

# EDI Essentials for the 1990s: *Your Total EDI Resource*

## *EDI Intertrends—North America*

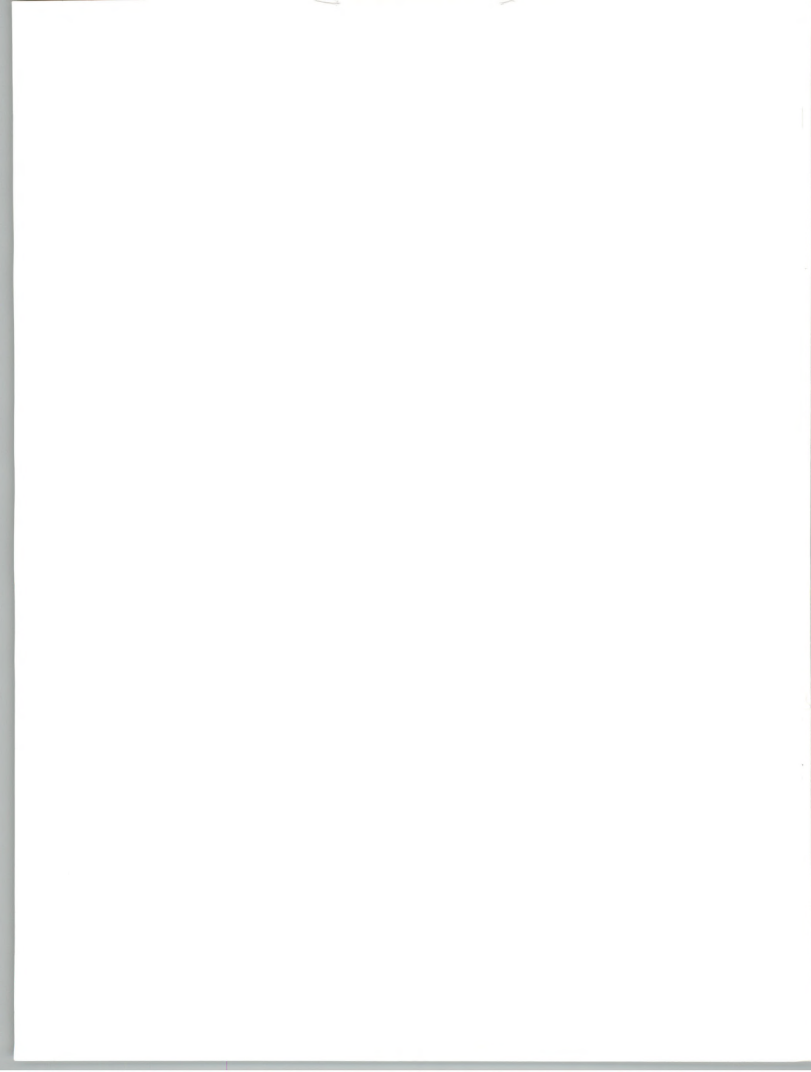
### **IS Managers, Marketing & Marketing Support Managers, and CEOs:**

- **CREATE YOUR OWN EDI TRAINING AND MARKETING MATERIALS** for customers and internal use with *The EDI Tutorial*
- **UNDERSTAND** the ANSI/EDIFACT standards controversy and how it affects your operation
- **MAKE THE RIGHT CHOICES** by evaluating competitive EDI products, networks, professional and consulting services
- **DESIGN YOUR OWN EDI PROGRAM** with INPUT's case study analyses of real-world EDI implementations

### **EDI Network, Software, and Hardware Vendors**

- **COMPETE** successfully by assessing your competitors' programs and international marketing strategies
- **FORECAST** your market's potential efficiently with intelligence on total market size, market share, and the competition's customer-based sales volumes.
- **INCREASE** your market share with an insider's look at users' purchasing plans, level of vendor satisfaction, and EDI implementation strategies.
- **GET INSIDE INFORMATION** on competitors' new products, price schedules and services, mergers, acquisitions and personnel changes

AT & T, British Telecom/  
McDonnell Douglas, Control  
Data, Federal EDI Network  
Services, Foodcom  
GE Information Services  
Harbinger, Kleinschmidt  
Computer, Sears  
Communications Company  
Sterling Software Ordernet  
EDI Inc., IBM, MSA,  
TranSettlements, Unisys...  
and more  
are profiled in this report.



# 1990s

Standards INTERfusion—the merging of disparate standards (ANSI, EDIFACT, UCS, TDCC, Tradacoms, etc.) into a single, worldwide EDI standard

“INTERgration”—of EDI systems with other data processing systems

INTERnetworking —EDI data networks linking together

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“ Aggregated EDI market growth for EDI services, software, and professional services, represent a nearly 40% compound annual growth rate through 1994. ”

—from INPUT's *EDI Intertrends*

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## BE PREPARED FOR EDI OPPORTUNITIES

EDI Intertrends offers much more than discussion of current trends and issues. This essential report gives recommendations, opportunities, and conclusions to both vendors and users, based on in-depth market survey research and intelligence. Find out what kinds of companies implement or fail to implement EDI. Why? If not, why not? Vendors can validate their marketing strategies to gain entry and market share in the expanding EDI markets, and prepare to defend markets that are being challenged. The report tells you where the market is expanding and where time is running out for new entrants.

IS Managers, Marketing Managers, and CEOs can maximize the benefits of their EDI operation and minimize potential pitfalls such as limited integration, legal issues, and cost concerns by learning from other EDI applications and user implementations.

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“ EDI transactions are one-tenth the equivalent paper document costs. ”

—from INPUT's *EDI Intertrends*

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## YOUR BASIC EDI MARKETING BUILDING BLOCKS

INPUT's EDI Tutorial gives you the basic building blocks to create your own EDI marketing materials. Whether you are introducing EDI internally, implementing EDI at customer installations, or selling EDI software, hardware, or consulting services, you have all the information you need to explain EDI and communicate the benefits.

## YOUR ONE-STOP EDI REFERENCE GUIDE

INPUT's EDI Intertrends is the *EDI Almanac* for the 1990s, combining valuable strategic information with encyclopedic coverage of the EDI world for both vendors and users. This report clearly explains and analyzes the history and development of EDI, the dangers and opportunities inherent in the standards controversy, the relationships between EDI applications and other data interchanges, and other major issues in the EDI world. INPUT's *EDI Intertrends* report is an invaluable one-stop reference guide for any participant in EDI, whether new to the field or an EDI veteran.

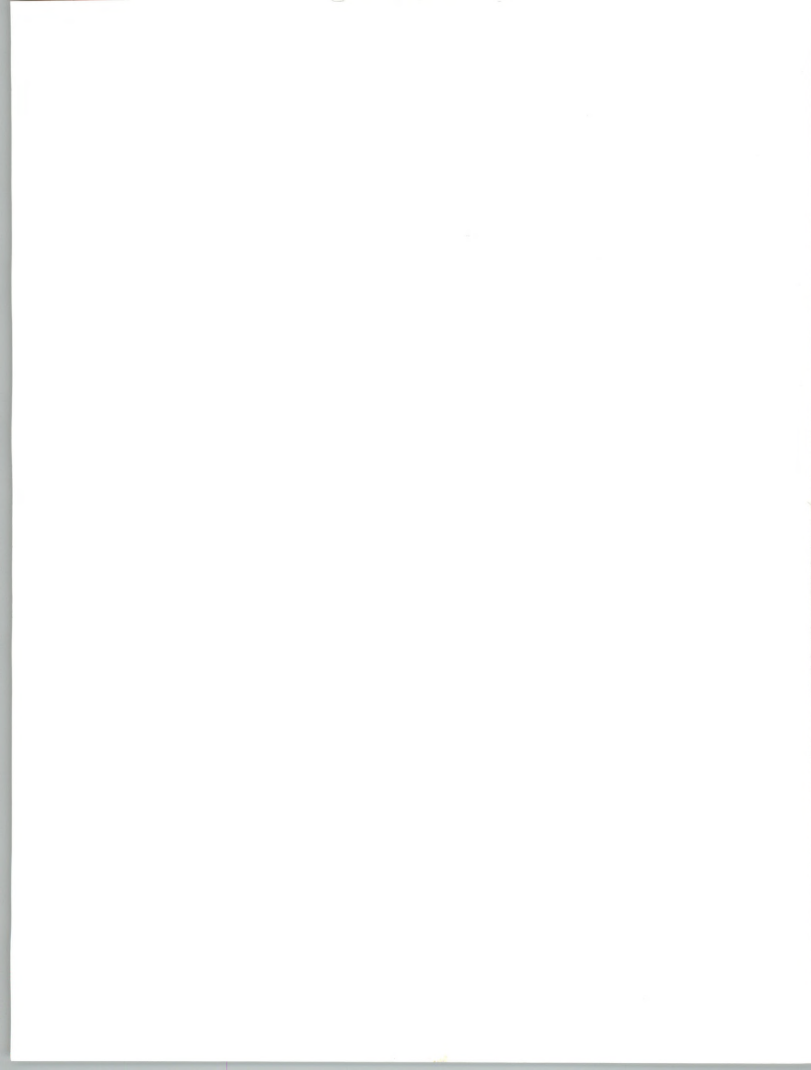
The *Must Have* EDI Report for the 1990s

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# The EDI ESSENTIALS for Success in the

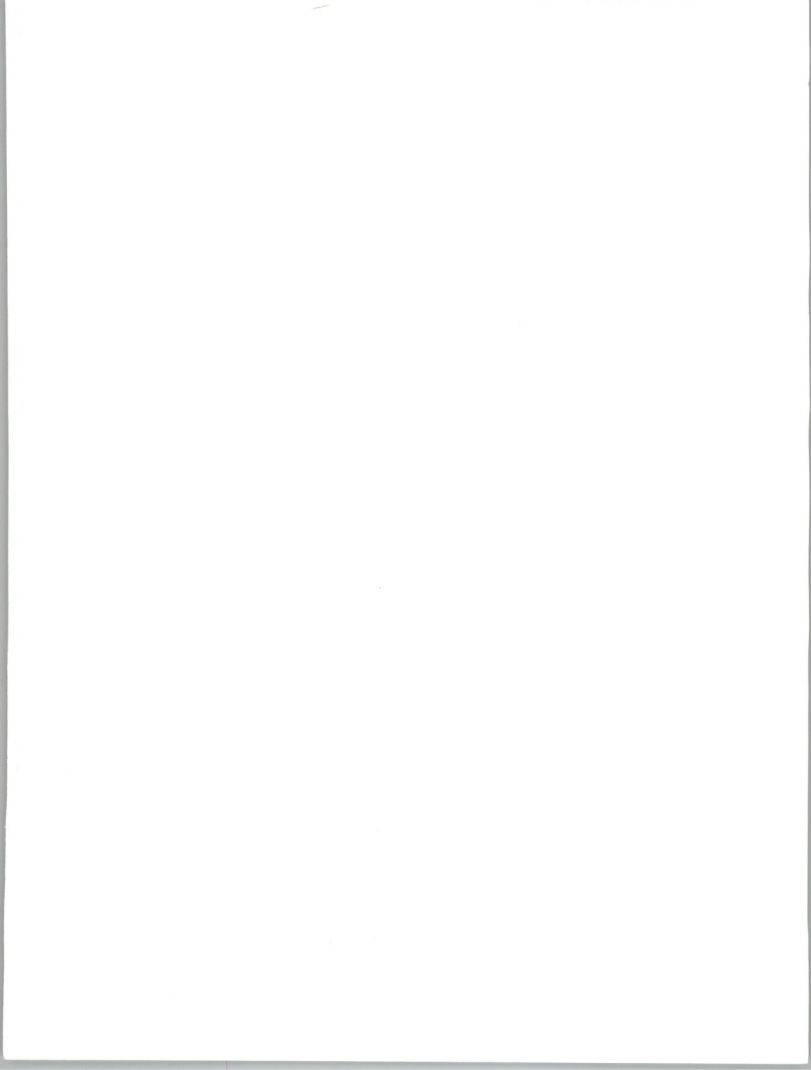
“The expected, but not materialized, RBOC (Regional Bell Operating Companies) market entry and the lack of market development activities by second-tier players has allowed leading vendors to achieve high growth rates while others have been left far behind.”

-from INPUT's EDI Intertrends

The global economy is here to stay. INPUT's EDI Intertrends gives you the data you need—clearly, concisely, graphically—to understand the complex interrelationships in today's and tomorrow's EDI world. These Intertrends include:

INTERNational Trends—developments and implementation in Europe, Asia, and North America

<b>EDI Intertrends—North America</b>	
<b>An Electronic Data Interchange Tutorial</b>	<b>EDI Software Intertrends</b>
<ul style="list-style-type: none"> <li>• Background, Functions, Varieties and Relationships</li> <li>• Software Solutions</li> <li>• Relationship between:               <ul style="list-style-type: none"> <li>- Electronic Mail (E-Mail) and EDI</li> <li>- EDI and On-Line Order Entry Systems</li> <li>- EDI and Electronic Funds Transfer</li> <li>- EDI and Logistics</li> <li>- EDI, Data Bases and Internal Applications</li> <li>- EDI, JIT and MRP</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Research Findings</li> <li>• EDI Software Company Developments</li> </ul>
<b>User EDI Intertrends</b>	<b>EDI Market Forecast Intertrends</b>
<ul style="list-style-type: none"> <li>• User Networking Dynamics</li> <li>• Computer Equipment Used</li> <li>• Implementation Reasons</li> <li>• New Industry Implementations</li> </ul>	<ul style="list-style-type: none"> <li>• Network Services Forecast Factors</li> <li>• EDI Network Service Forecast</li> <li>• EDI Network Services Market Shares</li> <li>• EDI Software Markets</li> <li>• Professional Service Forecast</li> <li>• Computer Equipment and Peripherals for EDI—Not Forecast</li> <li>• The Federal EDI Market</li> <li>• EDI-Driven User Expenditures</li> <li>• Total EDI Market Forecast</li> <li>• Forecast Reconciliation</li> <li>• Acquisition Intertrends</li> </ul>
<b>EDI Network Service Intertrends</b>	
<ul style="list-style-type: none"> <li>• Customer Satisfaction</li> <li>• Pricing and Profitability Intertrends</li> <li>• EDI Network Service Developments</li> <li>• Regional Bell Operating Companies and Community EDI Systems</li> <li>• Network Internationalization</li> </ul>	<b>Opportunities and Conclusions</b>



# About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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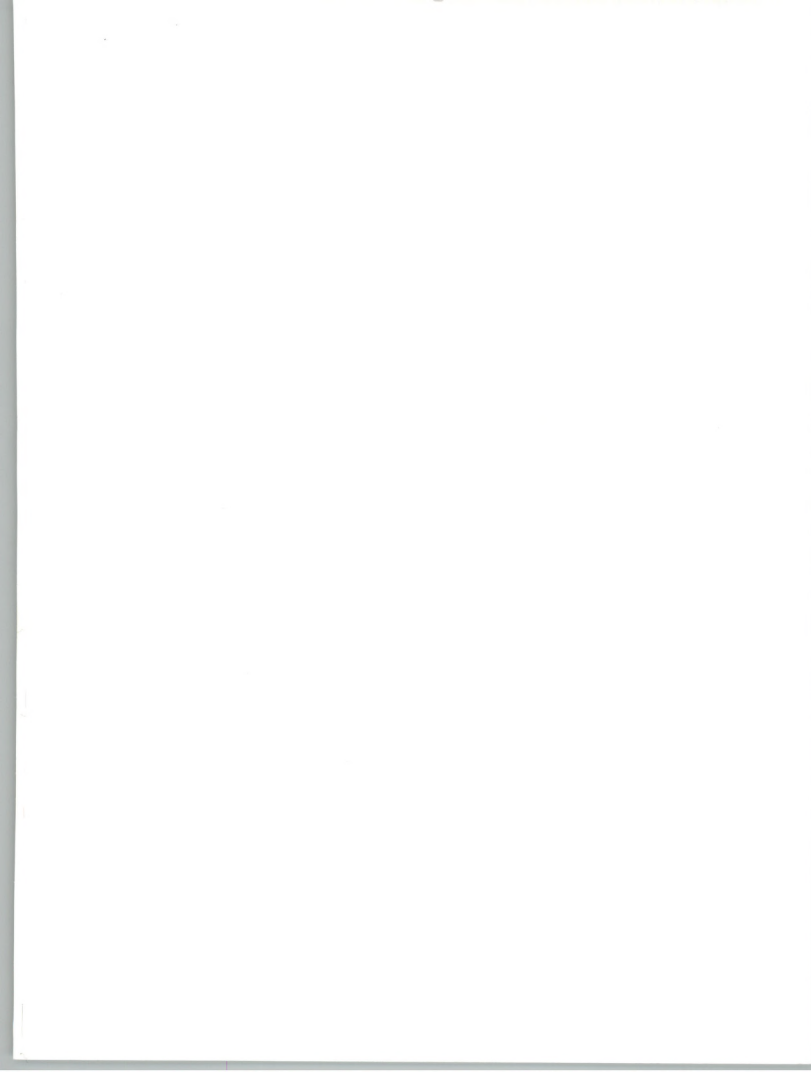
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# Find out where the real opportunities exist in the Federal EDI market

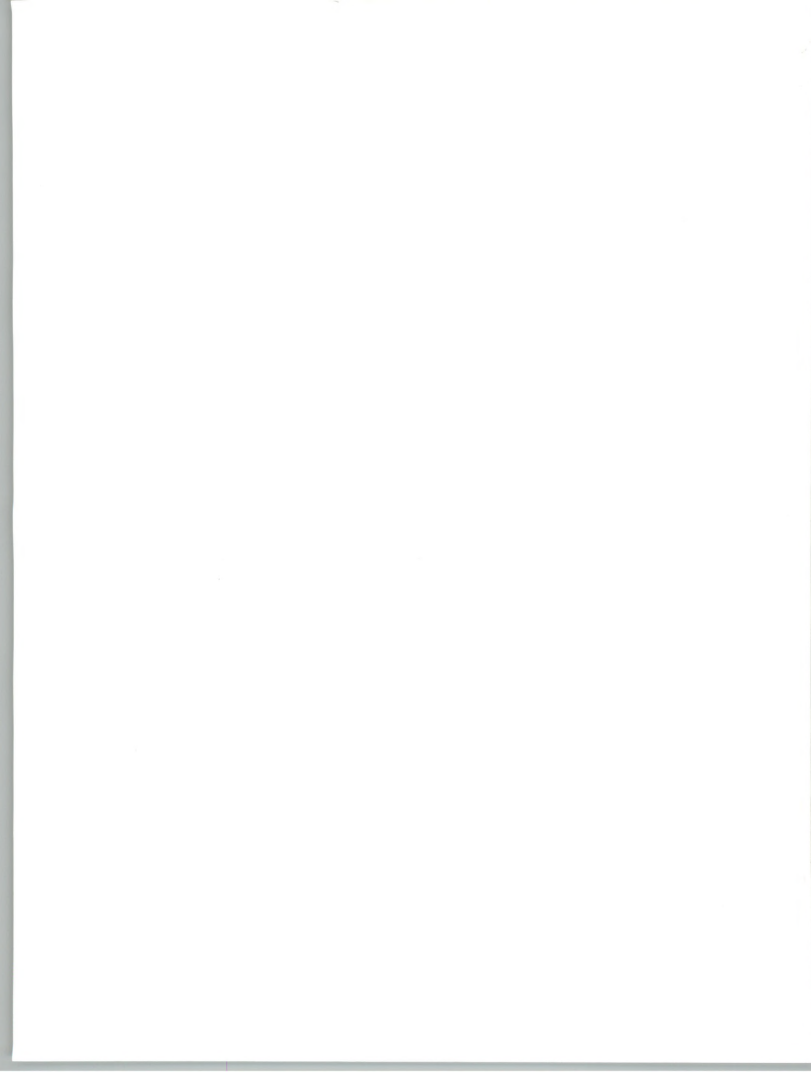
## *U.S. EDI Federal Markets, 1989-1994*

- UNDERSTAND the commercial factors driving federal EDI
- POSITION your company's marketing and product offerings according to agency needs and product selection criteria
- TARGET the product categories that represent high growth in this market
- DEVELOP the sales and pricing strategies needed in marketing to the government
- IDENTIFY competitors and potential teaming partners

### You will find:

- Market forecasts through 1994
- Defense and civil agency requirements and trends
- Competitive analysis and profiles
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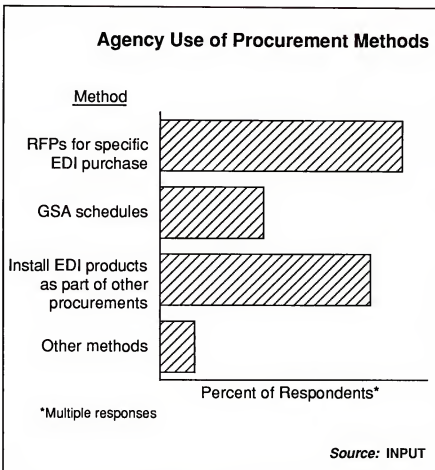
## FEATURES AND BENEFITS OF THIS REPORT

*U.S. EDI Federal Markets* is based on research of agency long-range plans for EDI programs and new system installations. Federal agency officials and EDI vendor executives were interviewed to obtain information on agency plans and product development strategies.

As a comprehensive analysis of the important competitive factors and considerations in the federal EDI market, this report is an indispensable planning tool to marketing and operations executives and managers who plan to take advantage of this growing opportunity.

The *U.S. EDI Federal Market* report is one of a series of INPUT EDI analysis reports. Other reports in the program include:

- *EDI Intertrends—North America*
- *EDI Intertrends—Europe*
- *Advanced EDI Services*
- *EDI User Case Studies*
- *North American EDI Service Provider Profiles*
- *North American EDI Software Provider Profiles*
- *EDI and Professional Services*
- *Vertical Market EDI Directions and Potentials*
- *EDI Software: Products, Issues, Market Trends*
- *EDI and X.400*



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# Play a role in the Federal Government's

The federal government, in its efforts to improve productivity through information technology, is adopting EDI in a big way. By a government-wide mandate, the federal government is requiring electronic linkage with private sector companies and other government agencies. The federal government provides lucrative opportunities to vendors of EDI products and services—if they understand the unique characteristics, requirements, and purchasing procedures of the federal sector.

The *U.S. EDI Federal Market, 1989–1994* report gives you vital information you need to understand and plan for EDI opportunities in the federal government. This report is a complete analysis of this major force in the EDI market and addresses all the major issues confronting the market.

<b><i>U.S. EDI Federal Market</i></b>
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## WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

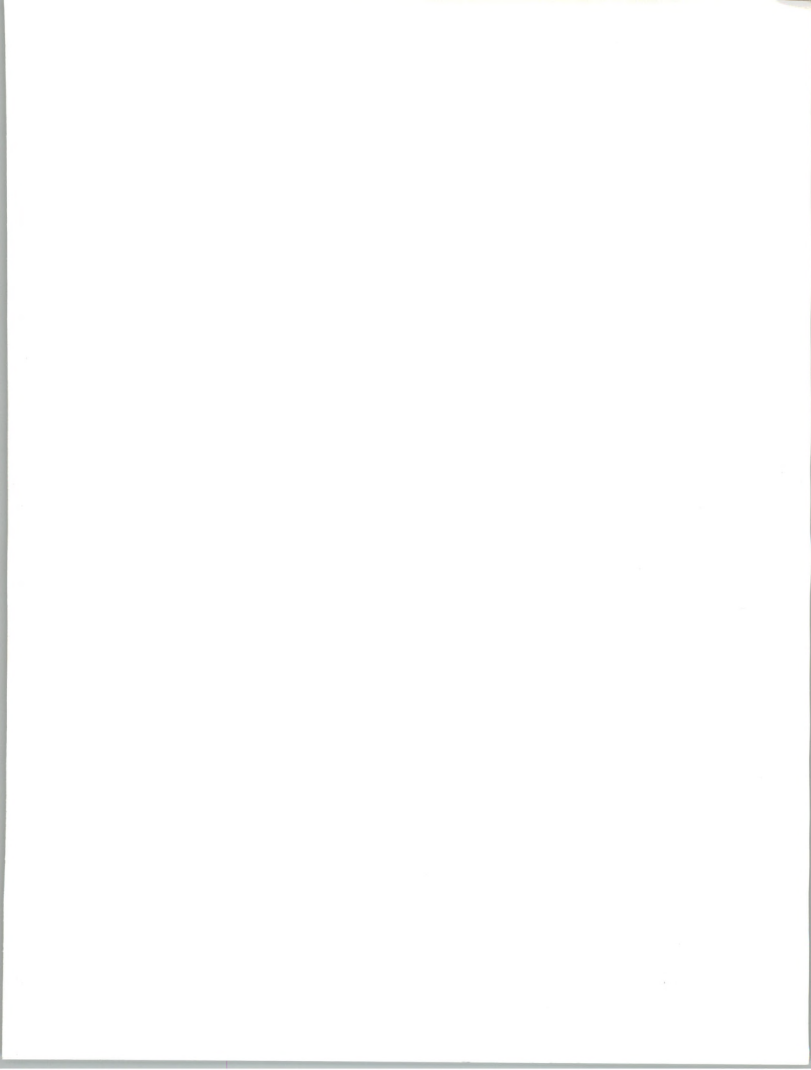
## HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?

Effective marketing to the government requires a thorough knowledge of federal EDI applications and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

## WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successful market and strategic plans.



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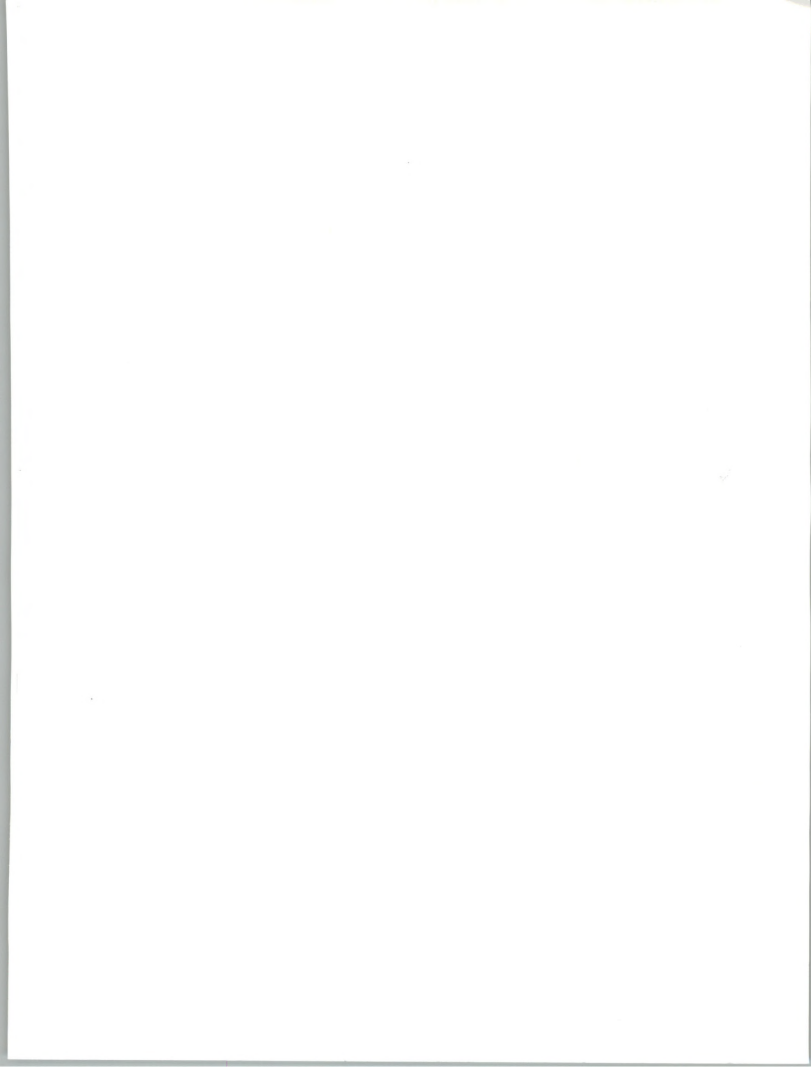
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***Public and private sector EDI:  
who are the players? what are the issues?***

Did you know that some of the greatest impetus for EDI comes from the public sector? The military's EDI programs with transportation carriers and grocery distributors, Customs' Automated Manifest System, and the Treasury Department's Vendor Express program are just a few of today's many federal EDI programs.

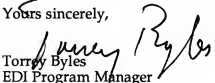
Just as defense research impacts the technological level of the commercial economy, the government's thrust into EDI is accelerating the rate of EDI proliferation in the private sector.

INPUT has just released two new reports that, together, will give you the complete picture on EDI today. *EDI Interrends* is a full wrap of EDI: vertical markets, users, software vendors, service providers, professional services and standards. *U.S. EDI Federal Markets* is a close-up look at the use of EDI in the Federal government including recent legislation that mandates EDI use by Federal agencies—from defense procurement to income tax collection.

What are the drivers of EDI growth today? What are the stumbling blocks? How are government EDI programs impacting private sector suppliers, regulated companies and inter-agency paper reduction?

Find out today how EDI is evolving and how the government is playing a leading role. Order these two timely reports today!

Yours sincerely,

  
Torrey Byles  
EDI Program Manager

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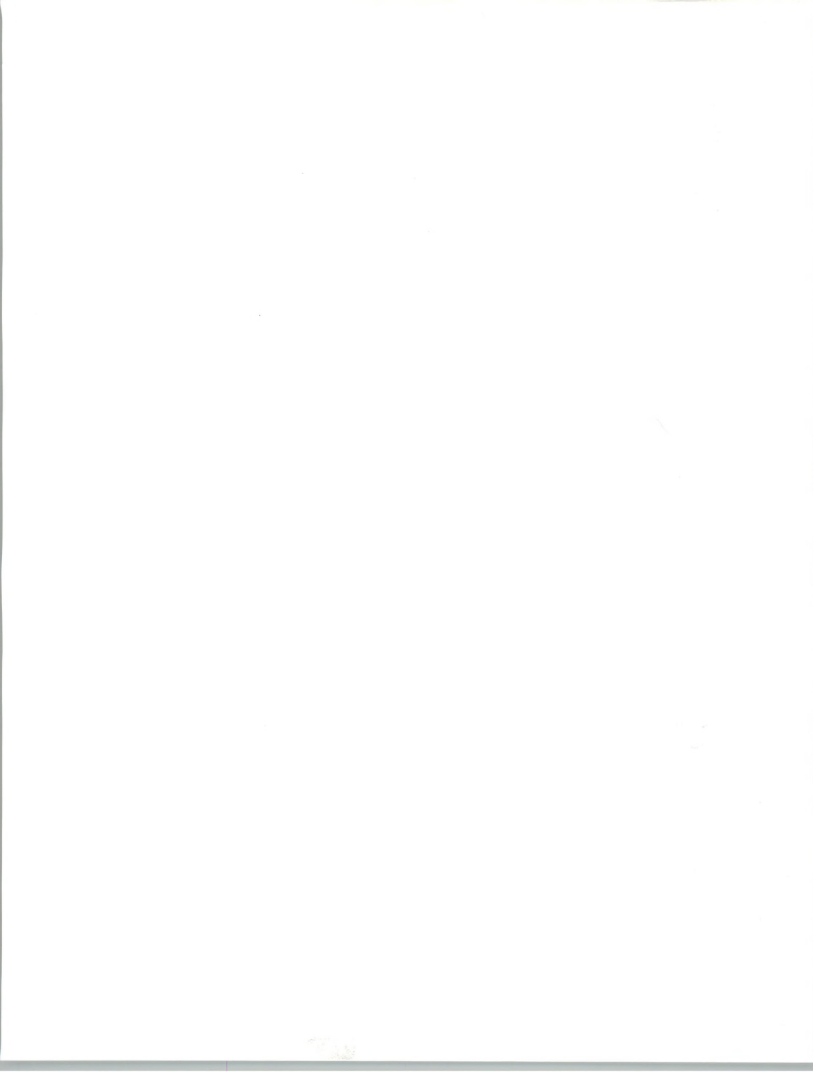
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## Find out where the real opportunities exist in the Federal EDI market

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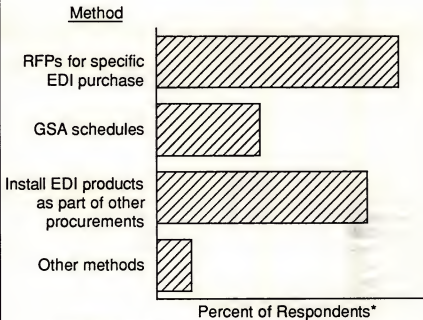
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### Agency Use of Procurement Methods



\*Multiple responses

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## Find out where the real opportunities exist in the Federal EDI market

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### *U.S. EDI Federal Markets, 1989-1994*

- UNDERSTAND the commercial factors driving federal EDI
- POSITION your company's marketing and product offerings according to agency needs and product selection criteria
- TARGET the product categories that represent high growth in this market
- DEVELOP the sales and pricing strategies needed in marketing to the government
- IDENTIFY competitors and potential teaming partners

#### You will find:

- Market forecasts through 1994
- Defense and civil agency requirements and trends
- Competitive analysis and profiles
- Strategies and market opportunities

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# Play a role in the Federal Government's

The federal government, in its efforts to improve productivity through information technology, is adopting EDI in a big way. By a government-wide mandate, the federal government is requiring electronic linkage with private sector companies and other government agencies. The federal government provides lucrative opportunities to vendors of EDI products and services—if they understand the unique characteristics, requirements, and purchasing procedures of the federal sector.

The *U.S. EDI Federal Market, 1989–1994* report gives you vital information you need to understand and plan for EDI opportunities in the federal government. This report is a complete analysis of this major force in the EDI market and addresses all the major issues confronting the market.

## ***U.S. EDI Federal Market***

- Market Analysis and Forecast
- Federal Agency Requirements and Trends
- Competitive Trends
- Key Opportunities

## **Agency Perspectives**

- Functional Requirements
- Performance Criteria
- Laws, Policies, Regulations
- Acquisition Plans and Preferences
- Vendor Performance

## **Vendor Perspectives**

- Vendor Participation
- Market Issues
- Vendor Selection and Performance
- Teaming Patterns

## **WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?**

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

## **HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?**

Effective marketing to the government requires a thorough knowledge of federal EDI applications and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

## **WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?**

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successful market and strategic plans.

# massive adoption of EDI

## FEATURES AND BENEFITS OF THIS REPORT

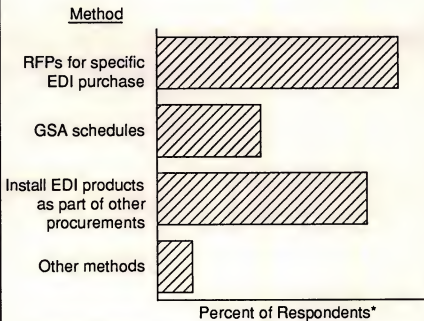
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EDI Intertrends offers much more than discussion of current trends and issues. This essential report gives recommendations, opportunities, and conclusions to both vendors and users, based on in-depth market survey research and intelligence. Find out what kinds of companies implement or fail to implement EDI. Why? If not, why not? Vendors can validate their marketing strategies to gain entry and market share in the expanding EDI markets, and prepare to defend markets that are being challenged. The report tells you where the market is expanding and where time is running out for new entrants.

IS Managers, Marketing Managers, and CEO's can maximize the benefits of their EDI operation and minimize potential pitfalls such as shallow, limited integration, legal issues, and cost concerns by learning from other EDI applications and user implementations.

“Aggregated EDI market growth for EDI services, software, and professional services, represent a nearly 40% compound annual growth rate through 1994.”

—from INPUT's *EDI InterTrends*

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# The EDI ESSENTIALS for Success in the

“ The expected, but not materialized, RBOC (Regional Bell Operating Companies) market entry and the lack of market development activities by second-tier players has allowed leading vendors to achieve high growth rates while others have been left far behind. ”

*- From INPUT'S EDI Intertrends*

The global economy is here to stay. INPUT's EDI Intertrends gives you the data you need—clearly, concisely, graphically—to understand the complex interrelationships in today's and tomorrow's EDI world. These Intertrends include:

INTERNational Trends—developments and implementation in Europe, Asia, and North America

## *EDI Intertrends—North America*

<i>EDI Intertrends—North America</i>	
<b>An Electronic Data Interchange Tutorial</b>	<b>EDI Software Intertrends</b>
<ul style="list-style-type: none"> <li>• Background, Functions, Varieties and Relationships</li> <li>• Software Solutions</li> <li>• Relationship between:                             <ul style="list-style-type: none"> <li>- Electronic Mail (E-Mail) and EDI</li> <li>- EDI and On-Line Order Entry Systems</li> <li>- EDI and Electronic Funds Transfer</li> <li>- EDI and Logistics</li> <li>- EDI, Data Bases and Internal Applications</li> <li>- EDI, JIT and MRP</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Research Findings</li> <li>• EDI Software Company Developments</li> </ul>
	<ul style="list-style-type: none"> <li>• User Survey Findings</li> <li>• Professional Services Industry Structure</li> <li>• EDI Professional Services Market Structure</li> <li>• EDI Professional Services Segment Activities</li> <li>• EDI Professional Services Market Segmentation</li> </ul>
<b>User EDI Intertrends</b>	<b>EDI Market Forecast Intertrends</b>
<ul style="list-style-type: none"> <li>• User Networking Dynamics</li> <li>• Computer Equipment Used</li> <li>• Implementation Reasons</li> <li>• New Industry Implementations</li> </ul>	<ul style="list-style-type: none"> <li>• Network Services Forecast Factors</li> <li>• EDI Network Service Forecast</li> <li>• EDI Network Services Market Shares</li> <li>• EDI Software Markets</li> <li>• Professional Service Forecast</li> <li>• Computer Equipment and Peripherals for EDI—Not Forecast</li> <li>• The Federal EDI Market</li> <li>• EDI Driven User Expenditures</li> <li>• Total EDI Market Forecast</li> <li>• Forecast Reconciliation</li> <li>• Acquisition Intertrends</li> </ul>
<b>EDI Network Service Intertrends</b>	
<ul style="list-style-type: none"> <li>• Customer Satisfaction</li> <li>• Pricing and Profitability Intertrends</li> <li>• EDI Network Service Developments</li> <li>• Regional Bell Operating Companies and Community EDI Systems</li> <li>• Network Internationalization</li> </ul>	<b>Opportunities and Conclusions</b>



# About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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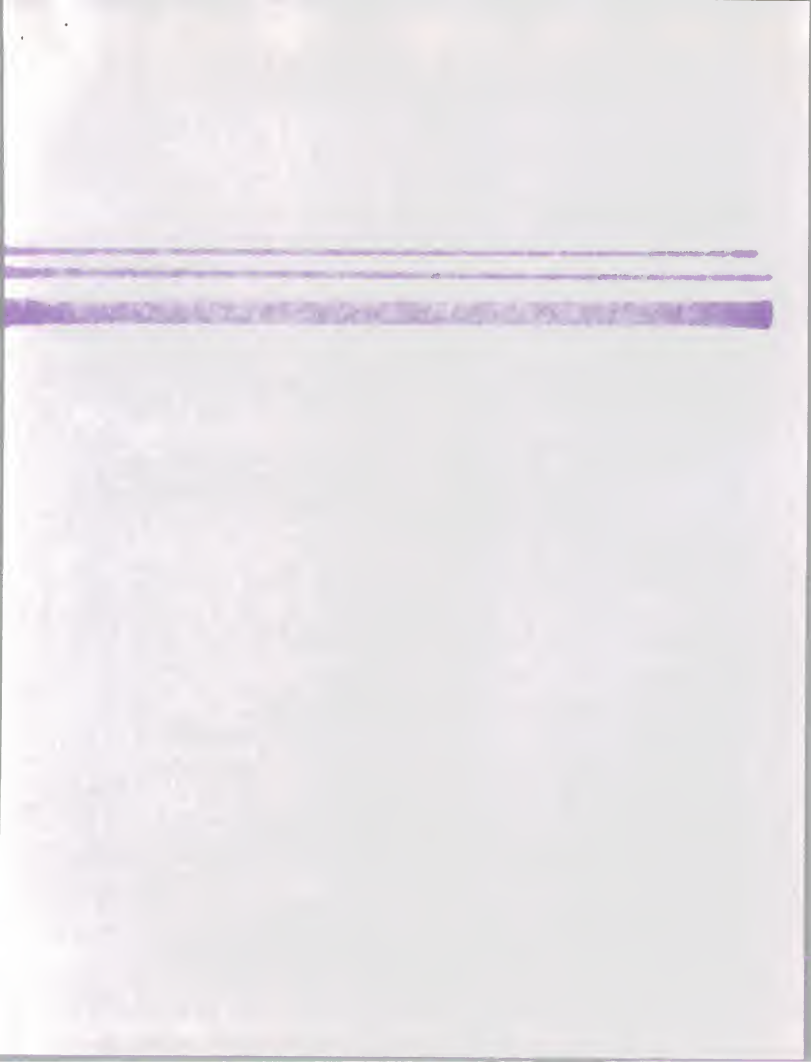
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Know the EDI markets, issues, players in BOTH public and private sectors..

Public and private sector EDI: who are the players? what are the issues?

How important is the Federal government to the growth of EDI?

Did you know that some of the greatest impetus for EDI comes from the public sector? The military's EDI programs with transportation carriers and grocery distributors, Customs' Automated Manifest System, and the Treasury Department's Vendor Express program are just a few of today's many federal EDI programs.

Just as defense research impacts the technological level of the commercial economy, the government's thrust into EDI is accelerating the rate of EDI proliferation in the private sector.

INPUT has just released two new reports that, together, will give you the complete picture on EDI today. EDI INTERTRENDS is a full wrap of EDI: vertical markets, users, software vendors, service providers, professional services and standards. FEDERAL EDI MARKETS is a close-up look at the use of EDI in the Federal government including recent legislation that mandates EDI use by Federal agencies -- from defense procurement to income tax collection.

What are the drivers of EDI growth today? What are the stumbling blocks? How are government EDI programs impacting private sector suppliers, regulated companies and inter-agency paper reduction?

Find out today how EDI is evolving and how the government is playing a leading role. Order these two timely reports today!

Yours sincerely,

Torrey Byles  
EDI Program Manager

Suggested  
heads



# Find out where the real opportunities exist in the Federal EDI market

## *U.S. EDI Federal Markets, 1989-1994*

- UNDERSTAND the commercial factors driving Federal EDI
- POSITION your company's marketing and product offerings according to agency needs and product selection criteria
- TARGET the product categories that represent high growth in this market
- DEVELOP the sales and pricing strategies needed in marketing to the government
- IDENTIFY competitors and potential teaming partners

### You will find:

- Market forecasts through 1994
- Defense and civil agency requirements and trends
- Competitive analysis and profiles
- Strategies and market opportunities

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# Play a Role in the Federal Government's Massive Adoption of EDI

is adopting EDI in a big way. BY a government-wide mandate, the Federal government is requiring electronic linkage with private sector companies & other gov. agencies.

The Federal government, in its efforts to improve productivity through information technology, will continue to play a vital role in overall EDI market growth. The federal government provides lucrative opportunities to vendors of EDI products and services—if they understand the unique characteristics, requirements, and purchasing procedures of the federal sector.

The U.S. EDI Federal Market, 1989–1994 report gives you vital information you need to understand and plan for EDI opportunities in the Federal government. This report is a complete analysis of this major force in the EDI market and addresses all the major issues confronting the market.

<b>U.S. EDI Federal Market</b>
<ul style="list-style-type: none"><li>• Market Analysis and Forecast</li><li>• Federal Agency Requirements and Trends</li><li>• Competitive Trends</li><li>• Key Opportunities</li></ul>
<b>Agency Perspectives</b>
<ul style="list-style-type: none"><li>• Functional Requirements</li><li>• Performance Criteria</li><li>• Laws, Policies, Regulations</li><li>• Acquisition Plans and Preferences</li><li>• Vendor Performance</li></ul>
<b>Vendor Perspectives</b>
<ul style="list-style-type: none"><li>• Vendor Participation</li><li>• Market Issues</li><li>• Vendor Selection and Performance</li><li>• Teaming Patterns</li></ul>

## WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the Federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

## HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?

Effective marketing to the government requires a thorough knowledge of federal EDI applications and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

## WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successful market and strategic plans.



## FEATURES AND BENEFITS OF THIS REPORT

*U.S. EDI Federal Markets* is based on ~~secondary~~ research of ~~available information~~ on agency long-range plans for EDI programs and new system installations. Federal agency officials and EDI vendor executives were interviewed to obtain information on agency plans and product development strategies.

As a comprehensive analysis of the important competitive factors and considerations in the Federal EDI market, this report is an indispensable planning tool to marketing and operations executives and managers who plan to take advantage of this growing opportunity.

The *U.S. EDI Federal Market* report is one of a series of INPUT EDI analysis reports. Other reports in the program include:

- *EDI Intertrends—North America*
- *EDI Intertrends—Europe*
- *Advanced EDI Services*
- *EDI User Case Studies*
- *North American EDI Service Provider Profiles*
- *North American EDI Software Provider Profiles*
- *EDI and Professional Services*
- *Vertical Market EDI Directions and Potentials*
- *EDI Software: Products, Issues, Market Trends*
- *EDI and X.400*

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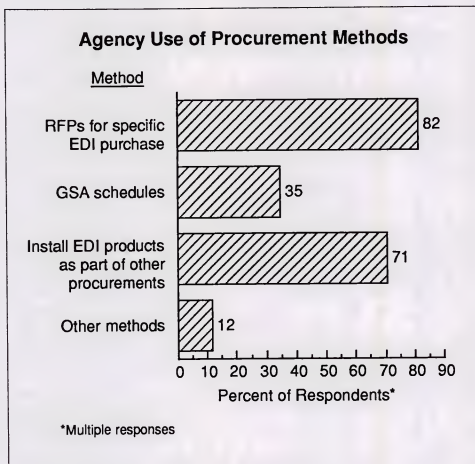
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- There was also a high percentage (71%) of respondents that use or plan to use the GSA Schedules. The GSA Schedules have expedited the purchasing of microcomputers and software so that agencies have a quicker and easier procurement vehicle to use.
- Roughly one-third of the respondents have installed or plan to install EDI products as part of another agency procurement. For example, customers' use of EDI, in its Automated Broker Interface (ABI) module, is a key component of the Automated Commercial system.

EXHIBIT IV-14



### 5. Software Acquisitions Methods

In developing their EDI systems, agencies can either write their own EDI software or purchase it. Over fifty percent of the agencies surveyed stated they would purchase the software from a vendor. (See Exhibit IV-15). Agencies are still adhering to DoD and civil agency policy by purchasing commercial software.



# About INPUT

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For Immediate Release

Contact: Torrey Byles  
415-961-3300

INPUT "Intertrends" Report Examines EDI Marketplace

December 20, 1989, Mountain View, CA

A new report published by INPUT, a Mountain View, California management consulting and market research firm, examines several North American "EDI Intertrends" -- integration, internationalization, internetworking and standards interfusion trends, identified in the Electronic Data Interchange market.

Electronic Data Interchange is the intercompany electronic exchange of formatted data representing routine business transactions. The data is standardized to make it easier to use directly within applications.

The report states that generally, EDI users are still reacting rather than proacting, in their adoption of the technology. At this stage in market development, most users are implementing EDI because they are being required to do so by their customers. In the "hub and spoke" environment, a supplier is dependent on its customer. If EDI is a condition of keeping that customer, then EDI will be installed.

However, according to INPUT, such forced installations are rarely optimized. Greater efficiencies are available through the integration of EDI in areas beyond order fulfillment, such as shipping and accounting. Users need to be more aware that although EDI may have been implemented under duress, the benefits should not be minimized. Rather, EDI costs can be spread across multiple application areas, while the benefits accrue exponentially through integration.

INPUT's EDI research has found that users remain concerned about EDI standards due to confusion over standards "families" but and also because of a planned migration from a generic North American standard called ANSI X12 to a standard called UN/EDIFACT which is being promoted as an international "language" for all EDI transactions. INPUT says that users need to become more familiar with the relationships between EDI standards technically and from a business perspective.

The new INPUT study, one of a series on EDI from the firm, provides market forecasts for each of the market components: network services, software and professional services.

A variety of factors have led to INPUT's lower forecast for EDI products and services, but the company maintains that a

2004

healthy growth rate of nearly 40% shows that the market is maintaining its dynamism.

The new forecast no longer includes end-user expenditures for private networks and INPUT has also evaluated the impact facsimile is having on EDI's potential. Further, expected market development activities by companies such as the RBOCs have not occurred causing a downscaling in network services (the largest portion of the market), while the software and professional service markets are larger than previously sized.

The market is showing evidence of consolidation, with five EDI acquisitions in 1988-1989 (American Business Computer, Microbilt, TranSettlements, McDonnell Douglas Information Services and the U.K.'s Istel.) Several additional acquisitions are expected.

Despite the market forecast adjustments, the EDI market remains attractive for vendors as EDI continues to offer users greater efficiencies in their intercompany relationships, and in their own information management requirements.

EDI Intertrends -- North America is available from any INPUT office.

##

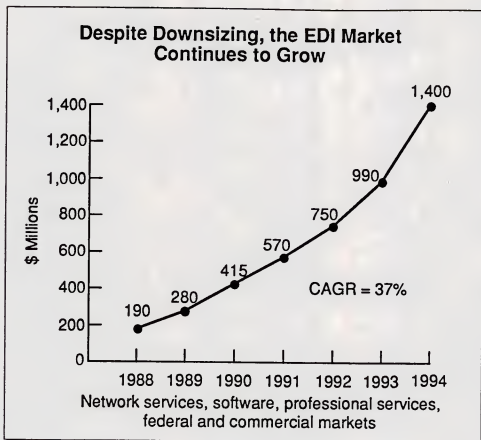
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NOTE TO EDITORS: For an editorial review copy of the report' Executive Overview, including graphics, please call (415) 961-3300.





EXHIBIT II-5



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Despite the market forecast adjustments, the EDI market remains attractive for vendors. EDI continues to offer users greater efficiencies in their intercompany relationships and in their own information management requirements.



DRAFT PRESS RELEASE EFDI REPORT

FOR IMMEDIATE RELEASE  
July, 1989

Contact: ~~Robert M. Cunningham~~  
(415) 961-3300

FEDERAL GOVERNMENT ELECTRONIC DATA INTERCHANGE  
MARKET TO REACH \$208 MILLION BY 1994

Mountain View, CA - Federal government market demand for EDI and EDI-like products <sup>→ equipment</sup> and services will increase from \$148 million in government fiscal year 1989 to \$208 million in 1994. The market will experience sustained growth at a compound annual growth rate of 7% through the five year forecast period, as stated in the recently updated report from INPUT, a leading market research and consulting firm.

Electronic Data Interchange is the electronic transfer of business information between organizations in a structured application. In the federal government, EDI is used to transfer electronic purchase orders, invoices, bills of lading, tax information and financial reports. The government's need for increased productivity and effectiveness, along with continuing budgetary constraints will drive Federal agencies to use EDI.

The report, titled U.S. EDI Federal Market 1989-1994, states that the 7% compound annual growth rate (CAGR) stems primarily from Department of Defense spending for general purpose computer equipment and microcomputer-based EDI software along with some spending for Civilian programs being implemented. The software portion of the 1994 market will represent 40% of the total and exhibits the strongest growth throughout the forecast period. The report also points to the wider availability and functionality of microcomputers at agencies as fueling EDI growth.

U.S. EDI Federal Market analyzes agency needs and both agency and vendor software product selection criteria. Federal agency buyers tend to focus on user friendly characteristics while vendors promote ease of upgrading in offering their EDI software products. The report also examines technical and regulatory issues influencing the market and major EDI initiatives in both defense and civilian agencies.

The report includes a discussion of the leading EDI vendors' views of the marketplace. Vendor and user issues and concerns are compared along with factors impacting the federal market for EDI products and services. Vendors interested in penetrating the federal EDI market should use this report to identify specific opportunities, agency activities, and potential teaming partners.



The study concludes that the Federal EDI market will likely expand over the next few years because budgetary, policy, and technological factors are converging to propel EDI into a major place in the Federal information systems marketplace. However, there are some impediments. Many agency, supplier, and vendor executives do not yet fully understand EDI or appreciate its market potential or its benefits.

INPUT expects this to change as the forces driving EDI become unavoidable. The Government will need to overcome current EDI impediments, such as security concerns and EDI literacy, with better policies, safeguards and user education.

Just as EDI is becoming more accepted in the commercial environment, Federal EDI, driven by the same dynamics impacting commercial firms as well as some unique issues, will grow. Each sphere of influence will have expectations of the other, further fueling the overall EDI market.

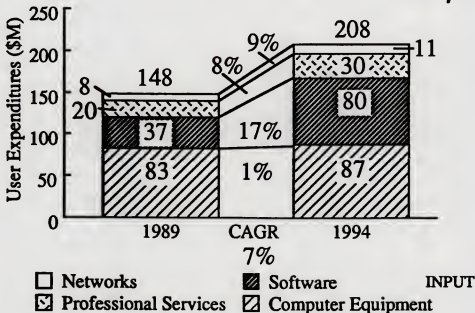
U.S. EDI Federal Markets 1989-1994 is available from INPUT's federal government research office at 8298 Old Courthouse Road, Vienna, VA 22182 (703) 847-6870 or INPUT's headquarter's office at 1280 Villa Street, Mountain View, CA 94041 (415) 961-3300.

\*\*\*\*\*

NOTE TO EDITORS: For an editorial review copy of the report's Executive Overview, please call INPUT at (415) 961-3300.



## FEDERAL GOVERNMENT Electronic Data Interchange Markets



NOTES:

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EDI INTERTRENDS REPORT

Headline:

**EDI Essentials for the 1990's: Your Total EDI Resource**  
— The Strategic Information You Need Today to Prepare for Tomorrow —

Title:

**EDI Intertrends -- North America**

*- Int'l Profiles*

**TORREY-QUESTION: I THOUGHT THE REPORT COVERED TRENDS IN EUROPE, ASIA ALSO?**

*IS Managers, Marketing & Marketing Support Managers, and CEO's:*

- OPTIMIZE your EDI operation<sup>3</sup> by learning from other EDI applications and user implementations
- CREATE YOUR OWN EDI TRAINING AND MARKETING MATERIALS for customers and internal use with *The EDI Tutorial*.
- UNDERSTAND the ANSI/EDIFACT standards controversy and how it affects your operation
- MAKE THE RIGHT CHOICES by evaluating competitive EDI products, networks, professional and consulting services
- KNOW YOUR VENDORS with INPUT's Vendor Profiles and Development Strategies
- STAY AHEAD by understanding current and future EDI User Intertrends-- and how they affect you

**EDI Network, Software, and Hardware Vendors**

- COMPETE successfully by assessing your competitors' development and international marketing strategies
- MAXIMIZE your R & D customer support strategy by addressing users' real concerns and level of vendor satisfaction



- FORECAST your market's potential efficiently with intelligence on total market size, market share, and the competition's customer-based sales volumes. The report tells you where the market is expanding and where time is running out for new entrants.
- INCREASE <sup>level of vendor satisfaction</sup> your market share with an insider's look at users' purchasing plans, philosophies, and EDI implementation strategies. Find out what kinds of companies implement or fail to implement EDI. Why? If not, why not?
- GET INSIDE INFORMATION on competitors' new products, price schedules and services, mergers, acquisitions and personnel changes

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**Companies Profiled:**

AT & T  
 British Telecom/McDonnell Douglas  
 Control Data  
 Federal EDI Network Services  
 Foodcom  
 GE Information Services  
 Harbinger  
 Kleinschmidt Computer  
 Sears Communications Company  
 Sterling Software Odernet  
 EDI Inc.  
 IBM  
 MSA  
 TranSettlements  
 Unisys.....

*read more about*

MORE

[NOTE: TORREY, NANCY--ARE THESE THE BEST COMPANIES TO MENTION? SUGGESTIONS? ARE TANDEM, STRATUS, PRICE WATERHOUSE PROFILED IN REPORT?]



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Available December, 1989

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[**INTERPERSE QUOTES WITH COPY/GRAPHICS**]

"EDI transactions are one-tenth the equivalent paper document costs." from INPUT's EDI InterTrends

7 "Aggregated EDI market growth <sup>for</sup> ~~projections~~ <sup>- software product</sup> represent/a nearly 40% compound annual growth rate through 1994, with EDI services, SW and professional services becoming a nearly \$1.4 billion market by that year." from INPUT's EDI InterTrends

[**NANCY: IS THIS GIVING TOO MUCH INFO AWAY? CAN WE TURN THIS QUOTE INTO A TEASER?**]

---or---

"The EDI marketplace is overdue for a consolidation. There is increasing evidence that this is starting." from INPUT's EDI InterTrends

"The expected, but not materialized, RBOC (Regional Bell Operating Companies) market entry and the lack of market development activities by second-tier players has allowed leading vendors to achieve high growth rates while others have been left far behind."



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**INTERNational Trends**--developments and implementation in Europe, Asia, and North America

NOT OBVIOUS IN REPORT  
TITLE

**Standards INTERfusion**--the merging of disparate standards (ANSI vs. EDIFACT) into a single, worldwide EDI standard

**INTERgration**--of EDI systems with other data processing systems

**INTERworking**--EDI data networks linking together.

### Be Prepared for EDI Opportunities

EDI Intertrends offers much more than discussion of current trends and issues. This essential report gives recommendations, opportunities, and conclusions to both vendors and users, based on in-depth market survey research and intelligence. Vendors can validate their marketing strategies to gain entry and market share in the expanding EDI markets, and prepare to defend markets that are being challenged. <sup>3</sup>IS Managers, Marketing Managers, and CEO's can maximize the benefits of their EDI operation and minimize potential pitfalls such as shallow integration, legal issues, and cost concerns. <sup>3</sup>

### Your Basic EDI Marketing Building Blocks

INPUT's EDI Tutorial gives you the basic building blocks to create your own EDI marketing materials. Whether you are introducing EDI internally, implementing EDI at customer installations, or selling EDI software, hardware, or consulting services, you have all the information you need to explain EDI and communicate the benefits.

### Your One-Stop EDI Reference Guide

INPUT's EDI Intertrends is the *EDI Almanac* for the 1990's, combining valuable strategic information with encyclopedic coverage of the EDI world for both vendors and users. This report clearly explains and analyzes the history and development of EDI, the dangers and opportunities inherent in the standards controversy, the relationships between EDI applications and other data interchanges, and other major issues in the EDI world. The EDI Glossary is an invaluable one-stop reference guide for any participant in EDI, whether new to the field or an EDI veteran.





(GRAPHICS)

EANR VIII-16

*no chart*

*only room for 1 exhibit*

[QUERY: BLOCK OUT NUMBERS?]

### EDI Market Forecast

Caption: "Vendors: Forecast your potential market for network services, software, professional services, federal and commercial markets."

EANR V-1

*no chart*

[QUERY: BLOCK OUT NUMBERS? WHICH ONES?]

### THIRD-PARTY NETWORK RATINGS

Caption: "Make informed choices based on INPUT's market survey research."

#### EDI Intertrends -- North America

— Introduction

— Executive Overview

An Electronic Data Interchange Tutorial

User EDI InterTrends

EDI Network Service InterTrends

EDI Software InterTrends

EDI Professional Service InterTrends

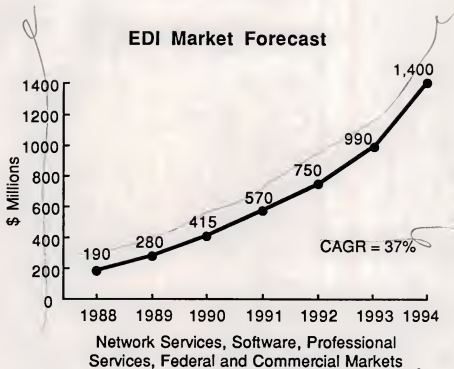
EDI Market Forecast InterTrends

Opportunities and Conclusions

Glossary of EDI Terms

? *Good Topic Headers*  
*more informative*  
*Sub-headers*





← is CAGR accurate?  
?  
y/s

21

User expenditures  
—  
Vendors can calculate potential market

leave out:

~~Should we include~~

NO!

#5



EANR V-1

Third-Party Network Ratings

*this title needs changing  
help*

Network (Number of Responses)	Primary and Secondary Networks User Averages					
	Technical Quality	S.E.*	Customer Service	S.E.*	Price	S.E.*
GE Information Services	3.9	.15	3.6	.18	3.6	.19
Sterling Software	4.3	.17	4.3	.19	3.7	.24
McDonnell Douglas Corp.	4.2	.17	4.1	.17	3.6	.17
Control Data Corp.	4.1	.22	4.0	.32	4.4	.30

*GE Information Services  
Sterling Software  
McDonnell Douglas Corp.  
Control Data Corp.*

\*S.E. = Standard Error of the Mean

*5 = best , 1 = poor*

*ratings for users*

*delete*

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~~115~~

