

Managed Digital Workplace Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Managed Digital Workplace Services Market size is estimated at USD 56.18 billion in 2025, and is expected to reach USD 76.47 billion by 2030, at a CAGR of 6.36% during the forecast period (2025-2030).

The driving factors that can contribute to managed digital workplace services include technological advancements, changing workforce demographics, availability of new technologies and tools, employee demand for greater flexibility, and a positive company culture facilitated by strong and helpful management. Additionally, successful digital transformations are influenced by factors such as effective change management, employee engagement, and a clear understanding of the goals and objectives of the shift.

Key Highlights

- The rise in adopting digital workplaces by various organizations would drive the demand for managed digital workplace services over the forecasted period. For instance, According to a survey done by beautiful.ai in 2022, which polled 3,000 managers to find out how the digital workplace has affected their businesses and what the future holds for the remote worker, 78% agree that significant financial resources are being directed toward achieving a successful digital workplace, and 80% said their firm is committed to investing financial resources in technology and tools to assist managers in successfully leading and meeting goals in a digital workplace. 81% are optimistic about digital work replacing their in-office setting. In a digital working environment, 66% feel that there is still a strong sense of connection.
- Furthermore, information technology has significantly impacted managed digital workplace services. With the increasing use of digital platforms and automation, workplaces have become more efficient and streamlined. Cloud-based facilities management software, for example, has enabled business leaders to stay organized and up-to-date, resulting in improved business performance. Additionally, digital workplace technologies have focused on communication, information management, and

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cybersecurity, providing better workflows and data management.

- Furthermore, artificial intelligence is increasingly important in managing digital workplace operations. By automating tasks and providing intelligent insights, AI enables organizations to streamline workflows, increase productivity, and improve employee experience. Some examples of AI applications in the digital workplace include knowledge management, data governance, information management, end-user experience management, and document management. Additionally, AI can help organizations formulate effective workplace automation strategies and increase employee productivity. As AI technology continues to evolve, it is expected to play an even more significant role in shaping the future of the digital workplace.

- Further, the changing technology and customer experience landscape in the BFSI sector will drive the demand for managed digital workplace services over the forecast period. Many BFSI sector companies, such as Swiss Re, an insurance firm, have partnered with market vendors to enable a cloud-based digital workplace, and the trend is expected to strengthen in the coming years, with the demand expected to increase from the BFSI sector. Further, the growing digital transformation in banks and insurance firms worldwide necessitates the need for digital workplace transformation for enhanced efficiency and productivity, thus further providing growth prospects for the studied market.

- For the global market for managed digital workplace services, the rising incidences of cybercrime present significant challenges and constraints. Securing digital assets, defending against cyber threats, and adhering to data protection regulations are challenging for organizations. Strong security measures and proactive security management are crucial in delivering managed digital workplace services due to the impact of cybercrime on customer trust and the requirement for greater investments in cybersecurity.

- Post-pandemic, hybrid work, and on-site work are gaining traction. Organizations worldwide must adapt to this new normal in different physical workplace settings or improvements in the corporate digital workplace. This work shift is analyzed to influence the demand for managed digital workplace services to improve work practices to ensure that productivity, operations, and business success continue. Post-pandemic, various firms have collaborated to use the benefits of the digital workplace; such a rise in collaborations would push the growth of the studied market during the pandemic.

Managed Digital Workplace Services Market Trends

Healthcare Sector Expected to Witness Robust Growth

- Incorporating emerging technologies in the healthcare industry is prevailing, owing to enhanced patient treatment and experience and better workplace management. It has been understood that the healthcare industry presents various staffing complexities, including larger teams, a mix of part-time, full-time, on-call, seasonal, remote, and on-site workers, and workers of multiple roles and specializations. A great deal of coordination and specificity is involved in the industry, making deploying a management solution crucial.

- Moreover, the increasing need to reduce labor costs in hospitals and other health facilities, increased operational efficiency, and consolidation in the sector are some of the primary factors driving the adoption of these solutions. Further, the growing demand for healthcare professionals and benefits associated with workplace management solutions, such as transparency and flexible scheduling of workplaces in the industry, is also expected to increase the adoption of these solutions in the healthcare sector during the forecast period.

- Further, there is an increase in investment in the construction of healthcare facilities due to the increased need for healthcare services. This increase in the market for healthcare facilities is caused due to the rise in population and the growing aging population across various regions worldwide. This will likely expand the healthcare sector's adoption of managed digital workplace services. For instance, as per the survey by OECD and WHO, the number of hospitals worldwide is expected to rise steadily over the next five years. According to the data, the number of hospitals is expected to reach 1,66,235 in five years.

- Many healthcare providers are investing in expanding and constructing new healthcare facilities. For instance, in June 2022, the South Carolina Department of Health and Environmental Control approved Roper St. Francis Healthcare's Certificate of Need's

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additional tower on the hospital's Berkeley County campus. The expansion of healthcare facilities is anticipated to create augmented demand for digital management services to keep track of the data and overall workplace management, which in turn is projected to generate demand for managed digital workplace services.

- Healthcare establishments require various workplace management services, such as Waste Management, Security Services, Catering Services, Cleaning Services, Technical Support Services, and many more, whose demand will likely increase shortly. These services are difficult to manage individually. Collaboration tools such as cloud computing, mobility, and physical and knowledge automation provided by workplace management services make it easy to handle it all simultaneously. Rapid expansion and digitalization trends have crested demand for managed digital workplace services.

Asia-Pacific Expected to Witness Significant Growth

- The Asia-Pacific region has experienced rapid technological advancements and digital transformation recently. This digital revolution has significantly changed businesses' operations, increasing demand for efficient and secure digital workplace solutions. Managed Digital Workplace Services have emerged as a critical enabler for organizations to enhance productivity, collaboration, and employee satisfaction.
- The Government and Public sector in the Asia-Pacific region are experiencing rapid digital transformation driven by the need to enhance citizen services, streamline operations, and improve efficiency. Many government organizations are turning to Managed Digital Workplace Services (MDWS) as a strategic solution to achieve these goals. Furthermore, governments across the Asia-Pacific are increasingly adopting digital channels to provide efficient and citizen-centric services.
- Moreover, managed digital services enable governments to create work environments that empower employees to collaborate seamlessly, access relevant information, and promptly respond to citizen inquiries and service requests. For instance, Singapore's Smart Nation initiative focuses on leveraging service desks to provide integrated digital services and personalized citizen experiences through platforms like the MyInfo service and the Moments of Life app.
- Furthermore, the managed digital workplace services (MDWS) market in the Asia-Pacific region is experiencing robust growth and holds immense potential. With increasing digitalization efforts, remote work adoption, and the drive for operational efficiency, organizations across the region recognize the value of MDWS solutions. The market is fueled by the growing demand for seamless remote collaboration, enhanced employee experiences, and robust data security.
- Further, as governments and enterprises invest in digital transformation initiatives, MDWS providers have a unique opportunity to offer tailored solutions that cater to the specific needs of the Asia-Pacific market. With the convergence of emerging technologies and a focus on innovation, the MDWS market in the region is poised for further expansion, playing a vital role in shaping the future of work and digital empowerment in the Asia-Pacific.

Managed Digital Workplace Services Industry Overview

Overall, the intensity of competitive rivalry is high and expected to remain the same throughout the forecasted period. Major players in the market, such as Atos Se, Fujitsu Ltd, HCL, and Capgemini, are constantly providing increased and enhanced offerings. Additionally, companies are employing powerful competitive strategies to sustain themselves in the market and retain their clients, thereby intensifying competitive rivalry. Further, the vendors are focusing on offering integrated services to the client where all-in-one managed digital workplace service can be provided to the client.

In April 2023, Stefanini, with workplace solution collaboration, Stefanini and Phillip Morris International (PMI) announced a partnership. Stefanini will provide managed services such as service desk support, service management, onsite support, and workplace core services such as End Point Management, ITAM, and M365. Phillip Morris International's approximately 79,800 employees will be served in 29 languages throughout 80 countries and 140 sites, including offices, factories, and retail stores.

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In September 2022, HCL Technologies (HCL), a global technology company, and Intel launched a Center of Excellence to foster the creation and adoption of industry-tailored Digital Workplace (DWP) offerings. Equipped with innovative technologies and experts, the Center of Excellence will leverage HCL's DWP solutions and Intel's technology portfolio to co-create solutions enabling seamless, connected, secure hybrid workplaces.

Additional Benefits:

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

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