ONE VOICE MAIL

VISION 2027–2038

Your business. *Your software.* Your rules.

How AI will change business software, and how Mail turns that shift into a three-phase plan: from undercutting Microsoft 365 and Google Workspace, to a platform where every app is free, to software that AI builds around your business.

PHASE 1 · 2027–2029
Compete & undercut

PHASE 2 · 2030–2032
Every app free, always

PHASE 3 · 2033–2035
Tell AI what you need

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00 AT A GLANCE

From one inbox to software that *builds itself*

Business software has always asked companies to fit themselves to it. AI is about to reverse that. This document applies the ideas from my article *How AI will change business software* to One Voice Mail, and sets out a three-phase plan to turn a working productivity suite into the platform where AI builds the software every business needs.

3	3 + 3	20 → 50+ → ∞	€0
phases, each building on the last	years per phase: build, then mature	apps across the three phases	per app, from Phase 2 onward

PHASE 1

Compete & undercut

Win users from Microsoft 365 and Google Workspace at about half the price, with ownership and privacy built in.

PHASE 2

The free-app platform

Grow to 50+ best-of-class business apps, every one of them completely and always free.

PHASE 3

Tell AI what you need

Describe your business and AI builds all your software around it, in a snap. No more adapting to the standard.

Three engines drive the plan. We **research every business domain and let AI clone the best**, like 3D printing for software. We **own our data centres from day one**, because a long-term AI platform has to own what it sells. And every app we build adds to an **ever-growing library** that becomes the training data from which, in Phase 3, AI learns to build software for any business.

01 THE THESIS

How AI will change *business software*

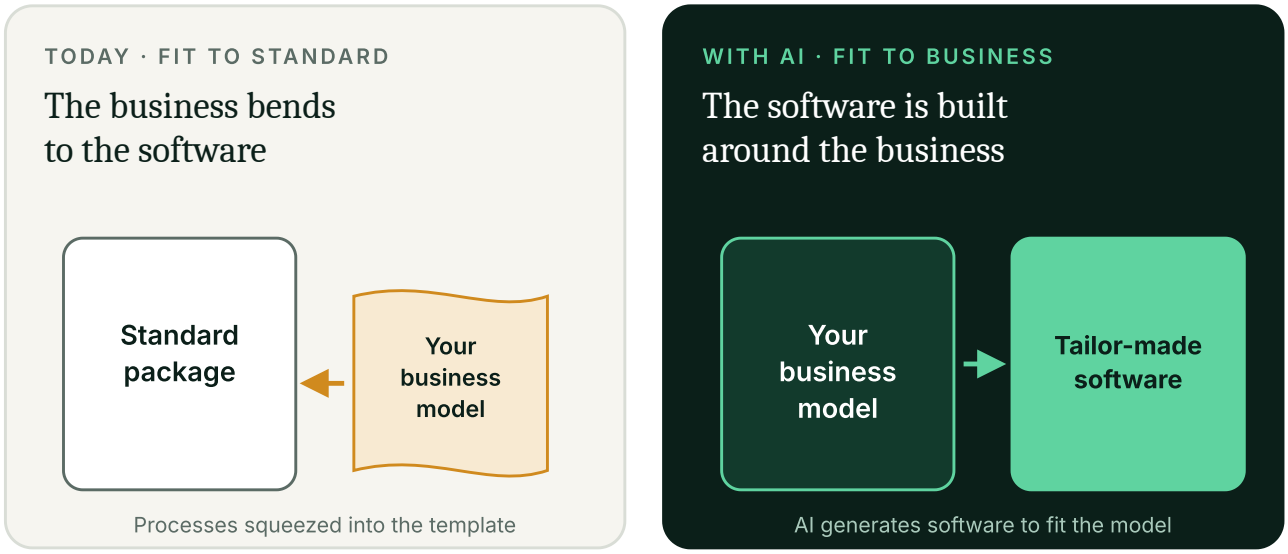
The core messages of the article, restated as the foundation for the Mail strategy.

The fit-to-standard compromise

Standard packages and ERP suites are sold as a fit for business requirements, but in practice the company adapts to the software. Custom software fits best, yet it is usually too expensive, so most companies accept off-the-shelf products and compromise.

That compromise hits the most valuable thing a company has: **its business model**. The model is what makes a company unique, profitable and competitive. Automating it usually means buying suites for finance, HR and payroll, sales and marketing, and ERP. During implementation the model is bent towards the package's standard processes: the "fit to standard" doctrine.

> **An extreme case**
> A large oil company running SAP for HR saw its HR processes as central to its business model and invested in heavy customisation. The final solution was roughly **70% custom and 30% standard SAP**. Few companies can afford that, and fewer see the risk of not doing it.

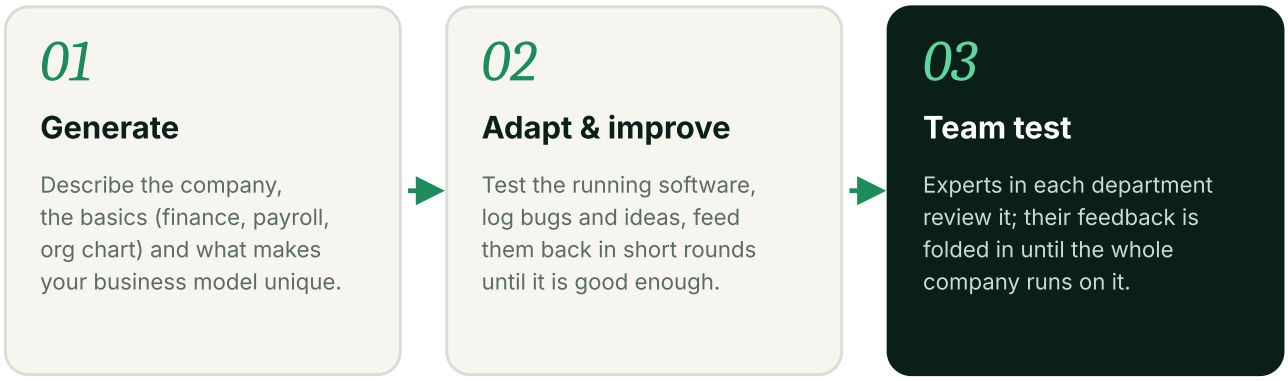


AI reverses the direction of fit: software is generated around the business model instead of the model being squeezed into a package.

Cheap custom software for everyone

In the end state, a company talks to an AI that generates **business software rather than code**. Take a wholesale pharmaceutical supplier: it describes the basics (finance integrated with banking, payroll, a self-

maintained org chart) and then what makes it unique, such as comparing prices with competitors and suppliers across countries and predicting price changes to time its purchases. The AI inventories the factors that drive purchasing and stock every day, and builds for them.



One conversation with an AI that generates business software, not code: done in under a day

The three-stage conversation from the article. Built on decades of proven business-software experience, it can be completed in under a day.

Training an AI for business software

This AI does not exist yet. To regenerate business software, it has to learn from the specifications of thousands of packages, in enough detail to rebuild each one. The sources are already out there:

- Functional design specifications, user manuals and test documentation
- Automated crawlers that infer functionality by operating the software
- Database structures and configuration parameters showing what each type of company fine-tunes
- User forums that reveal what works and what doesn't

How the software market will shift

- **Maturity around 2035.** Platforms that generate business software will need roughly **$100 billion** of training investment and specialised AI data centres before they mature.
- **AI platforms take over.** They sell subscriptions for continuous updates. ERP vendors lose share and valuation, get acquired, and their legacy products become training data.
- **Commodity first.** Finance and payroll move first; functions specific to a business model follow once there is enough training data.
- **Shared-cloud economics fade.** When every solution is unique, the multi-tenant cloud ERP case weakens. Generated software is light to run but stays linked to the model that built it.
- **Open source covers the basics.** Some open models will handle commodity functions for free.
- **Insourcing returns.** In-house AI payroll could be at least ten times cheaper than outsourcing. Outsourcing survives only where providers add real specialist know-how.

The Thinking Economy

Behind all of this is a broader shift. Value moves from routine processing to cognitive and creative work: people focus on strategy, innovation and the things that make their business unique, while AI builds and runs the systems.

What this means for a new entrant

Three conclusions follow for any startup. (1) **Whoever owns the platform and the library of proven business software holds the advantage.** (2) **The price of an individual app trends towards zero.** (3) **Infrastructure and compute become the real business.** Mail's roadmap is built on exactly these three points.

02 STARTING POINT

Where Mail *stands today*

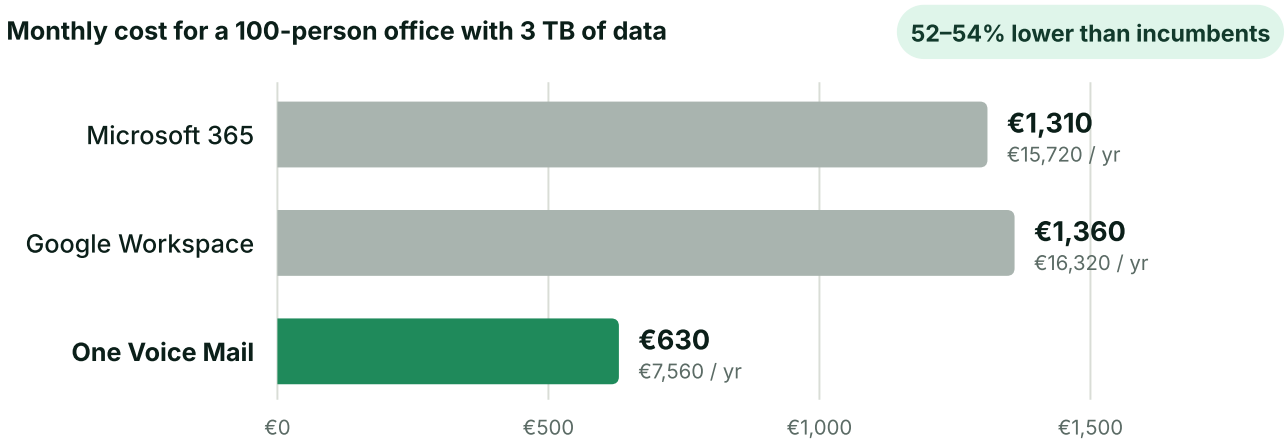
Mail is not a slide deck. The suite is built and working: the foundation for Phase 1 already exists.

20	3	21	€210
connected apps, one sign-in	desktop platforms: macOS, Windows, Linux	languages	per TB per month, unlimited accounts

One Voice Mail covers mail, calendar, contacts, notes and Drive; Office-compatible Docs, Sheets and Slides; Diagram and Project; plus Meetings, Meet, Tasks, Scrapbook, MailerHub, VoiceNotes and more. It runs on a server the customer chooses, with free desktop apps, open standards (IMAP, SMTP, CalDAV, CardDAV, WebDAV), S/MIME and PGP, passkeys and a one-year audit log. AI features are opt-in, routed through the organisation's own gateway, and never used to train on mail or build ad profiles.

Pricing that breaks the per-seat model

Per-seat plans bundle 1 to 2 TB of storage per user, while a typical office worker uses around 25 GB. Customers pay for 40 to 80 times the capacity they use. Mail charges for **pooled storage instead of seats**, with unlimited accounts and every app included.



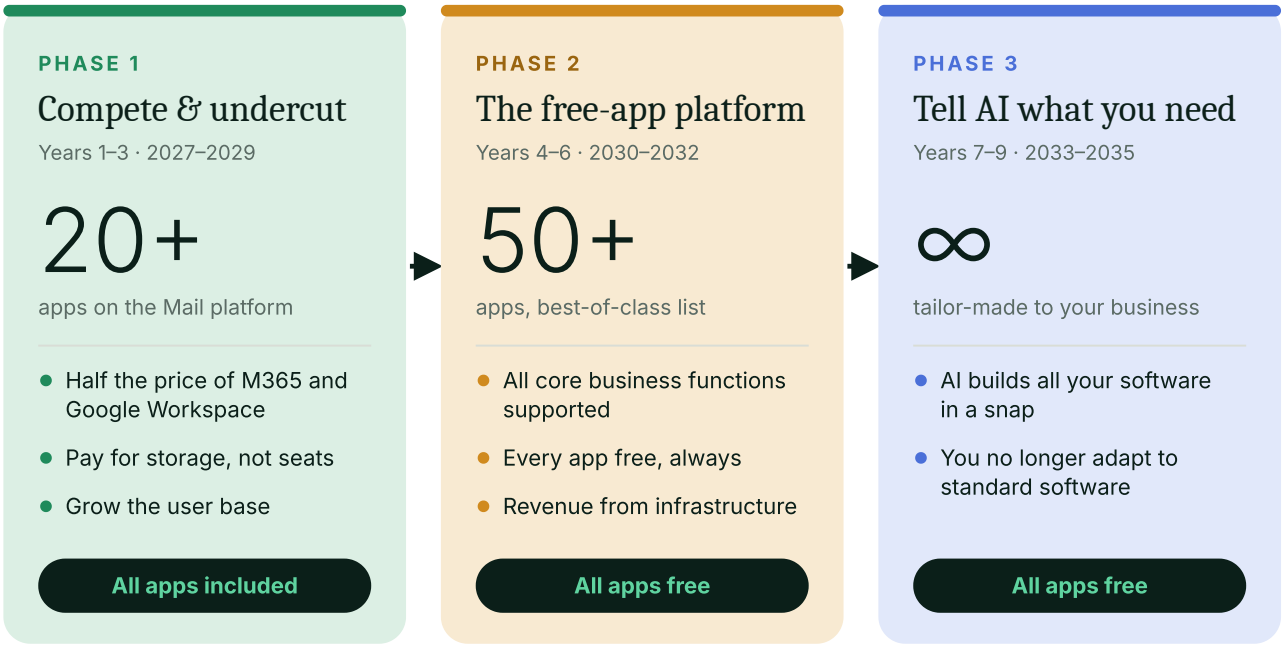
Worked example from the Mail business model: 100 people, 3 TB, annual commitment, EUR excluding VAT (October 2026). Monthly cost; yearly totals shown beside each bar.

This price advantage is the wedge for Phase 1. It is sustainable without investor subsidy, and it trains the market for what comes next: paying for infrastructure, not for software.

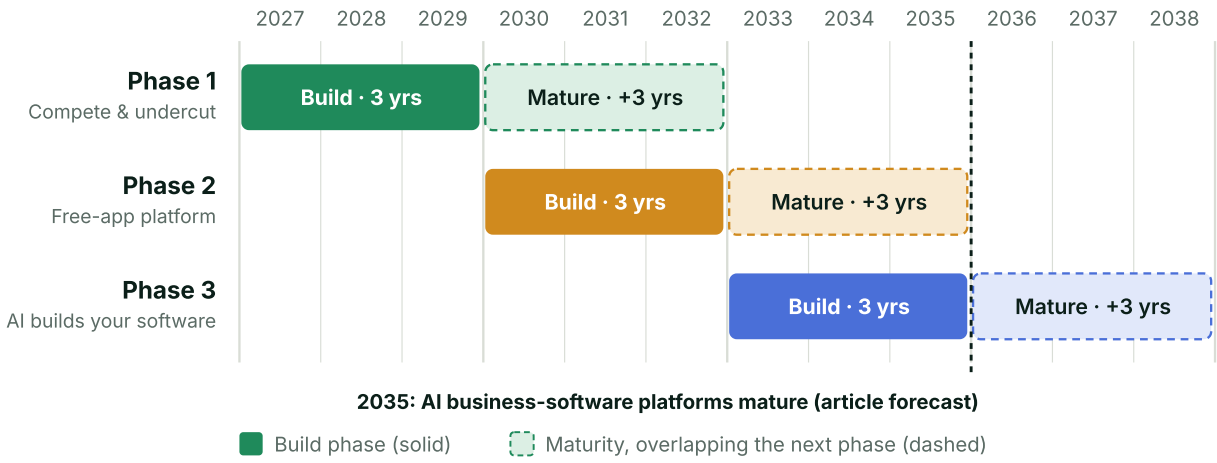
03 THE ROADMAP

Three phases, *one direction*

Each phase takes three years to establish and another three to mature, so the phases overlap. Every phase funds and feeds the next, and the whole plan lands in the window where the article expects AI business-software platforms to mature.



The three-phase roadmap, from 20+ apps on the Mail platform to software that AI tailors to each business.



Timeline: three years to build each phase, extending to six years per phase as maturity overlaps the next.

PHASE 1

Compete & undercut Microsoft 365 and Google Workspace

Years 1–3 (2027–2029) · maturing to 2032

Goal: Grow a loyal, paying user base by beating the incumbents on price, ownership and privacy.

- **20+ apps on the Mail platform**, all included: mail, calendar, Drive, Office editors, meetings and teamwork.
- **About half the price** of Microsoft 365 or Google Workspace, through storage-based pricing with unlimited accounts.
- **Easy switching:** Gmail and Outlook migration, open standards and free desktop apps.
- **Flexible models:** hosted, per-account subscription, or client-owned on the customer's own hardware.
- **First data centre from day one,** so the cost base is ours from the start.
- **The app factory starts internally:** the research-and-clone method extends the suite and proves itself.

Outcome → A growing customer base whose storage revenue covers infrastructure and funds the app factory.

PHASE 2

A platform where every app is free, always

Years 4–6 (2030–2032) · maturing to 2035

Goal: Turn the user base into a platform on which every business app is completely and always free.

- **50+ apps:** a best-of-class list covering all core business functions, added on top of the Mail, Meet, Meetings, Calendar, Contacts and Notes core.
- **New business app families** such as MailerHub, Forms, Finance and Desk, each built from the virtual best of its market.

- **Every app free, permanently.** Revenue comes from infrastructure (storage, compute and AI capacity), not from licences.

> **Why "free" works**
>
> Apps cloned by AI from a researched specification have a marginal cost close to zero, and we own the infrastructure they run on. The incumbents earn their money per seat and per app; they **cannot match a free platform without cannibalising their own model**. This is the article's prediction that commodity software is replaced first, played out on our own terms.

Outcome → A platform on which companies run their entire commodity stack, and the largest proven library of business apps we can build.

PHASE 3

Tell AI what you need

Years 7–9 (2033–2035) · maturing to 2038

Goal: Tell AI what your business needs, and get software that is tailor-made for you. You no longer adapt to the standard solution.

- **AI builds all your software in a snap,** through the generate, adapt and team-test conversation described in the article.
- **Your business model leads.** The pharmaceutical wholesaler gets its cross-border price prediction; the oil company gets its HR model without a 70% customisation project.
- **All apps stay free.** Generated solutions run on our platform and stay linked to the builder, so they keep adapting as the business changes.
- **Trained on our own library.** The builder learns from every app created in Phases 1 and 2.

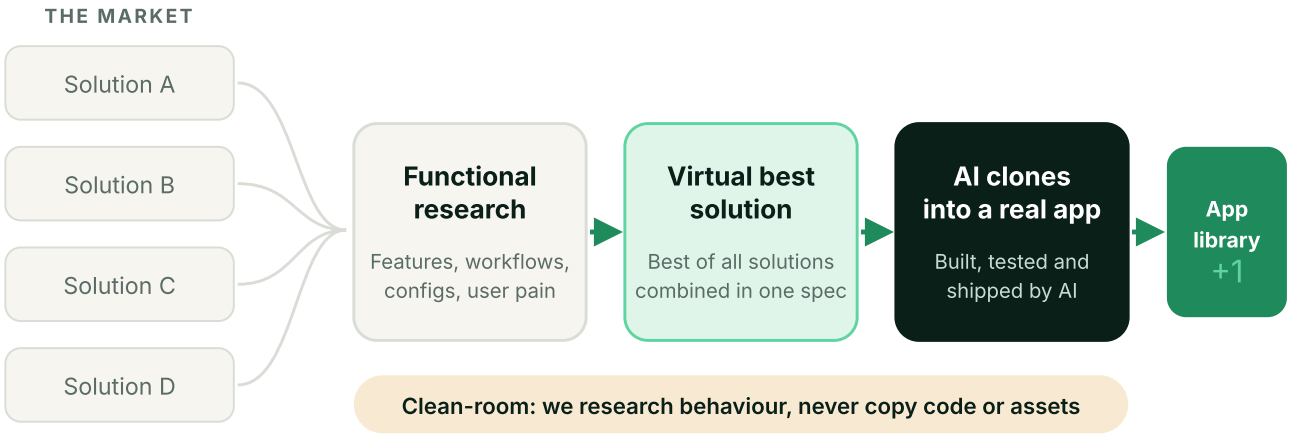
Outcome → Mail becomes what the article predicts will win: the AI platform on which businesses generate, run and continuously adapt all their software.

04 HOW WE DO IT

Three engines behind *the plan*

1 · Research the best, let AI clone it: 3D printing for software

For each business solution we research the market: the leading products, their features, workflows and configuration options, and what users love and complain about. From that research we design one **virtual solution that combines the best of all of them**. Then AI builds it. We define the best; AI prints it.



The app factory: market research becomes a single best-of-breed specification, which AI turns into a real app in the library.

The research is **functional**: we study documented behaviour and user needs, not anyone's source code, designs or assets. Building independently from a functional specification keeps the method clean of copying problems, and lets us repeat it for every domain.

2 · Own our data centres from day one

The long-term plan is an AI-supported platform. On such a platform, compute and storage *are* the cost of goods, so to be efficient and cost-effective **we must own what we sell**. The article makes the same point at market level: business-software AI needs specialised data centres.

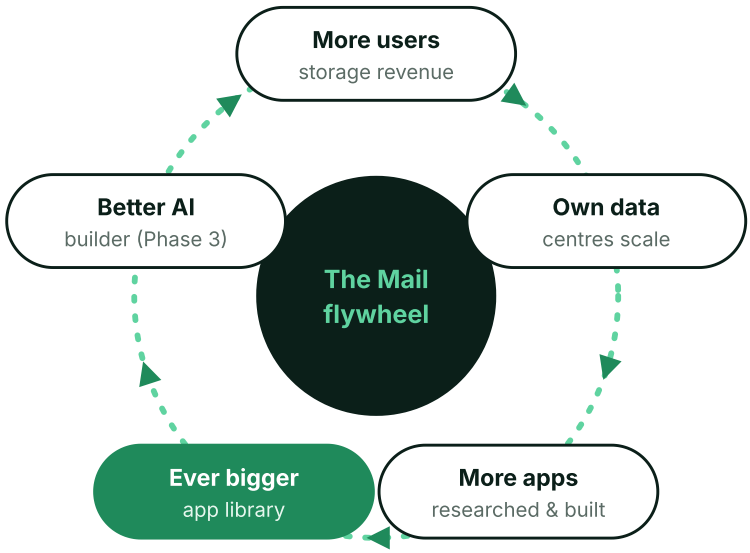
- **Cost:** no hyperscaler margin on every gigabyte and every AI request, which is what makes free apps affordable in Phase 2.
- **Control and sovereignty:** customer data stays on infrastructure we run, in the jurisdiction the customer expects.
- **Own the platform:** the hardware, the apps, the library and the AI builder sit in one hand.
- **Room for green energy:** owning the facility lets us choose how it is powered.

Today's reference unit economics assume rented servers (about €500 a month for the 100-person example). Owning the data centres converts that rent into an asset, and that gap widens with every customer.

3 · An ever-growing library that becomes the AI's training data

As time goes by we have more, and ever better, business apps for everything. Every app carries its researched specification, code, tests, configurations and real-world usage: precisely the training sources the article lists. In Phase 3 this library becomes **the main source from which AI learns how to build** the solutions customers ask for.

The incumbents' products will end up as someone else's training data. Ours are built to be training data from day one, inside a platform we own.



Each turn of the flywheel adds users, capacity and apps, and makes the Phase 3 AI builder better.

05 ALIGNMENT

From prediction to *strategy*

Each prediction in the article, and Mail's answer to it.

WHAT THE ARTICLE PREDICTS	HOW MAIL RESPONDS	PHASE
Companies are forced to fit their business model to standard software	AI builds software around the business model	3
Commodity functions such as finance and payroll move to AI first	Core business apps become free on the platform	2
Shared cloud and per-seat economics fade	Storage pricing now; free apps, paid infrastructure later	1–2
Specialised AI data centres are required	Own data centres from day one	1–3
Legacy packages become training data for AI platforms	Our library is designed as training data from the start	2–3
Open-source models handle commodity functions for free	We make commodity apps free ourselves and compete as a platform	2
In-house processing becomes far cheaper than outsourcing	Customers run everything themselves on Mail, hosted or client-owned	1–3
Generated software stays linked to the model that built it	Apps run on our platform and adapt continuously	3

Risks we plan for

RISK	HOW WE ADDRESS IT
Early data-centre investment	Start with a modular facility sized to the Phase 1 base and expand in step with storage revenue.
Intellectual property	Functional, clean-room research and independent implementation; no code or assets copied.
AI maturity arrives later than expected	Phases 1 and 2 stand on their own commercially; Phase 3 builds on whatever the models can do by then.
Trust and security	Privacy-first architecture, open standards, end-to-end encryption options, opt-in AI and a full audit log.
Incumbent response	Per-seat vendors cannot go free without undercutting their own revenue.

Your mail. Your files. *Your software.* Your rules.

Mail starts where businesses feel the pain today: paying too much, per seat, for software they must adapt to. It ends where the article says the market is heading: an AI platform that builds every business its own software, for free, on infrastructure we own.

We are looking for investors and distribution partners who want to build that platform with us.

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