

DIGITAL WORKPLACE

This is the Market Development Plan for the [Digital Workplace](#) partner accelerator program. Join the networking community [here](#) to propose updates to this document.

Executive Summary

The Digital Workplace sector, encompassing intranets, unified communications (UC), end-user computing (EUC), and related technologies, continues to experience robust growth driven by hybrid work models, AI integration, and the demand for secure, collaborative environments.

As of 2025, the global market is valued at approximately \$67.57 billion, projected to reach \$161.82 billion by 2030, growing at a compound annual growth rate (CAGR) of 19.1%. Alternative forecasts suggest even higher expansion, with Grand View Research estimating \$166.27 billion by 2030 at a 22.8% CAGR.

For channel partners—resellers, integrators, and managed service providers—this sector presents significant revenue opportunities through bundled solutions, managed services, and AI-enhanced implementations.

However, challenges such as tool sprawl, cybersecurity threats, and macroeconomic uncertainty require strategic navigation. Key trends like AI-powered personalization and unified platforms offer partners a chance to differentiate by delivering tailored, outcome-based services.

This report analyzes market dynamics, trends, competitive landscape, and actionable insights to help partners capitalize on the sector's momentum.

Executive Summary	1
Market Strategy	3
Trends, Size and Growth Projections.....	3
Competitive Landscape.....	4
Challenges and Opportunities for Channel Partners.....	5
Recommendations for Channel Partners.....	6
Conclusion.....	6
Solutions Catalogue	7
Unified Communications.....	7
End User Computing.....	7
VDI.....	7
Unified Endpoint Management.....	8
Application Packaging.....	8
Solution Use Cases	9

Market Strategy

The Digital Workplace refers to the integrated ecosystem of tools and technologies that enable seamless employee collaboration, productivity, and engagement, regardless of location. Core components include:

- **Intranets:** Centralized platforms for knowledge sharing, internal communications, and employee self-service.
- **Unified Communications (UC):** Services like UCaaS (Unified Communications as a Service), encompassing voice, video, messaging, and conferencing.
- **End-User Computing (EUC):** Virtual desktop infrastructure (VDI), device management, and cloud-based access to applications.
- **Related Technologies:** Security/compliance tools, workflow automation, and collaboration platforms.

Post-pandemic, the sector has evolved from reactive remote work solutions to proactive ecosystems supporting hybrid models.

For channel partners in the IT industry, this means shifting from hardware sales to high-margin services like deployment, optimization, and ongoing support. With enterprises prioritizing digital transformation, partners can leverage vendor ecosystems (e.g., Microsoft, Cisco) to drive recurring revenue.

Trends, Size and Growth Projections

The Digital Workplace market is on a steep upward trajectory, fueled by digital transformation initiatives and the gig economy's rise. In 2025, the market stands at \$67.57 billion, with forecasts varying by scope:

2025 trends emphasize AI integration, unification, and employee-centric design, creating bundling opportunities for partners:

1. **AI-Powered Personalization and Automation:** Generative AI (e.g., Microsoft Copilot) automates content creation, summarizes meetings, and personalizes intranets. 60-70% open rates in personalized newsletters reported by adopters. Partners can upsell AI training services.

2. **Unified Digital Workplaces:** Integration of UCaaS, intranets, and EUC into single platforms (e.g., Microsoft Teams + SharePoint) reduces tool sprawl. Omnichannel approaches bridge deskless workers via mobile apps.
3. **Hybrid Work and Mobile/Frontline Support:** Features like offline access and push notifications for mobile intranets address remote challenges. DEX (Digital Employee Experience) studies show troubleshooting as a top pain point (18% of remote workers).
4. **Enhanced Security and Self-Healing Systems:** Unified security in workflows detects threats without disruption. Studies indicate UC attacks tripled since 2021.
5. **Analytics and Employee Engagement:** Deeper reporting on engagement (e.g., via Webex AI) enables predictive insights. Trends like digital twins and IoT integration offer real-time operational data.

These trends align with channel partners' strengths in customization and support, enabling 20-30% margins on managed services.

Competitive Landscape

Microsoft dominates with ~19.1% market share in collaboration tools, followed by Google, Zoom, Salesforce, and Cisco. In UCaaS, leaders per Forrester's 2025 Wave include:

Vendor	Strengths	Partner Opportunities
Microsoft (Teams)	Seamless M365 integration; AI extensibility	High-volume reselling; custom Copilot deployments.
Zoom	AI-first video; interoperability	Hybrid UC bundles; CCaaS add-ons
Cisco (Webex)	Security, hybrid flexibility	Network-integrated EUC; room management

Google Workspace	Immersive connections; 3B+ users	SMB-focused intranets; cost-effective scaling
---------------------	-------------------------------------	--

Service providers like Accenture, Cognizant, and IBM lead in managed Digital Workplace services, partnering with hardware giants for end-to-end solutions. Channel partners can differentiate via niche integrations (e.g., Zoom + Cisco Rooms).

Challenges and Opportunities for Channel Partners

- **Macroeconomic Uncertainty:** 36% of partners cite economic instability as a top 2025 issue, pressuring ROI demonstrations.
- **Tool Fragmentation and Adoption:** Overwhelmed workforces face disengagement; generic programs reduce participation.
- **Cybersecurity and Compliance:** Rising threats (e.g., UC attacks) demand proactive monitoring, straining resources.
- **AI Hype vs. Reality:** Fragmented AI pilots limit impact; partners must focus on outcome-based proofs.
- **Managed Services Expansion:** With managed Digital Workplace at USD 56.18 billion in 2025, partners can offer VDI provisioning and UC optimization for recurring revenue.
- **AI and Hybrid Bundles:** Co-marketing with vendors like Cisco enables joint campaigns, targeting SMEs with 24% regional growth.
- **Localization and Scalability:** Use digital marketplaces for global reach; AI analytics optimize partner selection.
- **DEX Focus:** Address troubleshooting via self-healing tools, capturing 15-20% margins in frontline support.

Partners succeeding in 2025 will prioritize data-driven engagement and vendor-agnostic advice.

Recommendations for Channel Partners

1. **Build AI Expertise:** Invest in certifications (e.g., Microsoft Copilot) to lead transformations; target 20% revenue from AI services.
2. **Focus on Unification:** Develop bundles integrating UCaaS + EUC; use tools like Zapier for automation.
3. **Enhance Security Offerings:** Partner with vendors for IAM/DLP; offer compliance audits to mitigate risks.
4. **Leverage Data Insights:** Implement analytics for personalized pitches; track engagement to refine programs.
5. **Target Growth Verticals:** Prioritize BFSI and Asia Pacific; use events like Channel Partners Expo for networking.

Conclusion

The Digital Workplace sector in 2025 is a powerhouse of innovation, with AI, unification, and hybrid resilience driving explosive growth. For channel partners, this translates to a fertile ground for high-value services amid challenges like economic pressures and security demands.

By aligning with trends and vendors like Microsoft and Cisco, partners can secure sustainable revenue streams and position themselves as indispensable advisors in the evolving ecosystem. Proactive adaptation will define success—embrace the opportunities to thrive in this USD 160B+ future.

Solutions Catalogue

Unified Communications

The demand for hybrid work solutions offers opportunities to bundle UCaaS with collaboration platforms like Microsoft Teams or Zoom. Partners can differentiate by offering value-added services, such as compliance-driven UC solutions for regulated industries like healthcare and government, or AI-powered tools that enhance user experiences and streamline workflows.

Managed services, including implementation, training, and support, can attract businesses seeking to reduce IT overhead. Strategic partnerships with major vendors like Microsoft, Cisco, or RingCentral, as well as local telecom providers, can enhance market reach and service offerings.

Industry-specific solutions, such as UC platforms for telehealth, e-governance, or hospitality, also present significant potential.

End User Computing

End User Computing (EUC) denotes a grouping of products and capabilities that addresses the desktop and device computing needs of an organization's users.

VDI

A core component is VDI (Virtual Desktop Infrastructure). The global market for VDI was valued at around \$14.4 billion in 2022 and is estimated to grow to \$50.5 billion by 2030, at a CAGR of approximately 20.3%.

VDI 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.

Unified Endpoint Management

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.

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).

Solution Use Cases

Solution Use Cases define specific customer scenarios, including the pain points that are motivating their purchase and a profile of their current product estate, enabling sales teams to prospect for opportunities matching this pattern.

Use Case	Market Opportunity	Partner Solutions
Citrix Migration	As enterprise IT organizations evaluate their VDI strategies, many are considering a migration away from Citrix due to evolving business needs, technological advancements, and cost considerations.	