

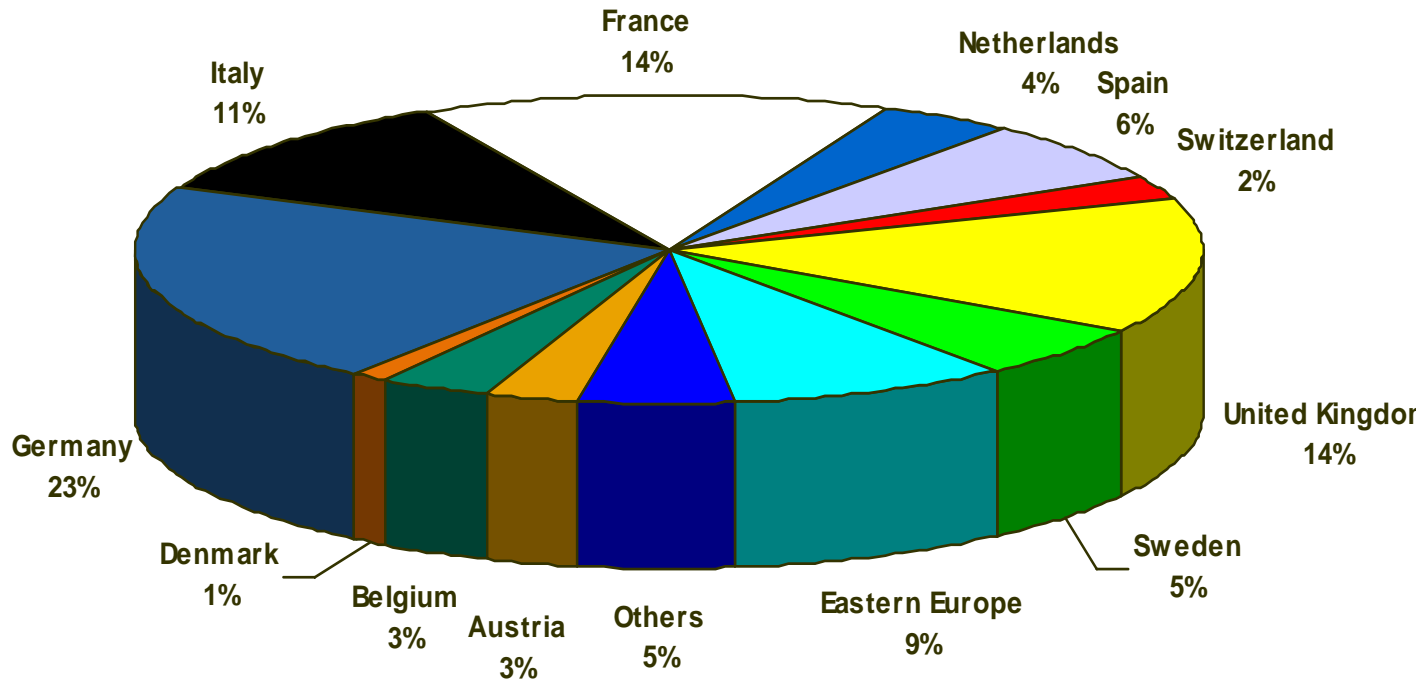
E-Invoicing & EBPP European Market Overview



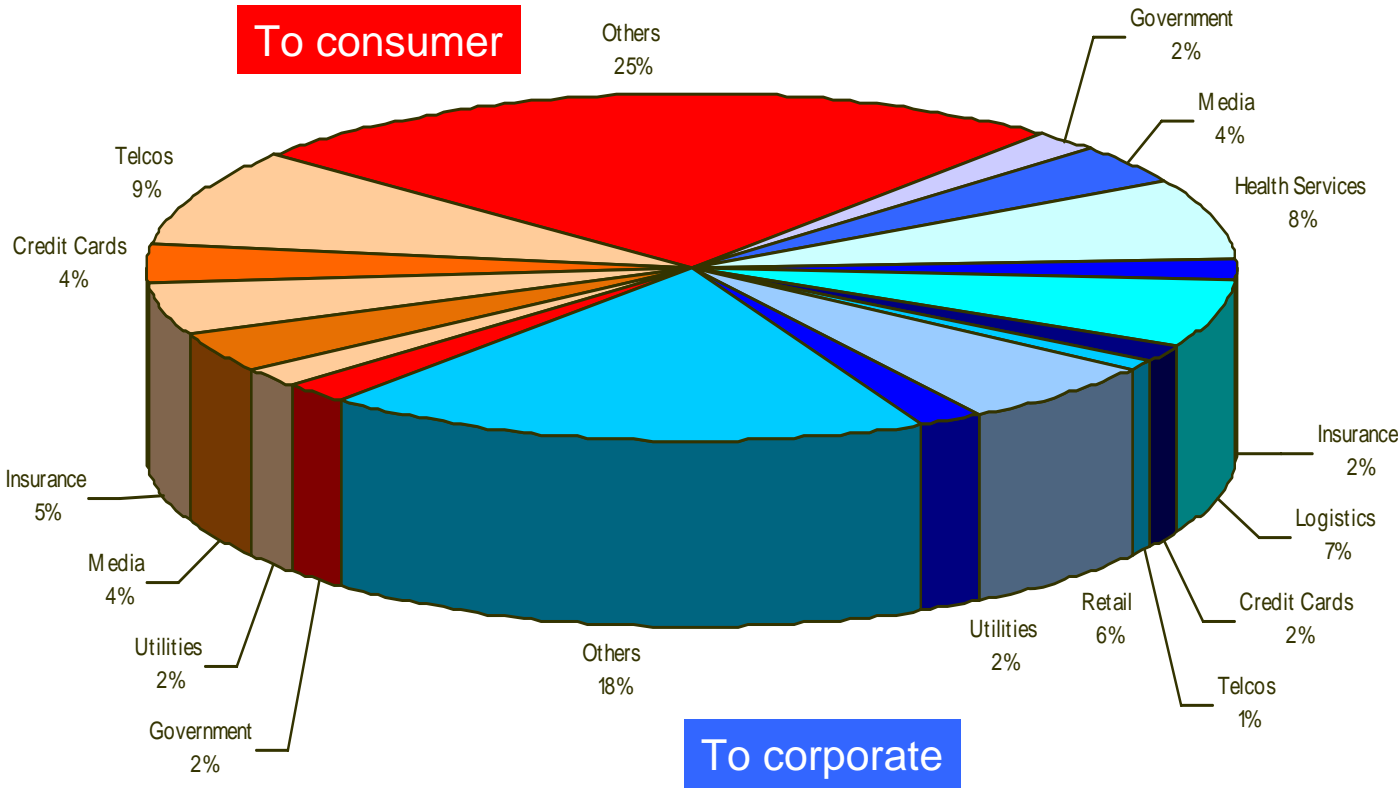
Bruno Koch
February 2007

Market size B2C & B2B invoices: 28 Bio.

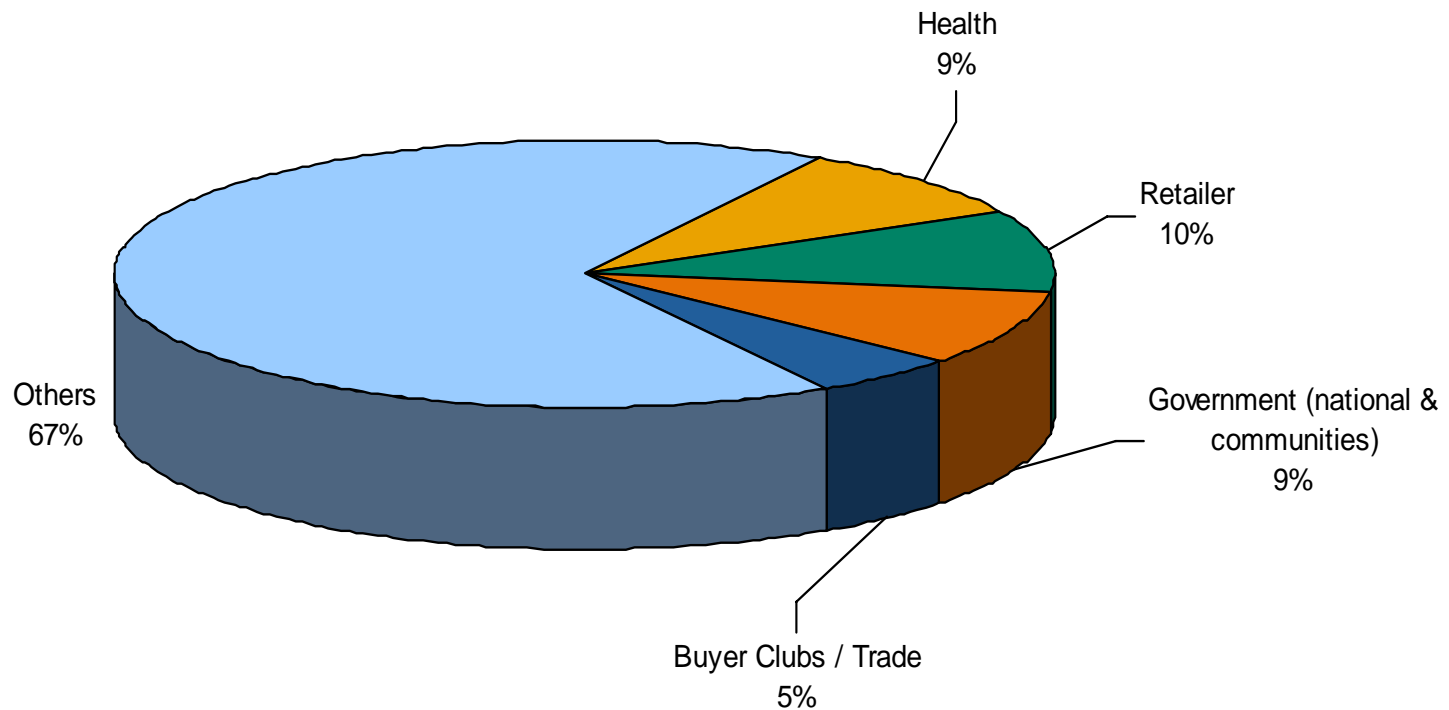
Includes all paper and electronic bills/invoices



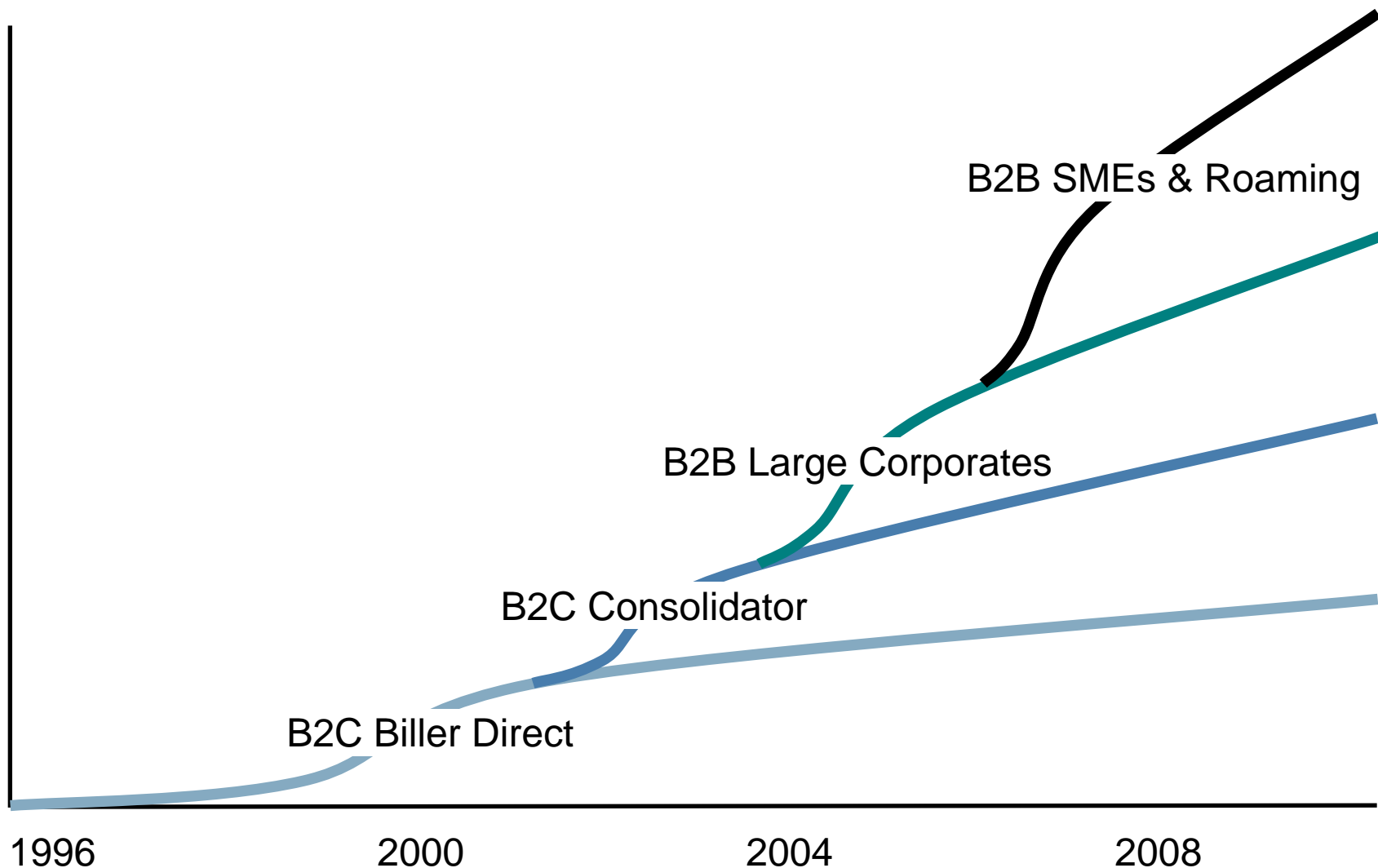
The largest bill/invoice issuers to consumers and corporate



The largest industries receiving invoices



Paperless Market Evolution



E-Invoicing & EBPP market figures

EDI invoices accompanied 1:1 by paper summary invoices not considered



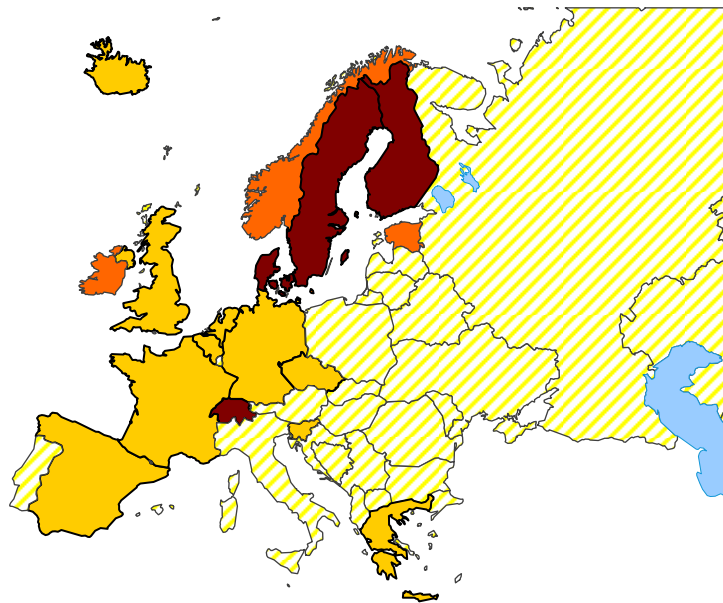
Europe	2006	2007 (E)
Participants	350,000 corporates 14.8 million consumers	630,000 (+80%) 18.6 (+25%)
Pure electr. volume	490 millions	710 (+45%)
– B2C	– 250	– 290 (+16%)
– B2B	– 240	– 420 (+75%)
# Service providers	160	260 (+60%)

Market penetration 2007

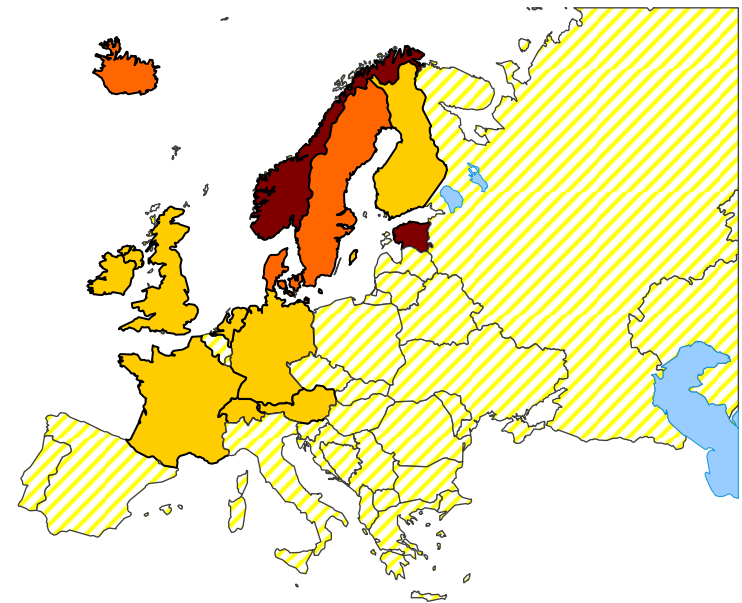
(electronic share of total volume)



B2B



B2C



 >10%

 3-10%

 1-3%

 <1%