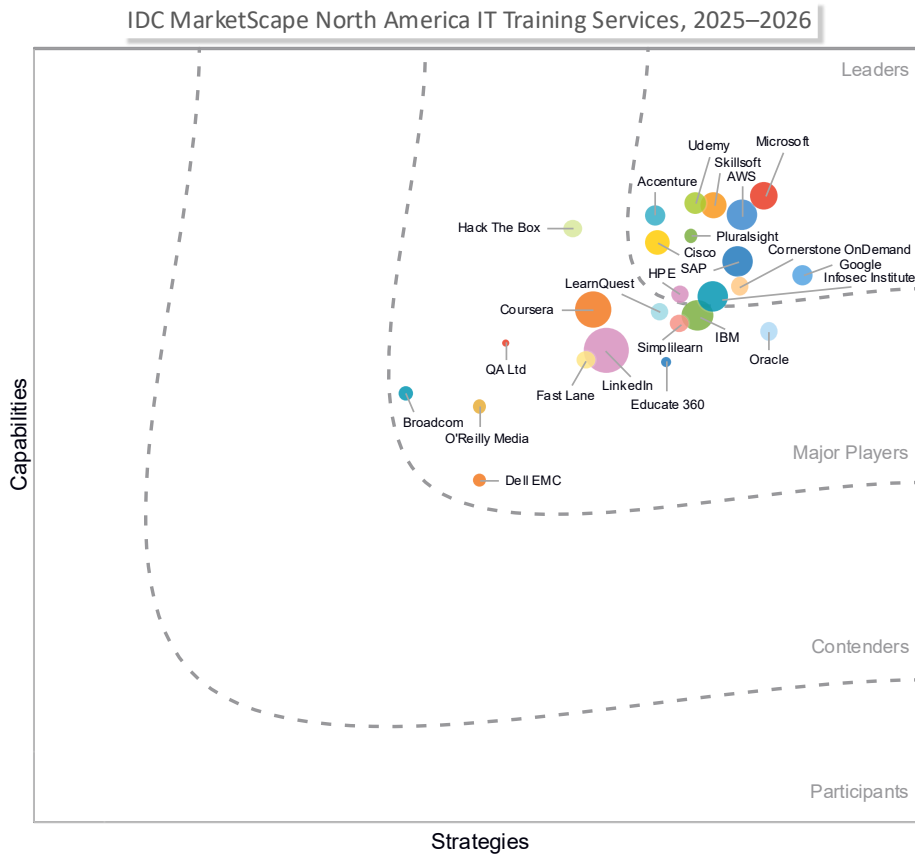
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THIS EXCERPT FEATURES CISCO AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape North America IT Training Services Vendor Assessment



Source: IDC, 2025

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: North America IT Training Services 2025–2026 Vendor Assessment (Doc # US52991625).

IDC OPINION

For years, North American organizations have struggled to fill technical roles as digital transformation (DX) accelerated faster than talent pipelines could deliver qualified candidates. And now, the arrival of AI and AI ways of working is fundamentally reshaping what it means to be skilled in IT.

The arrival of AI and other emerging technologies adds a new dimension of complexity to an ecosystem already stressed by widening IT skills shortages. IDC projects that by the end of next year, skills shortages could cost the global economy up to \$5.5 trillion in lost revenue, product delays, quality issues, and impaired competitiveness.

The combination of long-term talent shortages and new, AI-driven disruption creates a double-sided challenge. On the one side, IT leaders report shortages in AI-critical skills, with 48% saying that a lack of AI skills is holding back progress on that front. On the other side, organizations face overcapacity in legacy roles as automation takes hold. It is a situation that forces a fundamental rethinking of workforce development strategies, with companies moving from episodic training events to continuous, integrated skill building. Traditional approaches to workforce development buckle under such pressures. While most IT leaders give lip service to the idea of building a culture of learning, fewer than half of IT and business professionals say their companies give them time and space to learn.

Enter the IT skills platform market, a rapidly expanding ecosystem of training solutions that has become mission-critical infrastructure for enterprises attempting to close these gaps. According to IDC forecasts, the global IT training market reached \$21.5 billion in 2024 and is projected to grow to \$26.6 billion by 2029, driven by corporate emphasis on skill development, the adoption of cloud-based learning management systems (LMSs), and the rise of flexible microlearning formats.

Investment in learning technology is surging, with 73% of businesses planning to increase their spending in 2025, according to IDC's *2024–2025 Global IT Skills Survey*. Such growth reflects a fundamental shift in how organizations view workforce development. It is no longer a nice-to-have perk, but a strategic imperative for survival in an AI-driven economy.

The competitive landscape of IT skills platforms has become remarkably diverse, spanning everything from comprehensive learning management systems to specialized, gamified cybersecurity training environments. Established IT skills players compete alongside cloud-native offerings from the big hyperscalers, while niche providers focusing on cloud and cybersecurity carve out specialized domains.

The AI revolution is simultaneously disrupting and enhancing these platforms themselves. Sixty percent of organizations project high impact for AI in learning and development, with platforms leveraging artificial intelligence for proactive skill gap identification, personalized learning pathways, automated content assembly, and skills acquisition verification. AI-powered platforms can now analyze workforce data, market trends, and business performance to predict future skill needs before they become urgent, enabling strategic rather than reactive development.

The stakes for getting this right extend well beyond individual organizations.

The IT skills platform market has become ground zero in a larger battle over economic competitiveness, workforce equity, and organizational survival in the AI age. The 25 solutions examined here represent different philosophies about how learning happens, what skills matter most, and how technology can best serve learning and development. Some emphasize breadth of content; others prioritize depth in specialized domains. Some rely on expert-led video instruction; others champion hands-on labs and real-world simulations. Some target individual learners; others focus on enterprisewide transformation.

Understanding these differences and matching them to organizational needs, workforce characteristics, and strategic priorities has never been more consequential. In an era where the ability to continuously learn and adapt has become the ultimate competitive advantage, choosing the right learning platform may be one of the most important decisions an organization makes.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This IDC MarketScape analyzes IT training firms with portfolios that are appropriate to organizations considering significant digital and AI transformation initiatives.

The inclusion criteria include:

- A breadth of offerings
- Size and breadth of offerings that can substantially contribute to transformation initiatives
- Significant technology expertise that is important to transformation initiatives

A minimum annual revenue of \$50 million was set as an inclusion criterion because of the large number of providers in the region. The evaluation prioritizes organizational capabilities and strategic relevance over size alone, however. Enterprises may choose either broad partners for diverse needs or specialists for projects requiring focused expertise; both can support major transformation objectives.

Every organization is different. Its business goals, technology stack, budget priorities, and long-term digital adoption goals should shape its ideal partner choice. The diversity of the IT training market ensures access to providers with relevant expertise for immediate and future digital initiatives. This analysis is descriptive and not prescriptive.

To that end, the valuation examines three distinct categories of training providers:

- **Technology vendors:** Global vendors deliver proprietary training programs to their customers, equipping IT teams with expertise to deploy and optimize specific technologies. Their structured programs align with certifications and roles and use self-paced content, instructor-led courses, and labs.
- **Third-party training providers:** Independent firms focus on training as their core business, offering broad portfolios across numerous technology areas and modalities. The category also includes specialty training vendors. Third-party firms blend vendor-authorized courses with immersive boot camps, blended programs, and consulting services. Their flexibility accommodates rapid certification and ongoing skills development for organizations. With tailored content for technical, business, and leadership audiences, they effectively compete with larger firms and address client needs where breadth and adaptability matter most.
- **Software and HR platform vendors:** Other vendors deliver learning management systems and solutions that support organizational talent strategies. They enable content customization, analytics, and automated reporting and integrate training with HR, compliance, and skills management systems. These platforms offer scalable elearning, virtual classrooms, and social features, supporting administration, credential tracking, and real-time analytics at enterprise scale.

ADVICE FOR TECHNOLOGY BUYERS

When evaluating enterprise learning platforms, organizations must carefully consider a range of factors that can influence both immediate outcomes and long-term success. The following points outline major criteria organizations should consider before they buy:

- **Prioritize business alignment.** Select a skills platform that best aligns with your organization's strategic objectives. The best tool isn't the one with the most

features. It is the one that best supports your business outcomes, such as cloud adoption, cybersecurity readiness, or data transformation. Buyers should map platform capabilities against specific goals to ensure tech investment translates into measurable, trackable results.

- **Carefully evaluate content depth and breadth.** Content is the backbone of any IT skills platform. Evaluate whether the platform spans key domains like cloud computing, software development, AI, security, and emerging technologies while also offering depth within each domain. Some platforms excel broadly but lack advanced materials. Others are highly specialized. Buyers should make sure the platform they select balances both breadth for general upskilling and depth for expert training.
- **Look for role and skill-based pathways.** Technology learners benefit from tailored pathways that reflect real-world job roles, not just generic course listings. Seek platforms that offer tracks for developers, cloud engineers, data scientists, and those in similar roles. Thoughtful skill progression frameworks help employees see growth opportunities. And it helps leadership to better track workforce readiness in critical roles.
- **Consider assessment and benchmarking capabilities.** Skills data is as valuable as training content. Strong platforms provide diagnostics, quizzes, and performance benchmarking to measure workforce capability at both the individual and organizational levels. Buyers should prioritize solutions that allow them to track skills over time, identify gaps, and link assessments directly to learning objectives.
- **Look for integration with current IT tools.** A platform's ability to integrate with existing ecosystems amplifies its value. Check for compatibility with talent management systems, HR platforms, or LMS solutions already in use. Integration supports smoother onboarding, streamlined data collection, and unified reporting, reducing operational friction and maximizing ROI.
- **Consider user experience and engagement.** Even the best, most technically rich platform fails if users dislike engaging with it. Buyers should consider whether the interface is intuitive, mobile friendly, and designed to encourage continuous learning. Features like gamification, community forums, and hands-on labs matter. They can significantly boost adoption and participation rates across the workforce.
- **Emphasize practical, hands-on learning.** For IT professionals, theory without practice is insufficient. Ensure the platform offers sandbox environments, virtual labs, or coding challenges that mirror real-world work scenarios. This experiential approach is critical for reinforcing knowledge and building confidence in applying new skills.

- **Consider vendor credibility and partnerships.** Content quality is tied to the credibility of instructors and institutions behind it. Look for relationships with major technology vendors and whether certifications offered are officially recognized. Vendor partnerships lend both authority and career relevance to learning outcomes.
- **Put special weight on analytics and reporting depth.** Executive leadership will demand evidence of impact. Buyers should ensure the chosen platform provides detailed analytics that go beyond user participation. Look for dashboards that visualize skill progression, completion trends, and workforce readiness against future projects. Strong analytics improve strategic decision-making around talent and technology investments.

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

Cisco

According to IDC analysis and buyer perception, Cisco is positioned in the Leaders category of this 2025–2026 IDC MarketScape for IT training services in North America.

Cisco provides a multiplatform digital learning ecosystem, integrating Cisco U., Cisco Networking Academy, Cisco Learning Network, and a global certification program under the Learn with Cisco umbrella. Together, these platforms serve approximately 7 million learners annually and more than 28 million since inception, spanning career entry to expert levels. Cisco's portfolio is centered around networking, security, automation, cloud, AI, and collaboration, supporting both Cisco-specific and emerging multivendor technologies. Training is delivered through digital subscriptions, self-paced courses, blended and instructor-led programs, virtual and physical labs, and global outreach initiatives. In addition:

- **Learning experience and structure.** The Cisco learning environment is structured to support progression from foundational digital literacy (via NetAcad) to advanced professional credentials such as CCIE. Content includes modular video learning, microlearning, skill-based tutorials, gamified coursework, project-based learning, and a blend of synchronous and asynchronous delivery modes. Learning paths are mapped to certifications and job roles, with the option to include organizational customizations, industry use cases, and localized content. Learners interact through integrated peer discussion forums, study groups,

social feeds, and access to a prominent global community of instructors and subject matter experts.

- **AI and personalization features.** Cisco U. leverages AI/ML engines to deliver personalized learning recommendations, adaptive feedback, and custom learning paths based on skills gaps and role alignment. GenAI-driven content generation and assessment tools provide adaptive quizzes, targeted practice exams, and dynamic content refreshes aligned with Cisco's technology evolution. AI agents and virtual tutors are being piloted for context-aware guidance, with human mentorship and VIP community support supplements built into the platform. Progress is continuously analyzed to optimize learning recommendations, support individualized upskilling, and connect learners with relevant resources.
- **Certification prep features.** Cisco offers comprehensive preparation for its global certification suite (CCNA, CCNP, CCIE, and specialist tracks) and supports multivendor credentials in cloud and automation. Exam resources include adaptive practice tests, proctored simulations, task-specific mini labs ("tablets"), and hands-on training through Cisco Modeling Labs and Packet Tracer. CCIE and expert-level learners have access to remote and onsite physical labs to support high-stakes practical exams. Continuing education credits are automatically awarded for training activity and exams, streamlining recertification. Certification tracks are evaluated and updated to align with current industry role requirements and technology advances.
- **Experiential learning offerings.** Experiential learning is a core focus, delivered through an array of virtual labs, hardware-based remote labs, realistic network and security simulations, and rigorous project-based learning. Capture the Flag missions, ethical hacking challenges, and scenario-based assessments blend teamwork with technical practice. Cisco Live events and regional hackathons offer large-scale, hands-on guided learning every year, while peer forums, collaborative projects, and expert-moderated study groups reinforce retention and professional network development. Project-based learning and device-level labs allow users to verify proficiency with real equipment and environments found in enterprise settings.

Strengths

- **Networking focus:** Such Cisco learning programs as Cisco IT Essentials and its CCNA and CCNP certifications provide deep hands-on training in hardware troubleshooting, network protocols, router/switch configuration, and cybersecurity basics. This strong specialization can prepare professionals for in-demand network engineer roles, which are distinct from the more cloud-centric training that the hyperscalers provide.

- **Cross-solution synergies:** With a focus on continuous learning and cross-technology knowledge across its broad portfolio, Cisco's multidisciplinary approach supports innovative full-stack networking, helping learners stay current with an evolving IT landscape that includes Wi-Fi 6, zero trust security, and SD-WAN technologies.
- **Consulting:** Cisco customers report positive feedback around its professional services offering and its ability to address specific organizational requirements.

Challenges

- **Platform consolidation:** While advantageous, the consolidation of multiple learning platforms and interfaces (such as Cisco U., NetAcad, and the Learning Network) can create tracking complexity for organizations managing large, distributed teams.
- **Analytics and reporting:** Cisco's detailed analytics and reporting offer only limited real-time customization, with the highest value for reporting only realized through enterprise-level integration or data export.

Consider Cisco When

Cisco's learning ecosystem is well suited for organizations seeking comprehensive networking, AI and security skilling, a direct pipeline to industry-recognized certifications, and hands-on, authentic learning mapped to real-world job functions. Its approach aligns technical workforce needs with continuous technology shifts, regulatory requirements, and operational transformation. Global enterprises needing multiregion reach, detailed skills analytics, and strong integration with HR and talent systems will find value in Cisco's scalable infrastructure and services.

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

Market Definition

The IT training market in North America in 2025 is defined by rapid digital transformation, pressures to move to AI-assisted ways of working, persistent skills gaps, and the accelerating arrival of new and emerging technologies. The market encompasses a wide range of content, delivery models, and digital learning capabilities for organizational and individual upskilling, reskilling, foundational training, and technology adoption needs.

IDC broadly defines IT training as the content, platforms, and services supporting IT workforce and partner development. These include technical deployment, end-user education, certification preparation, and learning consulting. The point is to ensure that employees, partners, and clients are equipped to adopt and optimize enterprise technologies.

Providers increasingly offer portfolios that include technical onboarding for IT professionals, skills training to drive adoption, certification pathways for role-based and technology-specific validation, and advisory services to optimize capability development. The landscape emphasizes hybrid and modular learning — blending instructor-led, digital, and self-paced formats with immersive labs, virtual sandboxes, scenario-based projects, and microlearning — to meet the needs of both onsite and distributed teams.

Key features driving the market include the depth and currency of content, mobile and remote access, and integration of learning solutions within broader HR and business ecosystems. Providers are expected to support robust analytics and benchmarking (including skills gap analysis, real-time progress tracking, and ROI measurement), high-quality experiential and immersive learning (such as labs and simulations), and advanced personalization and AI-driven adaptation.

In North America, a diverse mix of global and regional providers — including technology vendors, specialty firms, and third-party platforms — compete by linking learning to measurable business value and performance outcomes.

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide IT Skills for Digital Business, 2025* (IDC #US52958725, October 2025)
- *IDC FutureScape: Worldwide Future of Work 2026 Predictions* (IDC #US53859325, October 2025)
- *Agentic AI and Enterprise Skills Training: The Road to 2030* (IDC #US53774225, September 2025)
- *IDC PlanScape: Mapping the Invisible — The IDC Enterprise Skills Assessment Framework* (IDC #US53431926, September 2025)
- *Worldwide IT Education and Training Services Forecast, 2025–2029* (IDC #US52958825, June 2025)
- *GenAI, Agentic AI, and Talent Transformation: How to Crush It* (IDC #US53550025, June 2025)
- *IDC PlanScape: How to Put Down an Enterprise Learning Rebellion* (IDC #US52959025, May 2025)
- *IDC PlanScape: An Enterprise Skills Framework for Human-AI Collaboration* (IDC #US52959425, February 2025)

Synopsis

This IDC study provides an assessment of IT training services vendors catering to the North American market. North American organizations continue to face persistent IT talent shortages as digital transformation outpaces workforce readiness. The emergence of AI and new digital workflows is redefining the skill sets required, amplifying pressure on companies to adapt more rapidly.

"AI is transforming not just technology but the very definition of what it means to be skilled," says Gina Smith, Ph.D., research director, IT Skills for Digital Business at IDC. "In the coming years, the winners will be those who cultivate adaptable, AI-fluent workforces capable of learning and evolving as technology evolves."

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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