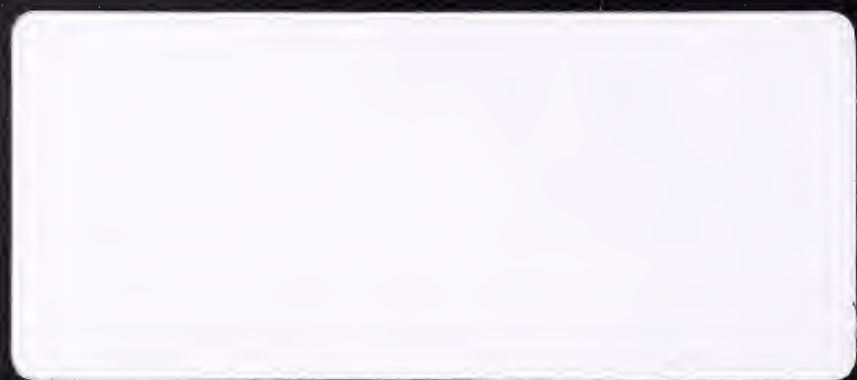


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EEDI • 1994

Today's Environment for Electronic Commerce

INPUT

ED-127

Notes:

Today's Environment

- Corporate downsizing
- Proliferation of computing across all business functions
- Continued positive return on investments for information systems

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ED-106

Notes:

Today's Environment

- Open systems model increasingly guiding planning and information systems design
- Standalone hardware and software in the office environment disappearing

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ED-107

Notes:

Today's Environment

- Integrated and overarching systems management including NOS, becoming more commonplace

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ED-108

Notes:

Electronic Commerce is the use of electronic network systems in order to conduct business transactions.

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ED-109

Notes:

EC Impacts User Communities

Wherever information is directly a competitive advantage

- Distribution
- Information svcs.
- High tech
- Government
- Media
- Health care
- Utilities
- Transportation/logistics

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ED-80

Notes:

In Japan We Are Most Concerned With:

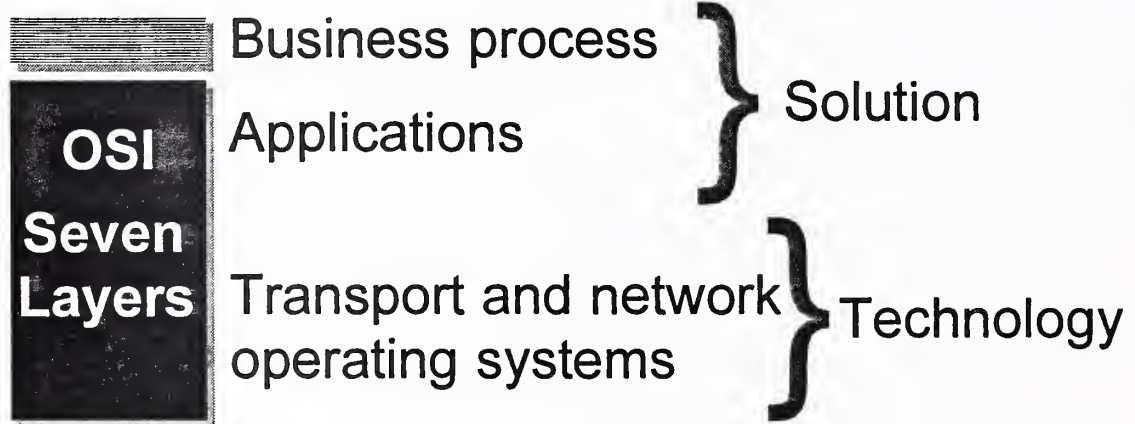
- Shipping
- Automotive
- Air Cargo Industry
- Steel Industry
- Government
- Construction
- Trade and Distribution
- Finance

INPUT

ED-110

Notes:

EC Consistant with Open Systems and Re-engineering



INPUT

ED-83

Notes:

Electronic Commerce Submarkets

- EDI services and software
- Electronic mail, including integrated multimedia
- Electronic information services

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ED-111

Notes:

Electronic Commerce Submarkets

- Electronic catalogs
- Point-of-sales services
- Financial EDI and EFT
- Debit and credit cards
- Workflow

INPUT

ED-112

Notes:

EDI As an Indicator of EC Trends

- Consolidation of software vendors
- Proliferation of services vendors
- Increase EDI traffic during economic downturn

INPUT

ED-113

Notes:

EDI As an Indicator of EC Trends

- Growing diversity of EDI applications
 - i.e., vertical targeting; more integration of EDI into business process applications

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ED-114

Notes:

EDI As an Indicator of EC Trends

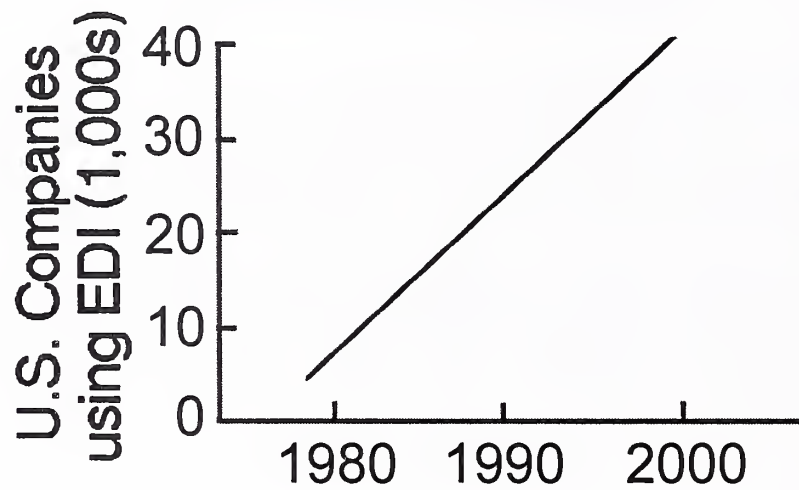
- Services increasingly profitable
- Telecom carriers offering EC products to enhance portfolios despite relatively small revenues

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ED-115

Notes:

EDI Use is Steadily Growing

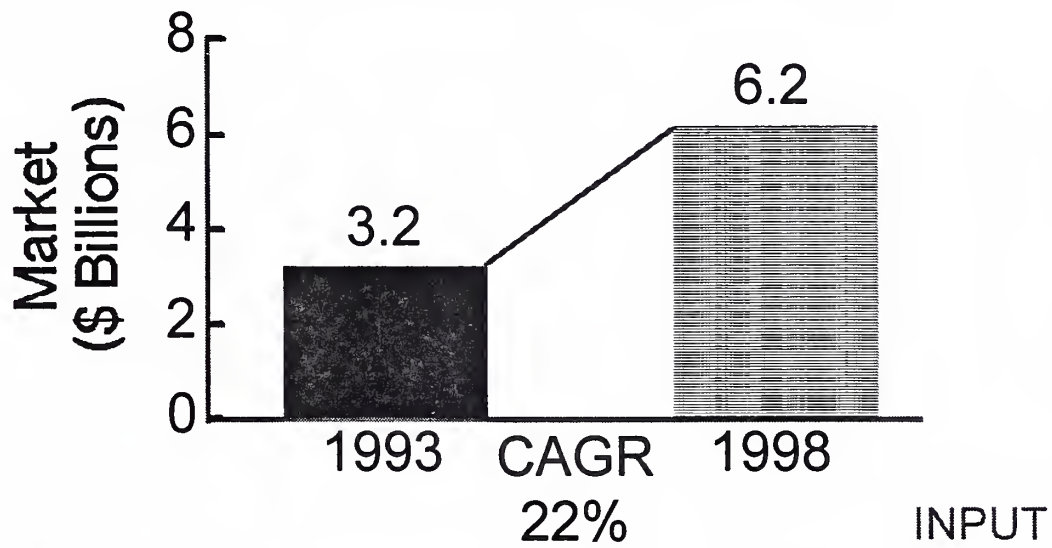


ED-91

INPUT

Notes:

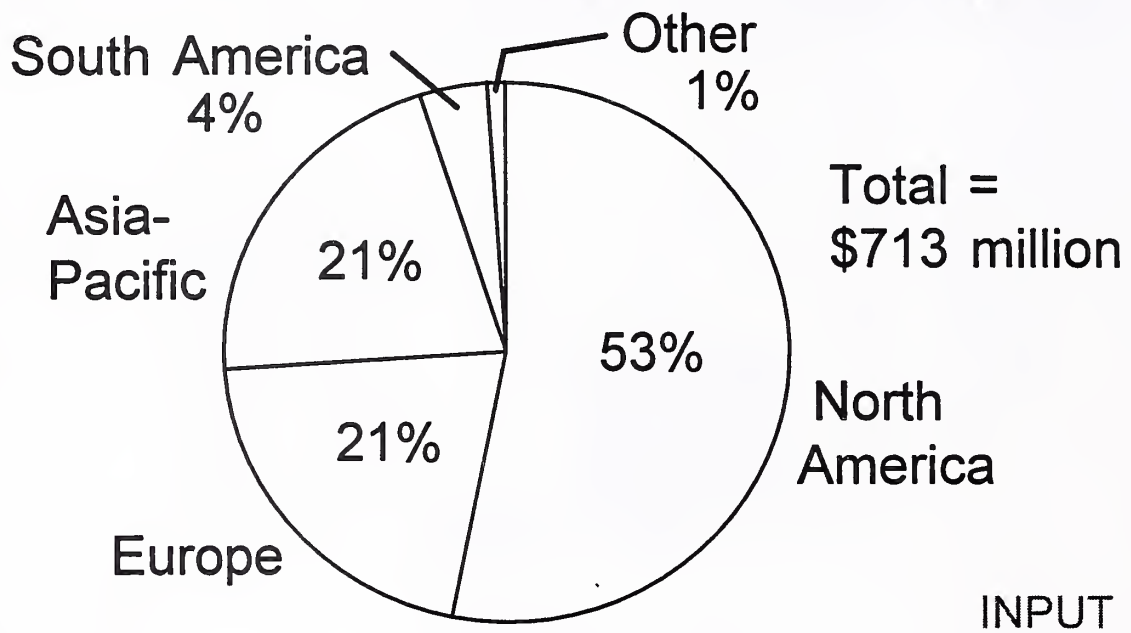
U.S. EC Software and Service Market



ED-15

Notes:

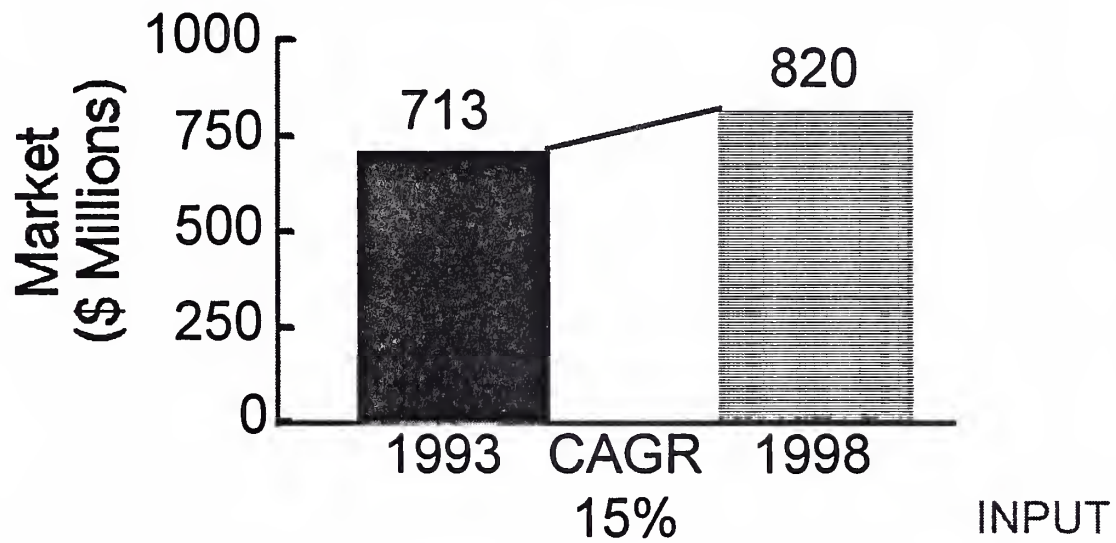
1993 EDI Markets by Region



ED-46

Notes:

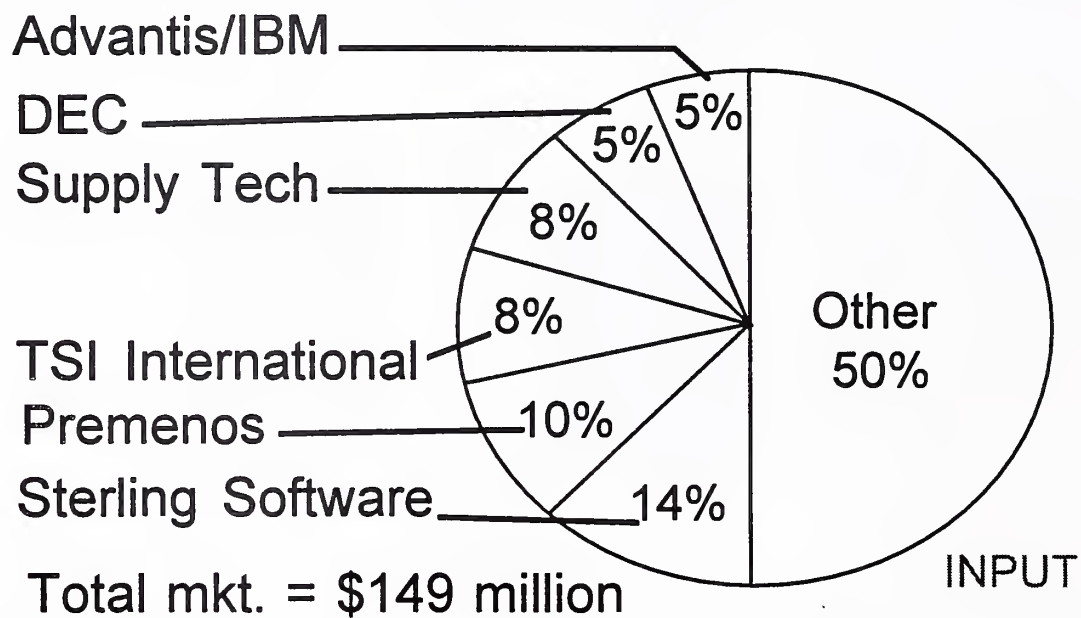
Worldwide EDI Market 1993-1998



ED-45

Notes:

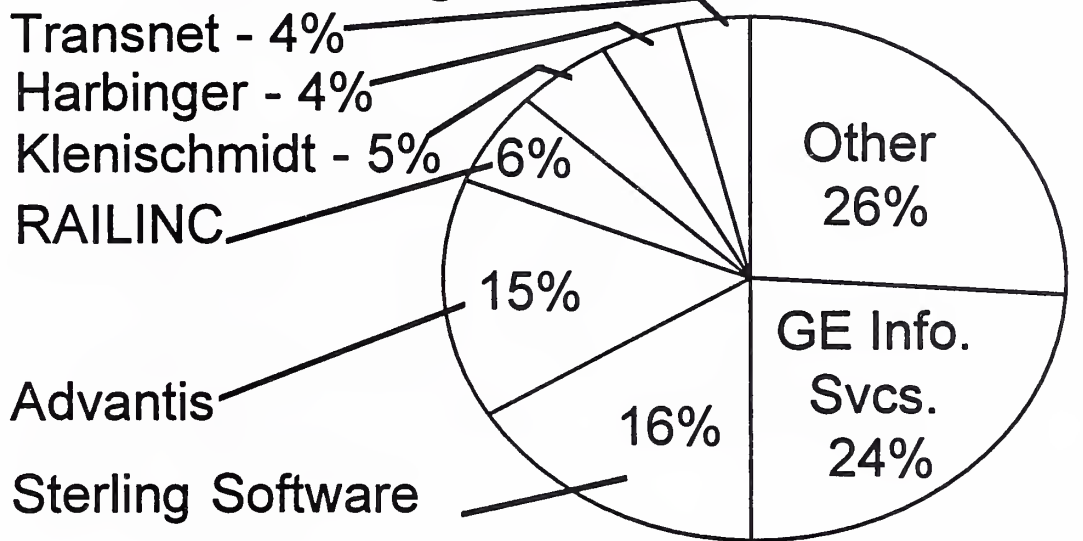
1993 Market Share Leading EDI Software Vendors



ED-39

Notes:

1993 Market Share Leading EDI VANs



Total mkt. = \$250 million

INPUT

ED-38

Notes:

Who are the Japanese EC Vendors today?

- The same as in the U.S.?

GEIS (Isi-Deutsu); ATT (Japan
ENS); MCI (NIS); Infonet (Mitsui
Knowledge Institute); Sterling
(Global VAN Japan); IBM

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ED-116

Notes:

And Others (i.e., Domestic)

- NTT
- Fujitsu
- United NET
- INTEC
- NRI

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ED-117

Notes:

Internet

- Will Internet be a competitive threat to U.S.-based or Japan-based EC (EDI) vendors?

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ED-118

Notes:

U.S. Competitive Issues

- Integration of EDI formatted messages into business processes applications already in place
- Increasing integration EDI into UNIX and other open systems architectures and operating systems

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ED-119

Notes:

U.S. Competitive Issues

- Hyper-importance of customer support, education over extended implementation periods

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ED-120

Notes:

Standards Issues Vary from Japan to U.S.

- However:
 - EDIFACT and X12 more in agreement in the future since agreements struck this year

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ED-121

Notes:

Standards Issues Vary from Japan to U.S.

- However:
 - Internet should not provide any competitive advantage on this basis; U.S. EDI competitors offer complete usability with all EDI standards

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ED-122

Notes:

ROXANNE W. REEVES, PH.D.
MANAGER,
ELECTRONIC COMMERCE PROGRAM

PROFILE

CAPABILITIES

- Roxanne Reeves adds in-depth research and analysis expertise to INPUT's Electronic Commerce product.
- Expertise in applied information technologies for strategic planning
- Over 11 years planning, research and analysis in a variety of industry sectors
- Seven years in data communications planning and implementation

BACKGROUND

- Formerly in Strategic Planning at British Telecom North America, supporting senior-level decision-makers with market analysis, competitive intelligence and market research on a broad range of related technologies
- Topics included EDI, electronic messaging, electronic funds transfer, point of sales services—in the context of worldwide communication networking
- Has made presentations to research industry associations nationally and internationally and maintained relationships with broad range of industry analysts.

EDUCATION

- Ph.D. University of Wisconsin—Madison
- M.A. Michigan State University
- B.A. Southern Methodist University

