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Reaching the Next-Generation Digital Workspace



Shannon Kalvar
Research Manager,
IT Service Management and Client Virtualization, IDC

Table of Contents

CLICK ANY HEADING TO NAVIGATE DIRECTLY TO THAT PAGE.

IDC Opinion . . . 3

Four Maturity Levels: Problem-Solvers, Tactical Managers, Solution Creators, and Digital Experience Managers . . . 6

Maturity Level Matrix . . . 6

Moving Up the Maturity Scale . . . 7

Business Decision Matrix . . . 7

Organize and Architect: From Problem-Solving to Tactical Management . . . 8

Elevate: From Tactical Management to Solution Creation . . . 9

Prepare for the Future: From Solution Creation to Digital Experience Management . . . 10

Maturity Level Details . . . 11

Maturity Level 1: Problem-Solvers . . . 11

Maturity Level 2: Tactical Managers . . . 12

Maturity Level 3: Solutions Creators . . . 13

Maturity Level 4: Digital Experience Managers . . . 14

Key Findings . . . 15

Key Finding 1: It's a Hybrid World . . . 16

Key Finding 2: Platforms Are Fundamental at Higher Maturity Levels . . . 17

Key Finding 3: Maturity Consistently Enhances Business Outcomes . . . 18

Key Finding 4: Maturity Unevenly Enhances Management Metrics . . . 20

Key Finding 5: Device Life Spans Increase Across Maturity Levels . . . 21

Key Finding 6: Unexpected Value Delivery . . . 22

Key Finding 7: A Gateway to the Next Workspace Model? . . . 23

Beyond Digital Experience: The Next-Generation Digital Workspace . . . 25

Challenges/Opportunities . . . 26

Conclusion . . . 27

Appendix: Supplemental Data . . . 28

About the IDC Analyst . . . 30

Message from the Sponsor . . . 31

IDC Opinion

In 2024, IDC and Citrix surveyed 400 North American enterprises with more than 5,000 employees to determine their approach to and level of maturity in managing their employees' digital workspace management in the modern dynamic and hybrid digital world. These enterprises displayed four distinct categories of maturity, each with a unique approach and corresponding challenges, and a steady increase in quantifiable business results as they progressed. IDC then enriched the survey with its global research data and analysis to deliver a comprehensive study.

In general, the study revealed the following:

- Organizations increase the exposure and integration of their end-user computing (EUC) approach as they progress in maturity, treating it as part of their overall hybrid strategy rather than an isolated discipline.
- Organizations seeking the highest levels of agility, innovation, and correspondingly increased profits focus less on cost optimization and more on fit for purpose.
- Tool consolidation facilitates the transition between lower levels of maturity; the transition to higher levels of maturity requires a unified platform and approach.
- There is a large disconnect between what users believe will be valuable and what they report as being useful after moving into operations.

Organizations that participated in this study fell into four discrete maturity levels:



Problem-Solvers (Maturity Level 1)

Resolve specific problems using one or more tools that are well suited to their exact needs.



Tactical Managers (Maturity Level 2)

Plan for and resolve business needs, **gaining a 108% improvement on time to deliver projects** and a **68% improvement in their ability to develop workspace solutions** over maturity level 1.



Solution Creators (Maturity Level 3)

Create an employee experience solution using digital workspace management, gaining greater control **(21% improvement from M2 in time spent in operations)** with corresponding increases in employee satisfaction and total uptime **(increases of 27% and 29%, respectively).**



Digital Experience Managers (Maturity Level 4)

Create a curated digital employee experience, delivering a **21.8% better ability to meet the target time** for end-user computing projects, a **21.9% better ability to meet offboarding requirements,** and a **21.5% increase in employee satisfaction levels.**

IDC's Definition of Digital Workspace Management and Digital Workspace Management Platform

IDC's research indicates that, for the foreseeable future, enterprises will rely on an increasingly dynamic digital estate to run their businesses. This estate resides on the edge, in public clouds, in datacenters, and behind the interfaces of various software-as-a-service providers. Employees will access this digital estate through **digital workspaces** housed on physical and virtual devices, and they will expect consistent, high-quality, and secure access to the resources they need, when they need them.

For the purposes of this study, IDC defines **digital workspace management** as the combination of infrastructure platforms, endpoint device control, endpoint operating systems, software as a service, and other software used to perform work. These elements may be coordinated through a digital workspace management platform, which may include application and/or desktop virtualization, custom workflows, and other technologies.

A digital workspace management platform is an integrated system — or system of systems — that provides employees with digital workspace management services. An organization may create its platform by connecting multiple systems together, by purchasing one from a vendor, or, most likely, through a combined approach. Some or all of the system components may be purpose built for workspace management; others may be selected based on their ability to meet specific use cases or be purpose built for other technical disciplines and be repurposed for this use.

Organizations at the start of their journey (maturity level 1 and 2) are hesitant to adopt a unified platform approach (over 67% are ambivalent, not likely, or not likely at all to adopt). Those at the midpoint of the journey (maturity level 3 and 4) are equally hesitant in concept but have already typically adopted a platform approach (56% of level 3 are fully integrated or have a central platform, with that number increasing to 66% for level 4). Apparently forced to adopt a platform practically, it seems that executives continue to discuss the complexities of such platforms until late in the maturity cycle.

Unlike in other maturity models, maturity level 4 in this study seems to indicate the start of a new journey. Although over 70% of respondents at maturity level 4 are satisfied with their results, they also see enormous opportunities for improvement. The paper will explore this, but IDC's initial take on this is that these organizations, having met today's needs, see the enormous changes coming to the digital workspace in the next five years and intend to get ahead of the change before it overwhelms them.

Four Maturity Levels: Problem-Solvers, Tactical Managers, Solution Creators, and Digital Experience Managers

The four maturity levels outlined below show distinctive patterns of perceived risk, decision-making, observability, and operations approaches, which drive unique outcomes.

Maturity Level Matrix

The following matrix intends to provide the reader with a way to quickly orient themselves in terms of their likely maturity level and what that means.

TABLE 1

Aspirations, Tools, and Challenges by Maturity Level

	Aspiration	Tool Approach	Challenge Statement
M1	Improve employee experience	You have some loosely integrated tools	It's hard to deliver without either making things too simple for the use case or improving the tooling.
M2	Sustainably support a quality employee experience	You have tightly integrated tools	As we dig into the environment, we keep finding more and more use cases that our tools cannot handle.
M3	Deliver a productive workspace in a constantly changing environment	You have a platform you could get more out of	The platform works for each use case, delivering what we need now but maybe not what we want.
M4	Build a new workspace for the AI moment	You have a platform you need more from	We face challenges that require us to work in a completely different way, and the tools cannot keep up.

Moving Up the Maturity Scale

Enterprises looking to move from one step on the maturity scale to another can use the suggestions below from IDC's research.

Business Decision Matrix

Deciding to transition from one maturity level to another is a business decision as much as it is a technical one, one with specific implications and steps. IDC recommends the following.

Organizations at the **problem-solving** stage **should transition** to **tactically managing** their environment. There are considerable benefits across almost all business metrics for the transition, with particular improvements in revenue, innovation, and profits, which come from stabilizing and managing the digital workspace.

Organizations engaged in **tactical management** **should consider** whether their corporation is attempting to accelerate innovation, manage risks, and control business costs, understanding that achieving those goals will in fact require both financial and time investment in a platform. If the corporation is not looking for those gains, or does not want them from the IT division, then it should pause its plan to transition to **solution creation**.

Organizations engaged in **solution creation** **should transition** to **digital experience management**. This transition solidifies the gains from M3 and translates them into distinct improvements in agility, innovation, and revenue, leading to improved corporate profits. With the platform investment already made, this process of refinement is primarily one of configuration and knowledge growth rather than financial investment.

Organizations engaged in **digital experience management** should prepare a **next-generation vision** for their digital employee experience. Having come to the end of what the current experience and tools can cover, they should reimagine the art of the possible and go forward.

Organize and Architect: From Problem-Solving to Tactical Management

Primarily, a shift in operational and strategic responsibility marks the transition from maturity level 1 to maturity level 2. The individual or team responsible for integrating, planning, and maintaining the digital workspace management platform moves from being part of an isolated team into the EUC context. Additionally, technology and strategic decisions about the platform move away from EUC and into the organization's broader architectural process, retaining specialized knowledge of EUC technology stacks.

IDC recommends taking the following actions as part of transitioning from problem-solving to tactical management:

- Train or hire an EUC-focused architect as part of the initial staffing plan.
- Focus executive and business communications on the benefits gained from this effort on onboarding and offboarding employees, meeting project requirements' time and cost commitments, and increasing agility in delivering solutions that meet business needs.
- Consider the role of cloud from the "EUC" point of view, with a specific focus on disaster recovery and elasticity.
- Communications with security teams should focus on generalized security concepts and resilience rather than on specific EUC or HR concepts.
- Technically, remote access from any device, integration with existing observability suites, and hybrid resource management for resilience are key features that deliver unexpected value, and they should therefore be targeted as "quick wins."

In line with the communicated benefits, the transition to this maturity level should show marked improvement in the business' ability to respond to new user requirements, resilience, and ability to link digital resources together to spur innovation. Many of these opportunities may already exist in the environment — incomplete mergers from the past, which still require extensive workarounds or efforts to maintain, may represent prime targets for a new (and lower-cost) approach. For example, a common internal problem is having to maintain two or more devices for a single employee due to incompletely transitioned applications from previous business mergers. Proper digital workspace management can use application virtualization or other streaming technologies to deliver those applications to enterprise-standard devices, reducing risk and increasing agility.

Elevate: From Tactical Management to Solution Creation

The installation of a comprehensive technology platform marks the transition from tactical management to solution creation, although the organization may still use specialized tools for specific purposes. The governance and strategy for this platform rest with the architecture team; the actual operations may fall either to the current end-user computing team (which should be renamed at this stage) or to platform engineers.

IDC recommends taking the following actions as part of transitioning from tactical management to solution creation:

- Combine the EUC and virtual desktop infrastructure (VDI) teams with current monitoring teams to create the "Digital Employee Experience Team." This unified team's mandate shifts from managing a technology platform to delivering an integrated, productive digital workspace experience for contractors, customers, and employees.
- Work with the cloud and/or platform architecture teams to understand how the hybrid digital estate is channeled into workspaces for different kinds of workers.
- Establish clear lines of communication with key line-of-business stakeholders for future integration into a continuous improvement loop.
- Focus executive communications on the establishment of stronger controls and the realization of existing business opportunities for productivity along with risk management. Business communications about the project should focus on opportunities to improve productivity, especially around the reduction of friction points and the delivery of task-focused applications to new categories of workers.

This level focuses primarily on benefits to the end user — enhanced productivity, reduced risk, and increased resilience so that people can work more effectively. Do not underestimate either the cost or the complexity of implementing the platform; by fully and honestly expressing these concerns, the organization can both anticipate negative sentiment and lay the groundwork for the transition to digital experience management.

Prepare for the Future: From Solution Creation to Digital Experience Management

The transition from solution creation to digital experience management comes about through the optimization of the existing platform, taking advantage of the integrations and features they possess. This optimization assumes not a finished "end state" broader infrastructure but rather that there will be constant change and a need for a hybrid approach to computing. In so doing, it enables employees to work and thrive using the enterprise's digital resources as they are, not as architects and developers hope they will become.

IDC recommends the following actions as part of the transition from solution creation to digital experience management:

- Engage the team in focused, iterative design sessions with the broader architecture team and the platform operations team. Giving the team visibility into upcoming digital estate changes will allow it to adapt the management platform before end users notice a change in their experience.
- Engage line-of-business users in continuous dialogue about their specific needs, transforming those into a continuous improvement pipeline to ensure that the digital experience provides consistent and sustained value.
- Focus executive communications on the ability to deliver on agility and improve profits by improving productivity, reducing overall costs, and increasing revenues by opening up new business opportunities. Business communications about the project should focus on how the changes will remove barriers, focusing on an "it just works" approach — the digital workspace moves aside, so employees can get to work.

This level focuses on team- and business-level benefits, delivering new revenue, reducing costs, and therefore increasing profits. One can see this, to some extent, as the "payoff" for adopting the cost and complexity of **solution creation;** organizations should budget and plan for **problem-solving** as a final program tranche. Organizations "stuck" in **solution creation** for an extended duration should budget and plan for this transition as an optimization project, with an intent to finally realize the full value of their platform investment.

Maturity Level Details

This section provides details on the maturity levels, their impacts on the enterprise, and the unique improvements they bring.

Maturity Level 1: Problem-Solvers

M1 organizations have a limited understanding of the risks associated with digital workspaces in general and the hybrid workspace in particular. They isolate decisions and operations into a specialized team and invest as little as possible to get the basic benefits resulting from the increased operational efficiency derived from having an integrated toolset.

Organizational Pattern for Problem-Solvers

Organizations at maturity level 1 typically do not perceive a high degree of risk across common EUC use cases, such as employee onboarding, device flexibility, and app or desktop management. On a scale of 1 to 5 (with 1 being the highest and 5 the lowest), they see these as being low operational risk (range of 3.86 to 4.02, median 3.89, perceived as low risk). Decision-making about their digital workspace management is mostly confined to VDI or EUC teams (55%) along with some input from an EUC architect associated with enterprise architecture (17.5%).

Organizations at this level of maturity mostly use integrated systems (68% fully or mostly integrated), which provide support for a correspondingly small number of use cases. The low improvements in time spent developing solutions and ability to meet new EUC commitments (less than 10% improvement in time to develop solutions and complete projects) reflect this. However, the investment to reach this level of maturity does pay off in terms of extended useful life of devices (roughly nine months in total), which suggests that the business case presented is likely purely focused on technical operations.

This focus on technical operations helps to explain why, in general, these organizations seem quite content with their solutions. Fewer than 5% see a need to make a major overhaul in their employee offboarding and device flexibility features,

and fewer than 10% see a need for the same for their security and compliance and hybrid workforce capabilities. Only 11.1% see a need for improvements in their centralized application and desktop management abilities.

This narrow focus on existing challenges limits the solution's ability to provide tangible business benefits. The strongest benefits at this level are **operational efficiency** (12.89% increase from an unmanaged state over the previous 12-month period), with a corresponding increase in **faster delivery of products to market** due to improved employee agility and productivity (12.85% increase). Innovation, cost savings, and agility (the primary benefits at maturity level 4) are among the least impacted at this maturity level (10.2%, 9.4%, and 8.6%, respectively).

Maturity Level 2: Tactical Managers

M2 organizations, realizing the risks and potential rewards that come from digital workspace management in hybrid environments, begin to make coordinated decisions and allocate resources to act on them. On average, they continue to use a coordinated system of systems rather than an integrated platform, which prevents them from achieving some business benefits but helps limit cost.

Organizational Pattern for Tactical Managers

Organizations at maturity level 2 begin to mature and perceive the risk inherent in common end-user computing use cases. Their risk awareness scores across all risk categories increased by a median of 0.47 (range of 3.3 to 3.61, median 3.42, low-median risk assessment), with a corresponding increase in investment, resources, and business outcomes. Decision-making about their digital workspace management moves up the organizational structure, with many still relying on the EUC team (23.2% of respondents) but others looking to a dedicated EUC architect (37.3% of respondents) either associated with the EUC team itself or in the enterprise architecture team or another kind of architect entirely (cloud or platform architects, 21.9% of respondents).

Organizations at this level of maturity continue to optimize their integrations across systems (66.9% of respondents indicate some or full integration of tools), while a few dabble in platforms (7.7%). Dramatic improvements in almost all categories reflect these refinements, with **returns on time to complete EUC projects improving by 108%** (from 8.22% improvement in M1 to 17.08% improvement in M2) and **time spent developing workspace solutions improving by 68%**

(from 9.3% improvement in M1 to 15.67% improvement in M2). Organizations overall gain 38% on their previous management metrics in this transition and an additional three months (from nine to 12) in useful device life.

Although these are strong returns, these M2 organizations begin to see the art of the possible, with 25.94% saying that they see an opportunity for major improvements across core digital workspace platform functions, with the highest number of respondents (28.9%) seeing hybrid workforce management as the greatest opportunity. It appears that the dramatic increase in their ability to change and deliver on their digital workspaces awakens them to the opportunities that lie ahead.

The dramatic improvements in **business agility** (16.17% over the previous 12-month period), **sustainability** (16.1%, probably as a result of the one-year extension of device life possible at this maturity level), and **improved employee productivity** (15.73%) reflect this exploration of the art of the possible. The most improved business metrics are faster innovation (52% improvement over M1) and increased profits due to both revenue improvements and operational efficiency (48%, 45%, and 21% improvement, respectively). Overall, business metrics improved by 30% on average during the transition from M1 to M2.

Maturity Level 3: Solutions Creators

M3 organizations seek to improve their employee productivity (both IT and line of business) by implementing a platform to manage their fractured digital workspace. These platforms bring good benefits, but the complexity of the effort can lead to disillusionment.

Organizational Pattern for Solutions Creators

Solutions managers have a clear awareness of the risk inherent in all common EUC use cases. Their risk awareness scores across all categories increase by a median of 0.74 (2.64 to 2.8 range, median of 3.42, above-average risk). Decision-making is primarily in the architecture group (58.3% of respondents), with a preference for dedicated EUC architects (24.3%), likely with experience in a specific integrated platform. Attention has shifted almost completely away from the VDI team, with only 9.7% saying that the team has primary strategy responsibilities and only 11.8% saying that it has primary operational duties within the digital workspace management context.

Organizations at this level of maturity begin the shift to using platforms rather than integrated systems of systems (36.1% use platforms and 39.6% use integrated systems of systems, with a majority responding that they use one of the digital workspace platform vendors in addition to other tools). This shift brings greater control (21% improvement from M2 in time spent in operations), with corresponding increases in employee satisfaction and total uptime (27% and 29%, respectively). The overall increase in business metrics is 13%, with the complexity of transitioning to a platform potentially suppressing some of the potential improvements.

This shift to a platform approach appears to correlate with an expanded understanding of both what is possible and the upcoming potential of EUC. On average, 44.72% of respondents at this level indicate that they would like to see significant or major changes in their platforms, in part because the shift carries with it some operational issues in delivering specific solutions due to the learning curve of new tools.

The shift to a platform approach brings with it impressive improvements in employee productivity (18.5% over the previous 12-month period), resilience (18.28%), and improved time to market (18.08%). The most improved business metrics are faster time to market (42% increase over M2) and reduced business risk (38%). Overall, business metrics improved by 11% on average during the transition from M2 to M3.

Maturity Level 4: Digital Experience Managers

M4 organizations have mastered their platforms and their current environment, allowing them the opportunity to look ahead at what end-user computing in the era of pervasive AI might be and how they might profit from it.

Organizational Pattern of Digital Experience Managers

Digital experience manager organizations have sufficient experience and tooling to realize the explicit risks involved with providing digital workspaces in environments with human actors. Their risk awareness scores have increased by an average of 0.61 (range of 1.94 to 2.23, median of 2.06, high risk). Decision-making remains firmly fixed in the architecture team, with a majority of those architects drawn from the platform and cloud groups (35.4% of respondents) rather than having EUC backgrounds (27.4% of respondents).

Organizations at this level of maturity have mostly moved to platforms (56.5% of respondents) rather than the system-of-systems approach (24.2% of respondents). This shift, along with the organization's growing expertise, allows it to deliver substantial improvements in offboarding (36% improvement) and time spent on operations (37% improvement), with an overall improvement in results of 16%. At this level of maturity, the organization reaps the best benefits from a 21.8% better ability to meet the target time for EUC projects, a 21.9% better ability to meet offboarding requirements, and a 21.5% increase in employee satisfaction levels.

By this level of maturity, 79.04% of organizations see a need for major changes across the platform's ability to satisfy common requirements for a hybrid workforce. Given their strong returns, it is unlikely that this indicates a major dissatisfaction with either their platforms or their gains — it has more to do with the realization that the digital workspace (and digital workspace management) both can and must change to meet evolving business needs in the era of AI everywhere.

The optimization of the platform brings with it impressive improvements to business agility (20.67% over the previous 12-month period), profits (19.75%), and innovation (19.64%). The most improved business metrics include profits (44% increase over M3) and revenue growth (34%). The distribution, however, is highly uneven, with some metrics falling and some barely increasing, for a total growth of 9% overall.

Key Findings

The following study findings provide key insights into the evolution of digital workspace management in hybrid environments:

- **Finding 1:** It's a Hybrid World
- **Finding 2:** Platforms Are Fundamental at Higher Maturity Levels
- **Finding 3:** Maturity Consistently Enhances Business Outcomes
- **Finding 4:** Maturity Unevenly Enhances Management Metrics

- **Finding 5:** Device Life Spans Increase Across Maturity Levels
- **Finding 6:** Unexpected Value Delivery
- **Finding 7:** A Gateway to the Next Workspace Model?

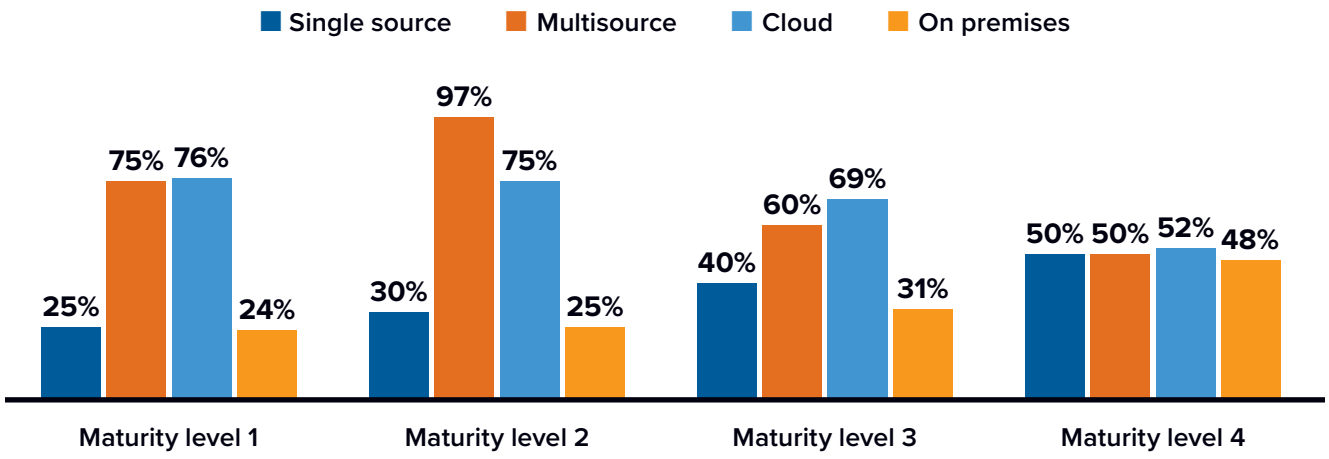
Key Finding 1: It's a Hybrid World

Organizations are, across all maturity levels, a little more than halfway through achieving their infrastructure management objective, with less than one-quarter at any maturity level saying that they were between "80% and 100%" done. What that objective is, though, varies widely, with many preferring permutations of multisource (column 2 below) and cloud first (column 3 below).

FIGURE 1

Convergence of Hybrid Strategies

(Percentage of respondents)



Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

For an accessible version of the data in this figure, see Figure 1 Supplemental Data in the Appendix.

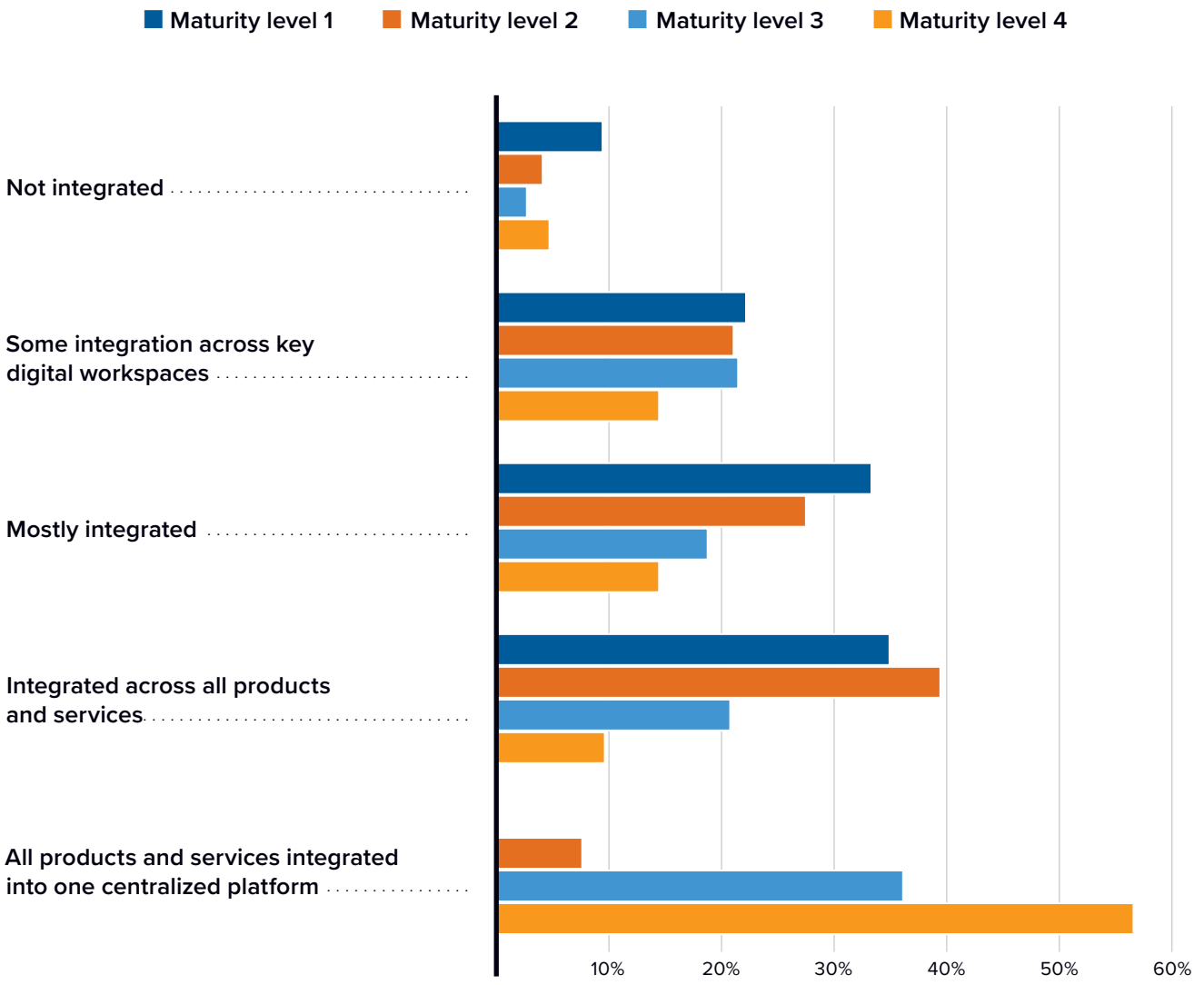
For most organizations, their current reality for their digital workspace infrastructure is some kind of multisource hybrid, spread across datacenter and cloud, with a long-term goal of achieving a workable dynamic balance of resources. M4 organizations, with their complex environments, may aspire to simplify their digital estate by pursuing a single-source strategy (2x more likely than those at M1) but are not making great progress in that direction.

Key Finding 2:
Platforms Are Fundamental at Higher Maturity Levels

FIGURE 2

Levels of Product and Services Integration by Maturity Level

(Percentage of respondents)



Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

For an accessible version of the data in this figure, see Figure 2 Supplemental Data in Appendix 2.

Overall, there seems to be a discrete transition in enterprises' approach to the decision of using a centralized platform. Organizations at the first two maturity levels are highly unlikely to have a platform (0% of respondents at maturity level 1, 7.7% at maturity level 2), while those at higher maturity levels are markedly likely to have a platform (36.1% at level 3, 56.5% at level 4). Those at lower maturity levels prefer some degree of integration across products and services, likely using a variety of specific point solutions integrated into automation, observability, and security frameworks.

This finding underpins the rest of the study. Organizations that have an integrated approach or, most effectively, a centralized platform for digital workspace management can outperform those that do not across most key metrics. This improved performance is not, unfortunately, without cost, and there is a marked tendency (discussed in Key Finding 4) for the uptick in cost and complexity associated with the platform to cause the user's perceptions of value (as opposed to their realization of that value) to come down.

Key Finding 3: Maturity Consistently Enhances Business Outcomes

The more organizations specialize in digital workspace management, the more they have to focus on specific business results. The initial transitions seem to bring a broad array of benefits (M0 to M1, M1 to M2), while the transition to M3 comes at a cost and M4 focuses primarily on the gains that come from agility and innovation. **Table 2** (next page) shows the percentage increase in business metrics across each transition, with the average results across all categories given in the last row.

- M1 average improvement — 11.44%
- M2 average improvement — 15.48%
- M3 average improvement — 18.28%
- M4 average improvement — 17.73%

TABLE 2

Business Outcomes by Maturity Level

	M1 to M2	M2 to M3	M3 to M4
Revenue growth	45%	7%	34%
Cost savings	36%	25%	-7%
Increased profits	48%	-12%	44%
Improved customer satisfaction	19%	3%	-7%
Increased operational efficiency	21%	-8%	-2%
Improved employee productivity	37%	18%	-14%
Faster innovation	52%	3%	24%
Reduced business risk	3%	38%	-1%
Faster time to market	-1%	42%	3%
Improved business agility	33%	-3%	32%
Increased sustainability	28%	1%	2%
Improved business resilience	36%	18%	-3%
Average	30%	11%	9%

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

Based on these results, organizations at maturity level 1 should attempt to transition to M2. Those looking to improve innovation and business cycle times, along with cost savings and risk posture, should shift to M3, while M4 is primarily focused on realizing those gains through revenue growth and improved profit margins.

Key Finding 4: Maturity Unevenly Enhances Management Metrics

Digital workspace management metrics improve steadily as the organization matures, with an average of 10.95% improvement over the previous 12-month period at M1 and growing to a 19.19% improvement over the previous period in M4. **Table 3** gives the top three results along with the average.

TABLE 3

Management Metrics by Maturity Level

Maturity Level	Average	First	Second	Third
1	10.95%	Problem resolution (14.2%)	Offboarding (12.87%)	Employee satisfaction (11.67%)
2	14.79%	Offboarding (18.26%)	Meet time to complete EUC projects (17.08%)	Reduced time to develop EUC solutions (15.67%)
3	16.49%	Employee satisfaction (18.42%)	Meet time to complete EUC projects (17.90%)	Uptime of EUC environment (17.31%)
4	19.190%	Offboarding (21.96%)	Meet time to complete EUC projects (21.88%)	Employee satisfaction (21.53%)

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

The strong average increase across all management metrics (with one exception) indicates that even the transition from integrated systems of systems to platforms (M2 to M3) brings with it increased value. The initial challenges of implementing a platform do, eventually, give way to better results.

Of note, the percentage improvement in the time to identify and resolve end-user problems remains stubbornly fixed, with 14.20% improvement over the previous 12 months at M1 and 14.67% improvement at M4. This is likely a reflection of the overall complexity of the digital workspace environment, even with additional resources and tools.

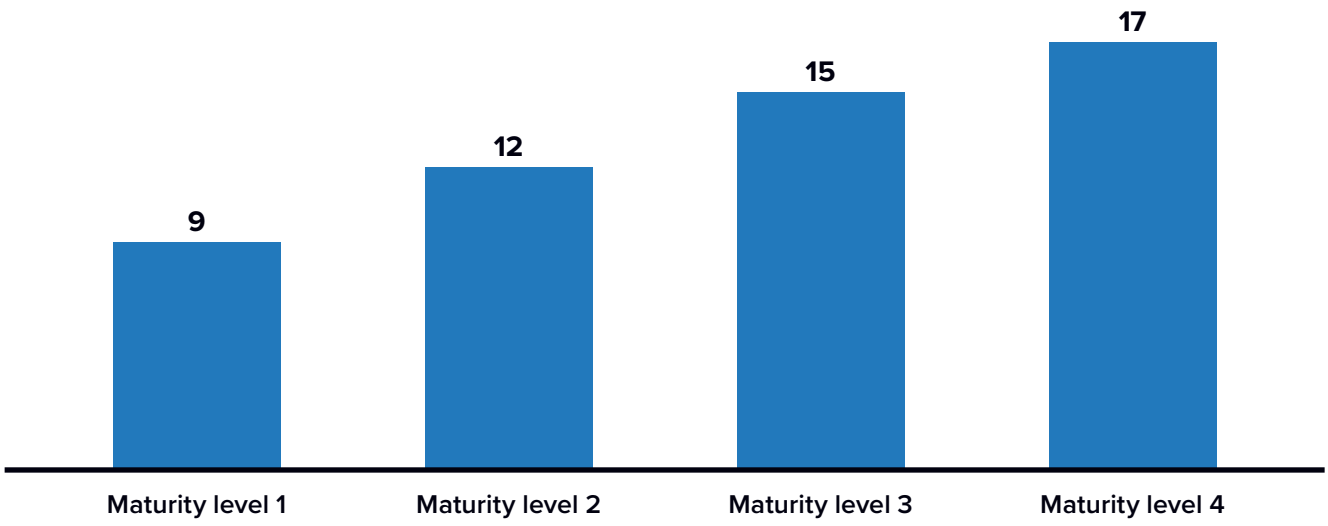
Key Finding 5: Device Life Spans Increase Across Maturity Levels

As an organization becomes more mature, improvements in device management and uptime produce a noticeable and important improvement in overall device life span. This can extend the upgrade life cycle for endpoint devices by as much as 17 months (roughly 1.5 years) for high-maturity organizations.

FIGURE 3

Device Life Span by Maturity Level

(Months)



Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

IDC calculated this extension with both a direct measure (extension in device life span) and indirect measures (improved uptime and useful time in service). The greatest gains are in the first stages of implementation (unmanaged to M1, nine months), with a steady two- to three-month increase in life span for each additional stage. An organization just looking to extend its device life spans, as opposed to finding all of the other advantages from a platform, would likely stop at M2 (12 months).

Key Finding 6:
Unexpected Value Delivery

Organizations discover value in unexpected places as they progress along the maturity curve. **Table 4** shows the variance between what respondents at a given level thought would be useful to them and what they actually reported as useful after using the platform for a while. A positive result (shown in blue) indicates that the feature was MORE useful than expected; a negative result (gray) indicates that it was LESS useful than expected.

Some features (such as securing a digital workspace) are both fairly consistent and easily understood in terms of delivering unexpected value. As organizations mature, they understand the risks they face better — at M1, the security features they can find seem enough, and at M2, they fail to meet their needs, so they shift to platforms that provide rich security functionality that meets their needs.

There is also a clear case for tools helping with dynamic management across four categories (control, cost, compliance, and resilience) within the hybrid digital workspace environment. Control as a category seems somewhat problematic — M1 with its increasingly integrated system-of-systems approach underdelivers while M4 with its monolithic platforms also struggles, possibly as a result of the increasing integration with cloud and platform architecture teams.

TABLE 4

Unexpected Value

	Maturity Level 1	Maturity Level 2	Maturity Level 4	Maturity Level 4
Managing the balance of cloud and on premises for compliance	20.7	10.4	9.2	19.4
Managing the balance of cloud and on premises for resilience	15.7	23.5	2.8	0
Securely delivering digital workspace	12.9	-4.6	12.6	19.4
Integrating with existing observability	7.9	12.9	6.1	9.7
Managing the balance of cloud and on premises for cost	2.1	11.5	9	-12.9

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Continued from the previous page

	Maturity Level 1	Maturity Level 2	Maturity Level 4	Maturity Level 4
Managing SaaS applications	-3.6	3.2	5.9	-6.5
Providing observability	-5.7	6.1	1.9	3.2
Providing remote access from any device	-6.4	14.9	5.9	0
Managing the balance of cloud and on premises for control	-12.1	4.2	4.3	-9.7
Managing traditional applications	-13.6	4.3	-7.8	9.7
Managing web applications	-13.6	-0.9	-4.1	3.2

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

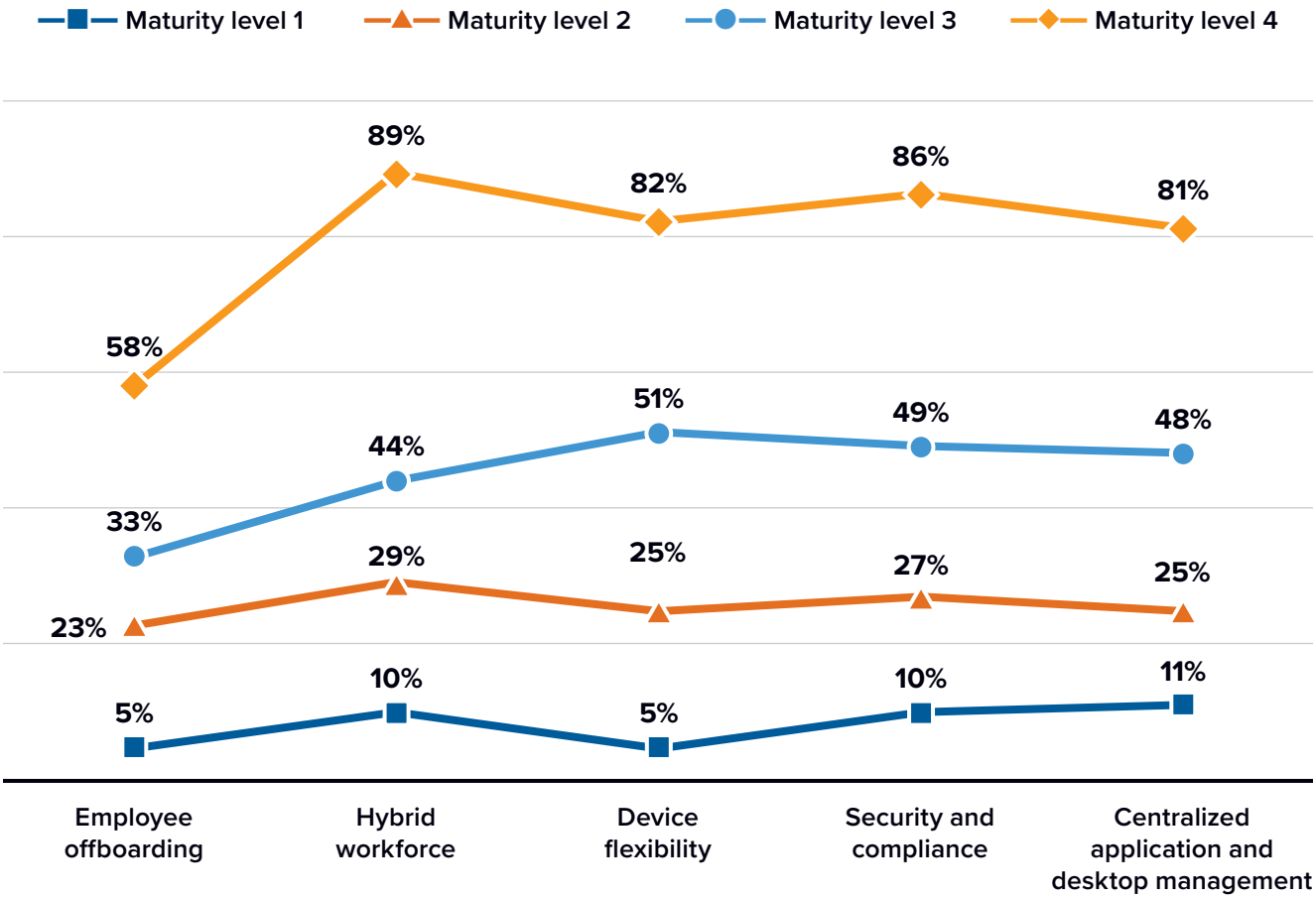
Key Finding 7: A Gateway to the Next Workspace Model?

Predictably, organizations at the M1 stage of maturity are relatively pleased with their tools, with a vast majority not seeing any need for major improvements or complete overhauls in capability. This increases dramatically over the maturity journey as organizations become increasingly aware of the risks they face in digital workspace management and the opportunities that doing it well can reap. By the highest level of maturity, most organizations (over 80%) are hoping to make major improvements in the next few years.

FIGURE 4

Organizations Hoping to Make Major Improvements

(Percentage of respondents)



Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

For an accessible version of the data in this figure, see Figure 4 Supplemental Data in the Appendix.

One way of reading this is that the current platforms are not delivering the value M4 enterprises need. However, the improvements in business results and value delivery suggest a different tale. It seems that M4 organizations, having successfully delivered on the vision of securable, compliant, easily manageable workspaces, are ready to take on the new challenges of the AI era and are looking to their platforms to deliver.

Beyond Digital Experience: The Next-Generation Digital Workspace

Imagining the next generation of digital workspaces, and therefore digital workspace management platforms, requires stepping beyond the current hype cycle about GenAI. Recent announcements about AI PCs, Copilot + PCs, and other buzzwords serve to whip up excitement but fail to articulate what, exactly, will be different in this "brave new world."

IDC and Citrix suggest the following questions as a place to start in forming this new vision:

1. **It is evident that the new workspace will contain both large "coordinating" models and a host of smaller "expert" models that perform specific functions.**

   Where does the organization wish to source its large coordinating model, and will it have more than one coordinator? What specific outcomes could the organization achieve if it could automate a single task requiring expertise (a small expert model)? Which of these later require coordinating across domains and are therefore best embedded in the digital workspace rather than in specific applications?

2. **The era of the "one size fits all" digital workspace is coming to an end. Instead, enterprises are increasingly going to dive deep into the employee experience to understand what each person needs to meet their potential. In light of this change, ask the following questions:**

   For each employee persona, to what extent does the digital workspace need to:

   - Disappear from view so that the employee can focus on physical tasks?
   - Intermediate between the employee and their tasks?
   - Intermediate between employees to enable different forms of collaboration?
   - Surround the employee with the data and tools they need to create something new?

In light of the answers to these questions, how well do the organization's current platforms provide governability, sustainability, and adaptable configurations that can be automated so that they perform at scale?

Challenges/Opportunities

IT organizations in enterprises of all sizes struggle to explain exactly how their current maturity level in hybrid workspace management directly impacts their ability to deliver projects and manage the critical technology transition ahead. In particular, once an organization moves into solution provisioning (maturity level 3), the path to digital experience management is seen more as rebranding than a fundamental shift, and that fundamental shift is underfunded or ignored in favor of higher-priority issues. This shift, from creating solutions to managing the employee experience, must take place in order to meet the coming shifts in needs.

This fundamental shift pairs with a particularly challenging lack of awareness about the security concerns related to digital workspace management at early maturity levels. This is both tactically troubling, given the rise of high-threat incidents, and unwise on an organizational level. Security is one of the areas where IT can generate corporate urgency; raising awareness about known and solvable security issues is likely an area of opportunity for enterprises, especially as they shift to the phase beyond digital experience management.

The enormous marketing effort put into GenAI will also distract focus from progressing digital workspace management far enough to support the glorious visions being sold. This is an opportunity for IT executives, though, who can suggest that improving their digital workspace management is a necessary precondition to sustainably deploying AI at scale in an enterprise. Without these investments, it is difficult or impossible to reallocate resources from existing projects or to develop the internal talent needed to maintain the newly deployed "intelligent" systems over time.

Platform providers need to partner with their customers to address these challenges, moving beyond the "speeds and feeds" conversation to questions of organizational structure, security, and the definition of success. Whereas, in the past, "success" referred to deployment numbers and stability, in the future, it may well revolve around dynamic response, adaptability, and the management of AI swarms at scale in a cloud operating model.

Conclusion

Digital workspace management and the platforms that support it are a critical part of the enterprise's journey into digital operations and beyond into the AI era. As the organization matures, it develops additional capabilities that will be critical to success in the next five years. However, many enterprises find themselves held back by their struggles as they transition from tactically solving problems to providing solutions.

Enterprises can overcome these challenges by transitioning more quickly to a digital workspace management platform that can manage hybrid technical environments by focusing their communications on employee benefits from the transition and by educating non-IT managers about the security implications and the ability to use these platforms as a springboard to digital operations.

Appendix: Supplemental Data

This appendix provides an accessible version of the data for the complex figures in this document. Click "Return to original figure" below each table to get back to the original data figure.

FIGURE 1 SUPPLEMENTAL DATA

Convergence of Hybrid Strategies

	Maturity Level 1	Maturity Level 2	Maturity Level 3	Maturity Level 4
Single source	25%	30%	40%	50%
Multisource	75%	97%	60%	50%
Cloud	76%	75%	69%	52%
On premises	24%	25%	31%	48%

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

Return to original figure

FIGURE 2 SUPPLEMENTAL DATA

Levels of Product and Services Integration by Maturity Level

	Maturity Level 1	Maturity Level 2	Maturity Level 3	Maturity Level 4
Not integrated	10%	4%	3%	5%
Some integration across key digital workspaces	22%	21%	22%	15%
Mostly integrated	33%	28%	19%	15%
Integrated across all products and services	35%	39%	21%	10%
All products and services integrated into one centralized platform	0%	8%	36%	57%

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

Return to original figure

Appendix: Supplemental Data (continued)

FIGURE 4 SUPPLEMENTAL DATA

Organizations Hoping to Make Major Improvements

	Maturity Level 1	Maturity Level 2	Maturity Level 3	Maturity Level 4
Employee offboarding	5%	23%	33%	58%
Hybrid workforce	10%	29%	44%	89%
Device flexibility	5%	25%	51%	82%
Security and compliance	10%	27%	49%	86%
Centralized application and desktop management	11%	25%	48%	81%

Source: *IDC Digital Workspace Survey Sponsored by Cloud Software*, January 2024

Return to original figure

About the IDC Analyst



Shannon Kalvar

Research Manager, IT Service Management and Client Virtualization, IDC

Shannon Kalvar is research manager for IDC's IT Service Management and Client Virtualization program, responsible for delivering research and advisory for IT executives, vendor management teams, and investment executives. Shannon's research coverage includes IT service management, desktop as a service (DaaS), virtual client computing, cost transparency tools, software asset management, and the use of AI and natural language processing for service management.

More about Shannon Kalvar

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IDC Research, Inc.
140 Kendrick Street, Building B, Needham, MA 02494, USA
T +1 508 872 8200

idc.com @idc @idc

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