Groupware Market and Trends

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Who we are

- Cybozu, Inc.
- Established in 1997
- Listed on the Tokyo Stock Exchange (1st Section).
- Main Products
  - "Cybozu Office" (Web-based Groupware for SMB companies)
  - "Cybozu Office ASP" (ASP Licence for iDC)
  - "Cybozu Garoon" (Web-based Groupware for Enterprise companies)
  - "Cybozu Dezie" (Web-based Database for SMB companies)
  - "Cybozu Remote Service" (ASP Service for Secure Access)
  - "Cybozu DotSales" (Web-based SFA for SMB companies)
- Our customers
  - 28,000 companies
  - 2,500,000 users
What is “Groupware”? 

• = “Collaborative software” (Wikipedia)
  • “Collaborative software is software designed to help people involved in a common task achieve their goals.”
• “ERP(Biz)” or “Info.”?  -->  “Info.”
• Groupware Applications
  • E-mail, Calendar(Schedule) Sharing, Forums(Message boards/Discussion boards), Workflow, Knowledge Management, Voice Mail, Wiki, SNS, Blog, Online Chat(Instant Messaging), VoIP, Video Conferencing, Data Conferencing, Application Sharing, Document Sharing, Project Management
## Market Share

<table>
<thead>
<tr>
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<th>2004</th>
<th>2005</th>
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<tbody>
<tr>
<td>IBM (LotusNotes)</td>
<td>36.4%</td>
<td>29.8%</td>
</tr>
<tr>
<td>Cybozu (Office, Garoon)</td>
<td>22.9%</td>
<td>25.2%</td>
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<tr>
<td>Microsoft (Exchange)</td>
<td>14.6%</td>
<td>14.4%</td>
</tr>
<tr>
<td>NeoJapan (desknets)</td>
<td>11.2%</td>
<td>9.3%</td>
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<tr>
<td>Fujitsu (Teamware)</td>
<td>3.7%</td>
<td>4.2%</td>
</tr>
<tr>
<td>NEC (StarOffice)</td>
<td>3.5%</td>
<td>3.0%</td>
</tr>
<tr>
<td>Hitachi (GroupMax)</td>
<td>4.3%</td>
<td>2.6%</td>
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Market Size in Japan = about “20 bil. yen”.
Growth rate is only a few percent.

(Nork Reserch, 2006)
Data1 – “Groupware”

under 5 bil. yen

over 5 bil. yen

(Nork Research, 2006)
Data2 - “Applications”

- E-mail: Installed 77.2%, Considering 13.8%, No interest 9.0%
- Forums: Installed 54.7%, Considering 29.0%, No interest 16.3%
- Calendar: Installed 45.3%, Considering 32.6%, No interest 20.0%
- Workflow: Installed 29.9%, Considering 48.4%, No interest 19.4%
- Knowledge: Installed 25.7%, Considering 47.3%, No interest 26.9%
- EIP: Installed 17.7%, Considering 48.2%, No interest 34.1%

(Nork Research, 2006)

- Web oriented
- Mobile Phone
  - Web browse
  - Mobile Application
  - Smart Phone (BB etc.)
- Enterprise 2.0
  - Blog
  - SNS
- Enterprise Search

- Integration
  - SSO
  - EIP
- Security
  - PKI
  - Access Control
  - Secure Mobile Access
- ASP/SaaS
Trend 2 : Competitors

- IBM
  - Lotus Notes 8 >>> EP 2.0
- Microsoft
  - MS-Exchange, SharePoint
- Other Groupwares
  - GroupWise, OpenExchange, Open Sources, etc.
- Google
  - Gmail, Google Calendar, Group, etc.
- Salesforce.com
  - Apex Platform