Presentation
to
JIPDEC

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San Francisco • New York • Washington, D.C. • London • Paris • Frankfurt • Tokyo

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Presentation to JIPDEC

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EEDI • 1994

Today's Environment for Electronic Commerce

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Today's Environment

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

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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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Today's Environment

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

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

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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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In Japan We Are Most Concerned With:

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

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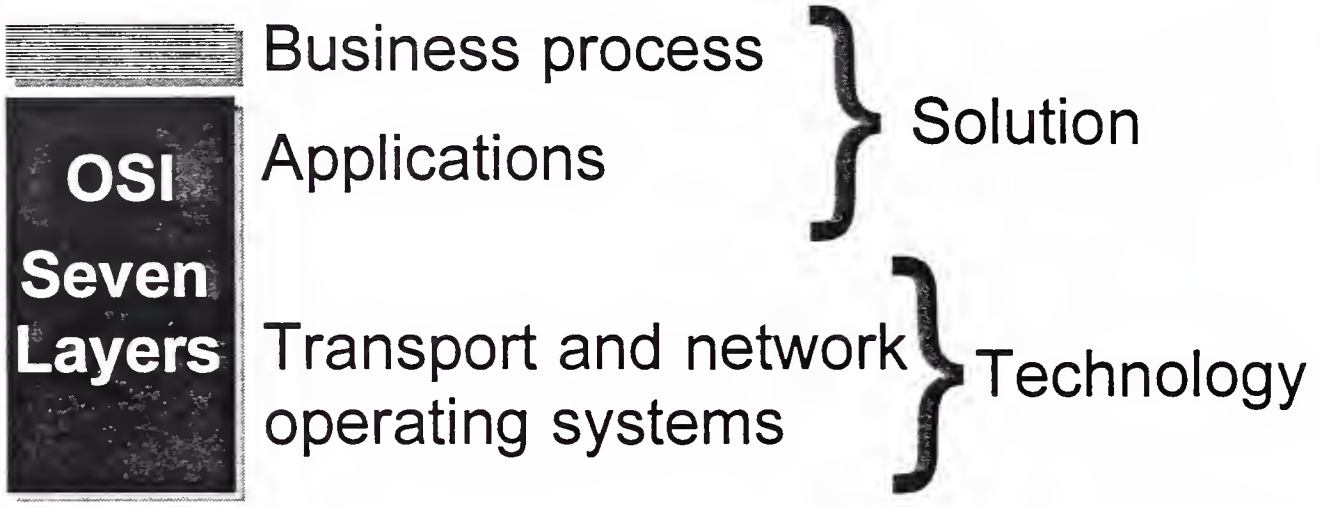
EC Consistant with Open Systems and Re-engineering



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Electronic Commerce Submarkets

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

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Electronic Commerce Submarkets

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

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EDI As an Indicator of EC Trends

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

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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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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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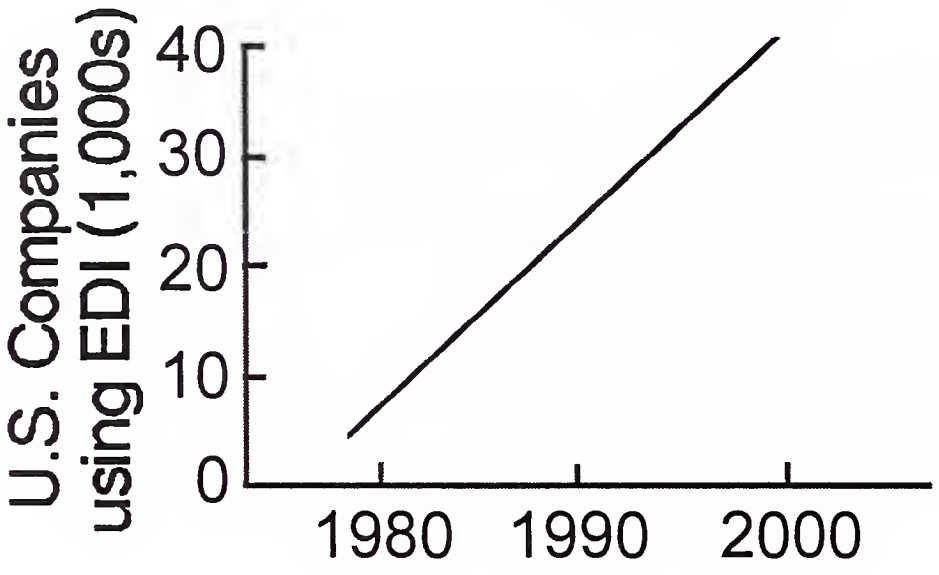
EDI Use is Steadily Growing



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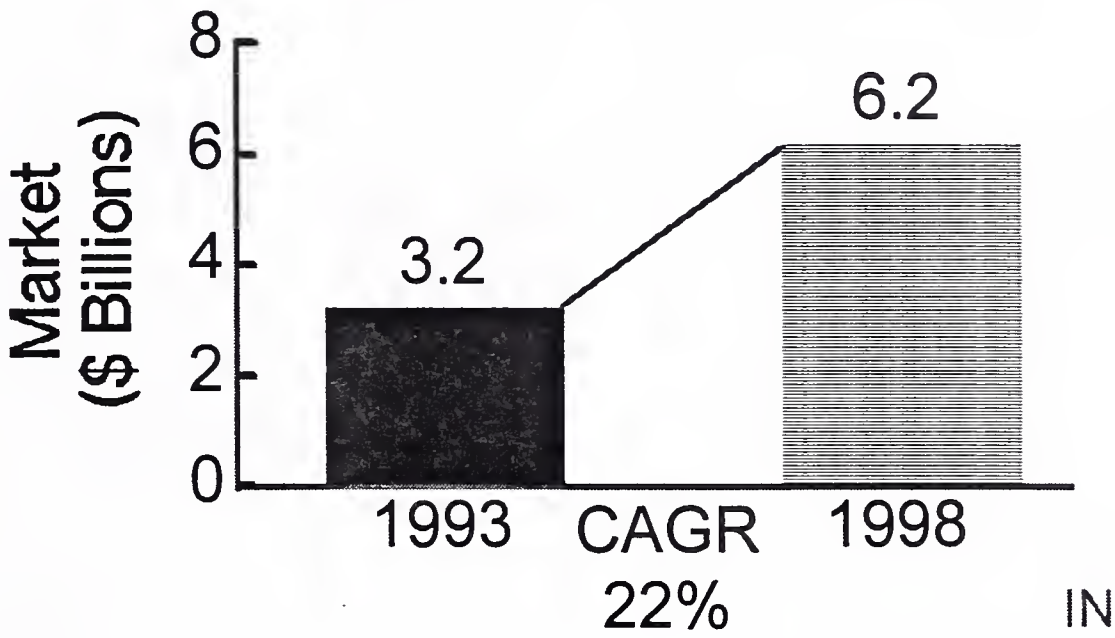
U.S. EC Software and Service Market



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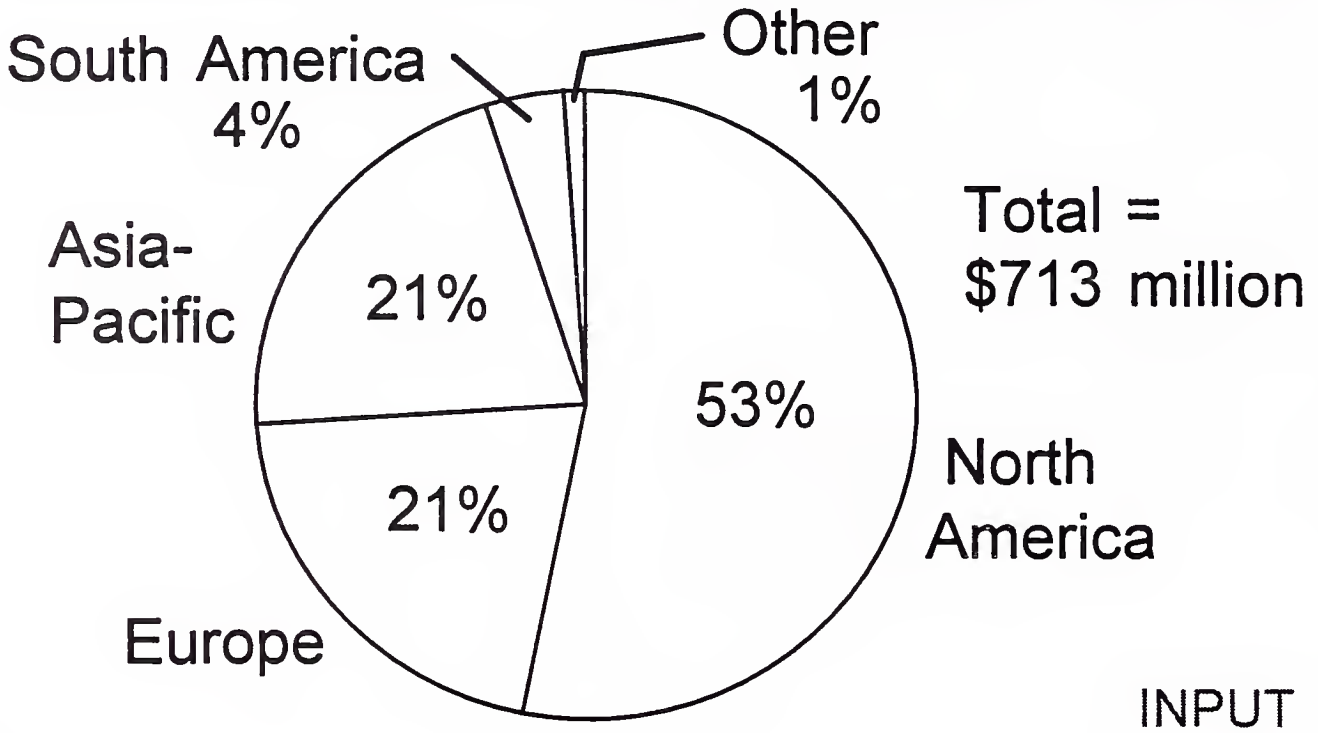
1993 EDI Markets by Region



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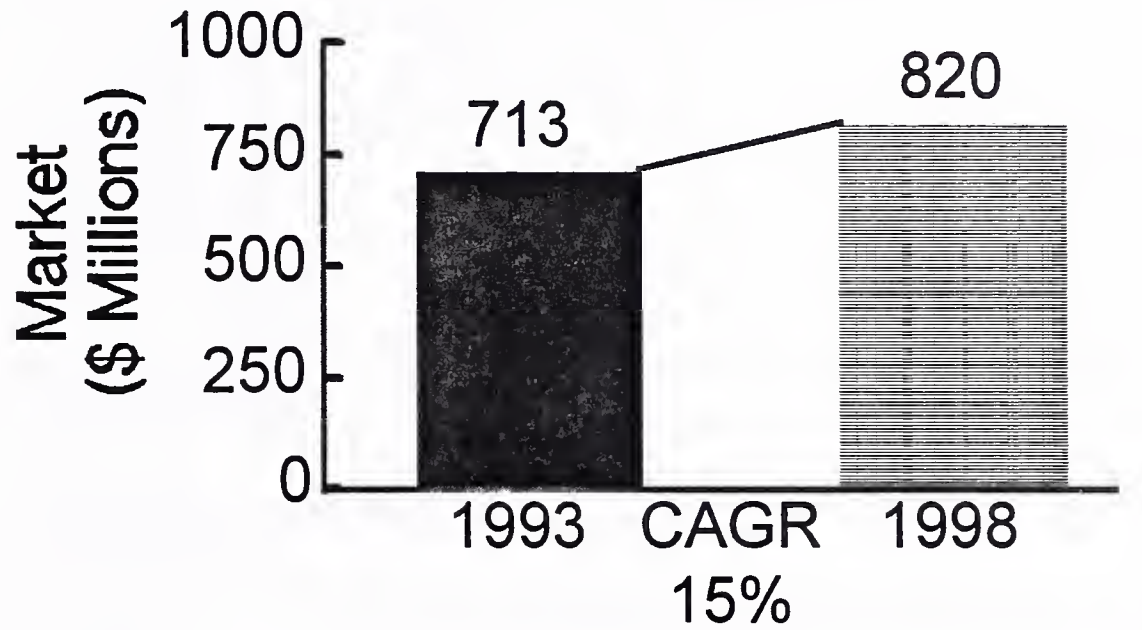
Worldwide EDI Market 1993-1998



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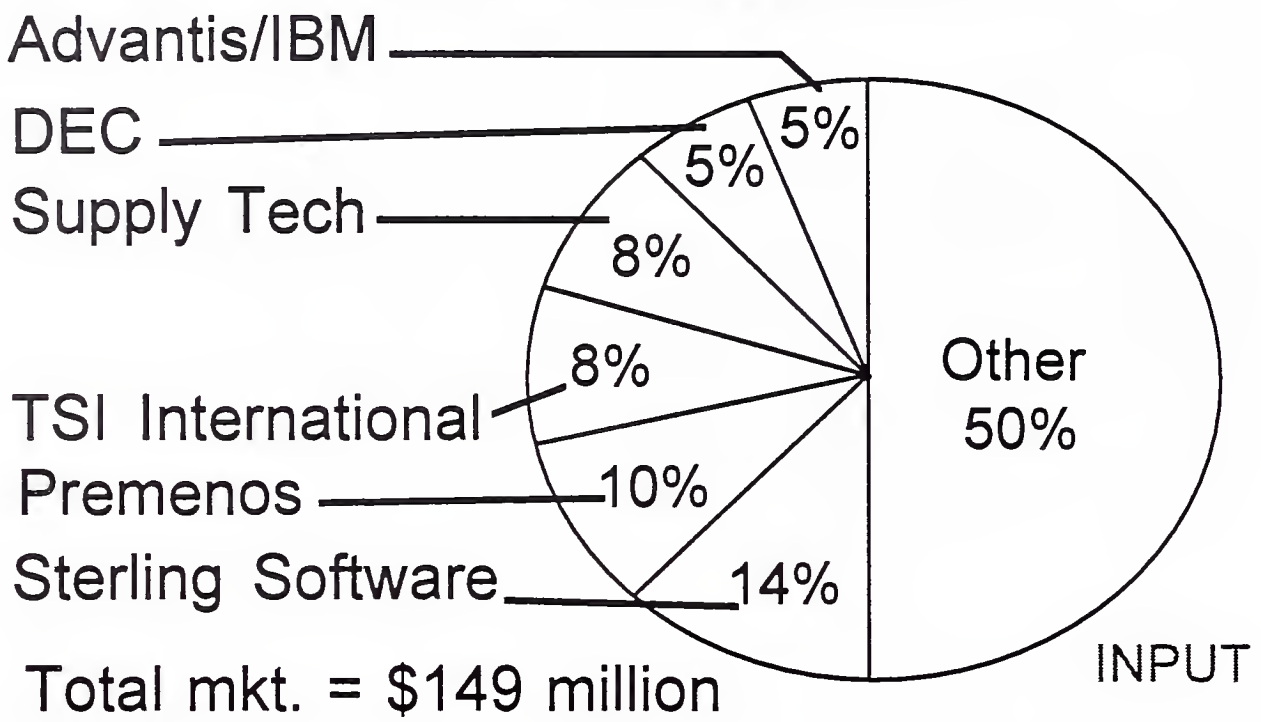
1993 Market Share Leading EDI Software Vendors



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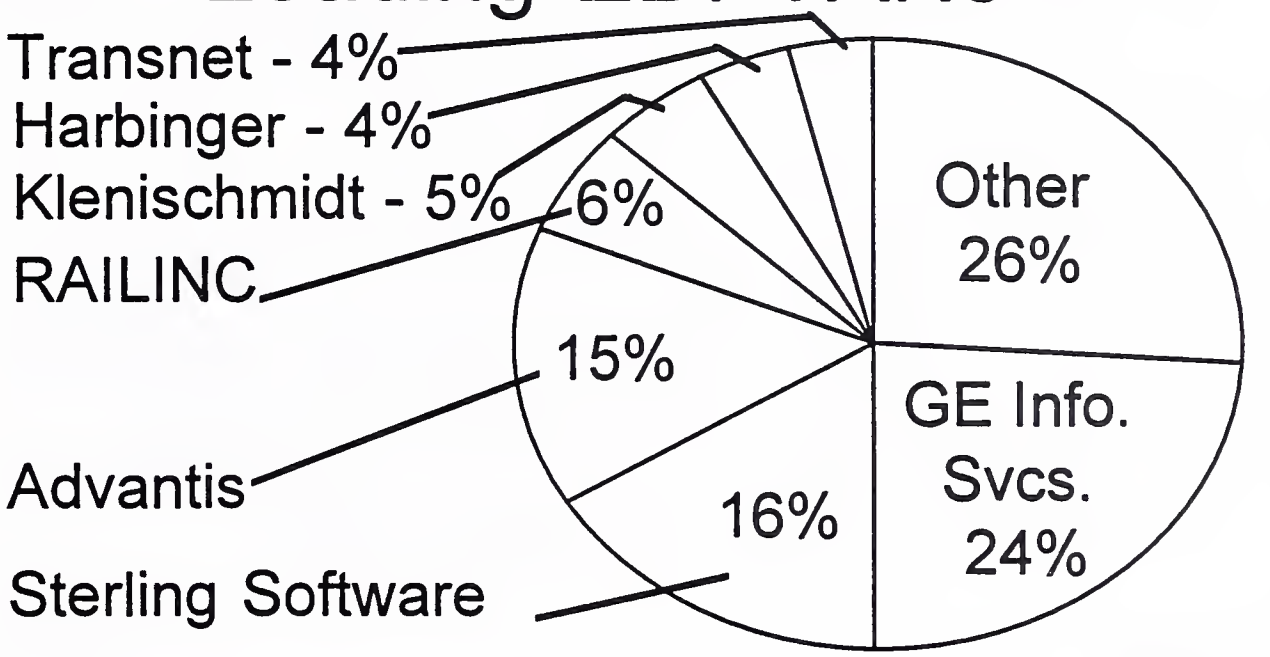
1993 Market Share
Leading EDI VANs



Total mkt. = $250 million

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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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And Others (i.e., Domestic)

- NTT
- Fujitsu
- United NET
- INTEC
- NRI

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Internet

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

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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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U.S. Competitive Issues

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

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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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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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