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EDI
EUROPEAN PERSPECTIVES

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EUROPEAN EDI MARKET

- 1986 Dollars 3M
- 1991 Dollars 175M
- AAGR 130 Percent

KEY EUROPEAN FACTORS

- International Trade
- Standards
- Harmonisation
- Telecommunications Environment

EDI IN EUROPE

- Initiatives
- Vendors
- Markets

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EDI INITIATIVES EUROPE

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ODETTE

- Fragmented National Development
- 60 Participants

DISH

- Trials Q4 '86
- Extensions To:
  - Banks
  - Insurance
  - Importers

EEC CO-ORDINATED PROJECTS

- Cost 306
- CD Project
- Trade Facilitation

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VENDOR ACTIVITY
EUROPE

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GEISCO

- Motornet
- Trade Express
- EDI Express
- VASP Agreements

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IBM

- BNS
- Joint Ventures:
  - Paribas

McDONNELL DOUGLAS
BRITISH TELECOM

- Edinet Limited
- Complimentary Strengths
- Cross Industry Approach

ICL/MERCURY

- Tradanet
  - 100 Users
- Penetration Pricing Strategy
- OSI Support

ISTEL

- Edict
  - 80 Users
- UK Network
- Fixed Usage Pricing

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SOFTWARE AND PROFESSIONAL SERVICES

- Standards Evolution
- Application Integration

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BUSINESS ENVIRONMENT

- Reduced Opportunities for Administrative Cost Saving
- Increased Domestic and International Competition
- Need for Co-Operation

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UK EDI MARKET

- 1986 Dollars 2M
- 1991 Dollars 75M
- AAGR 100 Percent

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UK MARKET

- Open Telecommunications Standards
- XI Standards
- Proactive Industry Associations

FRENCH MARKET

- 1986 Less than Dollars 1M
- 1991 Dollars 45M
- AAGR 160 Percent

FRENCH MARKET

- Growth Phase 1988
- Gradual Liberalisation
- Low Levels of Awareness
- Legal Constraints
- Fragmented Industry Structures

BENELUX

- Highly Regulated Telecommunications Environment
- Clearinghouse Services Used by Companies in Retail Distribution Chain--IBM/GEISCO

NORDIC COUNTRIES

- High Labour Cost
- High Dependence International Trade

WEST GERMAN MARKET

- Dollars 35M by 1991
- High Level of Awareness
- PTT Monopoly
- Implementation on Private and PTT Networks

ITALIAN MARKET

- Dollars 20M by 1991
- Low Levels of Awareness
- Least Mature Telecommunications Environment
- No Current Vendor Involvement

KEY ISSUES

- Standards
- Networks
- Software and Support

ENVIRONMENTAL ISSUES

- Legal
- Security
- Organisational