

WINTERGREEN RESEARCH, INC.

**Client Based Office Utility Market Shares, Strategies, and  
Forecasts, Worldwide, 2010 to 2016**

**Client Office Productivity Software Promotes Efficiency**



*Picture by Susie Eustis*

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***OPPORTUNITY ABOUNDS***

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Lexington, Massachusetts  
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**Office Productivity Suites  
Client Office Productivity Software  
Productivity Design & Development  
Forms Management  
Office PowerPoint  
Office Word  
Office Excel  
Lotus**

**Collaboration Capability**

**Unified Communications  
SOA Web Services**

**Digital Notebook**

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## **Client Office Productivity Suites Market Shares, Strategies, and Forecasts, Worldwide, 2010-2016**

LEXINGTON, Massachusetts (July 4, 2010) – WinterGreen Research announces that it has a new study on: Client Office Productivity Software Market Shares and Forecasts, Worldwide, 2010-2016. Office software is useful as a way to implement automated process for any task relating to writing, calculating, collaborating, or presenting. Software is needed for management and sales implementations of different productivity tasks in different industries. The study has 464 pages and 155 tables and figures.

Office productivity software enables use of computers intuitively. Continuous systems upgrades improve the functions available to users. Learning is iterative. Software development is iterative. As one generation of software rolls out, customer feedback is used to evolve more useful features. The products evolved are able to improve productivity across the board in all industries. The software is a big reason the computer industry keeps evolving. Enterprises are constantly challenged to address changing market conditions.

Office productivity suites feature systems that are intuitive to use for very specific formatting and customization of the device look and feel. People do not like to have their personal formats changed by someone else using the device. The software is personal. People can start a project without help from anyone, can ask for help if they need it, and can produce a result, a document, analysis, or presentation without anything but software. In this manner people can leverage what they know to communicate to a group.

A sales manager can build a power point presentation that is customized to a particular customer, being responsive to what is new in the product suite. An office suite is comprehensive. Software licenses provide the most advanced productivity suites available.

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Office productivity suite markets are dominated by Microsoft which has been increasing its market share over the past few years. Competition in this segment is from well-established companies with differing approaches to the PC market. IBM Lotus is the number two participant in the market. IBM has positioned its office productivity suites to address the needs of the enterprise.

#### OFFICE PRODUCTIVITY SUITE MARKET DRIVING FORCES

- Systems approach to office productivity
- Intuitive to use
- Sufficient configuration syntax to make offerings personal
- People can start a project without help from anyone
- Workers can ask for help if they need it
- Software help available online
- Productivity suites used to produce a result
- Productivity suites used to produce a document, analysis
- Productivity suites used to produce presentation
- People can leverage what they know to communicate to a group
- Support for team productivity
- Support for teams project management

Source: WinterGreen Research, Inc.

Connectivity and integration are the core tenants of IBM Lotus office productivity suites. Systems are designed to support linking applications and services for operational efficiency and cost savings. The nuance of running an enterprise is what matters, and the details of process are implemented in the software.

It is the versatility of the depth of syntax control over documents and spreadsheets that give office software its ability to provide personal productivity. People can work both online and offline. A sales manager can build a power point presentation that is customized to a particular customer, being responsive to what is new in the product suite. An office suite is comprehensive. Software licenses provide the most advanced productivity suites available.

Office Productivity Suites are client based systems that are useful for individuals and teams. For individuals, office systems automate what used to be manual process. Systems support communications in the enterprise and business environments. Systems are used for collaboration. They are used to accomplish project management.

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With the advent of cloud computing it has been suggested that the client based office productivity suites would decline in importance, replaced by cloud based products such as Google docs. This has not been the case and will not for the foreseeable future for two reasons. 1. Current products have robust, ever growing functionality not easily duplicated in a cloud environment. 2. Workers want to be able to work online and offline. Productivity tools are valuable because they go anywhere where there is not necessarily online access, on airplanes, to the woods, on the train, and in the attic. Once online, documents can be shared, but they can be created and worked on offline.

In business, users create documents to communicate. Automating the process of communication depends on the ability to create dynamic smart documents that update by using document controls and data binding to connect to back-end systems. Users manage document properties in the Document Information Panel.

The ability to view and edit document properties while working on a document is useful. The Document Information Panel displayed at the top of a document is complemented by the fact that properties for files are saved to a document management server. A Document Information Panel is used to edit the document properties for a server document, the updated properties will be saved directly to the server. The sharing of syntax provides ease of use.

Office productivity suites have evolved an elaborate suite of syntax that needs to go with the documents. This syntax keeps evolving in a manner that gives Microsoft significant strategic advantage in the market.

Forecast for office productivity markets represent consideration of how the online applications will impact the traditional productivity software markets. Client based office productivity software shipments at \$23 billion in 2009 are anticipated to continue a steady growth pattern reaching \$39 billion by 2016. The growth will be sustained via increasing penetration of the current installed base, upgrades by current users.

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As laptops and netbooks extend into underdeveloped countries, many of the productivity suits adopted will be from the open source community, meaning that Microsoft and IBM will be thrust back onto their current customer base. The depth of functionality is impressive and useful to people working. What is happening though is that the feature function packages continue to get better. As vendors interview users, more functions are built out. The large installed base provides a way to keep improving the productivity software, spreading the cost of improvements out over a very large number of users, leveraging the primary advantage of packaged software.

Keywords: Office Productivity Suites, Client Office Productivity Software, Productivity Design & Development, Forms Management, Office PowerPoint, Office Word, Office Excel Lotus, Collaboration Capability, Unified Communications,,SOA Web Services <http://wintergreenresearch.com/reports/OfficeProductivity.htm>

## **YOU MUST HAVE THIS STUDY**

### **Companies Profiled**

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## Market Leaders

Microsoft  
IBM  
Corel

## Client Based Office Productivity Market Participants

### Selected Company Profiles

Apple  
Adobe Systems  
Avaya  
Google  
RedHat

## Client Based Office Productivity Software Market Shares, Strategies, And Forecasts, Worldwide, 2010 to 2016

### Report Methodology

This is the 447th report in a series of primary market research reports that provide forecasts in solar energy, robots, communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and batteries to store energy. Automated process and significant growth potential are a priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve

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market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards. Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used

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to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

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# Client Based Productivity Software Market Shares, Strategies, and Forecasts, Worldwide, 2010-2016

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**WINTERGREEN RESEARCH**, IS ABLE TO IDENTIFYING MARKET TRENDS THROUGH PRIMARY RESEARCH TECHNIQUES. THE EMPHASIS IS ON DEVELOPING ACCURATE NUMBERS THAT INCLUDE UNDERSTANDING DEVELOPMENTS, INTERVIEWING DISTRIBUTORS AND USERS, AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, **WINTERGREEN RESEARCH** SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH SURVEYS AND FOCUS GROUPS THAT ARE INHERENTLY LIMITED BECAUSE THEY ARE NOT ACCURATE. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT **WINTERGREEN RESEARCH**. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT AND FILTERING OF INFORMATION FOR THE PURPOSE OF ACHIEVING INTEGRATION INSIGHT.

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**ELLEN T. CURTISS**, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

**SUSAN EUSTIS**, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF SOA MARKETING STRATEGIES, INTERNET EQUIPMENT, CLOUD COMPUTING, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, ENERGY MARKETS, ELECTRIC VEHICLES, THIN FILM BATTERIES, BUSINESS PROCESS MANAGEMENT, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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