

Electronic **B**ill **P**resentation & **P**ayment

Electronic **I**nvoice **P**resentation & **P**ayment

Electronic **S**tatement **P**resentation

Electronic e**X**change

E-**B**illing

E-**I**nvoicing



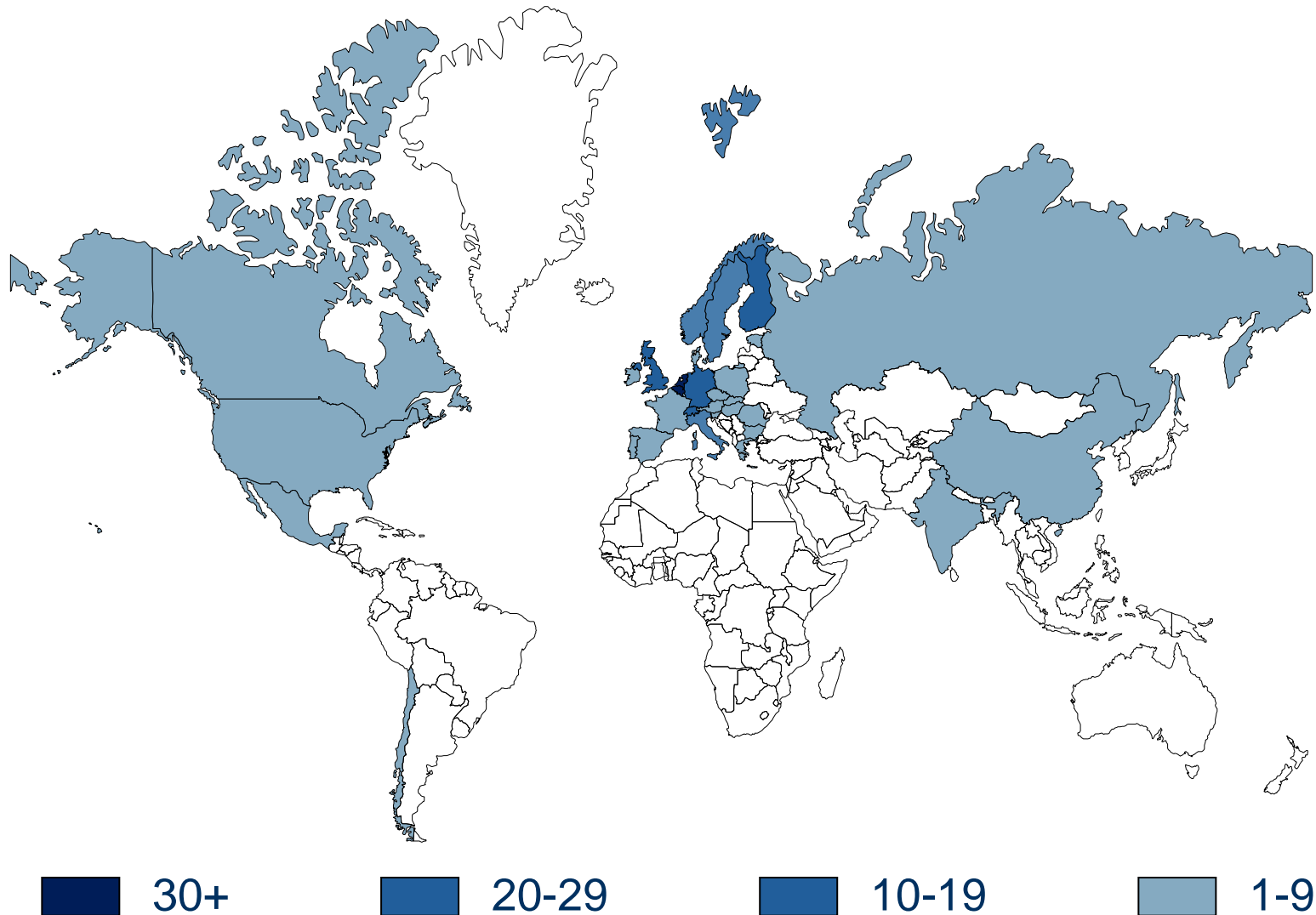
Bruno Koch, Founder

* **Welcome** * Hoşgeldiniz * Boa vinda *
 Benvenuti * Velkommen * **Bienvenido** * **Welkom** * Bem-
 Vindo * здравствуйтe * Välkommen * **Herzlich**
Willkommen * Tervetuloa * υποδοχή *
Witamy * Üdvözöljük * **Bienvenue** * Vítejte * Vitajte
 * Bine ati venit * Isten Hozott * Fàilte * Tervetuloa *

...to delegates coming from these 31 countries:

* **USA** * **France** * **Chile** * **Spain** * **Canada** * **Denmark** *
Mexico * **Norway** * **The United Kingdom** * **China** * **Portugal**
 * **Switzerland** * **Russia** * **India** * **Finland** * **Bulgaria** *
Greece * **Germany** * **Ireland** * **Czech Republic** * **Poland** *
Austria * **Sweden** * **Slovenia** * **Hungary** * **Luxembourg** *
Belgium * **Italy** * **The Netherlands** * **Estonia** * **United Arab**
Emirates * **Romania** *

Summit 2009: Participants per country



2008

- Roughly 1 million businesses use E-Invoicing (in a tax compliant manner)
- 25 million consumers
- One billion electronic invoices

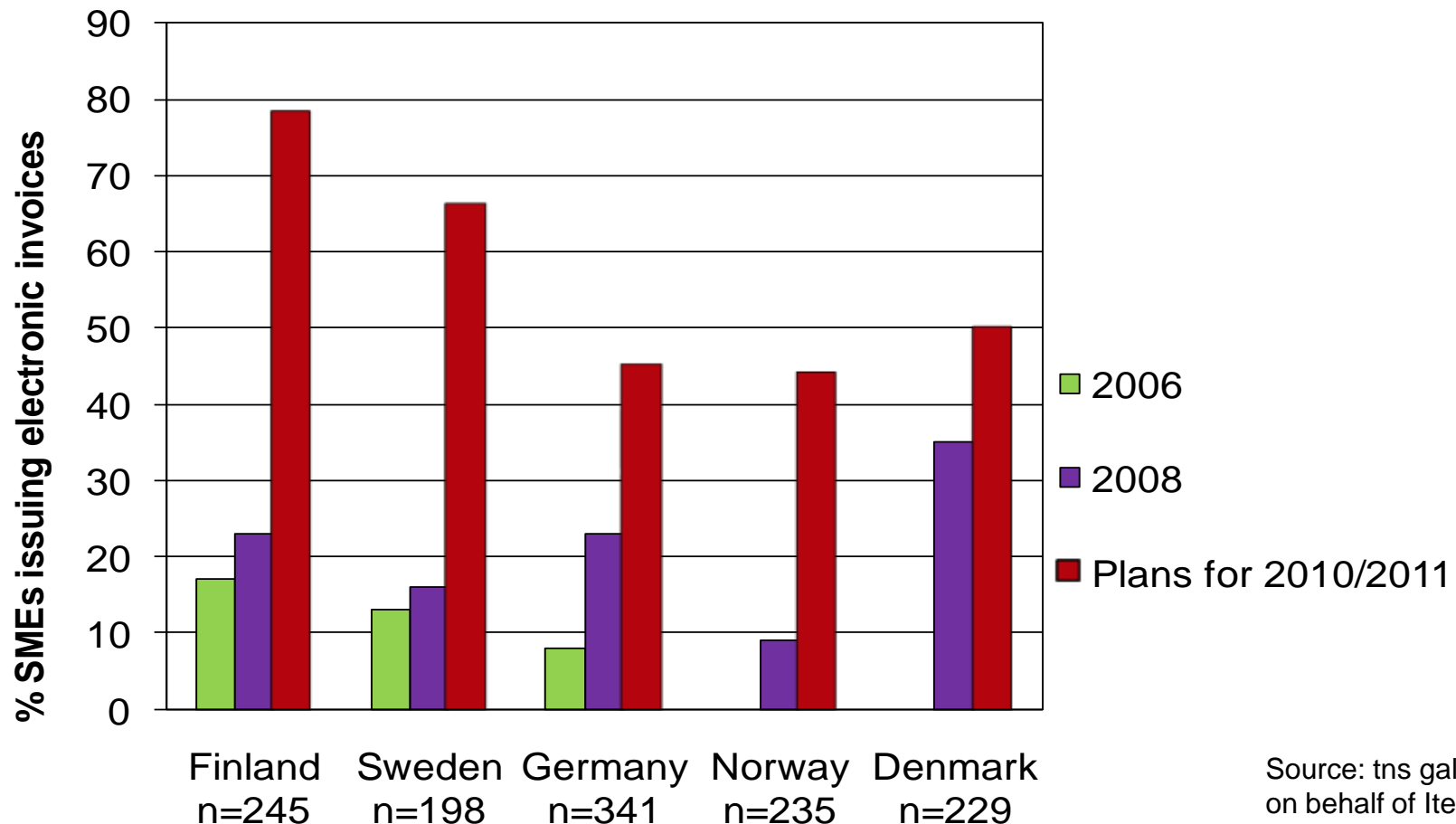
Expectation for 2009, every day

- 1,200 businesses
- 11,000 consumers

will become new E-Invoicing users

SMEs as new E-Invoicing users (1)

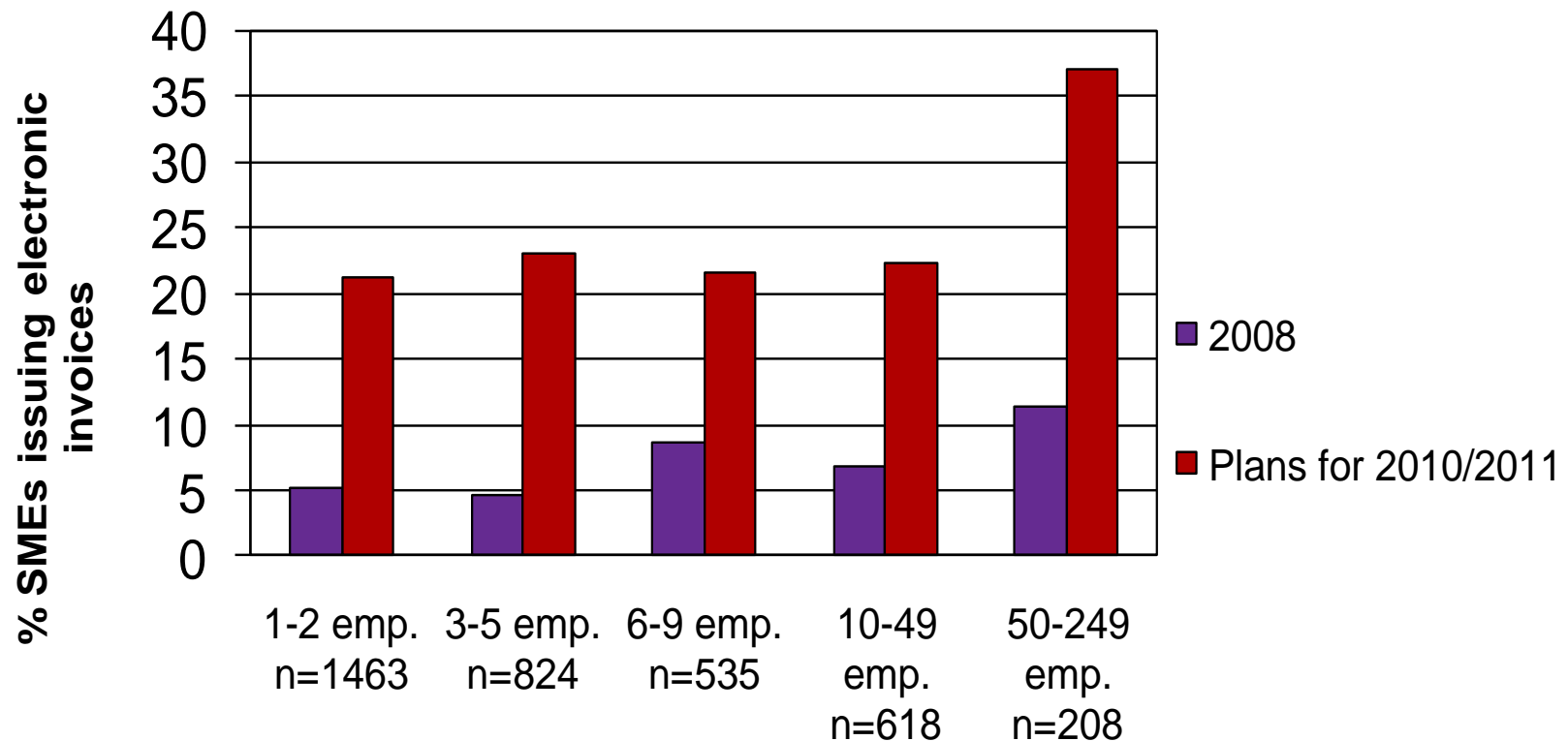
E-Invoice usage of small/mid-sized senders



Source: tns gallup
on behalf of Itella, 2008

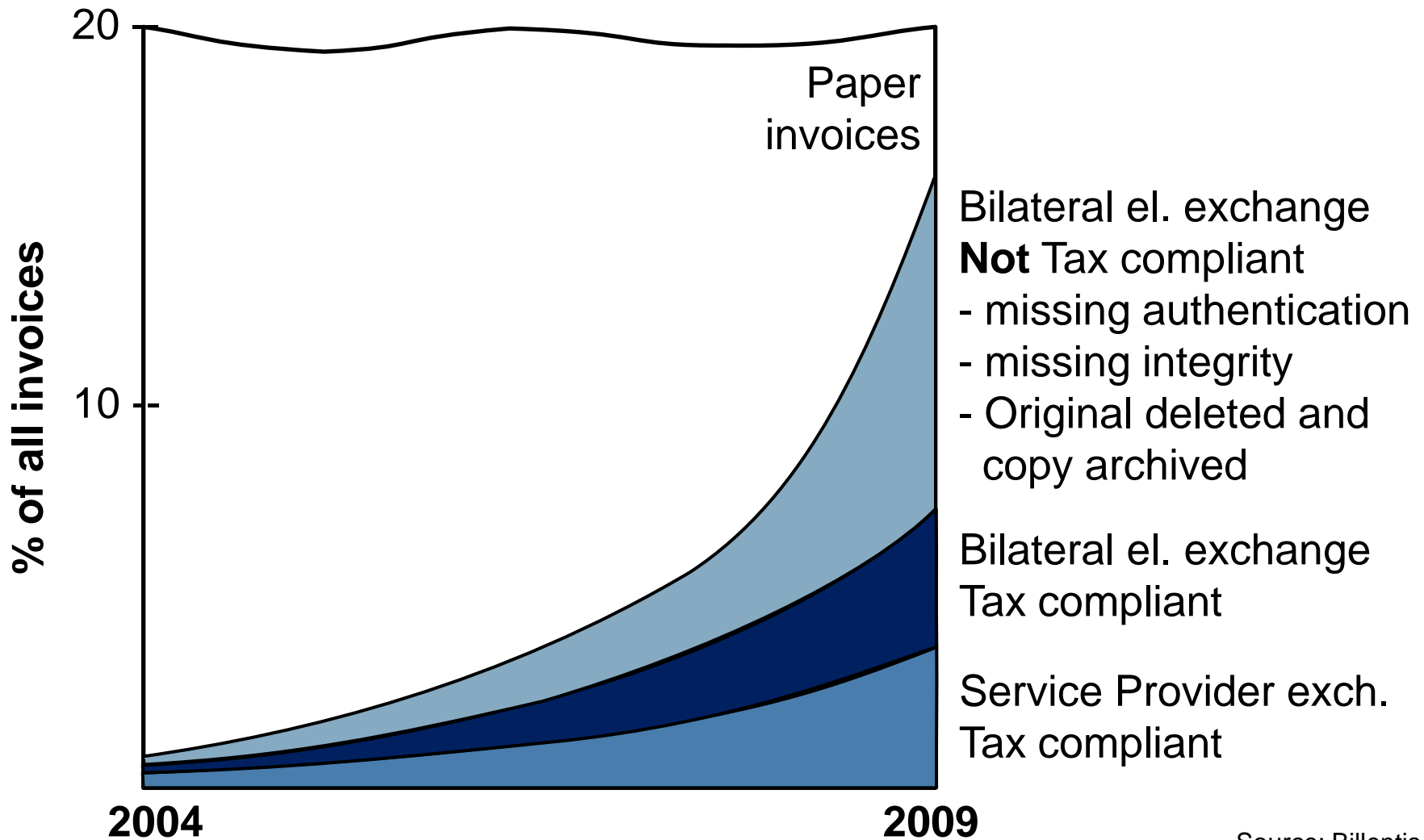
SMEs as new E-Invoicing users (2)

E-Invoice usage of Spanish small/mid-sized senders



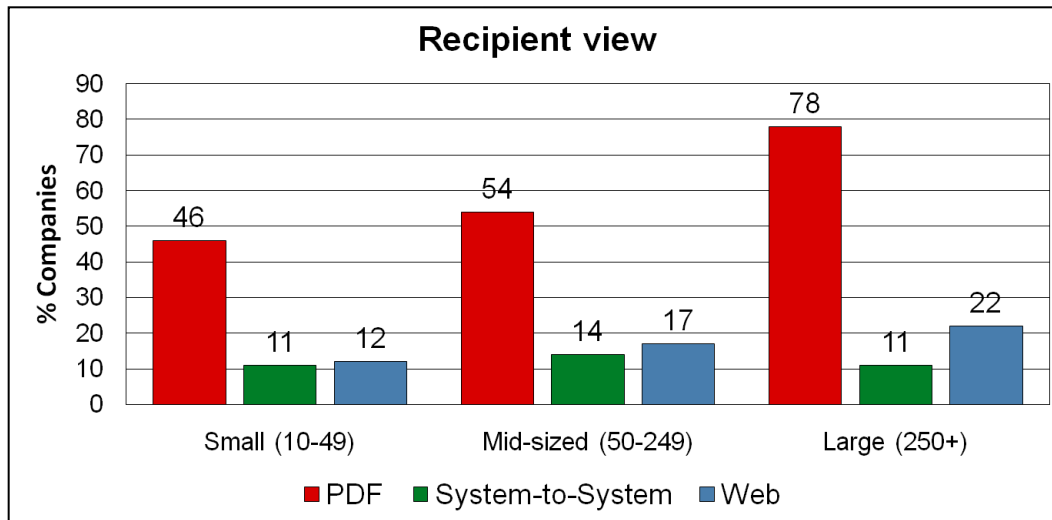
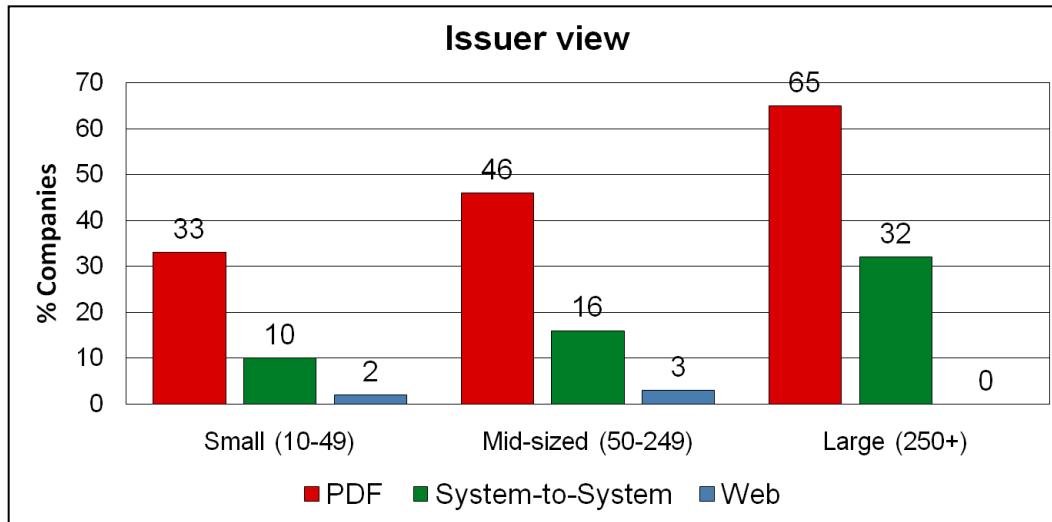
Source: AETIC/everis, 2008

Electronic invoice data exchange



Source: Billentis

Electronic Invoice Exchange in companies of 7 EU countries



Outlook:
PDF or EDI or both?

→ Roundtable 1

Source: European Commission
The European e-Business Report 2008

Trends for large organisations



Today

Large trading parties already on board

Domestic trading parties

Opt-In roll-out

Dematerialisation of invoices

Proprietary solutions

Interconnection among service providers: limited number and based on bilateral solutions

Next steps

SMEs, by considering their special situation regarding skills, systems, processes

International suppliers/customers

Change to Opt-Out: Declare E-Invoicing as mandatory, sanctions for unwilling counterparts

Full integration & process automation

International standards
Standard features of ERP providers

Large accounts increase the pressure for improvement

Rich offering for bilateral or service provider model is available:

- **Users of accounting or ERP systems**
E-Invoice Management features integrated parts or Add-Ins (SAP, Microsoft, ...)
- **Invoicing portals**
with modular packages, most with a limited number of free e-Invoices per months

- Client software (comparable to Outlook) for inbound orders and outbound invoices, most with Purchase Order flip feature
- Printer drivers
- PDF Mailers with or without enrichments (signature, structured data mapping, etc.)
- Office Tools / Add-Ins, e.g. ebInterface (AT), WinDTE (CL), FactOffice (SP)

Solutions for SMEs (3)

Office Word feature: Open Source Add-In



Mis Facturas

Seleccionar:

Año: 2009 Mes: Enero Estado: Emitidas

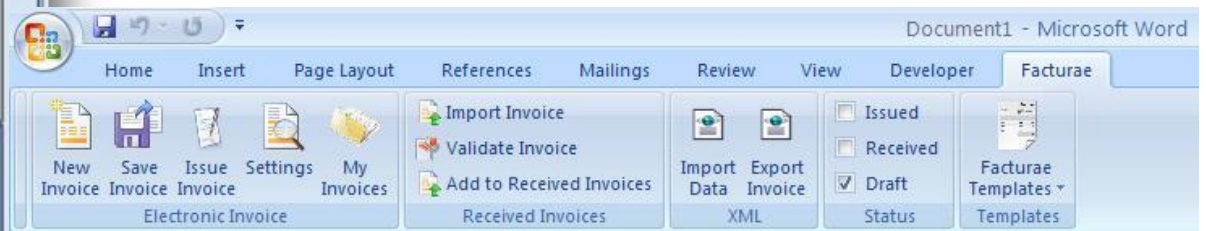
Cobradas Rechazadas Pagadas

Emisor:

Cliente:

Importe: Ir:

prueba-004 (P) COBRADA	16/01/2009
natalia duarte calderon	17045678
	€ 3.745,78
prueba-002 (E) RECHAZADA	29/01/2009
Antonio cejas Mustaff	14545465
	€ 3.000,00
prueba-001 (P) EMITIDA	31/01/2009
Alvaro Gonzalez	52870003H
	€ 1.535,63



FactOffice: <http://factoffice.codeplex.com/>

- Lack of interest
- Missing transparency
- Inappropriate respectively confusing marketing communication of stakeholders
- Insufficient collaboration among various stakeholders
- Heterogeneous international legislation

Heterogeneous international legislation



Legislation	Region
Strictest rules	Many countries in Latin America
Strict rules	Germany, Italy, Switzerland, ...
Moderate rules	Nordic countries, The Netherlands, United Kingdom North America Australia
Not yet finalized and official rules	Most countries in Asia Africa

For detailed guidance in terms of national legislation, see

http://ec.europa.eu/taxation_customs/taxation/vat/traders/invoicing_rules/index_en.htm

Equal treatment of paper and electronic invoices → Roundtable 2

- Recession and the resulting pressure for cost reduction; interesting business case for users
- Private sector
 - Large issuers and recipients
 - Providers with their rich offerings of applications and services
- Public sector
 - Projects on national level, declaring E-Invoicing as mandatory
 - Projects on EU level
 - Developing pilots which can be adopted by others
 - Pushing harmonisation
 - Pushing standardisation
 - Pushing interconnectivity among service providers

Soon the perfect environment?



Unique situation in 2009

- Initiatives involve all major stakeholders
 - Well coordinated regarding content and timing
 - Market awareness, recognition and maturity sharply increasing
 - Right ingredients at the right time in whole Europe
- Ideal environment for a strong uptake of the market

*Are you still waiting and
thinking about E-Invoicing?*



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europa summit 2009