

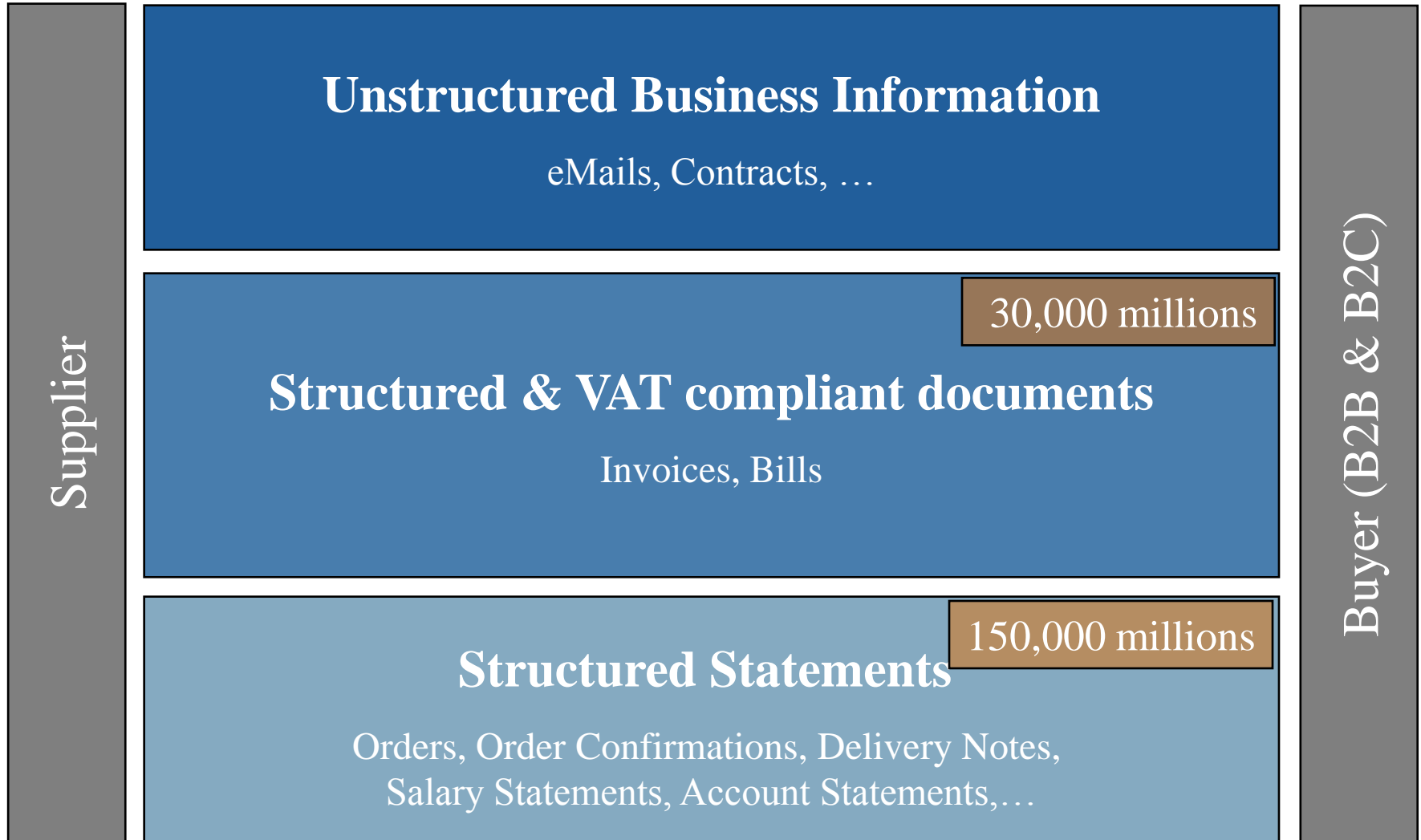
# E-Invoicing & EBPP European Market Overview



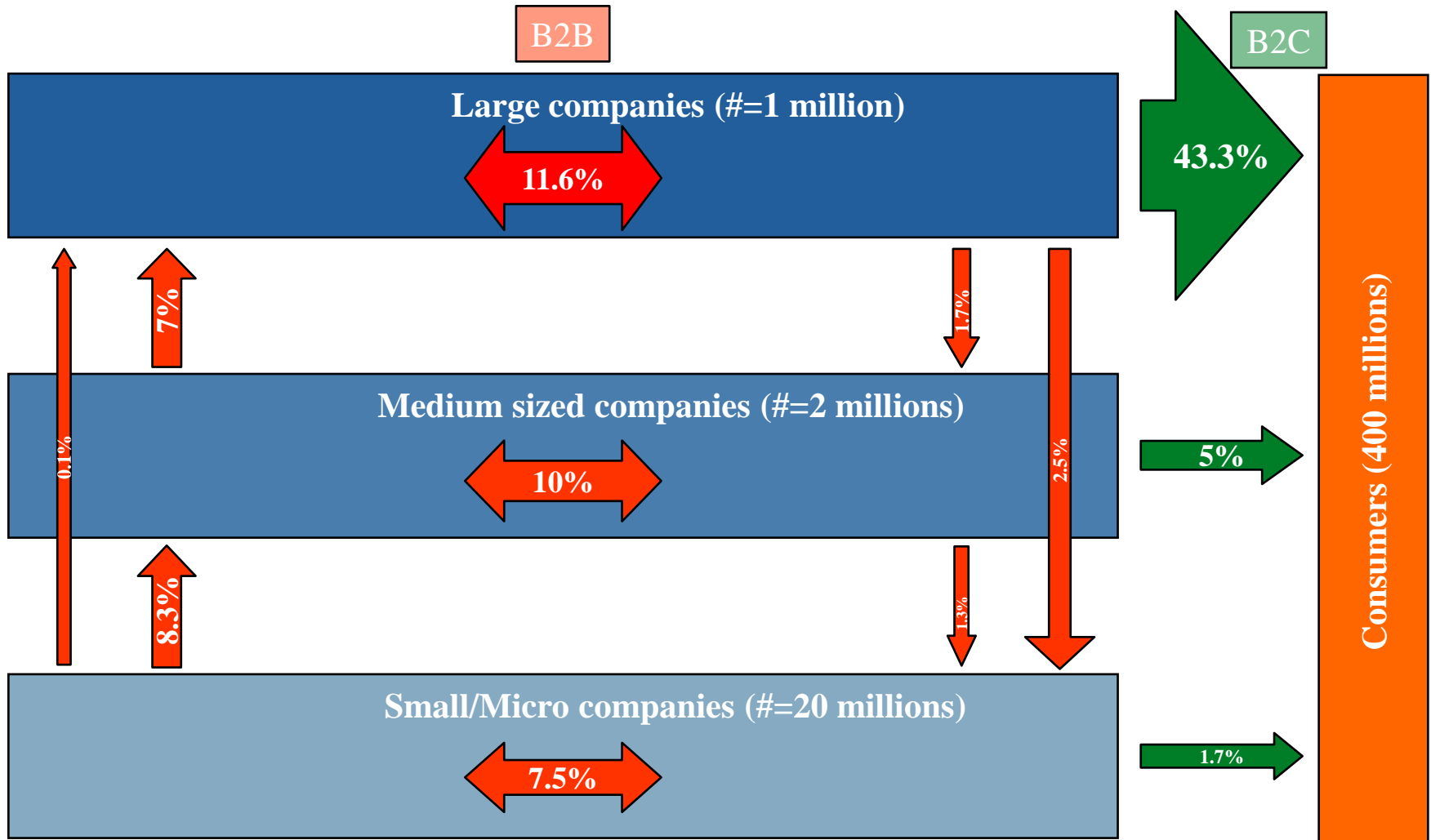
Bruno Koch  
February 2009

# Invoice relevance by volume

## European View

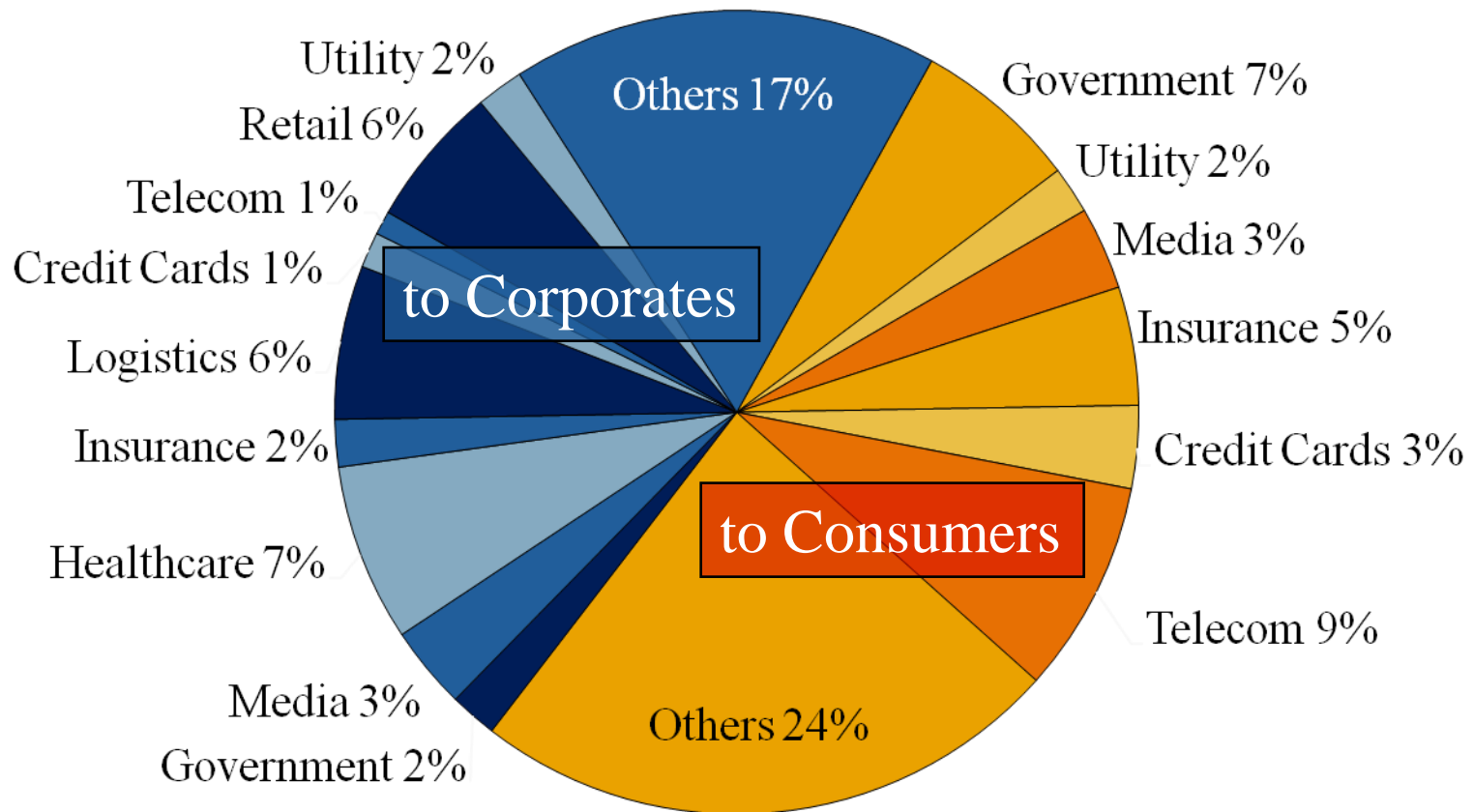


# Invoice streams



# The largest in the billing industry

## Issued invoices per industry and addressed segments



# Market penetration 2009

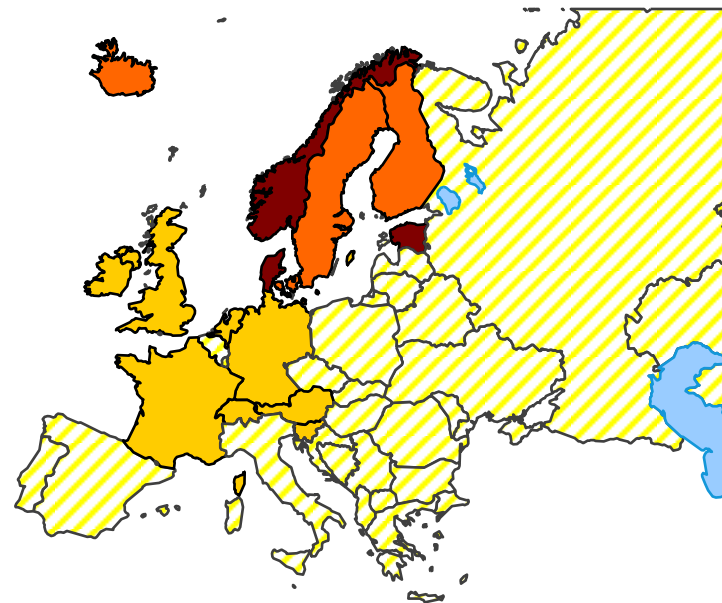
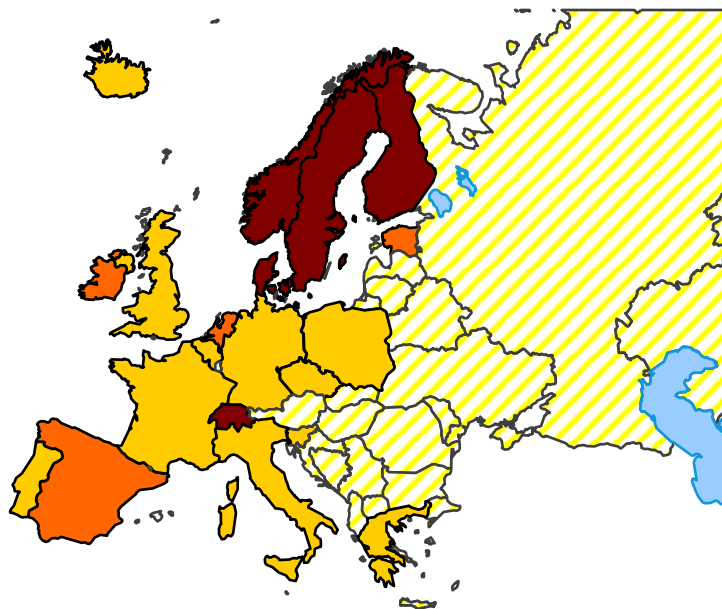
(electronic share of total volume of 30 billion)



**B2B**

**2009 (E)**

**B2C**



 >12%

 6-12%

 1-5.9%

 <1%

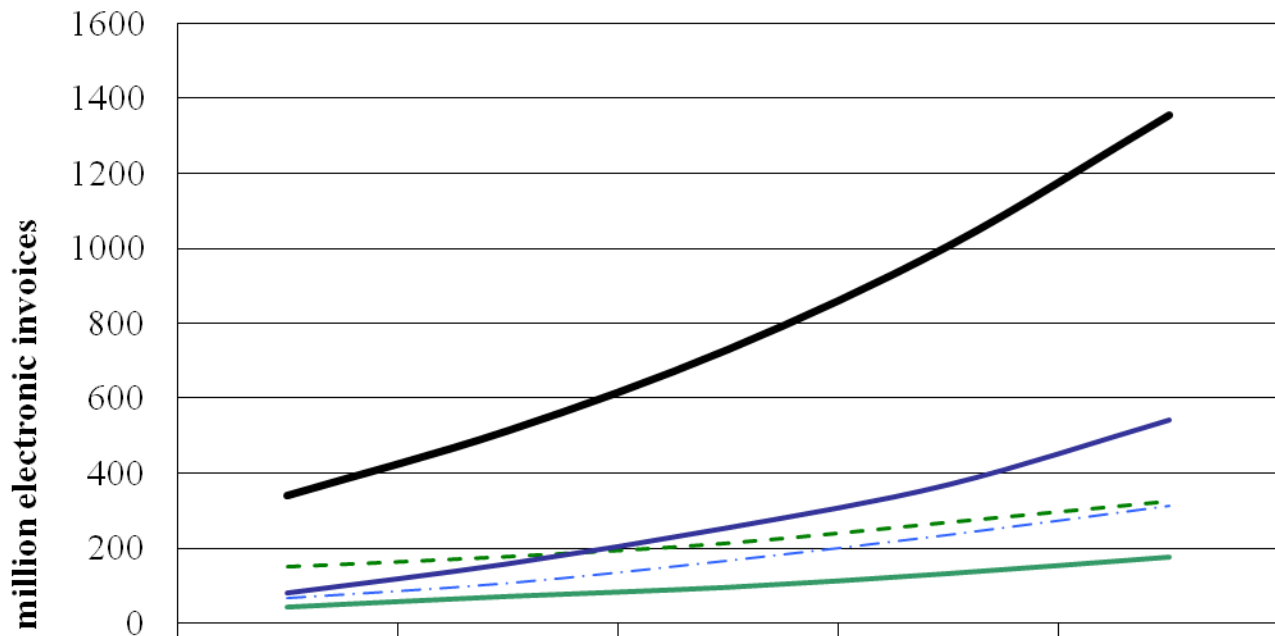
# E-Invoicing/E-Billing market figures



Europe	2008	2009 (E)
Participants	950,000	1,400,000 (+47% )
	23.3	28.3 (+21%)
Electronic vol. only	1,005 million	1,355 million
- B2C	- 400	- 500 (+25%)
- B2B	- 605	- 855 (+41%)
Electr. with paper summary invoice	350 million	300 million (part. replaced by digitally signed invoices)
# Service providers	340	370 (+9%)

# Used channels for electronic invoices

**Electronic invoice volume transferred directly or via consolidator**



	2005	2006	2007	2008	2009 (E)
- - - B2C Biller Direct	150	177	212	268	324
— B2C Consolidator	43	71	95	131	175
- · - B2B Direct	66	106	166	235	312
— B2B Consolidator	80	158	255	370	543
— Total (millions)	339	512	729	1005	1353

## Which electronic messages are offered by European consolidators?

