



Virtual Desktop Services Assessment and Forecast

Report Abstract
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Who Is This Report For?

“Virtual Desktop Services Assessment and Forecast” is a comprehensive market analysis report designed for:

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

Scope of the Report

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

- What is the current and future market for virtual desktop services?
- What are the client segments for virtual desktop services and their characteristics? What are the drivers, benefits, and inhibitors for each segment?
- What is the size and growth of the virtual desktop services market by client segment and geography?
- How will the April 2014 planned end of Microsoft Windows XP support, adoption of mobile applications and BOYD/user-owned devices influence adoption of virtual desktop services
- Who are the largest vendors? How does this compare with managed desktop services vendors?
- How is the market organized? Who are the main vendors?
- What are vendor challenges and critical success factors by market segment?
- Additional topics include the nature of partnerships and technologies, vendor targeting by geography..



Key Findings & Highlights

The virtual desktop services market has changed drastically in the past 18 months. Clients, 18 months ago, were turning to virtual desktop service offerings for two main reasons:

- Further lower their end-user computing costs, through the adoption of end-user segmented technologies and services
- Drive security and centralization of data storage.

Since then the market has changed. Demand is now driven by clients wanting to provide mobile workers and VIPs access to applications. This is the largest segment. A few early-adopters clients are also considering BYOD and user-owned devices strategies, sometimes venturing into pilot activity.

Experience from several comprehensive contracts suggests new client drivers: a larger U.K.-based financial services organization is currently deploying virtual desktops for a large part of its workforce with several goals e.g. promoting home working, reducing office space to reduce real estate costs, changing its corporate culture from toleration of home working to welcoming home working and therefore adapting management and reporting.

Meanwhile, an increasingly number of IT services vendors has launched recently standard virtual desktop offerings, offering it as an opex offering. They are joining early vendors in this field: Atos, Dell, IBM, KPN Corporate Market and Orange Business Services. The success of such standard offerings, in spite of their innovation and quality, has been limited.

Looking ahead, we are expecting a few shifts in the vendor landscape with the arrival of telecom services providers and Indian vendors, as well as a renewed interest from several IT services vendors, which traditionally did not pursue desktop services opportunities, for lack of profitability reasons.

This not to say that the market for virtual desktop services is an El Dorado. The market remains fundamentally constrained by Microsoft's Windows license scheme, which can make the virtual desktop business case hard to achieve. The market is to remain largely feature-driven until Microsoft makes changes in its license economics.

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Vendors Researched

Atos, Capgemini, Compucom, Computacenter, CSC, Dell, Fujitsu, HP Enterprise Services and HP Technology Services, IBM Global Services, Indra sistemas, Infosys, KPN Corporate Market / Getronics, Logica, Mahindra Satyam, Orange Business Services / France Telecom, Steria, T-Systems and Unisys.

Report Length

82 pages, consisting of 10 chapters and 17 data charts

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