

E-Invoicing Operators Forum 2010

Opening remarks



Bruno Koch

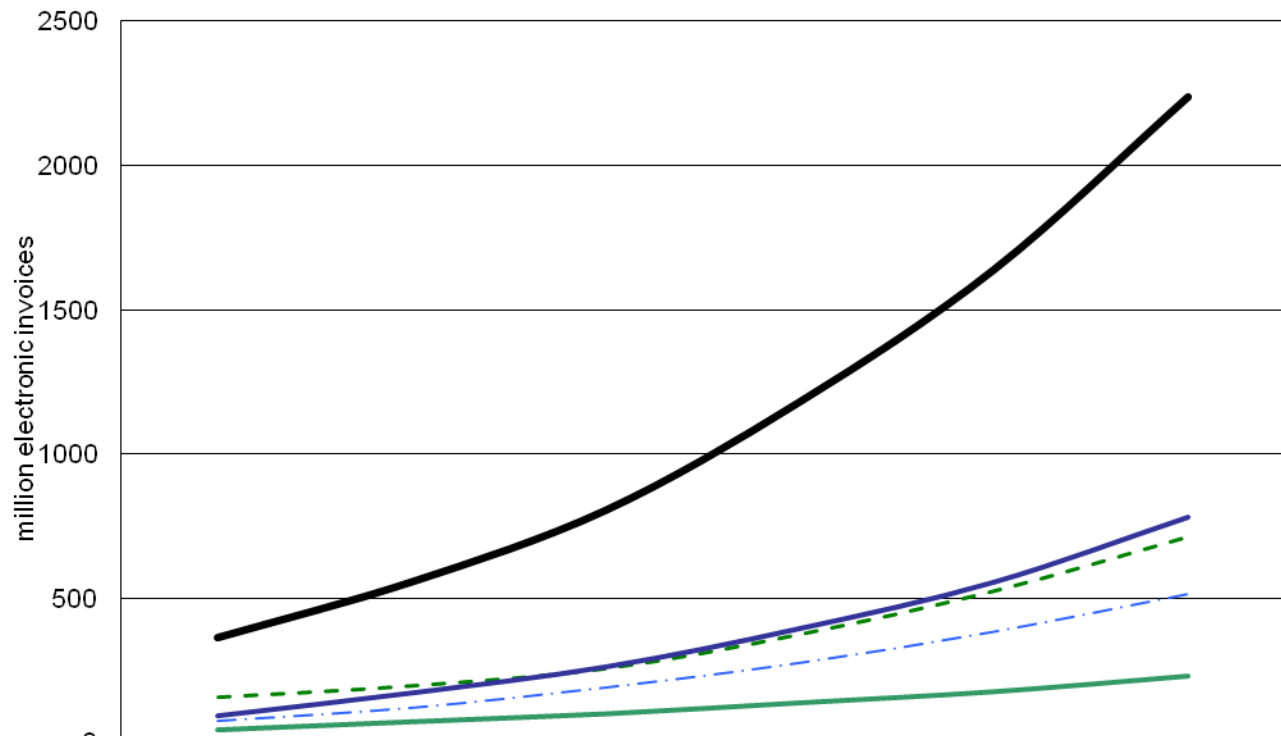
General situation for operators & trends

Channels Used for Electronic Invoices

Processed volume

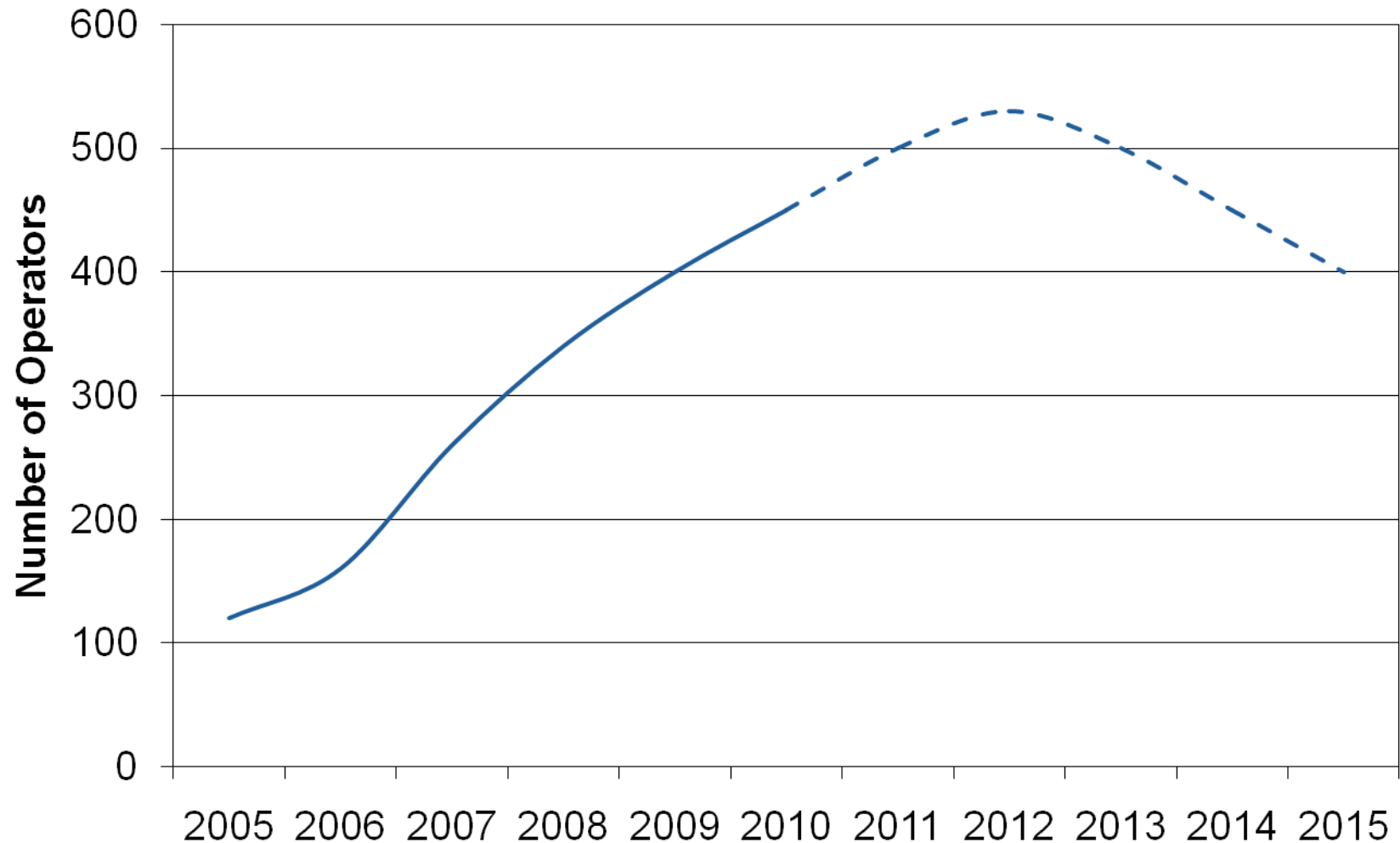


Electronic invoice volume transferred directly or via service providers



	2005	2006	2007	2008	2009 (E)	2010 (E)
--- B2C Biller Direct	155	195	254	373	523	711
— B2C Consolidator	43	71	99	137	176	231
-.- B2B Direct	73	119	190	275	384	515
— B2B Consolidator	90	170	260	393	554	779
— Total (millions)	361	555	803	1179	1637	2236

Number of European E-Invoicing Operators



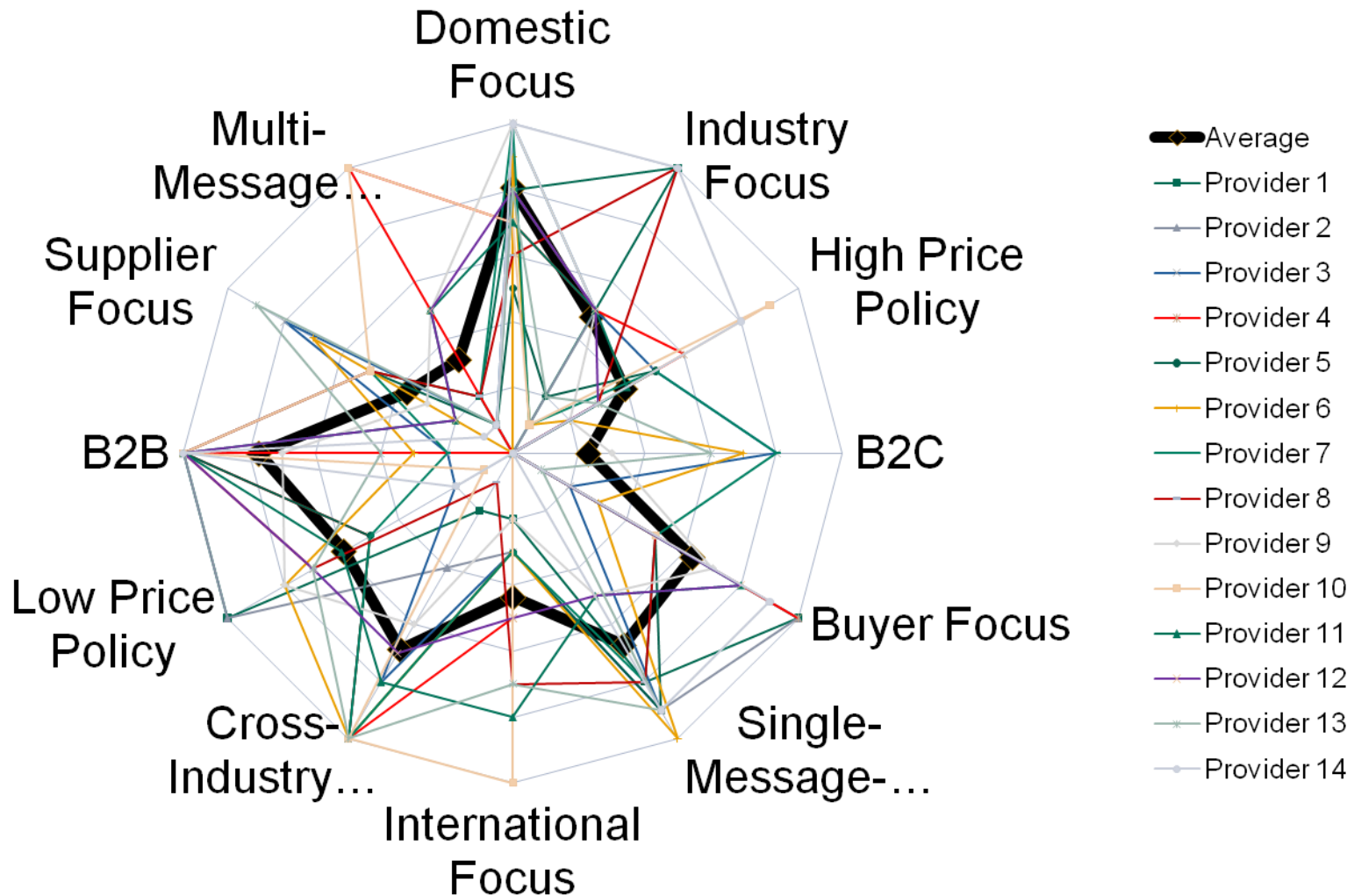
Operators with 20+ millions of E-Invoices in Europe (Estimate for 2010)



- Anachron
- b-process
- Cegedim
- Crossgate
- EDB
- EDICOM
- Evenex
- Itella
- Logica
- Medidata
- Nets
- Nordea
- Seres
- SETTCE
- Tieto

Focus of European Market Leaders

(measured by processed E-Invoicing Volume)



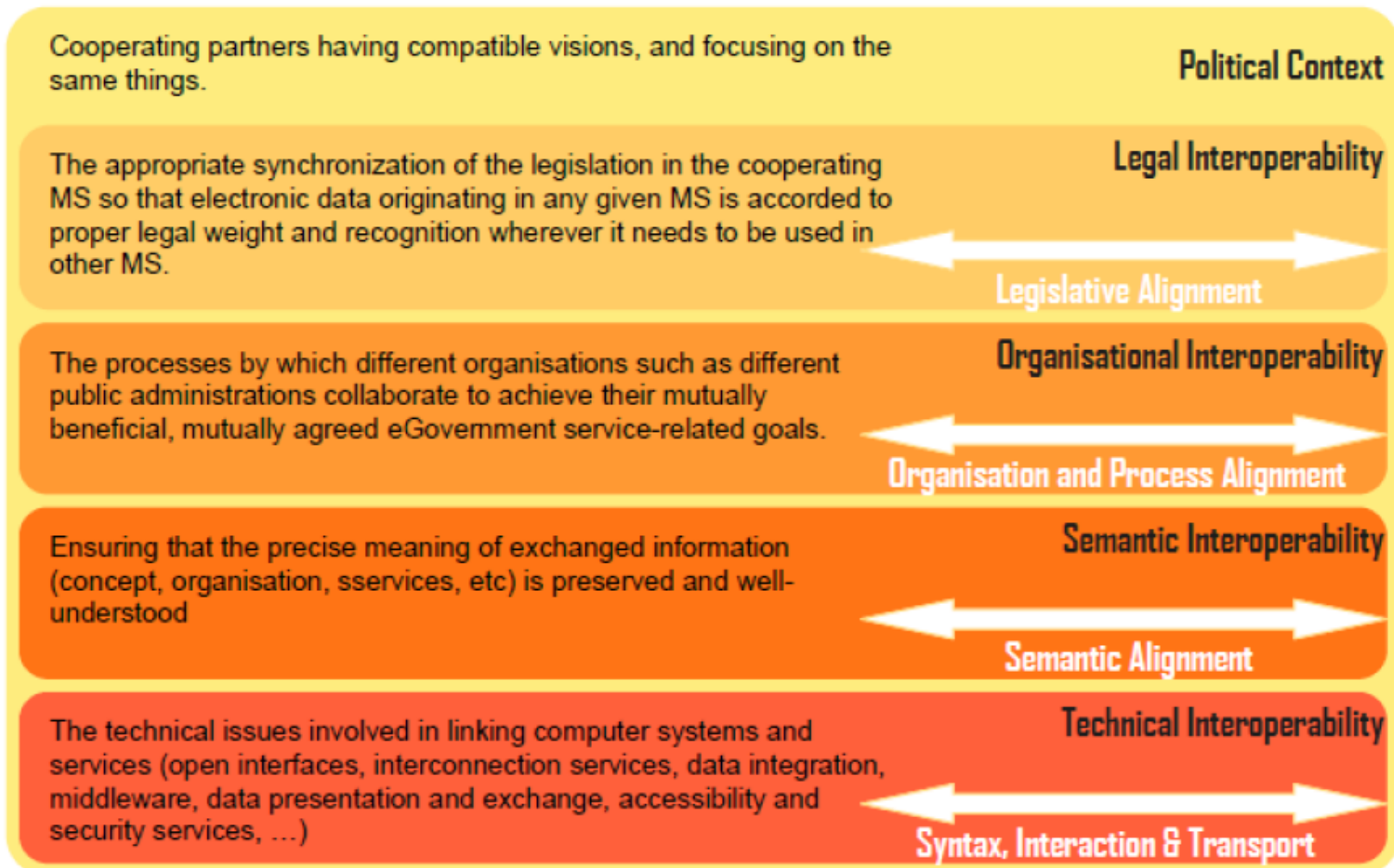
Recommendations of EC Expert Group and influenced actions in Working Groups & Associations

Some Working Groups & Associations following Expert Group recommendations



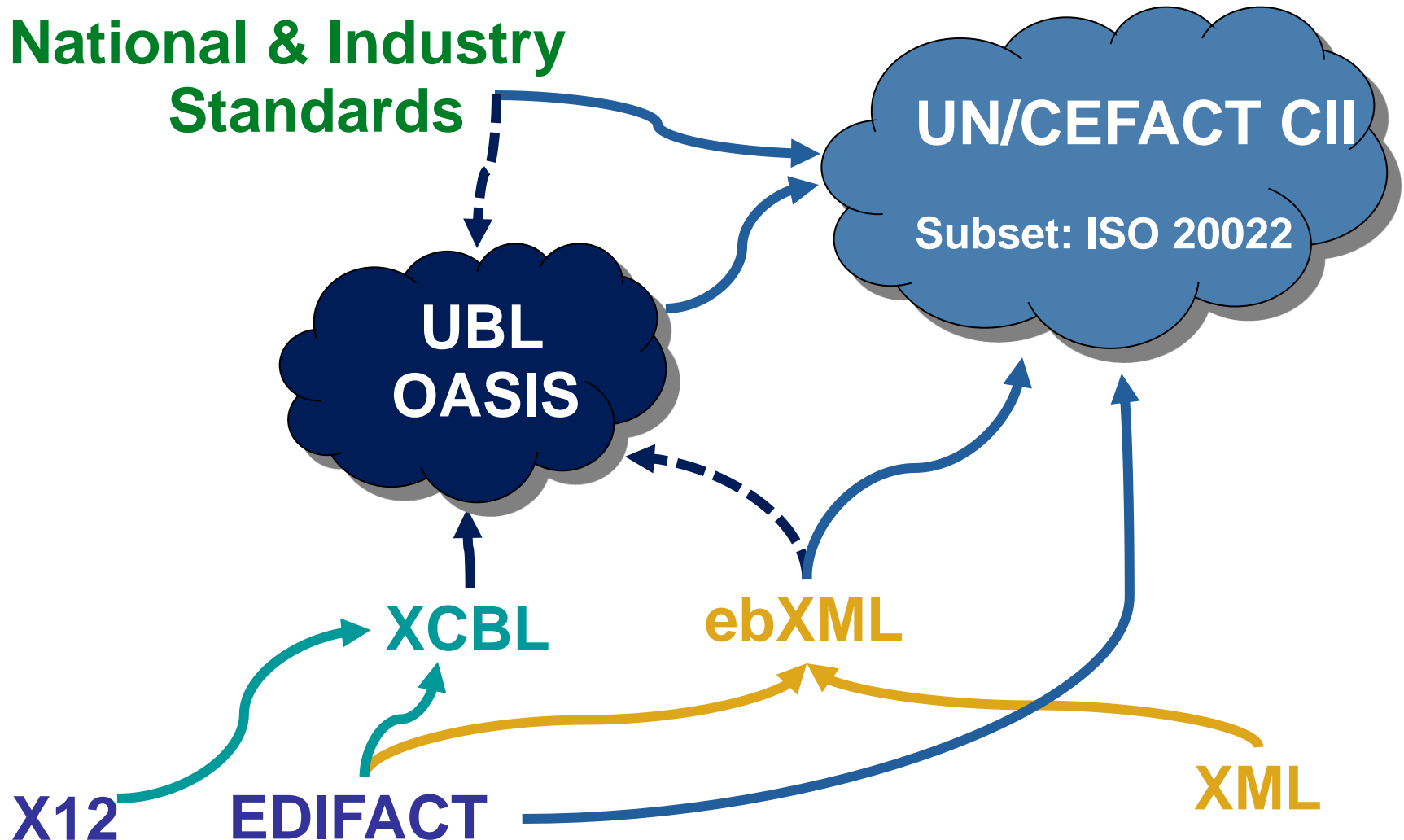
- PEPPOL
- CEN
- UN/CEFACT
- VeR / Association for Electronic Invoicing
- and others

The EIF defines various layers of interoperability, explained in the figure below.



- Development of sustainable **compliance guidelines** for electronic invoicing
- **Enablement of SMEs**: Propose solutions and recommendations to remove the barriers that hinder the usage of E-Invoices by SMEs. The barriers are of different nature: technical, organisational, educational or legal.
- **Conformance criteria** for interoperability across e-Business networks and services (model interoperability agreements etc.)
- **Awareness and Promotion**, e.g. via www.e-invoice-gateway.net

National & Industry Standards



Source: Document Engineering Services / Billentis

Planned are a number of actions, concerning

- Legal aspects
- Adoption by large enterprises and SMEs
- The establishment of national fora (should discuss the implementation)
- Establishment of a European stakeholder forum (look after the various documents and future actions at a European level)
- It is expected that this Communication will be adopted by mid-November 2010. The actions can then be implemented after this date.

Source: CEN WS eINV3

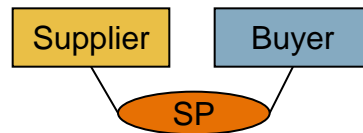
Terms used today

Bilateral/direct exchange model



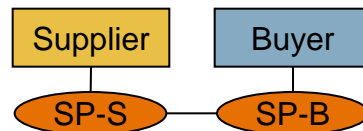
A model for the exchange of information directly between a buyer and a seller in a one-to-one relation.

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

Closing remarks

Service Provider Revenues (1)

Finland, Germany, Switzerland, United Kingdom



- **Portal Users**

Do quite often get the services for free, up to a certain volume of 10 or 20 invoices per month. If they surpass this volume, they can purchase a fixed priced package of 100 or 500 additional E-Invoices (Prepayment via Credit Card or Direct Debit).

- **ERP/EDI Users** pay typically on issuer and recipient side

- Setup Fee (Registration of new user, Gateway Software if required, Define a mapping table for one invoice format, Not included is the ERP integration work)
- Time based Fee (monthly or annual)
- Transaction based Fee (Data translation as defined in the mapping table, Rough data validation of tax relevant fields, Quite often included: Produce a PDF out of EDI data, Digital signature, Verify process for digital signature, producing a log file, Exchange of control messages, etc.; Not included are added values like archiving and sophisticated data validation on field level)

Service Provider Revenues (2)

Finland, Germany, Switzerland, United Kingdom



Issuer prices in EUR	Average Price	Price range
Setup	630	0 – 1,200
Timebased fee per year	1,020	0 – 3,600
Transaction fee per invoice	0.38	0 – 0.80

Recipient prices in EUR	Average Price	Price range
Setup	7,800	170 – 25,000
Timebased fee per year	3,700	0 – 16,700
Transaction fee per invoice	0.35	0 – 0.60

Service Provider Revenues (3)

Finland, Germany, Switzerland, United Kingdom



- Billentis analysis 2004 for 1 E-Invoice, tax compliant form end-to-end: EUR 1.91
- Analysis 2009: Average = EUR 2.00
- Price for interchange an E-Invoice among different platforms (Interchange fee): EUR 0 - 0.35
- Marketing price for convincing a trading partner as new user: EUR 80-120

- Prices in some other countries like France and Spain are lower
- New generation of providers with prices of EUR 0 – 0.25 (Portal based services)

Market Report

E-Invoicing / E-Billing in Europe 2011

Cut costs with automated and
optimised processes



Bruno Koch

Target Group

- European invoice issuers and recipients of any size and organizations abroad doing business with European companies
- Mainly B2B with consideration of B2C

Report

- Language: English
- Length: Approximately 100 pages
- Format: PDF, no print version

Scope for invoice issuers/recipients of any size

- Increase market transparency
- Get a help for being successful with E-Invoicing project
- Get a help for finding the right solution/service
- Accelerate the internal decision and implementation process

For sponsors

- Get contact data of interested organisations in an early stage of the evaluation process
- Marketing opportunity with high visibility for pre-selected audience

- Executive Summary
- Introduction
- Improving the invoice management & supply chain
- Business Case for issuer/recipient
- How to be successful with your project
- The market
- Solutions & services
- Featured sponsors
- Appendix A: Law & Regulations
- Appendix B: Glossary, Sources

Internal view

Neutral
overview

Sponsors

Marketing

- Press-Releases in English, German, Spanish
- Google Advertisements in 20+ languages
- Bimonthly newsletter to subscribers in 70+ countries

Distribution by Billentis

- The report will be sold for 590 EUR

Distribution by Sponsors

- **Free**, but dedicated distribution to recipients (must be known by name; no anonymous download allowed)

Sponsors collecting contact data

Website examples for the Report 2009



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E-Invoicing / E-Billing in Europe

Taking the next step towards automated and optimized processes

This in-depth research report provides valuable knowledge and support for invoice senders and recipients seeking to replace expensive paper-based invoice management with more cost-effective electronic processes. Written by an independent European e-invoicing consultant, with market analysis from Billentis, the report provides all the relevant information for succeeding with an e-invoicing project, including facts, qualitative views, evaluation and product information by leading providers.

Readers will learn:

- How to improve the invoice management & supply chain
- The business case for invoice senders and recipients
- Success factors for e-invoicing projects
- An analysis of the e-invoicing market
- Solutions and services available today

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Format: PDF, 101 pages

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