

Magic Quadrant for Desktop as a Service

16 September 2024 - ID G00802050 - 51 min read

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Desktop as a service is now deployed within many organizations, but to only a minority of employees within those organizations. Although secure remote work remains the primary use case, an increasing number of deployments address sustainability needs.

Market Definition/Description

Gartner defines desktop as a service (DaaS) as the provision of virtual desktops by public cloud or other service providers. DaaS provides desktop or application end-user experiences from virtual machines (VMs) accessed using a remote display protocol. DaaS vendors incorporate a fully managed control plane service into their offerings, which facilitates user connections and provides a management interface. DaaS can be delivered preconfigured as a service. Alternatively, it can be delivered as a platform, in which case the client is responsible for assembly, configuration and management. DaaS is charged for using subscription- or usage-based payment structures.

DaaS solutions allow remote workers, offshore workers, third-party employees, contractors, home workers and office workers to access virtual desktops hosted in the cloud. DaaS solutions include technology that enables centralized management of all VMs. DaaS virtual desktops can be configured for a variety of use cases associated with contact center workers, process workers, information workers, and workers who require high-performance computing or rich graphics.

Must-Have Capabilities

Must-have capabilities in this market include:

- A cloud control plane, from where DaaS operations are performed, that is managed and maintained by the vendor that brokers connections to VMs hosted by a public cloud or other service provider.
- A remote desktop protocol that provides secure access to virtual desktops or applications.
- Support for the ability to connect from a range of endpoints, including those running Windows, macOS, Linux, iOS, Android, Chrome OS, thin clients and common browsers.
- A tool to manage virtual desktop resources, users and assignments.

Standard Capabilities

Standard capabilities in this market include:

- The ability to orchestrate persistent and nonpersistent compute and storage resources for Windows 10/11 desktop experiences, or for similar experiences on a Windows Server OS running single-session or multisession VMs.
- Image management technology to allow central updating or management of VMs.

Optional Capabilities

Optional capabilities in this market include:

- Vendor-provided compute and storage resources.
- Application-hosting capabilities (published app).
- Monitoring of virtual desktop and application usage, user experience and performance.
- User profile management and application layering and masking.
- Support for GPU workloads.
- Integration or extension of the client's network into the DaaS environment.
- Multicloud and hybrid deployment options.
- IT service management (ITSM) tool and configuration management database (CMDB) integration.
- Digital employee experience (DEX) or digital experience monitoring (DEM) tool integration.

Magic Quadrant

Figure 1: Magic Quadrant for Desktop as a Service





Vendor Strengths and Cautions

Alibaba Cloud

Alibaba Cloud is a Niche Player in this Magic Quadrant. Its Elastic Desktop Service provides a vendor-assembled desktop as a service. Operations are mostly focused in Asia/Pacific, with most clients located within China and a smaller presence in North America and Europe. Clients tend to be small and midsize enterprises primarily in government, education and regulated industries.

Alibaba Cloud provides its own range of endpoints to complement its DaaS solution and uses its own proprietary remote desktop protocol, Adaptive Streaming Protocol (ASP). In support of environmental sustainability, Alibaba Cloud has committed to reduce its emissions and has set targets to reach carbon neutrality by 2030.

Strengths

- **Operations:** Alibaba Cloud has global presence with its hyperscale cloud. It has more engineers and operations staff, as well as more users and virtual desktops under management, than most other vendors. The company has the highest availability service level of all vendors in this report at 99.975%, measured monthly, with service credits for breaches.

- **Product bundles:** The Elastic Desktop Service offers a broad range of virtual desktop options and is designed with clear sizing options for enterprise use cases. Clients using Alibaba Cloud can minimize the number of vendors providing virtual desktops to workers because it includes a comprehensive set of capabilities, including analytics and options for endpoint devices. In addition to virtual desktops, Alibaba Cloud offers virtual applications running on Windows or Linux, as well as virtual mobile applications.
- **Sustained growth:** Alibaba Cloud reported that the number of virtual machines under management grew significantly from the previous Magic Quadrant, and growth was higher than most other vendors. It has sustained growth year over year and has set realistic growth targets, including plans to focus on expansion in the Middle East over the next 12 months.

Cautions

- **Global market presence:** Alibaba Cloud has been active in its home market (China) and adjacent regions (Southeast Asia). Broader global adoption is weaker, and the vendor will need to expand its market focus to challenge the Leaders in the DaaS market. It will need to overcome the challenge of trust in a market where geopolitics impacts adoption of products from Chinese vendors in North America and Europe, the largest markets globally.
- **Industry vertical strategies:** Alibaba Cloud has no vertical-aligned offerings or marketing aligned with the Elastic Desktop Service, requiring clients with specific vertical requirements to explore integration options during the sale and design phases with Alibaba.
- **Lack of customer success management:** Alibaba Cloud focuses primarily on an online engagement model for learning and certification of enterprise clients' operations team. It provides onboarding and migration support, but no aligned customer success management service.

Amazon Web Services

Amazon Web Services (AWS) is a Leader in this Magic Quadrant. Amazon Workspaces offers vendor-assembled desktop-as-a-service options, while Amazon WorkSpaces Core offers self-assembled options. Amazon WorkSpaces Web provides access to web applications, and Amazon AppStream 2.0 offers application virtualization with multisession configurations. Its operations are global, with clients mainly from medium and large enterprises.

In August 2023, Microsoft license terms changed to allow Microsoft 365 applications, including Microsoft Teams, to operate on Amazon WorkSpaces. In November 2023, AWS launched the Amazon WorkSpaces Thin Client, fulfilled through Amazon Business, providing clients with an end-to-end service for onboarding employees. In support of environmental sustainability, AWS is targeting 2040 for net-zero carbon emissions — the same deadline for the whole Amazon group.

Strengths

- **Geographic strategy:** AWS has a strong regional presence; only vendors with multicloud capabilities can host workloads in more locations. Amazon WorkSpaces' integration with AWS

Global Accelerator provides low-latency interconnections between regions for high-availability use cases.

- **Operations:** AWS provides DaaS operations and local-language support in all regions where its cloud is deployed. Its operations include cost optimization for customers. Amazon WorkSpaces' capabilities include operations interfaces and automation. Gartner rarely observes clients needing to purchase additional third-party tools with Amazon WorkSpaces, although Amazon WorkSpaces Core is designed for integration with third parties.
- **Viability:** AWS has significant DaaS revenue, alongside a diverse portfolio of cloud services. AWS is one of the few hyperscale vendors within this Magic Quadrant and is not reliant on others for the Amazon WorkSpaces virtual desktop software or the remote network technology, the WorkSpaces Streaming Protocol.

Cautions

- **Marketing execution:** AWS primarily targets existing customers with its DaaS services rather than engaging in a broader marketing effort to attract new customers. Gartner believes this may reduce the pace of growth for AWS.
- **Market understanding:** Amazon WorkSpaces lacks multisession capabilities, which inhibits AWS' ability to optimally address the lowest-cost use cases, such as contact centers and business process outsourcing.
- **Innovation:** The pace of change from AWS is sometimes slower than from other DaaS vendors – for example, Windows Server 2022 support arrived two years after it launched. Customers should engage with AWS to keep abreast of roadmaps for key capabilities they require.

Anunta

Anunta is a Niche Player in this Magic Quadrant. Its Enterprise DaaS and Packaged DaaS offerings provide a vendor-assembled and vendor-managed desktop as a service. Its operations are focused in North America, Asia and the Middle East. Clients tend to be midsize and large enterprises across industry sectors. Anunta has embedded automation, streamlined onboarding and proactive experience management within its offerings. It has a range of offerings, from DaaS optimization tools to full DaaS services.

Anunta did not provide evidence of targets to become carbon-neutral for environmental sustainability.

Strengths

- **Product strategy:** Anunta offers automation and orchestration within its offering and provides comprehensive design, onboarding and migration support. Its Packaged DaaS is a predesigned offering, whereas its Enterprise DaaS is designed from standard building blocks and shaped to meet client needs.
- **Business model:** Anunta reports continued growth in revenue and the number of clients, with a focus on geographical and market expansion. Its existing client base regions include Asia, Australia, Europe, India, the Middle East and North America. North America is Anunta's largest

market, delivering 60% of the vendor's revenue. Anunta focuses on reducing and continually optimizing costs for clients and actively measures customer and end-user satisfaction.

- **Market responsiveness:** Anunta dynamically adjusts its offering strategy due to continually changing market conditions. For example, in 2023, it launched a SaaS-based cloud cost optimization tool. It has actively expanded to new geographic markets, leveraging strategic partnerships with large existing client-bases that would benefit from Anunta's DaaS offerings.

Cautions

- **Marketing execution:** Market awareness of Anunta's brand and offering is limited. More than 75% of its revenue is attributed to DaaS. Given the limited awareness of DaaS, clients should seek assurance that Anunta plans to increase its market awareness, thus ensuring long-term viability.
- **Marketing strategy:** Anunta is active on social media platforms and has run joint marketing events with Microsoft and VMware. Despite these efforts, Gartner's clients seldom mention Anunta during inquiry calls.
- **Sales and execution:** Anunta reports consistent growth rates ahead of Gartner market forecasts, but we do not observe conquest sales. Its offering design relies on other vendors, which can impact Anunta's ability to maintain competitive pricing.

Apporto

Apporto is a Niche Player in this Magic Quadrant. Its Virtual Computer Lab and Secure Mobile Workspaces offerings provide self-assembled, vendor-assembled and vendor-managed desktop as a service. Its operations are mostly focused in North America and Europe, but are available globally. Clients tend to be small and midsize enterprises, with a large percentage of clients in higher education.

Apporto has redesigned its control-plane platform for cloud, on-premises and hybrid deployments. The network protocol has also been redesigned to improve experiences with rich graphics and media. Apporto did not provide evidence of targets to become carbon neutral for environmental sustainability.

Strengths

- **Business model:** Apporto is increasing its channel presence beyond only supporting direct sales. This further enables the vendor's expansion into new markets, such as financial services, and new geographies. For example, Apporto has strengthened its presence in Europe.
- **Vertical/industry strategy:** Apporto serves a broad range of industries with a horizontal set of capabilities, but it also has deep vertical focus for higher education. Its higher-education-focused offering integrates with learning management systems to allow capacity to be booked for lessons and provides features that enable tutors to shadow the work of students within learning labs.
- **Customer experience:** Apporto allows volume reductions three times each year, which is uncommon in this market. It has a robust onboarding process and customer success teams,

and it actively seeks customer sentiment feedback alongside performance monitoring.

Cautions

- **Marketing execution:** Apporto has reshaped its offering to address an increased volume of clients looking to migrate from traditional on-premises virtual desktop infrastructure (VDI) deployments. Its marketing message aligns the reshaped offering, but client awareness remains low.
- **Geographic strategy:** Apporto targets the North American and European markets, which limits its applicability for other regions. The company is growing its DaaS business, but its resources will be stretched until it scales the number of internal resources and channel partners.
- **Innovation:** Apporto continues to improve its offering by incorporating generative AI (GenAI). However, much of this investment is focused on catching up with competitor capabilities, such as supporting workloads on-premises. Much of the innovation planned is integration with vendors in adjacent markets (for example, single sign-on, endpoint operating systems and learning management systems), which is not differentiated.

ATSG

ATSG is a Challenger in this Magic Quadrant. Its Cloud PC offering is a vendor-managed DaaS offering and includes desktop and application virtualization options. Services are available globally and operated from delivery centers in North America and Asia. Clients tend to be midsize enterprises, with some large enterprise customers that are generally headquartered in North America. Clients are from all industry verticals, but most commonly healthcare, hospitality and education.

ATSG has integrated digital employee experience (DEX) measurement capabilities into its DaaS offerings and proactively focuses on providing DEX functionality. ATSG has targets to become carbon-neutral for environmental sustainability.

Strengths

- **Overall viability:** ATSG's operations are stable, its leadership has had no significant changes, and its business model is successful with a significant focus on client and user experiences. It expands beyond DaaS to incorporate cloud, network, security and operations services, including service desk.
- **Product and service:** In its DaaS offering, ATSG focuses on services and automation, which allow workloads to run in public clouds, its private cloud, on-premises or in hybrid configurations. It has built its offering around its ATSG Cloud Manager for DaaS, which provides clients with a low-touch, highly automated experience.
- **Market responsiveness/track record:** ATSG initially enabled DaaS when work-from-home mandates required rapid scaling. It has adjusted the shape and design of its offering because more clients have requirements for hybrid deployments dealing with on-premises application virtualization alongside cloud-hosted desktops.

Cautions

- **Low growth rates:** In the previous 12 months, ATSG has not grown its installed base at the same rate as others in the market. ATSG must face this challenge in a very competitive market.
- **Vertical/industry strategy:** ATSG serves clients in a range of industries, with the largest being travel and hospitality. Vertical products are not available, and therefore, its products require configuration per deployment for regulatory compliance.
- **Partner reliance:** ATSG is the largest vendor to rely on third parties for brokering and virtual desktop technologies. It has intellectual property in the operation and management of DaaS. Its reliance on third parties means it is at higher risk of price disruption compared with Leaders and Visionaries in this Magic Quadrant.

Citrix

Citrix is a Leader in this Magic Quadrant. Citrix is among a small number of vendors to offer all three DaaS options (self-assembled, vendor-assembled and vendor-managed), although most Gartner clients use the Citrix cloud control plane to operate self-assembled capabilities. Citrix is globally available and targets clients from all industry sectors and all scales of enterprise, although its products are most commonly used in larger enterprises with regulatory compliance requirements.

Citrix supports workloads on all major clouds. Citrix states that its environmental sustainability plans are being updated to reduce carbon emissions, but did not share a net-zero target.

Strengths

- **Configurability and extensibility:** Citrix enables simple out-of-the-box experiences for organizations to deploy DaaS but also offers deep configurability to meet the most complex enterprise requirements. Gartner identifies Citrix's most strategic partnerships being with Microsoft and Google, among its strong partner ecosystem.
- **Operations benefits:** Citrix provides clients with out-of-the-box capabilities to manage spending, scale DaaS environments intelligently and reduce the effort required to operate a DaaS environment. Many DaaS vendors, including some in this Magic Quadrant, leverage Citrix technology to operate their DaaS environments.
- **Market focus:** Citrix focuses on enabling secure access to desktops and applications, and this remains the core tenet of its DaaS offering. Its products are most suited to complex application and desktop use cases. Citrix is now supporting the most complex deployments by leveraging DaaS alongside on-premises workloads.

Cautions

- **Client sentiment:** Gartner inquiry calls with Citrix clients of all sizes highlight continued dissatisfaction with their commercial relationship. Clients consistently identify a lack of contractual flexibility, fixed terms and conditions, the inability to negotiate volume changes and a general lack of client empathy during negotiations.

- **License bundling:** Citrix has decreased the number of license options it sells to two DaaS offerings (Citrix Universal Hybrid Multi-Cloud and, by invitation only, Citrix Platform License). This bundling provides Citrix, and its channel partners, with a simpler portfolio to sell, and it reduces its cost of sale. Gartner clients should assess which features of the new licenses they will utilize, today and in the future, because some Gartner clients report unused bundle features.
- **Focus on the largest clients:** The majority of Citrix customers now transact and gain support through channel partners. Citrix engages directly with only the largest enterprises; clients from midsize enterprises should plan on working with a channel reseller. Smaller enterprises should plan on buying Citrix services through a cloud solution provider. This narrow focus on large customers and product bundling may make Citrix less relevant for midsize organizations.

Dizzion

Dizzion is a Visionary in this Magic Quadrant. Its DaaS offerings — Flex, Managed, Complete and +Compliance — provide vendor-assembled and vendor-managed solutions. Its operations are mostly focused in North America, EMEA and Asia, but are available globally. Clients tend to be small or midsize enterprises. Dizzion has focused on automation, resilience and compliance through investment in its self-developed management plane, a resilient cloud architecture model and numerous compliance certifications, including the Payment Card Industry Data Security Standard (PCI DSS), the Health Insurance Portability and Accountability Act (HIPAA), the General Data Protection Regulation (GDPR) and Service Organization Control 2 (SOC 2). In support of environmental sustainability, Dizzion stated its aim to reach a carbon-neutral goal, but did not detail targets for when this would be achieved.

In 2023, Dizzion acquired Frame Platform and integrated the solution as its primary DaaS architecture earlier this year, focusing on multicloud development. The Horizon platform will still serve enterprise customers with complex needs.

Strengths

- **Multicloud:** Dizzion's Frame Platform solution offers a centralized cloud control plane with workloads supported natively in public cloud (on AWS, Google Cloud Platform [GCP], IBM Cloud, and Microsoft Azure), in private clouds with Nutanix AHV, and on bare-metal AWS and Azure with Nutanix NC2. It also provides customers with hybrid solutions.
- **Ease of use:** Dizzion allows customers to get started with a trial and convert to permanent licenses, onboard/offboard users, deploy desktops with a high degree of automation, easily add apps for publishing, and build a solution for external customers. Dizzion offers a simple pricing model for minimal assistance (bring your own infrastructure) or fully managed service in the cloud.
- **Growth opportunities:** With its proprietary platform that is multicloud- and hybrid-capable, Dizzion is well-positioned to take advantage of market growth and compete with vendors offering hybrid solutions.

Cautions

- **Duplicate technology:** Dizzion has clients on two technology stacks: its own Frame platform and Omnisia Horizon. It is costly to maintain support for two technologies, and Gartner expects Dizzion will migrate customers to the Frame platform over the coming years.
- **Vertical integration:** Dizzion focuses on architecture, engineering and construction, business process outsourcing, financial services, higher education, and technology verticals. Dizzion has two architectures: one based on Frame platform and another on Omnisia Horizon. Clients should ensure the selected Dizzion offering meets their industry vertical requirements – for example, in healthcare, the Frame platform lacks the validation with electronic medical record applications such as Epic.
- **Market awareness:** Dizzion is not well-known with buyers who lead end-user services and is infrequently mentioned by Gartner clients. To sustain growth, Dizzion will need to target marketing for those end-user service leaders who would benefit from multicloud or hybrid use cases.

Flexxible

Flexxible is a Niche Player in this Magic Quadrant. Its FlexxDesktop offering provides vendor-assembled and vendor-managed DaaS capabilities. Its offerings are available globally, with operations centers in North America, Europe, India and Latin America, and through key systems integrator partnerships. Clients tend to be midsize and large enterprises.

Flexxible focuses on providing an automation-first platform that can operate DaaS services in various clouds using a range of virtualization technologies, from Microsoft to Citrix. In support of environmental sustainability, Flexxible stated that it is developing plans to reduce carbon emissions, but did not share any net-zero targets.

Strengths

- **Market responsiveness:** Flexxible has a long tenure in the market and supports large systems integrators and clients that operate DaaS. It caters to enterprise clients, managed service providers and systems integrators, with key client use cases focusing on automation.
- **Viability:** Flexxible can support a range of cloud platforms, has strong automation frameworks and can easily integrate with customer tools and processes. Flexxible has a modular architecture, including automation and DEX management. Analytics, diagnostics, DEX capabilities, automation and Level 1-support portal modules are included in its FlexxDesktop offering.
- **Product or service:** The FlexxDesktop offering has several analytics capabilities that make it possible to measure experience levels. Flexxible is one of a handful of DaaS vendors that offers experience-level agreements (XLAs). Flexxible also measures levels of proactive operations – that is, the number of issues that were resolved without being reported by clients – as part of client contracts.

Cautions

- **Customer awareness:** Client awareness of Flexxible remains low; they are rarely mentioned by clients during Gartner inquiry interactions on DaaS. Therefore, its deployment base is small, and growth is in-line with market forecasts and lower than the majority of vendors.
- **Market understanding:** Flexxible has produced few DaaS product enhancements in the previous 12 months. It has focused more on its digital employee experience management tool. Clients engaging with Flexxible should assess its roadmap and investment focus to ensure these align with their digital workplace strategy.
- **Marketing focus:** Flexxible has increased its focus on client- and security-facing offerings. DaaS is a lower priority, is marketed at a much lower level, is somewhat hidden on Flexxible's website and is no longer mentioned in social media channels such as LinkedIn.

IronOrbit

IronOrbit is a Niche Player in this Magic Quadrant. Its INFINITY Workspaces offering provides a vendor-managed DaaS solution for a range of use cases but is most common in high-performance computing that requires graphical processing units (GPUs). Its offerings are available globally, but most of its customers and operations are based in North America.

IronOrbit has developed its DaaS offering to run within its private cloud platform or on Microsoft Azure. In support of environmental sustainability, IronOrbit did not share targets or plans to reach net-zero, but aims to align with that goal.

Strengths

- **Market responsiveness:** IronOrbit focuses on clients with GPU-enabled applications for industries such as construction, engineering and architecture. It has adapted its offerings as new GPUs were released and as software vendors released new applications (for example, Autodesk, Dassault Systèmes and Siemens).
- **Business model:** IronOrbit has focused on turnkeylike services, resulting in low levels of effort and skills required from clients adopting its DaaS offering. IronOrbit designs its offerings to provide modularity, recovery options and comprehensive SLAs and has more flexibility than many DaaS solutions.
- **Sales strategy:** IronOrbit targets midsize enterprises with a vertical strategy aligned to architecture, engineering and construction, healthcare, manufacturing, financial services, and legal services. Its focus on vertical use cases and the applications used flows back into the design of its offering, so sales activities are better aligned to client requirements in the targeted markets.

Cautions

- **Marketing execution:** IronOrbit could focus its marketing to reach more end-user service leaders responsible for DaaS and scale its offering. Its offering has not been mentioned by Gartner clients during inquiry calls.

- **Customer experience:** IronOrbit adopts a boutique approach in its DaaS offering, retaining fewer users than Leaders in this Magic Quadrant. Its customer success management is exclusively for larger deployments as part of a premium support package. Clients should work with IronOrbit to define the engagement and support model appropriate to their needs.
- **Geographic strategy:** IronOrbit users and workloads can reside in multiple regions. However, with a primary focus on North America and a limited global footprint, this offering is less attractive for enterprises from other regions. Clients should assess regional requirements when engaging with IronOrbit.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its offerings include Azure Virtual Desktop, Windows 365 and Microsoft Dev Box. The offerings provide self-assembled and vendor-assembled DaaS. Its operations are global, with clients in small, midsize and large enterprises. Microsoft has integrated Azure, Microsoft Intune and Windows to deliver unique and exclusive DaaS capabilities – for example, Windows 10/11 Enterprise multisession, which enables optimized Azure resource utilization when using Windows.

In support of environmental sustainability, Microsoft evidenced plans to be carbon-neutral and is the only vendor that showed plans to be carbon-negative.

Strengths

- **Operations:** Gartner estimates that Microsoft has the largest installed base in this market. Microsoft's installed base grew in absolute terms more than any other competitor in this research over the past 12 months. Discussions with users of Gartner's client inquiry service, together with evidence from Gartner Peer Insights, indicate positive sentiments as Microsoft scales its offerings and operations.
- **Overall viability:** Microsoft has an entire ecosystem of end-user service offerings, including Windows, Microsoft Intune, Microsoft 365, Entra ID, FSLogix and various GenAI Copilot solutions. Its DaaS offerings have grown to a dominant position in the market, and Microsoft's scale and breadth of offerings enhances its overall viability.
- **Marketing execution:** Microsoft consistently communicates its offering strategies, providing documentation and learning modules through its website, social media and events. It also publishes thought leadership and white papers on topics such as IT sustainability and the future of work. Gartner client inquiry indicates that most of our clients already have a basic understanding of at least one of Microsoft's DaaS offerings.

Cautions

- **On-premises capabilities:** Azure Virtual Desktop on-premises using Azure Stack HCI is not as capable as the offerings from traditional VDI vendors. Traditional vendors have differentiation in managing application virtualization, a common use case for on-premises solutions. Microsoft has not been observed displacing on-premises application solutions.

- **Variable pace of change:** Microsoft has been slower to build some capabilities into its offerings. For example, offline mode for Windows 365 is not yet available but was announced as a strategy at launch in 2021, and modernizing Teams for VDI has been slow. Updates that require other groups within Microsoft to perform work have been slowest to launch.
- **Sales execution:** Gartner observes Microsoft marketing and positioning Windows 365 as its lead DaaS solution. Clients should determine if their use cases may be better served by consumption-based pricing and customization options in Azure Virtual Desktop compared with user-license-based pricing for standardized Windows 365.

Omnissa

Omnissa is a Leader in this Magic Quadrant. Omnissa Horizon Cloud Service offers a range of self-assembled to vendor-assembled DaaS solutions. Horizon Cloud Service integrates with cloud infrastructure services from AWS, Google, Microsoft and others to provide its full DaaS capability to clients. Omnissa has integrated its offerings with Microsoft's DaaS offerings and is simultaneously a Microsoft partner and a competitor. Horizon Cloud Service is globally available and adopted by clients from all industry sectors and all scales of enterprise. It is most commonly used in larger enterprises with regulatory requirements. In support of environmental sustainability, Omnissa is yet to define its targets to become carbon-neutral.

Since the previous Magic Quadrant, Broadcom acquired VMware, renamed the End-User Computing (EUC) Division as Omnissa in April 2024, and then sold to KKR. As of 1 July 2024, Omnissa is operating independently of Broadcom software under KKR ownership. The separation of Omnissa from Broadcom has been completed in the U.S. and Ireland, with other jurisdictions to follow.

Strengths

- **Range of deployment options:** Horizon Cloud Service is seen by Gartner in a range of enterprise scenarios and has particular strengths with hybrid deployments that require on-premises and cloud workloads. Horizon Cloud Service enables a range of desktop and application virtualization options.
- **Offering integration:** Omnissa is a significant player in the digital employee experience market, and customers can take advantage of the close integration of Omnissa Workspace ONE Experience Management within Horizon Cloud Service instead of having to work with an outside vendor for DEX capabilities. Similarly, Workspace ONE Unified Endpoint Management supports Day 2 management of Horizon Cloud Service persistent desktops for updates, patches, policies and so on.
- **Healthcare integration:** Horizon Cloud Service is one of the three DaaS solutions validated by healthcare records vendor Epic. This is a sizable vertical for the DaaS market and often requires substantial customization, which Horizon enables.

Cautions

- **Marketing:** Market sentiment for Horizon is often mixed, with it previously being owned by Broadcom. Clients should work closely with Omnissa over the next 12 months to allow time to assess the new organization's culture and client focus.
- **Level of support:** Omnissa technology and bundling should be relatively easy to separate from VMware. Gartner client inquiry indicates concerns regarding its ability to maintain the same level of support globally with Omnissa's dedicated support team. Clients should work with Omnissa to alleviate any concerns and mitigate risks.
- **Development:** Omnissa may have slowed the development of Horizon's next-generation cloud control plane on some cloud platforms during the recent changes of ownership, but it is now an independent enterprise. The independence will offer Omnissa more opportunity to develop a single multicloud platform and create new partnerships that previously conflicted with its hypervisor parent.

oneclick

oneclick is a Niche Player in this Magic Quadrant. Its oneclick DaaS platform offers a self-assembled, vendor-assembled and vendor-managed offering more commonly utilized by cloud service providers (CSPs), although it sells directly to enterprises. The CSPs are generally very large enterprises servicing small and midsize end-user clients. Its operations are mostly focused in Europe and Asia.

oneclick has developed a cloud platform that allows clients to operate workloads in numerous clouds via an API framework. In support of environmental sustainability, oneclick shared targets to reduce carbon emissions by 30% by 2030, but did not share a net-zero target.

Strengths

- **Geographic strategy:** oneclick has a clear geographic focus, with partnership models in place to continue growth in Europe and Asia. oneclick also has plans to expand into North America.
- **Business model:** oneclick can offer service levels that meet client requirements across both enterprise customers and cloud service providers. Its business model includes a high degree of automation alongside measuring digital experiences, with the goal to make its offering more human-centric.
- **Operations:** Modular architecture and a choice of service levels results in an offering that can, compared with others in this Magic Quadrant, run on the broadest range of hyperscale and regional cloud providers, as well as in on-premises and hybrid deployments. Options range from base services, including orchestration and management of virtual desktops, and extend to optionally include network management, managed security, backup and digital rights management.

Cautions

- **Marketing execution:** oneclick has a strong web presence, but its overall marketing has not raised awareness of its offering. Gartner clients have not mentioned oneclick during inquiry

calls.

- **Customer experience:** oneclick's offering has a comprehensive set of service options, but many clients are service providers and adopt base services. The result is that many of oneclick's services are used by small businesses. Large enterprises should seek evidence that oneclick can effectively operate at their scale.
- **Market understanding:** oneclick has focused on horizontal services and primarily targeted the requirements of managed service providers. Its installed base tends to be smaller organizations. oneclick does not have specific vertical industry presence such as banking integrations, although it is International Organization for Standardization (ISO) 27001-certified and GDPR-compliant.

Parallels

Parallels is a Visionary in this Magic Quadrant. Its Parallels DaaS offering has both self-assembled and vendor-assembled capabilities, and is hosted on Microsoft Azure. The vendor offers a range of features, such as multisection, single session, dedicated, pooled nonpersistent, published app, vGPU, and full Windows or Linux desktops. The vendor mostly serves small or midsize businesses, with a focus on education, healthcare and government verticals.

Parallels has developed its DaaS solution — which includes image management, integration with FSLogix, support for MSIX app attach and cost-saving techniques — on Microsoft Azure. In support of environmental sustainability, Parallels did not share any targets to reach net-zero carbon emissions.

Strengths

- **Growth opportunity:** Parallels is capitalizing on the DaaS and VDI market turbulence by positioning itself as an alternative to mature vendors. Clients report that moving to Parallels is a short learning curve for Citrix administrators.
- **Azure integration:** Parallels DaaS, which can be optionally purchased and deployed via Azure Marketplace, offers image management with template versioning, deploy/configure FSLogix, simple deployment of gateway/load balancer appliance, universal printing and storage cost-saving techniques.
- **Licensing:** Parallels' virtual desktop offerings — DaaS and its Remote Application Server (RAS) — both have simple license models that are easy to understand. DaaS is licensed on a named user basis (a minimum of 15 users and a one-year commitment).

Cautions

- **Offering:** Parallels' DaaS is a new offering with limited deployments at scale. However, Parallels has a long history and experience in VDI with its more mature RAS solution.
- **Remote Desktop Protocol (RDP):** Parallels' protocol is solid and based on RDP with enhancements and User Datagram Protocol (UDP). RDP traditionally struggles with long-distance connections and connections with high latency or packet instability. Clients should

test Parallels' mitigations, including RDP protocol performance — for example, testing local gateway locations designed to optimize network performance.

- **Growth:** Parallels may have a boost in growth and development from market turbulence, but that is a short-term burst. A well-formed long-term growth strategy will be essential to maintain present growth rates.

Workspot

Workspot is a Niche Player in this Magic Quadrant. Workspot offers self-assembled DaaS solutions hosted on the major hyperscale cloud platforms (Azure, AWS and GCP) and on-premises infrastructure. Workspot is globally available and applicable to all industry verticals. Customer use cases are split between rich graphics requirements, such as manufacturing and AEC (architecture, engineering and construction), and general enterprise workloads.

Workspot has significant experience and intellectual property in optimizing, monitoring and operating DaaS. In support of environmental sustainability, Workspot shared guidance that it has selected hyperscale locations most likely to be carbon-neutral by 2028, but did not offer a target to reach net-zero emissions.

Strengths

- **Market responsiveness/record:** Workspot has provided DaaS services since 2012 and has remained focused on DaaS, now adding VDI. It is client-focused and responsive to client requests, reshaping its offerings to meet new requirements — for example, switching to a self-assembled DaaS model based on client demand.
- **Business model:** Workspot has switched to a self-assembled DaaS model in order to target clients with VDI skills that are now migrating to the cloud, as well as to increase its proportion of use by managed service providers.
- **Vertical/industry strategy:** Workspot has clear markets within which it can differentiate. Its ability to support high-performance GPU workloads makes it an attractive offering for architecture, engineering, construction and manufacturing. Its support for hybrid and on-premises workloads is important for customers that have not adopted a cloud-first strategy.

Cautions

- **Customer experience:** Workspot has a defined methodology to support clients in designing and deploying its offerings, but beyond this, it offers limited ongoing customer success management compared with other vendors in this Magic Quadrant. Ensure clarity of which success services will be available when engaging with Workspot.
- **Low adoption:** Despite its ability to scale to very high volumes, Workspot has lower adoption compared with other vendors in this Magic Quadrant. Gartner clients should work with Workspot to fully exploit its potential.
- **Operations:** Workspot has transitioned from a vendor-assembled offering to a self-assembled offering. This is a significant change from the DaaS model where Workspot packaged

infrastructure as a service (IaaS) into the cost of the service to where the Workspot offering manages a customer-provided and -funded IaaS architecture. As a result, it is in direct competition with all vendors in the Leaders quadrant. Gartner clients should assess Workspot's differentiation during procurement cycles.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- **Parallels:** Following the launch of Parallels DaaS, Parallels qualified for inclusion in this Magic Quadrant.
- **Omnissa:** Omnissa has been added as a result of Broadcom's purchase of VMware in 2023, and KKR's subsequent purchase of the renamed Omnissa (previously VMware End-User Computing) from Broadcom.

Dropped

- **Frame Platform:** Dizzion's owner, LLR Partners, closed its acquisition of Frame Platform from Nutanix. As of 30 May 2023, LLR has merged Dizzion and Frame. Dizzion is represented in this Magic Quadrant because its offerings now incorporate the Frame Platform capabilities.
- **VMware:** Following the acquisition of VMware by Broadcom, the Horizon products assessed in this Magic Quadrant were transferred to a new business, called Omnissa. Omnissa was then sold by Broadcom to KKR. Omnissa replaces VMware in this Magic Quadrant.

Inclusion and Exclusion Criteria

The inclusion criteria has changed from 2023. In 2023, a vendor could qualify if 25,000 virtual desktops with GPUs or 250,000 virtual desktops with CPUs were available. In 2024, vendors could qualify with 100,000 CPU-enabled virtual desktops. Gartner expects this number to rise in future years.

To qualify, vendors need:

1. **Market participation:** They must sell desktop as a service (DaaS) that aligns to the market definition.
2. **Market traction:** The desktop as a service offering must meet the following criteria:
 - The vendor has been active in the virtual desktop infrastructure, server-based computing or desktop-as-a-service market (or markets) before 1 April 2023.

- The DaaS offering (or offerings) that will be assessed have been generally available on or before 1 April 2024.
 - The vendor can evidence 100,000 monthly active users of its DaaS offerings on 1 April 2024.
 - The vendor can evidence 25,000 virtual machines under management on 1 April 2024.
3. **Customer Interest Index:** The vendor must rank among the top organizations in the Customer Interest Index defined by Gartner for this market. Data inputs used to calculate DaaS customer interest include a balanced set of measures, such as:
- Gartner customer search, inquiry volume and trend data
 - Volume of job listings specifying experience with the DaaS offering as a job requirement on job placement boards (e.g., LinkedIn and Indeed) and/or on a range of employment websites in the U.S., Europe and China
 - Frequency of mentions as a competitor to other DaaS vendors within reviews on Gartner's Peer Insights forum between March 2023 and April 2024
 - Social media presence and engagements
4. **Regions:** DaaS must be available in at least two regions. The regions considered in this Magic Quadrant are:
- **North America:** For the scope of this research, we defined North America as the U.S., Canada and Mexico.
 - **Europe:** For the scope of this research, we defined Europe as the sum of Western and Eastern Europe. Gartner defines **Western Europe** as the following countries: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and the U.K. (United Kingdom). We define **Eastern Europe** as the following countries: Albania, Belarus, Bosnia and Herzegovina, Bulgaria, Czech Republic, Croatia, Estonia, Hungary, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey and Ukraine.
 - **Asia/Pacific:** For the scope of this research, we included **Greater China** (the Chinese mainland, Hong Kong and Taiwan), **Mature Asia/Pacific** (Australia, New Zealand, Singapore, South Korea and Japan), **Emerging Asia/Pacific** (India, Indonesia, Malaysia and Thailand), and the **Rest of Asia/Pacific** (Bangladesh, Pakistan, Philippines, Sri Lanka and Vietnam).
 - **Latin America:** For the scope of this research, we included Brazil, Chile and Argentina.
 - **Middle East and Africa**

5. **Support services** must be available in each of the six regions for coverage during daytime working hours (approximately 8 a.m. to 5 p.m.) in at least one time zone per region.
6. **Technical capabilities** relevant to Gartner clients and features assessed must be generally available on or before 30 April 2024. Vendors offering DaaS can be in any or all of the following configurations:
 - **Self-assembled DaaS:** Self-assembled DaaS services are where the client selects a cloud-based virtualization broker and integrates this with a customer-defined IaaS.
 - **Vendor-assembled DaaS:** Vendor-assembled services incorporate a cloud-based virtualization broker integrated with a cloud infrastructure. The vendor is responsible for orchestration of all infrastructure services upon which the virtual desktops operate.
 - **Vendor-managed DaaS:** Vendor-managed DaaS services are where the vendor provides a virtualization platform, a cloud infrastructure and the management of virtual desktops.
 - *Note: Although systems integrators provide these offerings, their services are not covered here. They are covered by the Magic Quadrant for Outsourced Managed Workplace Services.*

Vendors must include the following services to qualify:

- A managed control plane for the solution as part of the base license or usage fee (or fees)
- Additional management software required to operate the virtual desktop environment
- Maintenance, updates and upgrades to all cloud infrastructure and management software required to operate the DaaS platform
- Unique intellectual property (IP) that is critical to DaaS operations and/or user experience (A vendor who solely integrates and orchestrates other vendors' platforms or services would not qualify.)
- A remote desktop protocol to provide secure access from an external user's device to the DaaS virtual machines
- Provide a desktop experience that can include any or all of the following:
 - A hosted Windows or Linux server operating system that allows multiple sessions per server, delivering an individual desktop experience to each user
 - A hosted Windows or Linux server operating system that allows a single session per server, delivering a desktop experience to users
 - A hosted Windows or Linux desktop client operating system that allows a single session per operating system virtual machine
 - A hosted Windows or Linux desktop client operating system that allows multiple sessions per operating system virtual machine to deliver individual experiences to each user.

- VMs that are persistent or nonpersistent that are assigned to an individual or within a pool

Vendors will not qualify if they *only* provide these services, though these additional services can be evidenced in the provider questionnaire:

- Hosted Windows or Linux application virtualization where the application remains on the DaaS infrastructure and is accessed via the remote desktop protocol
- Hosted macOS services
- Unified workspaces
- Local hypervisors
- Managed services
- Endpoint security and posture checking, which may optionally include workspace biometric assessments
- Additional value-added features from either their own portfolio of products or third-party products.

Honorable Mentions

Gartner tracks more than 30 vendors in the DaaS space. Although this research identifies 14 vendors that have met our inclusion criteria, the exclusion of a vendor does not mean that the vendor and its products lack viability. Described below are several noteworthy vendors that did not meet all of our inclusion criteria, but could be appropriate for clients, contingent on requirements:

- **Accops:** Accops offers virtual desktop infrastructure (VDI) software, workspace software, zero-trust capabilities, remote browser isolation, multifactor authentication and endpoint hardware. Accops' solutions can be deployed on-premises or in public clouds. It added a DaaS offering to its portfolio in 2021. Accops' clients are primarily located in India, the Middle East and Japan, and the company is expanding to other regions. Accops is included as an honorable mention due to its potential to scale and disrupt, primarily in Asian, Middle Eastern and Latin American markets. Accops did not meet the inclusion criteria for number of users.
- **Google (Cameyo):** In 2024, Google acquired Cameyo, which provides virtual app delivery — the ability to virtualize Windows, Linux and internal web apps instead of delivering a full desktop, resulting in lower infrastructure and cloud hosting costs. Cameyo's platform supports both CPU-based and GPU-accelerated applications and enables access to apps from ChromeOS, Windows, macOS, iOS, Android and HTML5 endpoints. With a focus on application delivery, it is a top choice for delivering Windows applications to ChromeOS devices, and is frequently included in large ChromeOS deployments. Cameyo supports multiple regions, with 80% of its volume in North America and EMEA, and the remaining users in Latin America and Asia/Pacific. Cameyo did not meet the inclusion criteria to provide a full virtual desktop experience.

- **HP Inc.:** HP Inc. offers technology to broker connections between remote workers and physical devices or virtual desktops. Its HP Anyware offering was built using its own GPU-enabled workstation software, integrated with technology within its Teradici acquisition. HP Inc. owns the PCoIP protocol and the control plane. HP Inc. did not meet the inclusion criteria for management and update technologies for virtual machines because these capabilities were released in a product called HP Anyware Manager Enterprise after the evaluation deadline for this report.
- **Leostream:** Leostream provides control plane and management tools that enable virtual desktops on-premises, in infrastructure-as-a-service deployments and also in public clouds, such as on AWS through an integration with Amazon WorkSpaces Core. Leostream was founded in 2002 and has traditionally focused on clients that require high levels of configuration in their VDI solutions. Its offering has matured and now addresses a broader range of VDI and DaaS use cases. Leostream did not meet the inclusion criteria for a managed control plane service.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the viability of their DaaS offerings; their effectiveness in the market; and their growth, client retention and reputation.

- **Product:** This criterion looks at the breadth and depth of the vendor's DaaS offerings, whether its capabilities match what is required by enterprise clients, and its track record on delivering its roadmap.
- **Overall viability:** This criterion includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. It considers the likelihood of the organization to continue to offer and invest in the product, as well as the product's position in the vendor's current portfolio. Consideration is given to the sustainability of investment/ownership structure, profitability, leadership stability, organizational and partner scalability, and year-over-year product revenue growth.
- **Sales execution:** This criterion looks at the vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Consideration is given to the clarity and competitiveness of the vendor's packaging and pricing model, sustainability of new business growth, and ability to replace competitors.
- **Market responsiveness:** This criterion looks at a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers tenure in the market, product vision, value proposition and quality of the vendor's roadmap.
- **Marketing execution:** This criterion looks at the clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message in order to influence the market, promote

the brand, increase awareness of products and establish a positive identification in the minds of customers. This “mind share” can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities. Consideration is given to a vendor’s use of various channels and creation of thought-leading content, as well as overall market awareness of the vendor’s DaaS offerings.

- **Customer experience:** This criterion covers the products, services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality buyer interactions, technical support and account support. This also may include ancillary tools, customer success programs, availability of user groups, service-level agreements and so on. Consideration is given to general customer feedback and related case studies.
- **Operations:** This criterion looks at the ability of the vendor to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to efficiently operate and effectively scale.

Criteria for product and overall viability are rated **high**. These are the drivers for a successful, high-scale product. These evaluation criteria are high to ensure we can highlight the vendors most viable to clients globally.

Sales execution, market responsiveness and operations are rated **medium**. Given the product design and viability are critical, these are supporting elements to the offering. Operations is rated medium in 2024, down from high in 2023, because vendors have increasingly automated their capabilities.

Marketing execution is rated **low**. Many DaaS offerings with poor awareness remain viable offerings.

The Ability to Execute criteria used in this Magic Quadrant are listed in Table 1. For additional details on each criterion, see the Evaluation Criteria Definitions section.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High

Evaluation Criteria ↓	Weighting ↓
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	Medium
Operations	High

Source: Gartner (August 2024)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to understand current market opportunities and to create and articulate their vision for future market direction, innovation, customer requirements and competitive forces. Ultimately, vendors are rated on their vision for the future and on how well that maps to Gartner's position.

- **Market understanding:** This criterion considers a vendor's ability to understand customer needs and translate them into products. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision. Consideration is given to a vendor's unique value to the market, understanding of external market forces, and alignment with customer objectives and use cases.
- **Marketing strategy:** This criterion looks for clear, differentiated messaging consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements. Consideration is given to overall ability to communicate a unique value proposition, effectively use various marketing channels and address needs of target buyer personas.
- **Sales strategy:** This criterion considers whether the vendor has a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, communication, and partners that extend the scope and depth of market reach, expertise, technologies and its customer base. Consideration is given to pricing and bundling, sales channels, and sales partnership strategies.
- **Product strategy:** This criterion evaluates whether a vendor's approach to product development and delivery emphasizes market differentiation, functionality, methodology and features that

cover current and future requirements. Consideration is given to the vendor's vision to deliver expanded capabilities and a consistent product release cadence, as well as its ability to ensure that its roadmap addresses common customer needs and use cases.

- **Business model:** This criterion looks at the design, logic and execution of the vendor's business proposition to achieve continued success. Consideration is given to the vendor's business, value proposition and unique capabilities (for example, patents, people, technology and data).
- **Vertical industry strategy:** This criterion considers a vendor's strategy to direct resources, skills and products to meet the specific needs of individual market segments, including verticals. Additional consideration is given to the most common industries among customers, specific target industries and compliance with common industry regulations or certifications.
- **Innovation:** This criterion looks at direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes. Consideration is given to the strength of the DaaS offering roadmap.
- **Geographic Strategy:** This criterion looks at the provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside its "home" or native geography – either directly or through partners, channels and subsidiaries – as appropriate for that geography and market. Additional consideration is given to the number of employees allocated to different regions, tailoring of go-to-market or product strategy to address regional differences, and the depth and scope of partners available in countries with existing and new customers.

Criteria for offering (product) strategy and innovation are weighted **high**. These criteria have the most influence on whether a client will purchase the DaaS offering and its future health.

Criteria for market understanding, sales strategy, business model and vertical industry strategy are weighted **medium**. DaaS is adopted by a broader set of verticals compared with VDI, meaning that industry strategy is less important. Market understanding and sales strategy are less important than product strategy and innovation for the continued success of an offering. Business models of successful DaaS vendors vary, and hence, are less of an indication of a successful offering than innovation and product strategy.

Criteria for marketing strategy and geographic strategy are weighted **low**. Market strategy is rated low because most emphasis needs to be on the path to a successful sale, which is product-led rather than marketing-led. Geographic strategy is now rated low because most vendors have global capabilities.

The Completeness of Vision criteria used in this Magic Quadrant are listed in Table 2. For additional details on each criterion, see the Evaluation Criteria Definitions section.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (August 2024)

Quadrant Descriptions

Leaders

Leaders exhibit strong execution and vision scores and have proved their success in the market by gaining market share. Leaders have successfully shown they can attract clients new to desktop virtualization, as well as those who are migrating from on-premises VDI solutions. They address a broad range of use cases and have scale across multiple regions.

Challengers

Challengers exhibit a strong set of technologies, marketing and sales execution, and intellectual property, as also exhibited by Leaders, but they tailor solutions to specific market segments or use cases. They may be satisfied with servicing their current customer base or market, or they may lack the strategic support, direction or desire to compete in the Leaders quadrant.

Visionaries

Visionaries exhibit strong capabilities in their current offerings and a complete set of functionalities to address common use cases. However, the vendor's size, size of its installed base, platform breadth or integration points make it appropriate for some, but not all, buyers. Characteristics of visionaries in this Magic Quadrant include a broad range of DaaS capabilities that have the opportunity to scale, are applicable to all industry verticals and have broad global reach.

Niche Players

Niche Players exhibit leadership in specific use cases, market segments or verticals. However, their offerings fail to provide a breadth of features that make them relevant to all buyers, regardless of vertical, geographic market or use case. Characteristics observed in Niche Players for this Magic Quadrant include high-performance workloads, rich graphics enabled by GPUs, focus on specific regions, focus on specific industry verticals and capabilities that, while available for sale as DaaS offerings, are commonly deployed by others to enable white-label DaaS offerings.

Context

The goal of any Magic Quadrant is to provide a level view of comparable products (size, capability and corporate structure) to address the demands of a wide variety of buyers. Not every company's requirements are identical. We encourage clients to review the accompanying [Critical Capabilities for Desktop as a Service](#) to review use case and functionality requirements, and this research to align industry expertise, vision, technology and cost requirements to the right vendor, regardless of the vendor's quadrant.

Market Overview

The DaaS market continues to grow as organizations transition traditional VDI services to the cloud and address the security challenges related to highly distributed work. Gartner forecasts that DaaS spending will grow from \$3.0 billion in 2024 to \$4.4 billion in 2028, with a compound annual growth rate of 10%.¹ The DaaS market has also benefited in the last 12 months due to turmoil in the on-premises VDI market. Gartner clients have cited Citrix price increase and license bundling, as well as the uncertainty related to the now completed KKR acquisition of Omnissa, as reasons they have moved from on-premises VDI to DaaS.

In Gartner's 2024 Digital Workplace Summits, 55% reported that their organizations have deployed DaaS or are in the process of deploying, 14% are running a proof of concept, 16% are planning to deploy and only 15% have no plans to deploy DaaS.²

The DaaS market has three key distinct types of offerings, with vendor products positioned in one or more of the three segments:

- **Self-assembled DaaS** is where the client assembles a DaaS solution from components made available by the vendor. Clients select and configure the cloud infrastructure, profile management technology and associated storage. Clients are responsible for configuration and

management of the virtual machines. The vendor operates the client-selected components and provides management and updates of the infrastructure through the life of the service.

- **Vendor-assembled DaaS** is where the vendor defines most of the solution. The client has less configuration work to perform and focuses on management of the virtual machines.
- **Vendor-managed DaaS** is where the full service is managed and supported by the vendor. Managed DaaS vendors generally manage, patch and maintain the virtual machine OS and, in some cases, provide end-user support.

Vendors in the market range from smaller bootstrapped or private-equity-funded to the largest publicly traded hyperscale cloud vendors. Adoption of DaaS has benefited from the ability to host workloads in locations that allow low network latency, which is especially useful when workers are overseas. Looking forward, Gartner expects more adoption of solutions that measure and seek to continuously improve digital employee experience.

DaaS/virtual desktop infrastructure is also being used to reduce carbon emissions, as cited by 37% of surveyed organizations that had completed one or more sustainable IT initiatives.³ However, most vendors do not have comprehensive net-zero emissions targets. Gartner expects sustainability to increase in importance as a use case for DaaS.

Acronym Key and Glossary Terms

Gartner Customer Interest Indicator (CII)	The Customer Interest Indicator assesses client inquiry volumes, Gartner Peer Insights mentions, social media followers, Gartner search, Google Trends and web traffic analysis.
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Evidence

¹ [Forecast: Public Cloud Services, Worldwide, 2022-2028, 2Q24 Update.](#)

² **2024 Gartner Is Desktop as a Service the Right Choice to Deliver Enterprise Endpoint Experiences? session poll.** The poll “Which Best Describes the Status of ‘Desktop as a Service (DaaS)’ in Your Organization?” was conducted among attendees of the breakout session “Is Desktop as a Service the Right Choice to Deliver Enterprise Endpoint Experiences?” at the 2024 Gartner Digital Workplace Summit (NA) on 18-19 March 2024 and at the 2024 Gartner Digital Workplace Summit (EMEA) on 10-11 June 2024. In all, 95 in North America and 102 in EMEA participated in this poll. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiment of the respondents surveyed.

³ **2023 Gartner Sustainable IT Opportunities Survey.** This survey was conducted to assess the actions and impact of IT to reduce greenhouse gas emissions within IT and the enterprise. The research was conducted online from 6 November through 18 December 2023. In total, 200 respondents were interviewed across North America (n = 68), Europe (n = 82) and Asia/Pacific (n = 50). Respondents represented qualifying enterprises in over 20 different industries with reported enterprisewide annual revenue for fiscal 2022 of at least \$500 million. Qualified enterprises also

were currently engaged in sustainability-related activities within the IT organization. Respondents were leaders or executives in either IT roles or mixed business and IT roles and were directly involved in making sustainability-related decisions. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiment of the respondents surveyed.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen

to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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