

Opening Remarks

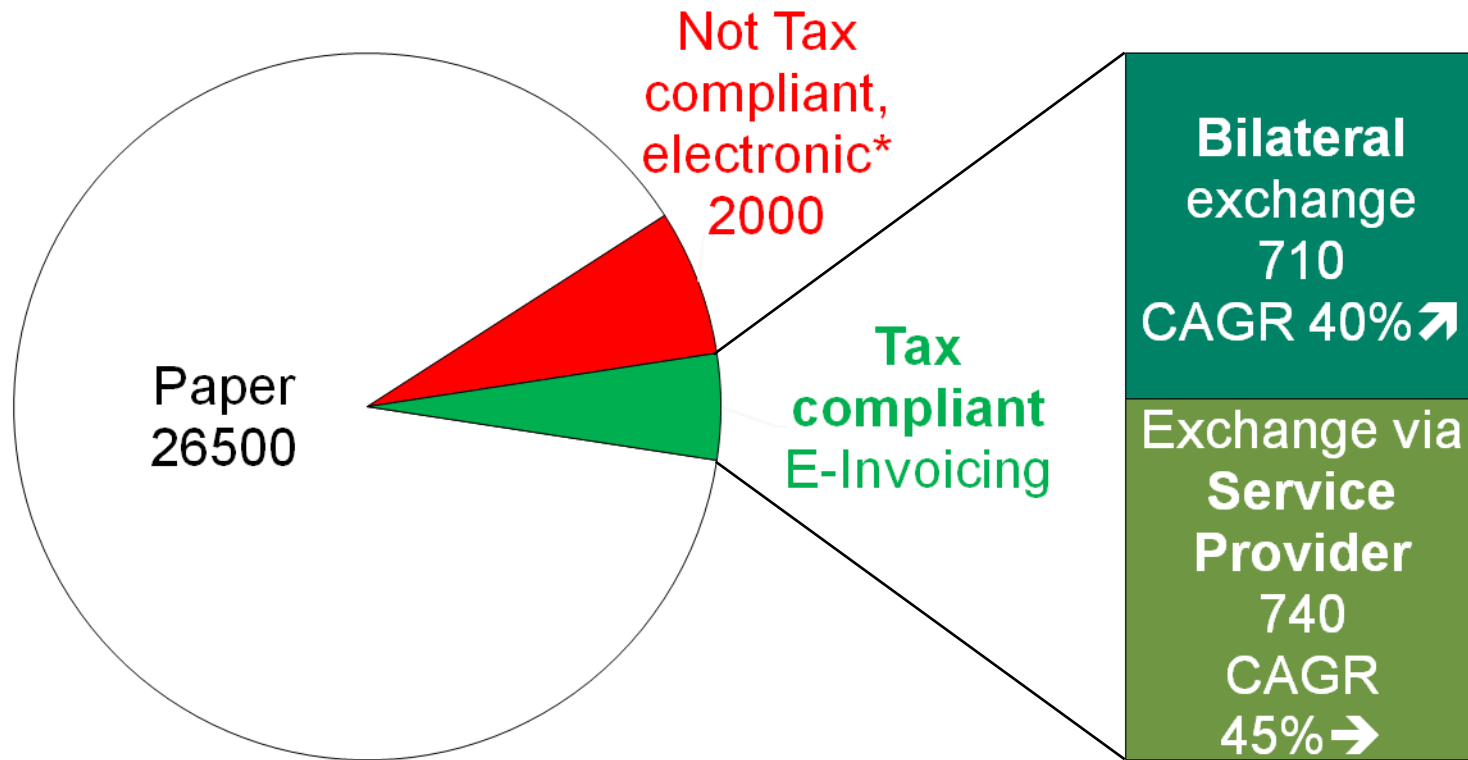
4th E-Invoicing Operators' Forum



Bruno Koch

European Invoice exchange 2009

Figures in millions, includes B2B & B2C volume



*) Missing Authentication and/or Integrity
Electronic original deleted and just copy (electronic or printed) is archived

Message transfer alternatives

Accelerator for bilateral exchange?



- Secured mail based exchange of documents with options for E-Invoicing
- Certified emails in Italy within 1-3 years
- De-Mail in Germany, likely up-and-running 2009/2010
- “Elektronische Zustellung” in Austria, already up-and-running (digitales Oesterreich)

Today's' market preferences



Countries with preference for Service Providers

Denmark
Estonia
Finland
France
Norway
Slovenia
Sweden
Switzerland

Countries with dominance of bilateral exchange (sometimes operated by 3rd parties as SaaS)

Austria
Germany
The Netherlands
United Kingdom

- End of 2009: close to 400 Operators (340 in 2008)
- In average, every month 1 disappears and 6 new ones appear → Forecast for peak number increased to 500-550
- Exploding number of solution providers in markets with government programs, e.g. Spain, Sweden, Holland, ...
- Operators with E-Invoice volume > 20 millions p.a.
 - Cegedim
 - b-process
 - EDB
 - PROGRATOR|gatetrade
 - Logica
 - Anachron
 - BBS
 - Tieto
 - SETTCE
 - Medidata

- Natural growth of bilateral connections
- Basware with more than 60 partners
http://www.basware.com/OUR_SOLUTIONS/SUPPLIER_CONNECTIVITY/EINVOICING_NETWORK/Pages/default.aspx
- Some domestic networks with interconnections based on standards
- Many collaboration models failed during negotiations
- European Commission supported initiatives with concrete results and recommendations

- Supported messages, uni- and bi-directional (core messages and confirmations/rejections...)
- Ensure legal requirements for e-invoices, especially
 - Authenticity, including non-repudiation of delivery
 - Integrity
- Semantic
- Technique
- Addressing & Routing; eIDs for end-users and operators; public address book and/or routing directory
- Responsibilities of partners
- Cross-platform support 1st-3rd level; error allocation
- Pricing model regarding interchange and end-user fees
- Contracts; for end-users and among operators
- Procedural documentation, if legally required (e.g. CH, DE)

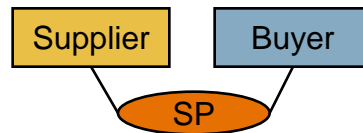
Terms used today

Bilateral/direct exchange model



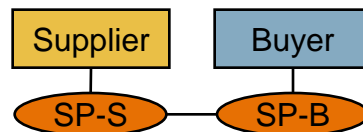
A model for the exchange of information directly between a buyer and a seller in a one-to-one relation.

3-corner model



An invoicing process set-up whereby Trading Partners have separate contractual relationships with the same Service Provider. The 3-Corner model in principle can only offer reach to the parties that are connected to the central hub.

4-corner or multi-corner model



An invoicing process set-up whereby each Trading Partner has contracted with one or several separate Service Providers, whereby the Service Providers ensure the correct interchange of invoices between the Trading Partners

Source: CEN Glossary