Managed Digital Workplace Services - Growth, Trends, Covid-19 Impact, and Forecast (2023 - 2028)

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Report description:

The managed digital workplace services market is expected to grow with a CAGR of 20.23% during the forecast period. This is due to the early adoption of cloud-based networks in the region.

Key Highlights
Managed digital workplace services offer a full suite of managed services, including deskside support, end-user device support, and service desk, which aims to enhance employees' productivity and security while ensuring the best returns on IT investments. These solutions will cut costs by exempting the need for organizations to employ exclusive, dedicated resources to manage and deal with the complexity of IT systems. Furthermore, managed digital workplace services aim to redefine the workplace experience by providing a personalized, intelligent, and secure modern workplace and enhancing collaboration and productivity on any device.
Moreover, automation-enabled workplace support services were differentiators for service providers a few years ago, and they have been witnessing significant traction in today's environment. As enterprises move toward a user and business-centric view, workplace services also increasingly involve cloud, mobility, and collaboration enablement with a clear view of business impact. Such factors are fostering the need for effective services desk to end-user device support services to embrace digital transformation across businesses, thus fostering the growth of the market.
The role of managed digital workplace services gained an enormous boost in the past two years as the role of technology has been further accentuated since the COVID-19 pandemic. Businesses and organizations now increasingly rely on the digital workplace to collaborate and work in teams across geographies and in real-time.
End-user industries, from retail and manufacturing to government and public sectors worldwide, are in a state of rapid transformation. The critical impetus driving this transformation is the need to go digital. Companies recovering from the negative impact of the pandemic are doubling down on the digitization process as they look for ways to insulate themselves from such a

crisis in the future. For instance, according to a recent survey by Flexera Software, digital transformation has been the leading priority for IT initiatives for global companies since 2020. According to the same survey, priorities for IT technology initiatives in companies worldwide increased from 54% in 2020 to 74% in 2022.

The growing focus on digital transformation across end-user industries provides opportunities for market vendors to offer innovative digital transformation solutions. For instance, in June 2021, Ssquad announced a multi-million-dollar deal with IBM. Under the seven years contract, IBM will use the services of Ssquad to provide infrastructure support to one of its customers operating in the retail and consumer goods industry with a presence in over 30 countries. As part of the contract, Ssquad will deploy and deliver digital workplace and infrastructure support services to one of IBM's undisclosed customers.

The pandemic significantly accelerated the transition from paper-based processes to digital ones. Digitizing and streamlining document-heavy operations resulted in business time, cost, and satisfaction savings. They also made it easier for customers and employees to digitally complete mundane, paper-based procedures like loan agreements, healthcare registration papers, and business contracts. Organizations today rely on digital document management and e-signatures to keep operations running, and customers have grown to expect the process's practicality and additional convenience.

Managed Digital Workplace Services Market Trends

Service Desk is Expected to Grow Significantly

A service desk acts as a single point of contact between the service providers and the users. A standard service desk is used to handle incidents, service requests, and user communications. The goal of a service desk is to provide superior service to its customers within a pre-determined timeframe. In addition, market vendors like Allied Digital are offering specialized industry-specific service desk services.

As organizations continuously move toward digital transformation and service desks, it can enable practical and sustainable digital transformation that is customer and business-centric, thereby boosting the demand for service desks across the end-user industries.

Collaboration tools such as cloud computing, mobility, and physical and knowledge automation are supported by a secure, connected network foundation. They have changed how organizations improve productivity, and businesses worldwide are preparing for upcoming innovations that will drive their competitive advantage. This has resulted in the need for advanced service desk services to embrace the evolving technology landscape.

With new technologies altering how work gets done, market vendors are offering service desk services powered by advanced technologies such as artificial intelligence, robotics, and machine learning. For instance, the Fujitsu service desk service, Social Command Center, is powered by artificial intelligence, virtual assistants, and cognitive learning. It delivers a 24/7 personalized support service through a single point of contact to empower users to self-serve.

End-user organizations across the world are relying on service desk services to provide satisfaction and the best experience while simultaneously increasing the productivity of their employees. Such benefits offered by service desk services have resulted in organizations worldwide embracing managed digital workplace services, thus fostering market growth.

According to a survey by Flexera Software, digital transformation has been the leading priority for information technology (IT) initiatives for global companies since 2020. Other preferences include cybersecurity as well as strategic cloud migration.

North America is Expected to Witness Significant Growth in the Market

The development of the regional industry for digital workplaces can be attributed to the rising adoption of emerging technologies such as AI, BYOD, and enterprise mobility management solutions. Several regional workplace transformation service providers are

rapidly incorporating cloud technologies and artificial intelligence (AI) into their service offerings.

With digital workplace services, an organization can optimize the potential of its workplace by improving both employee experiences and business performance.

In September 2022, Ricoh USA Inc. announced the acquisition of Cenero LLC, a service-focused audio-visual technology, unified communications, and IT solutions provider. This acquisition will help Ricoh support its customers with its growing number of offices, meeting rooms, and learning spaces that are quickly being modified to support hybrid working and learning models.

COVID-19 impacted the work culture across the region. It compelled organizations to move to work from home. Organizations that quickly embraced digital workplaces coped with the changes and managed business continuity. Additionally, digital workplace tools offer features, bandwidth, and performance for administration and production to continue despite challenging circumstances.

Moreover, smart city projects and initiatives are ongoing, and by 2025, it is expected that there will be around 30 global smart cities, and 50% of these will be located in North America and Europe. According to the OECD, these steps are supported by global investments, which would be about USD 1.8 trillion between 2010 and 2030 for all infrastructure projects in urban cities. These projects require digital workplace services to be outsourced to third parties to increase the productivity of their projects.

Further, the region is witnessing an explosion of new cloud tools adopted for hybrid and multi-cloud environments. At the same time, established cloud platforms are pivoting to fit into the new hybrid reality. The large public cloud providers are ramping up tools to support hybrid cloud operations, including management, computing, networking, and security offerings.

Managed Digital Workplace Services Market Competitor Analysis

The managed digital workplace services market is highly competitive and consists of several major players. In terms of market share, a few of the major players currently dominate the market. Many companies are increasing their market presence by securing new contracts and tapping new markets.

In September 2022, IBM announced its plans to acquire Dialexa, a significant digital product engineering services organization in the United States, to help organizations drive innovation and achieve their digital growth goals. The acquisition is expected to broaden the product engineering capabilities of IBM and provide clients with full-service digital transformation solutions.

In July 2022, IBM announced the acquisition of Databand.ai, a leading provider of data observability software that assists enterprises in resolving data issues, such as errors, pipeline failures, and low quality, before they impact their bottom line. Today's announcement expands IBM's software portfolio across data, AI, and automation to cover the spectrum of observability and assists businesses in ensuring that reliable data is delivered to the appropriate users at the right time.

Additional Benefits:

 The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION
1.1 Study Assumptions and Market Definition
1.2 Scope of the Study

2 RESEARCH METHODOLOGY

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