Virtual Desktop Services and BYOD Assessment and Forecast

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Virtual Desktop Services and BYOD Assessment and Forecast" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within desktop services
- Vendor marketing, sales and business managers developing strategies to target virtual desktop and BYOD service opportunities within desktop services
- Financial analysts and investors specializing in the IT services sector, including IT infrastructure management and IT outsourcing.

Scope of the Report

The report analyzes the worldwide market for virtual desktop services and BYOD. It addresses the following questions:

- What is the current and future market for virtual desktop services and BYOD?
- What are the client segments for virtual desktop services and BYOD and their characteristics? What are the drivers, benefits, and inhibitors for each segment?
- What is the size and growth of the virtual desktop services and BYOD markets by client segment, geography, service line, activity and sector?
- How did spending grow in 2013 and how will it increase in 2014 and onwards?
- What are the offerings in the market?
- How is the market organized? Who are the main vendors? How can they be assessed and compared? What are the criteria to assess the service offerings and offering strategies of the different vendors?
- What are vendor challenges and critical success factors, by market segment?

This report includes one grid that assesses the service offerings of 14 virtual desktop services and BYOD vendors.

Key Findings & Highlights

NelsonHall's market analysis of the Virtual Desktop Services and BYOD consists of 100 pages.

The virtual desktop services market has remained a market characterized by steady growth in spending. Client demand has remained traditionally oriented towards cost savings and IT features, e.g. centralization of applications and data storage. Clients are adopting primarily server-based computing VDs and are investing more selectively in VDI technologies.

Looking ahead, demand is likely to accelerate from a new client segment, more interested in mobility, e.g. providing access for personnel outside the enterprise locations, either on-the-move or when home-working. BYOD specifically remains a niche, and is likely to find adoption only in very specific sectors.

The virtual desktop services market remains active from the supply-side, with most vendors having rejuvenated their virtual desktop services offerings. Most vendors are adjusting their main virtual desktop service offering to make it more standard and re-usable across clients. This effort is primarily taking the form of structured methodologies and reference architectures. Meanwhile, most vendors have also revisited their standard offerings, which tended to be too inflexible for enterprise clients' needs, and which met limited demand. Changes have occurred around hosting location and application virtualization options. The two main offerings, main and standard, are to converge in the mid-term.

In BYOD specifically, most vendors are addressing the BYOD opportunity through two of their offerings: virtual desktop services and enterprise mobility, and are not going beyond this. Only a few vendors have articulated more comprehensive BYOD offerings by expanding into structured advisory services.

Client demand itself is largely driven by demand for traditional cost savings and IT features. This demand has remained steady year after year, with a limited acceleration in spending resulting from the end of Windows XP extended support. Looking ahead, given the length and complexity of a migration project from Windows XP to a virtual desktop, Windows XP is not expected to drive much further spending on virtual desktop services spending.

Meanwhile, client demand has become much more comprehensive and complex. Mobility remains a strong driver for the years ahead. Demand for BYOD is niche and is likely to remain so, as a result of the complexity of tax, HR and legal constraints around allowances, home working and hardware self-support. Finally, a few clients are incorporating virtual desktop services as part of a company-wide effort to reduce G&As, through a real estate approach that includes virtual desktop services and home-working.

Contents

Report Length

100 pages, consisting of 11 chapters

Vendors Researched

Atos, Capgemini, CGI, Computacenter, CSC, Dell (services), Getronics, HP (services), KPN IT Solutions, Orange Business Services, Steria, Tech Mahindra, T-Systems and Unisys.

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