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Digital Workplace Market by Component (Solutions [Unified Communication and Collaboration, Unified Endpoint Management, Enterprise Mobility and Management] and Services), Deployment, Organization Size, Vertical, and Region - Global Forecast to 2026

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Abstracts

MarketsandMarkets estimates the global digital workplace market size would grow from USD 22.7 billion in 2020 to USD 72.2 billion by 2026, at a Compound Annual Growth Rate (CAGR) of 21.3% during the forecast period. Key factors that are expected to drive the growth of the market are the cost optimization and improved productivity and availability of new technology and tools. However, lack of thought leadership among organization and clear and defined Return on Investment (ROI) are expected to limit the market growth. Apart from drivers and restraints, there are a few lucrative opportunities for digital workplace providers in the market. Increasing adoption of cloud and enterprise mobility services among enterprises and increasing adoption of workplace transformation services among SMEs are some of the opportunities for vendors in the digital workplace market. These opportunities are expected to present new market growth prospects for digital workplace vendors.

The managed services is expected to grow at a higher CAGR during the forecast period

Managed services include the management of pre-and post-production environments for digital workplace practices. These services are usually outsourced to third-party service providers. The managed service providers help organizations successfully benefiting from cloud services and enable smooth and efficient functioning of the production environment. Moreover, the managed service vendors offer the ability to

manage toolchains and post the expiry of subscription from the original seller, which is considered a major advantage. The service providers excel in technical skills that are required to practice continuous development and delivery in an IT ecosystem, thereby enabling IT teams to securely deliver applications to customers. Moreover, these services help organizations focus on other business-critical activities, resulting in the secure and efficient execution of digital workplace practices.

Telecommunication and ITes industry vertical to hold the highest market share in 2020

Telecommunication and ITeS vertical is one of the fastest-growing verticals with respect to the adoption of advanced technologies, such as cloud computing, big data analytics, DevOps, digital stores, and social networks. The telecom companies have to manage a huge customer base; fulfill continuously changing customer demands; and offer a variety of mobile services, TV, and phone and wireless services through various devices. Handling such complex and confidential data makes it important for this vertical to adopt digital workplace practices, enhance customer satisfaction, adopt digitalization, and maintain its competitive position. The rapid advancements in cloud computing and the Internet of Things (IoT) technologies have led telecom companies to leverage their existing infrastructures to accommodate these technologies. The software systems needed in the telecommunication and ITeS vertical have to be highly robust and reliable, as their failure can lead to huge revenue losses. Such factors are expected to drive the demand for digital workplace solutions and services in the vertical during the forecast period.

APAC to grow at the highest CAGR during the forecast period

The digital workplace market in APAC is driven by rapid advancements in cloud computing, IT infrastructure services, and IoT have led many APAC organizations to adopt digital workplace solutions and services. With the increasing adoption of cloud technologies and the rising IT demands for digital transformation, digital workplace solutions are expected to increase rapidly during the forecast year. Due to this region's huge customer potential, organizations around the globe want to set their footprint here. Due to these factors, the adoption of digital workplace solutions and services would prove to be beneficial for enterprises, as they can enjoy the benefits of providing better customer service, uniting their workforce, improving their operational efficiency, enhancing the automation process, and reducing operational costs.

By Company: Tier 1–18%, Tier 2–44%, and Tier 3–38%

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By Designation: C-Level Executives–32%, Director Level–36%, and Others–32%

By Region: North America–38%, Europe–26%, APAC–18%, and RoW– 18%

The digital workplace market comprises major solution providers, such as Atos (France), Cognizant (US), IBM (US), Wipro (India), Infosys (India), Zensar (India), Accenture (Ireland), Fujitsu (Japan), HCL Technology (India), DXC Technology (US), NTT Data (Japan), Unisys (US), HPE (US), TCS (India), Sonda (Chile), KissFlow (India), Capgemini (France), and others. The study includes an in-depth competitive analysis of key players in the digital workplace market with their company profiles, recent developments, COVID-19 developments, and key market strategies.

Research Coverage

The digital workplace market revenue is primarily classified into revenues from solutions and services. Digital workplace components revenue is associated with variety of solutions such as unified communication and collaboration, unified endpoint management, and enterprise mobility and management. The market is also segmented based on components, deployment, organization size, vertical, and region.

Key benefits of the report

The report would help the market leaders/new entrants in this market with the information on the closest approximations of the revenue numbers for the overall digital workplace market and the subsegments. This report would help stakeholders understand the competitive landscape and gain insights to better position their businesses and plan suitable go-to-market strategies. The report would help stakeholders understand the pulse of the market and provide them with information on the key market drivers, restraints, challenges, opportunities, and COVID-19 impact.

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*Details on Business overview, Solutions and Services offered, Recent developments, MNM view, Key strengths/right to win, Strategic choices made, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

13 ADJACENT/RELATED MARKET

14 APPENDIX

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