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Virtual Desktop Infrastructure Market Assessment, By Deployment [On-premises, Cloud], By Offering [Service, Solution], By Enterprise Size [Small & Medium Enterprises (SMEs), Large Enterprises], By Industry Vertical [IT & Telecom, Healthcare, BFSI, Retail, Education, Construction & Manufacturing, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global virtual desktop infrastructure market size was valued at USD 12.31 billion in 2022, which is expected to reach USD 32.26 billion in 2030, with a CAGR of 12.8% for the forecast period between 2023 and 2030.

Virtual Desktop Infrastructure is a technology that enables users to access a virtualized desktop environment hosted on remote servers. Users can interact with these desktops through thin clients or devices, with processing and storage taking place on the servers. The growth of VDI is driven by factors such as the rise in adoption rate by businesses, improved data security, centralized management, scalability, reduced hardware costs, remote work trends, and the need for flexible access to computing resources, leading to its rise in demand worldwide.

Businesses are increasingly adopting VDI, due to its compelling benefits. It centralizes desktop environments, enhancing security by preventing data from residing on individual devices. It offers streamlined IT management, scalability, and cost savings by reducing hardware requirements. The surge in remote work trends and the need for flexible access to computing resources further drive the adoption of VDI, catering to

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modern work dynamics.

In September 2023, WebinarCare stated that approx. 50% of enterprises and 24% of small businesses across the globe use desktop virtualization. Also, the VDI adoption rate is highest in the financial sector, 48%, followed by the healthcare sector at 47%.

Global Existence of High-performance VDI Cloud Services to Create Traction in the Market

The presence of high-performance VDI cloud services is significantly influencing the growth of the virtual desktop infrastructure market. These services offer advanced computing power, seamless scalability, and robust security. It caters to diverse user needs, enabling businesses to efficiently manage remote workforces, minimize infrastructure costs, and enhance user experiences. The availability of such cloud services is driving the adoption of VDI, thereby propelling the market growth by meeting modern demands for flexible, and powerful computing solutions.

For example, Amazon Web Services (AWS) has developed its cloud-based iteration of VDI, tailored for multiple users. The AWS VDI entails a fully managed Desktop as a Service (DaaS) solution named Amazon Workspaces. This allows users to establish and utilize Amazon Linux or Microsoft Windows desktops, accessible from anywhere.

Utilization of Workspace as a Service (WaaS)

Workspace as a Service (WaaS) has transformed the traditional office setup by offering a cloud-based, flexible, and scalable work environment. WaaS enables remote work, reducing physical office space requirements and associated costs. It provides access to software, data, and collaboration tools from anywhere, promoting productivity and accommodating the evolving work trends. Moreover, WaaS caters to the need for agility and mobility, making it a significant market driver.

For example, Citrix Workspace has fueled the VDI market by providing a seamless, secure, and scalable solution. It enhanced user experience, facilitated remote work, ensured compliance, and built a strong partner ecosystem, contributing to its adoption across industries and sizes of organizations, thereby driving the market growth.

Migration to a cloud-based VDI solution for the generation of market opportunities

The shift to cloud-based VDI solutions has bolstered virtual desktop infrastructure

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market security. It centralizes data and applications, minimizing risks associated with local storage. Enhanced security measures, such as encryption and authentication protocols, can be implemented more effectively. Additionally, centralized monitoring and regular updates improve threat detection and mitigation, contributing to a more secure computing environment for users and organizations paving the way for opportunities in the market for its future prosperity.

For example, the pairing of Azure Virtual Desktop with the Azure public cloud presents an array of robust security elements, such as Azure Sentinel and Microsoft Defender for Endpoint, already integrated before implementation. This empowers organizations to adhere to essential VDI security protocols right from the initiation of their virtualization endeavor.

North America dominates the Global Market

North America's strong virtual desktop infrastructure market position stems from its advanced technology, cloud adoption, and remote work culture. Investments in IT innovation, data security, and tech giants' presence are fueling market growth. These factors make North America a leading force in driving VDI market expansion, a trend likely to continue.

For example, in August 2023, Virtual Driver Interactive, a prominent provider of simulation-based driver training solutions in California secured a contract with the Baldwin County School District for 48 advanced VDI driving simulators. This innovative project is set to transform the method through which students acquire driving skills, offering them a realistic and secure virtual driving encounter. These simulators have been installed in multiple schools, including Baldwin, Baldwin Virtual, Daphne, Elberta, etc. With an estimated 2,150 students participating annually, this move promises to revolutionize driver education across the district.

Government Initiatives

Government initiatives focus on driving digital transformation, bolstering cybersecurity, and enabling remote work capabilities. Through funding and regulations, governments incentivize VDI adoption across sectors such as healthcare and education, enhancing service delivery and accessibility. VDI facilitates modernization, data security, and efficient remote work, contributing significantly to the market's expansion on a global scale.

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For example, the Korean government and the National Research Foundation of Korea (NRF) introduced technologically advanced BIM Environment-Based VDI. Integrating Building Information Modeling (BIM) Environment-Based VDI can bolster the Virtual Desktop Infrastructure (VDI) market. This advancement offers tailored virtual workspaces for architecture and construction professionals, enabling efficient collaboration and data management. By catering to industry-specific needs, BIM-based VDI solutions can drive adoption, enhancing the VDI market through improved productivity and streamlined workflows in the architecture and construction sectors.

Impact of COVID-19

The Virtual Desktop Infrastructure market has been profoundly impacted by the COVID-19 pandemic, witnessing distinct changes before and after the outbreak. Prior to COVID-19, VDI adoption was steadily rising due to advantages in centralized management and security. However, the pandemic's sudden remote work requirements propelled the demand for VDI as organizations urgently sought secure remote access to desktops. Consequently, there was a rapid surge in VDI implementation to accommodate remote work setups. In the post-COVID era, VDI has solidified its position as a critical tool for business continuity and remote collaboration. The market experienced accelerated growth as companies recognized the need for flexible and secure access to applications and data. Cloud-based VDI solutions gained prominence for their scalability and remote management convenience. Hence, it can be stated that the pandemic expedited VDI adoption, but its enduring importance lies in addressing modern workplace needs and ensuring resilient IT infrastructures.

Key Players Landscape and Outlook

Significant advancements are unfolding in the global virtual desktop infrastructure market, with major companies focusing on finding new initiatives and technologies to increase their market worth and revenue. Considerable expenditures are being funneled for the development of highly advanced VDI solutions. Additionally, notable collaborations, acquisitions, and partnerships are dynamically shaping the industry's landscape as these companies vigorously pursue their goals.

In February 2023, VMWare unveiled the VMware Horizon Accelerator, an initiative merging dashboard analytics with a skilled team of Horizon Pros offering comprehensive Virtual Desktop Infrastructure lifecycle services and support. It encompasses guidance, best practices, and hands-on assistance from inception to optimization. Moreover, the program aims to enhance Horizon solution performance,

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assisting organizations in swiftly realizing optimal results and value from their VDI deployment.

In October 2022, Amazon launched Amazon Workspaces Core, a fully managed, infrastructure-focused Virtual Desktop Infrastructure solution. Amazon Workspaces Core offers APIs for seamless integration with third-party VDI software, allowing IT administrators to retain their familiar solutions while end-users continue to use existing client software for a hassle-free experience. Users can create Ubuntu desktops for their technical staff.

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