

Workstyle Reform Solution Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a research on the domestic workstyle reform solution market with the following conditions:

1. Research period: January to June, 2017
2. Research target: Workstyle reform solution providers, solution adopted users, pertinent organizations, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature search

<What is the Workstyle Reform Solution Market? >

Workstyle reform solutions are defined in this research as those ICT solutions, services, and products that improve production and work efficiency aiming to reform the workstyle. They can be applied to such categories as environment (facilities), terminals/devices, streamlining of sales/processes/workflows, communication/sharing information, and HR/labor/general affairs.

Such services and products include free-address construction, telework systems, VDI (virtual desktop infrastructure), video/web conference systems, and in-house SNS/business chat.

◆ Key Findings

■ Workstyle Reform Made Progress in Diverse Business Areas, Not Only in White-Collar Jobs but Also at Various Job Sites

In addition to attempts at office environment mainly for white-collar jobs, many endeavors toward better workstyle and work processes have been made at various job sites in the form of virtualization to improve utilization of facilities and production status at factories, chat bot at call centers, web-camera monitoring and guidance operations at stores, IC tags to check transportation in the warehouses and self-checkout at retailers, and etc.

■ As a Result of IT Vendors Being Required to Provide Workstyle Reform Solutions to Wider Business Areas, More Collaborated Services Provided

When user companies try to reform their workstyle by improving work efficiency and saving labor, utilizing IT solutions is indispensable. IT solution providers are required to provide not only consulting services to solve the challenges in bringing about reforms at user companies, but also to offer high-value-added solutions collaborated with various external pertinent businesses such as makers of office furniture/fixtures, video/web conference solution providers, HR businesses, and etc.

■ Domestic Market Size of Thin-Client VDI Solutions Attained 45,850 Million Yen in FY2016, Future Market Expansion Expected

Within various workstyle reform solutions, VDI (Virtual Desktop Infrastructure) solution, which is one of the thin-client solutions, achieved 42,500 million yen in FY2015 and 45,850 million yen in FY2016. It is anticipated to attain 62,000 million yen by FY2020. Because more telecommuting is likely to be adopted and more robustness of security is needed to press ahead with workstyle reform, the market is projected to expand for the future.

◆ **Report Format:**

Published report: “Work Style Reform 2017”

Issued on: June 16, 2017

Language: Japanese

Format: 572 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

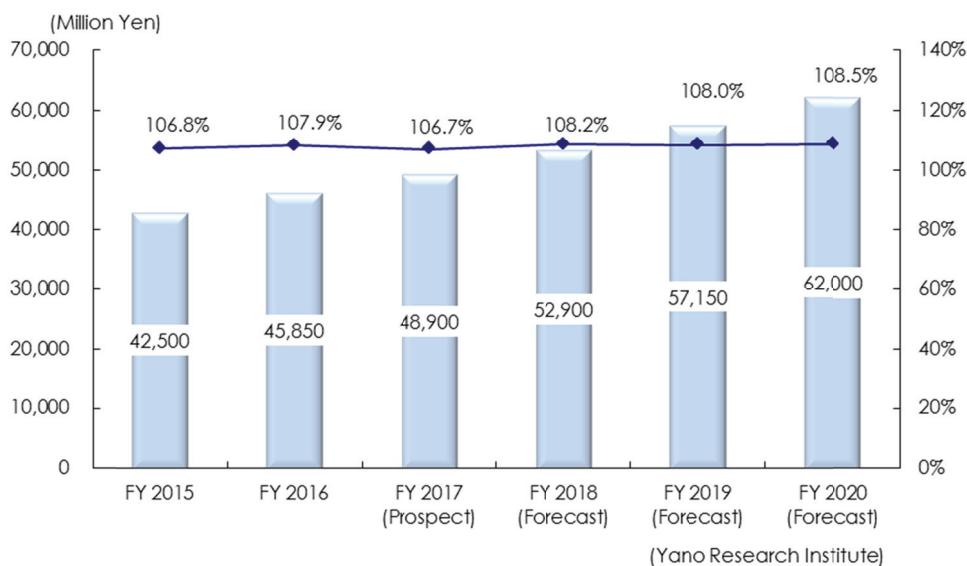
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure & Table 1: Transition and Forecast of Thin-Client VDI Market Size**

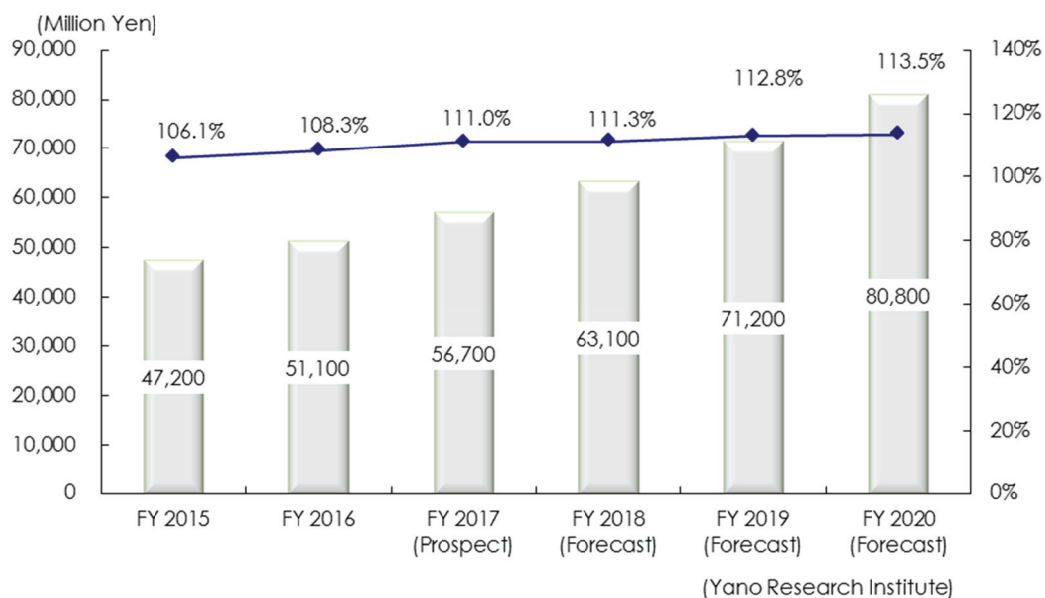


Million Yen	FY 2015	FY 2016	FY 2017 (Prospect)	FY 2018 (Forecast)	FY 2019 (Forecast)	FY 2020 (Forecast)
Domestic Market Size of Thin-Client VDI	42,500	45,850	48,900	52,900	57,150	62,000
Y-o-Y Comparison	106.8%	107.9%	106.7%	108.2%	108.0%	108.5%

Note:

1. The market size is based on the sale of businesses.
2. The market size is calculated based on the sale of businesses that provide terminals, software, and solutions regarding thin client virtual desktop infrastructure.

■ **Figure & Table 2: Transition and Forecast of Video/Web Conference Solution Market Size**



Million Yen	FY 2015	FY 2016	FY 2017 (Prospect)	FY 2018 (Forecast)	FY 2019 (Forecast)	FY 2020 (Forecast)
Domestic Video/Web Conference Solution Market Size	47,200	51,100	56,700	63,100	71,200	80,800
Y-o-Y Comparison	106.1%	108.3%	111.0%	111.3%	112.8%	113.5%

Note:

3. The market size is based on the sale of businesses.
4. The market size is calculated based on the sale of businesses that provide terminals, systems, services, and MCUs regarding video/web/audio conference solutions.