End User Computing

Channel Market Report

Executive Summary

The EUC market encompasses diverse solutions such as Virtual Desktop Infrastructure (VDI), Unified Endpoint Management (UEM), Desktop-as-a-Service (DaaS), and application virtualization, alongside deployment modes like cloud-based and on-premise systems. The cloud-based segment is anticipated to dominate, holding a 56.8% market share in 2025, driven by its scalability and suitability for remote work.

Key industries adopting EUC solutions include IT and telecom, which is projected to account for 43.7% of the market in 2025, healthcare, expected to reach $17.26 billion by 2032 with a CAGR of 6.3%, and education, forecasted to hit $14.98 billion by 2032 at a CAGR of 6.5%.

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Overview

The End User Computing (EUC) market is undergoing significant expansion, propelled by the global shift toward remote and hybrid work models, accelerated digital transformation, and rising demand for secure, scalable IT solutions. Valued at $13.19 billion in 2024, the market is expected to grow to $35.82 billion by 2032, achieving a compound annual growth rate (CAGR) of 13.3%.

Some projections suggest even greater potential, with estimates reaching $108.81 billion by 2034 at a CAGR of 6.76% or $43.14 billion by 2037 at a CAGR of 10.4%, depending on regional and methodological variations.

Channel partners, including value-added resellers, system integrators, distributors, and managed service providers, are central to this ecosystem, facilitating over 70% of IT spending in 2023. This report explores the trends, opportunities, challenges, and strategies for channel partners to thrive in the dynamic EUC landscape.

EUC Categories

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Key industries adopting EUC solutions include IT and telecom, which is projected to account for 43.7% of the market in 2025, healthcare, expected to reach USD 17.26 billion by 2032 with a CAGR of 6.3%, and education, forecasted to hit USD 14.98 billion by 2032 at a CAGR of 6.5%.

Other sectors, such as banking, financial services, insurance (BFSI), government, retail, manufacturing, and media, also contribute to market growth.

Geographically, North America leads with a 38.7% share in 2025, followed by Europe at 26% by 2037, while Asia-Pacific emerges as the fastest-growing region due to rapid digitalization.

Buyer Trends

Several factors are fueling the EUC market's growth. The enduring shift to remote and hybrid work environments has heightened demand for VDI, DaaS, and UEM solutions to ensure secure, seamless access to applications and data.

The widespread adoption of cloud technologies enhances the appeal of these solutions, offering cost-efficiency and flexibility.

Additionally, the rise of Bring Your Own Device (BYOD) and Choose Your Own Device (CYOD) policies, with the U.S. BYOD market valued at over USD 26 billion, drives demand for device-agnostic solutions. Emerging technologies, such as AI, edge computing, and 5G, are further enhancing EUC performance by enabling real-time analytics and personalized user experiences.

However, cybersecurity remains a critical concern, as increased remote access heightens vulnerability to attacks, necessitating robust security features like conditional access and self-healing platforms. Complex multi-cloud environments, rising infrastructure costs, and evolving regulatory requirements, such as GDPR and HIPAA, pose additional challenges for organizations and their partners.

Industry Partnerships

The competitive landscape is marked by innovation and strategic alliances among key players like Citrix Systems, VMware, Microsoft, Amazon Web Services (AWS), and IGEL Technology.

Citrix offers comprehensive digital workspace solutions, while VMware's Workspace ONE integrates with Microsoft Endpoint Manager and Google Workspace to support hybrid work.

Microsoft leverages Azure for cloud-based EUC solutions, and AWS provides virtual desktop services through WorkSpaces. Strategic partnerships, such as VMware and

Microsoft's 2022 collaboration on Workspace ONE or KKR's USD 4 billion acquisition of Broadcom's EUC Division in 2024, underscore the market's dynamism.

These players are investing in AI-driven analytics, self-healing platforms, and workspace suites to enhance user experiences and security, creating opportunities for channel partners to align with innovative vendors.

Channel Opportunities

For channel partners, the EUC market offers substantial opportunities to drive growth. The dominance of cloud-based solutions presents a chance to partner with providers like AWS, Microsoft Azure, or Google Cloud to deliver DaaS and UEM offerings, supported by implementation and migration services.

The growing emphasis on cybersecurity and compliance creates demand for consulting services to deploy secure, regulatory-aligned solutions, particularly in industries like healthcare and BFSI.

The integration of AI and edge computing opens avenues to collaborate with vendors like NVIDIA or Oracle, offering advanced solutions for sectors such as manufacturing and telecom.

The BYOD trend provides opportunities to deliver UEM and VDI solutions tailored to diverse devices, while the Asia-Pacific region's rapid growth invites partnerships with regional vendors to serve dynamic workforces in countries like India and China.

Additionally, the rising demand for managed services, including consulting, support, and maintenance, allows partners to build recurring revenue streams by offloading IT management for clients.

Challenges

Despite these opportunities, channel partners face challenges in adapting to the cloud-driven disruption of traditional hardware-focused models, requiring a shift to SaaS and subscription-based offerings.

Intense competition from both established players and agile startups demands differentiation through value-added services like customization and superior support.

Cybersecurity expertise is essential to address client concerns about data breaches, while navigating complex regulatory landscapes requires compliance-focused solutions.

To succeed, partners should form strategic alliances with leading vendors, invest in training for cloud, AI, and cybersecurity expertise, and focus on industry-specific solutions for high-growth sectors.

Leveraging data-driven insights from firms like Canalys and offering comprehensive managed services can further enhance competitiveness.

Conclusion

In conclusion, the EUC market offers channel partners a dynamic opportunity to capitalize on the growing demand for cloud-based, secure, and scalable solutions. With a projected CAGR of 13.3% through 2032, partners can drive growth by aligning with innovative vendors, building expertise in emerging technologies, and delivering tailored solutions for industries like healthcare, education, and BFSI.

By addressing challenges such as cybersecurity, regulatory compliance, and competition through strategic partnerships and value-added services, channel partners can establish themselves as trusted advisors in the evolving EUC ecosystem.

Service Models

Desktop-as-a-Service (DaaS), Virtual Desktop Infrastructure (VDI), Unified Endpoint Management (UEM), and application virtualization represent the core delivery models in the End User Computing (EUC) market, each catering to distinct organizational needs with unique advantages, challenges, and use cases.

Understanding these differences is critical for channel partners to align their offerings with client requirements and market trends.

Desktop-as-a-Service (DaaS)

Desktop-as-a-Service (DaaS) is a cloud-based model where virtual desktops are hosted and managed by third-party providers, such as Amazon Web Services (AWS) WorkSpaces, Microsoft Azure Virtual Desktop, or Citrix Managed Desktops.

In this model, the provider handles infrastructure, maintenance, software updates, and security, delivering a fully managed, subscription-based service. DaaS excels in scalability, allowing organizations to rapidly adjust the number of virtual desktops based on demand, making it ideal for dynamic workforces, seasonal businesses, or industries like education and call centers with fluctuating needs.

For example, educational institutions can scale up virtual desktops during exam periods and scale down afterward, minimizing costs. DaaS eliminates the need for significant upfront capital expenditure on hardware, as it leverages the provider's cloud infrastructure, and its pay-as-you-go pricing aligns with operational budgets.

Providers often integrate advanced security features, such as encryption, multi-factor authentication, and endpoint detection, which are critical for industries like healthcare and banking, financial services, and insurance (BFSI), where compliance with regulations like HIPAA or GDPR is essential.

Additionally, DaaS simplifies compliance by centralizing data storage in the cloud, reducing the risk of data breaches on end-user devices. However, DaaS relies heavily on stable internet connectivity, and performance can degrade in regions with unreliable

networks. Customization options are often limited compared to on-premise solutions, as providers offer standardized configurations.

Organizations may also face vendor lock-in, where switching providers incurs significant migration costs, and long-term subscription fees can accumulate, potentially exceeding the cost of other models over extended periods.

For channel partners, DaaS presents opportunities to offer implementation, migration, and ongoing support services, leveraging partnerships with cloud providers like AWS or Microsoft to deliver scalable solutions with minimal upfront investment.

Virtual Desktop Infrastructure (VDI)

Virtual Desktop Infrastructure (VDI), in contrast, is typically deployed on-premise or in a private cloud, with virtual desktops hosted on an organization's own servers or data centers, managed internally or by a partner.

Leading solutions like VMware Horizon and Citrix Virtual Apps and Desktops provide robust platforms for VDI deployments. VDI offers organizations greater control over the desktop environment, enabling extensive customization of configurations, security policies, and applications to meet specific requirements.

This makes VDI particularly suitable for industries with stringent regulatory needs, such as finance or government, where data sovereignty and compliance with regulations like GDPR or PCI DSS are critical.

For instance, a financial institution can configure VDI to restrict data exports and enforce strict access controls. VDI also supports offline access, as desktops can be hosted locally, reducing dependency on internet connectivity—a key advantage in environments with limited network reliability.

Additionally, VDI allows organizations to optimize resource allocation, such as dedicating high-performance GPUs for graphic-intensive applications in industries like engineering or media. However, VDI requires substantial upfront investment in servers, storage, and networking infrastructure, as well as ongoing maintenance and skilled IT staff to manage the environment.

Scaling VDI is complex and costly, often requiring additional hardware or licenses, which can delay deployment compared to DaaS. Performance can also be constrained by on-premise hardware limitations, and organizations must handle their own security updates and patches, increasing operational overhead.

For channel partners, VDI deployments offer significant opportunities to provide consulting, implementation, and managed services, but they demand deep technical expertise and resources to design and maintain complex infrastructure.

Unified Endpoint Management (UEM)

Unified Endpoint Management (UEM) shifts the focus from delivering virtual desktops to managing and securing a diverse range of devices, including desktops, laptops, tablets, and smartphones, within a single platform.

Solutions like VMware Workspace ONE, Microsoft Intune, or IBM MaaS360 integrate device management, application delivery, and security policies, making UEM ideal for organizations adopting Bring Your Own Device (BYOD) or Choose Your Own Device (CYOD) policies.

Unlike DaaS and VDI, which prioritize desktop virtualization, UEM emphasizes endpoint management, ensuring consistent security and configuration policies across varied devices and operating systems, such as Windows, macOS, iOS, and Android. For example, in retail, UEM enables secure management of employee tablets and customer-facing kiosks, while in education, it supports student-owned devices in virtual classrooms. UEM supports modern management features like zero-touch provisioning, remote wipe capabilities, and integration with cloud services for scalability.

It also enables organizations to enforce compliance policies, such as requiring device encryption or restricting unauthorized apps, which is critical for regulated industries.

However, UEM does not provide the full desktop virtualization capabilities of DaaS or VDI, and its effectiveness depends on seamless integration with other EUC solutions. Managing diverse device ecosystems can also introduce complexity, particularly in ensuring compatibility across platforms.

For channel partners, UEM offers opportunities to deliver device management services, support BYOD initiatives, and provide integration expertise, but it requires proficiency in cross-platform security and configuration management.

Application Virtualization

Application Virtualization delivers individual applications to users without virtualizing the entire desktop, using solutions like Microsoft App-V, Citrix Virtual Apps, or Cameyo.

This model streams applications to devices, isolating them from the underlying operating system to enhance security and compatibility. It is particularly cost-effective for organizations needing to deliver specific applications, such as legacy software or task-specific tools, without the overhead of full desktop virtualization.

For instance, a call center may use application virtualization to provide agents with access to a CRM application, or a manufacturing firm may deliver CAD software to engineers. This approach reduces resource demands, as it does not require hosting full desktop environments, and it simplifies updates by centralizing application management.

Application virtualization also enhances security by isolating applications, reducing the risk of conflicts or malware. However, it does not provide a complete desktop experience, limiting its use for workflows requiring a full operating system environment. Compatibility issues may arise with complex or resource-intensive applications, and performance can be affected by network latency.

For channel partners, application virtualization offers a niche opportunity to support clients with targeted application delivery needs, often as a complementary solution to DaaS or VDI, but it requires expertise in application packaging and delivery optimization.

Application Packaging

Application packaging is the process of preparing software applications for deployment in a standardized, consistent, and automated manner across various computing environments, such as desktops, virtual desktops, or cloud-based platforms.

It involves encapsulating an application, along with its dependencies, configurations, and settings, into a portable format that can be easily installed, updated, or removed without conflicts or compatibility issues.

In the context of the End User Computing (EUC) sector, application packaging ensures that applications run seamlessly on diverse devices and platforms, including Windows, macOS, iOS, Android, and virtualized environments like Virtual Desktop Infrastructure (VDI) or Desktop-as-a-Service (DaaS).

The primary goals of application packaging are to simplify deployment, enhance compatibility, improve security, and streamline management. By creating standardized packages—such as MSIX, App-V, or containers—application packaging isolates applications from the underlying operating system, reducing conflicts with other software or system settings.

This isolation also enhances security by minimizing the risk of malware or unauthorized access, which is particularly valuable in regulated industries like healthcare and banking, financial services, and insurance (BFSI).

Packaging supports modern EUC trends by enabling applications, including legacy software, to be delivered to cloud-based platforms like Microsoft Azure Virtual Desktop or AWS WorkSpaces, ensuring compatibility without requiring extensive code rewrites.

For channel partners, such as Managed Service Providers (MSPs), system integrators, and value-added resellers, application packaging is a critical service that reduces deployment time, lowers support costs, and enhances client satisfaction in complex EUC environments.

Enterprise Browsers

Enterprise browsers are specialized web browsers designed to meet the security, compliance, and productivity needs of modern enterprises.

Built on open-source engines like Chromium (used by Chrome, Edge, and others), they incorporate features such as zero-trust security, granular policy enforcement, data loss prevention (DLP), and integration with identity and access management (IAM) systems.

According to Gartner's 2024 Market Guide for Enterprise Browsers, adoption is expected to reach 25% by 2026, driven by the shift to hybrid and remote work and the increasing reliance on web-based applications, including Software-as-a-Service (SaaS) platforms and internal web apps.

A 2024 Forrester study further notes that 90% of IT professionals see web-based solutions as the future of EUC, with enterprise browsers playing a pivotal role in securing the "last mile" of digital work—where users interact with sensitive data.

In the EUC sector, enterprise browsers address the limitations of consumer browsers, which lack the visibility, control, and security required for enterprise use. They provide a unified platform for accessing web-based applications, reducing the complexity of traditional security tools like Virtual Private Networks (VPNs) or Remote Browser Isolation (RBI).

For example, enterprise browsers like Talon (acquired by Palo Alto Networks for $625 million in 2023), Island, and SURF Security offer features such as anti-phishing, data redaction, and behavioral monitoring, ensuring secure access to SaaS apps like Salesforce or internal portals without compromising user experience.

Integration with EUC Delivery Models

These capabilities align with the EUC sector's focus on enabling secure, flexible access to resources across diverse devices and locations.

Enterprise browsers complement and enhance the core EUC delivery models—DaaS, VDI, UEM, and application virtualization—by providing a secure, browser-based access layer that simplifies application delivery and endpoint management.

Enterprise browsers enhance DaaS by serving as the primary interface for accessing these virtual desktops, offering built-in security features like conditional access and DLP. For instance, Google's Chrome Enterprise Premium integrates with AVD to provide advanced threat protection, copy/paste controls, and screenshot protections, reducing reliance on complex VDI setups.

Enterprise browsers reduce VDI dependency by providing secure, browser-based access to web applications, minimizing the need for full desktop virtualization. For example, SURF Security's zero-trust browser allows employees to access SaaS and internal apps without complex VDI infrastructure, lowering costs and improving productivity.

Enterprise browsers integrate with UEM to enforce device posture checks, ensuring only compliant devices access corporate resources. For instance, Island's enterprise browser verifies user identity and device status (e.g., OS patch levels, encryption) before granting access to SaaS apps, aligning with zero-trust principles.

Application virtualization delivers applications independently of the desktop environment, and enterprise browsers complement this model by serving as a secure delivery mechanism for web-based and virtualized applications. For example, Talon's browser supports Secure Socket Shell (SSH) apps and SaaS platforms, ensuring secure access across devices.

Vendor Profiles

Nerdio

Nerdio, a leading software provider in the End User Computing (EUC) sector, delivers significant value to channel partners—such as Managed Service Providers (MSPs), system integrators, and value-added resellers—seeking to expand into this rapidly growing market.

By focusing on simplifying the deployment, management, and optimization of Microsoft cloud technologies like Azure Virtual Desktop (AVD), Windows 365, and Microsoft Intune, Nerdio empowers partners to capitalize on the $60 billion Desktop-as-a-Service (DaaS) market, projected to grow at 18% annually through 2037.

Nerdio's primary value lies in its automation-centric platform, which streamlines the management of Microsoft cloud-based EUC solutions, reducing operational complexity and costs.

The Nerdio Manager for MSP and Nerdio Manager for Enterprise platforms enable partners to deploy and manage AVD and Windows 365 environments efficiently, offering features like auto-scaling, license optimization, and granular role-based access control (RBAC).

These capabilities can reduce Azure compute and storage costs by up to 80%, as demonstrated by clients like Equitable Bank, which achieved over 50% savings on Azure costs. For partners, this translates into the ability to offer cost-effective DaaS solutions, attracting clients transitioning from traditional Virtual Desktop Infrastructure (VDI) solutions like Citrix or VMware to Microsoft's cloud-native platforms.

AppCure

Appcure, a provider of application packaging and virtualization solutions, plays a pivotal role in the End User Computing (EUC) sector by addressing critical needs for application delivery, security, and compatibility in modern digital workspaces.

Its flagship offering, the Appcure platform, automates the packaging of applications into formats like MSIX, App-V, or containers, ensuring compatibility with modern EUC solutions such as Microsoft Azure Virtual Desktop, Citrix Virtual Apps, and VMware Horizon.

This automation reduces the time and complexity of application deployment, which is critical in EUC environments where organizations need to support hybrid workforces accessing applications from various devices and locations.

For example, Appcure's ability to convert legacy applications into modern formats allows businesses to maintain critical software in cloud-based or virtualized settings without requiring costly rewrites, addressing a key pain point in industries like healthcare and finance where legacy systems are prevalent.

For channel partners, Appcure's value lies in its ability to enhance their service offerings in the EUC market. By integrating Appcure's solutions, partners can offer end-to-end application management services, from packaging and testing to deployment and maintenance, complementing broader EUC strategies involving DaaS, VDI, or Unified Endpoint Management (UEM).

For instance, partners can leverage Appcure to streamline application delivery for clients adopting BYOD policies, ensuring secure access across diverse devices without compromising performance. Additionally, Appcure's compatibility with UEM solutions like Microsoft Intune enhances its utility for partners serving clients with complex device ecosystems, such as in education or retail, where managing varied endpoints is critical.

Liquidware

Liquidware provides a suite of platform-agnostic solutions that enhance user experience, streamline application delivery, and optimize workspace performance across physical, virtual, and cloud-based environments.

Its flagship products—ProfileUnity, FlexApp, Stratusphere UX, and CommandCTRL—form a comprehensive suite that complements major EUC platforms like Microsoft Azure Virtual Desktop (AVD), Windows 365, Citrix Virtual Apps and Desktops, VMware Horizon, Amazon WorkSpaces, and Dizzion Frame. These solutions

enable organizations to manage hybrid workspaces, ensuring flexibility, security, and productivity for remote and distributed workforces.

- **ProfileUnity** focuses on user environment management (UEM), centralizing user profiles, policies, and data across physical, virtual, and cloud environments. It modernizes profile management by offering context-aware policies, immediate policy enforcement at login, and advanced role-based access control (RBAC).
- **FlexApp** revolutionizes application delivery through a dynamic application layering approach, where applications are attached on-demand without traditional installation, reducing base image management and enabling pristine Windows workspaces.
- **Stratusphere UX** provides advanced monitoring and optimization for digital workspaces, offering real-time visibility into user experience, application performance, and endpoint strategy.
- **CommandCTRL** is a SaaS-based solution that leverages AI for real-time desktop remediation and process identification. It addresses IT support challenges by instantly pinpointing resource-intensive processes (e.g., a slow application) and enabling rapid fixes, reducing resolution times from hours to minutes.

Liquidware's suite addresses all facets of DEX—management, delivery, monitoring, and control—allowing partners to offer end-to-end services that complement platforms like AVD, Citrix, and VMware. This reduces the need for multiple vendors, simplifying service delivery and increasing profitability.

Rimo3

Rimo3 focuses on automating Windows application management, addressing the challenges of migrating and maintaining applications in modern EUC environments.

Its flagship product, the Workspace360 platform, encompasses tools like Discover360, Validate360, Package360, and Wayfinder, which collectively streamline application discovery, compatibility testing, packaging, and strategic migration planning.

These solutions are designed to reduce time, cost, risk, and complexity in enterprise IT transformations, enabling organizations to maintain evergreen

workspaces—continuously updated, secure, and compliant environments—while minimizing downtime and manual effort.

Rimo3's platform integrates seamlessly with leading EUC tools, including Microsoft Intune, System Center Configuration Manager (SCCM), Nerdio Manager for Enterprise, Liquidware FlexApp One, and ServiceNow, enhancing existing workflows through its extensible API.

This interoperability makes Rimo3 a versatile solution for organizations transitioning from legacy systems like SCCM to cloud-native endpoint management with Intune or modernizing applications for cloud-based DaaS platforms. By automating repetitive tasks like patch validation and application packaging, Rimo3 ensures compliance with cybersecurity standards and reduces vulnerabilities.