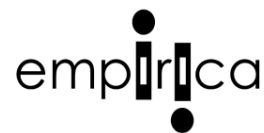


e-Business Trends

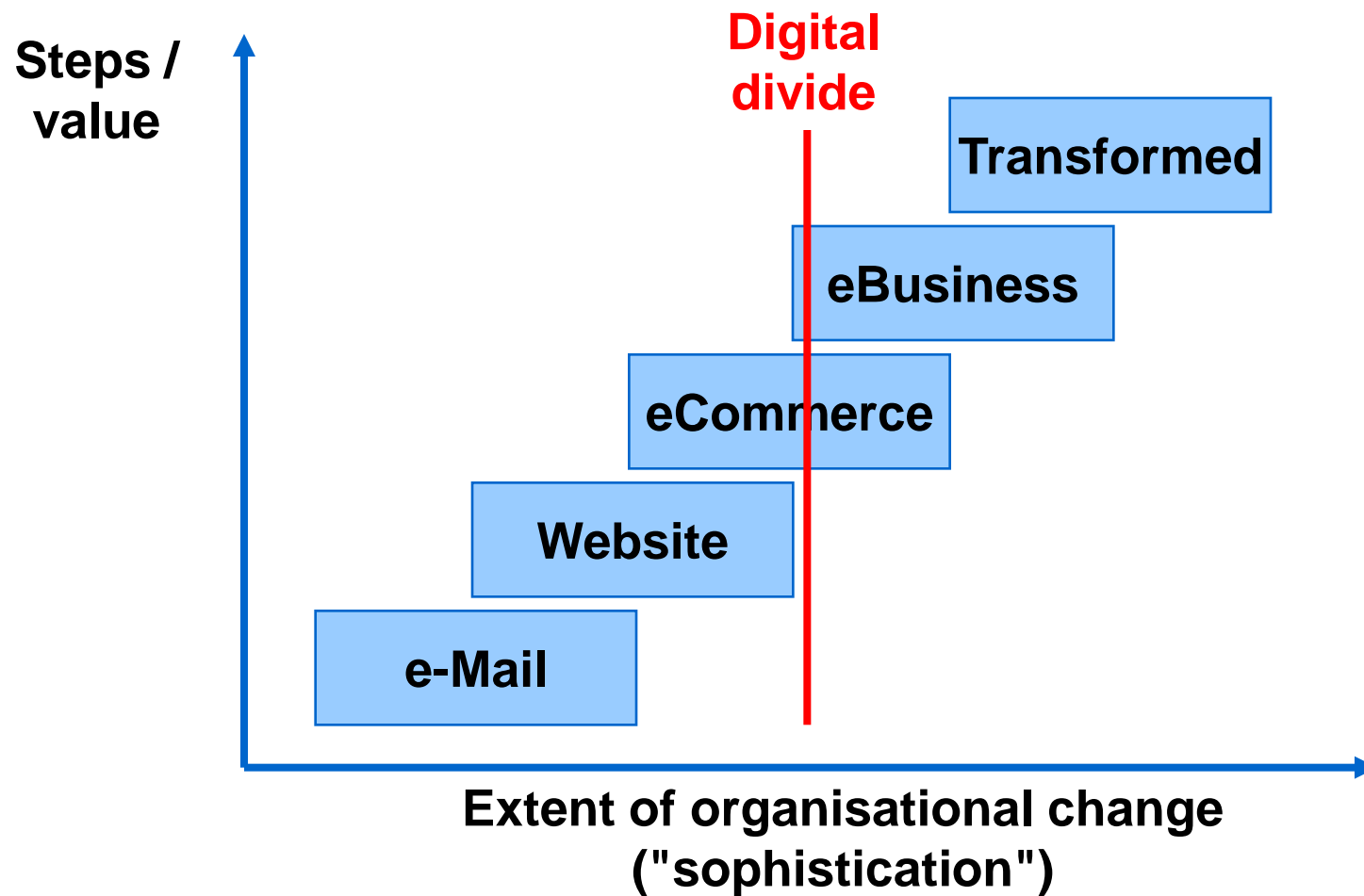
**Bridging the gap from 'simple'
to advanced data exchanges**

**Hannes Selhofer
empirica GmbH, Bonn**



**CEN Industry Conference on Electronic Invoices,
18 June 2009, Brussels**

The eMaturity Ladder



Share of business processes conducted electronically

"In summary, which of the following best describes the relevance of e-business for your company:

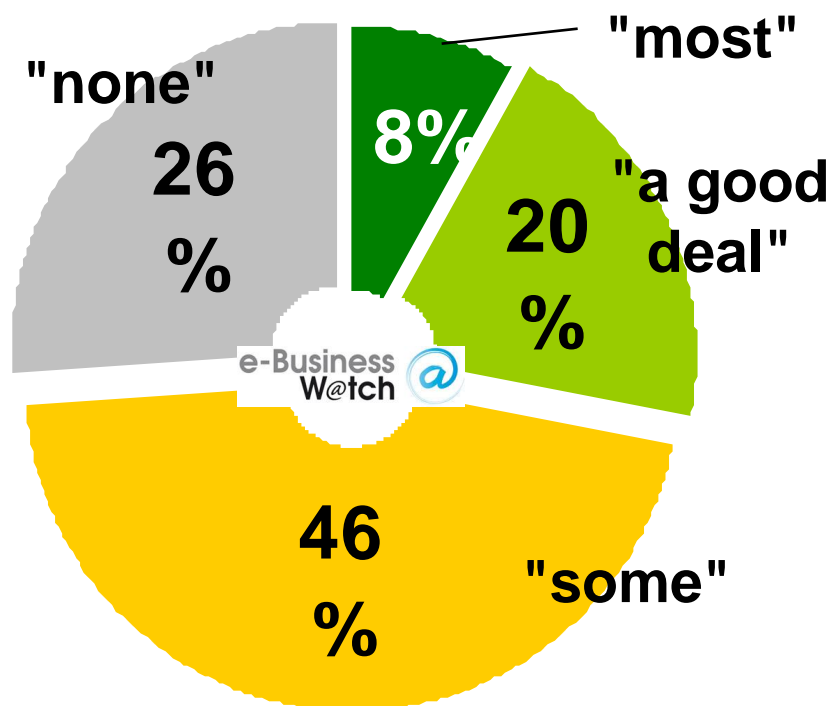
*Would you say that **most** of your business processes are conducted as e-business, **a good deal** of them, **some**, or **none**?"*



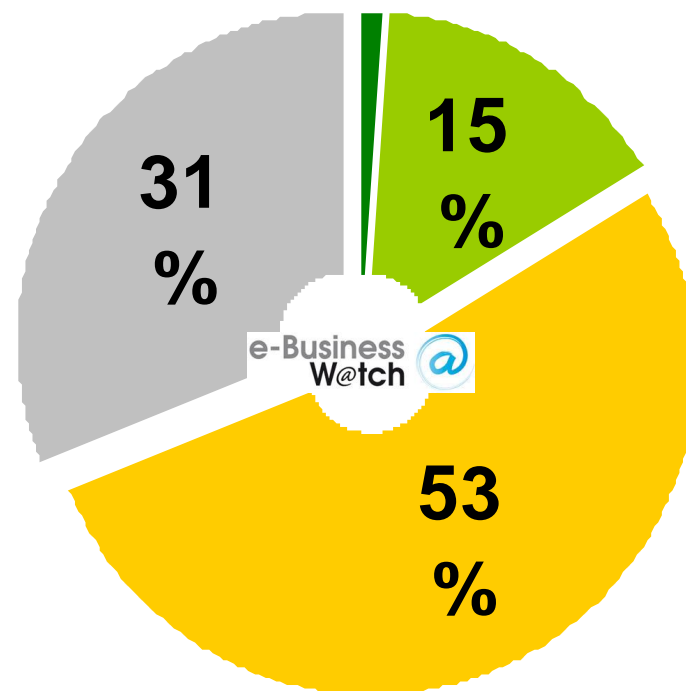
(e-Business telephone surveys among IT decision makers - 2007, 2009)

Share of business processes conducted electronically

Chemical, rubber and plastics industry (2007)



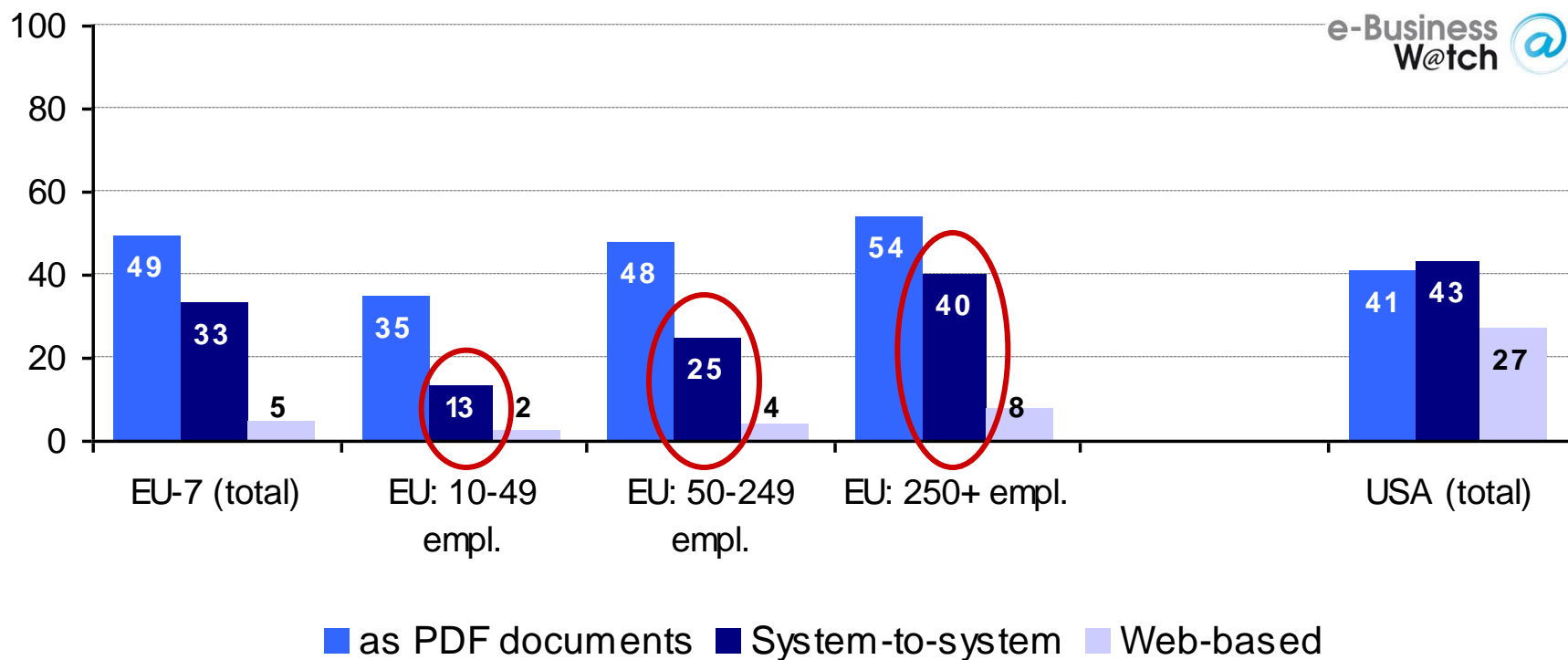
Glass, ceramics and cement industry (2009)



(Self perception by companies, e-Business Surveys 2007/09)

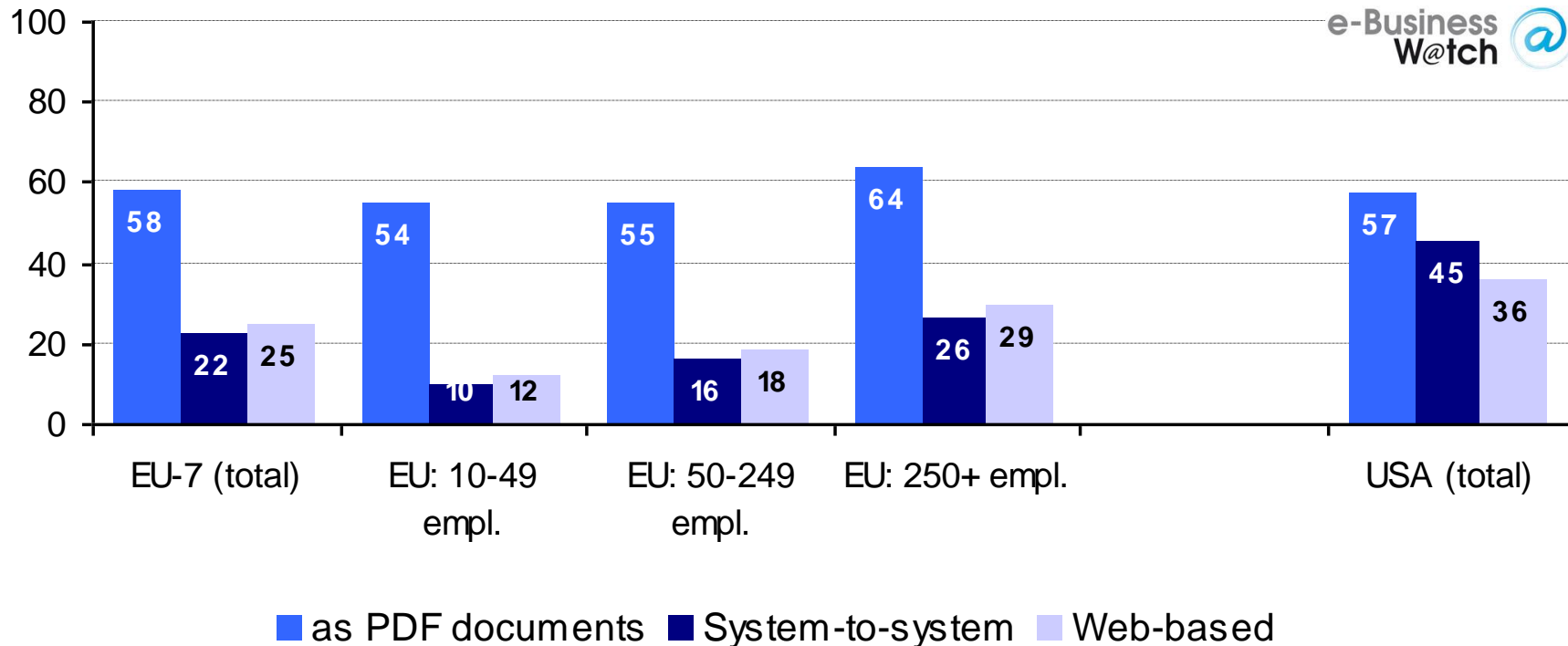
Adoption of eInvoicing

Chemical, rubber and plastics industry (2007): Companies **sending** electronic invoices



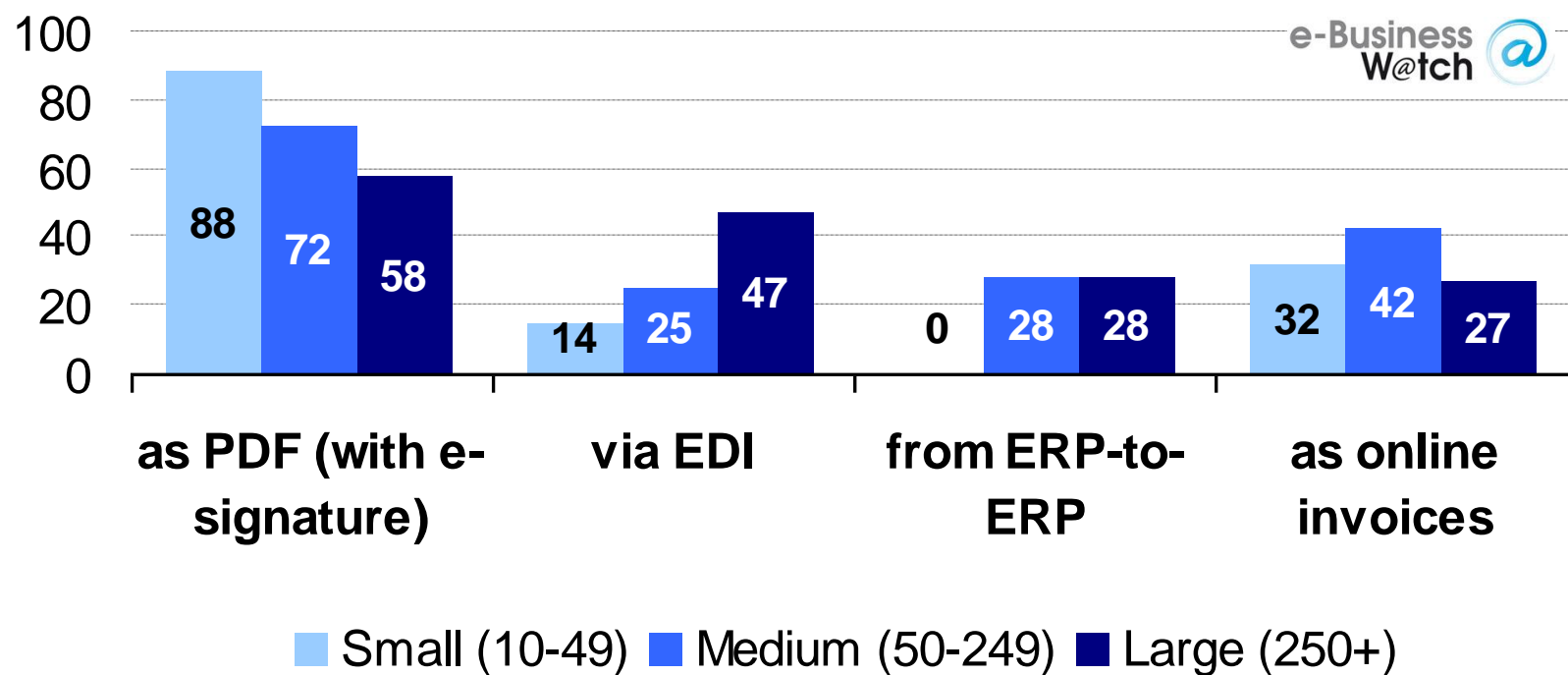
Adoption of eInvoicing

Chemical, rubber and plastics industry (2007): Companies **receiving** electronic invoices



Methods used for e-Invoicing

**Glass, ceramics and cement industry (2009):
(% of companies using e-invoicing)**

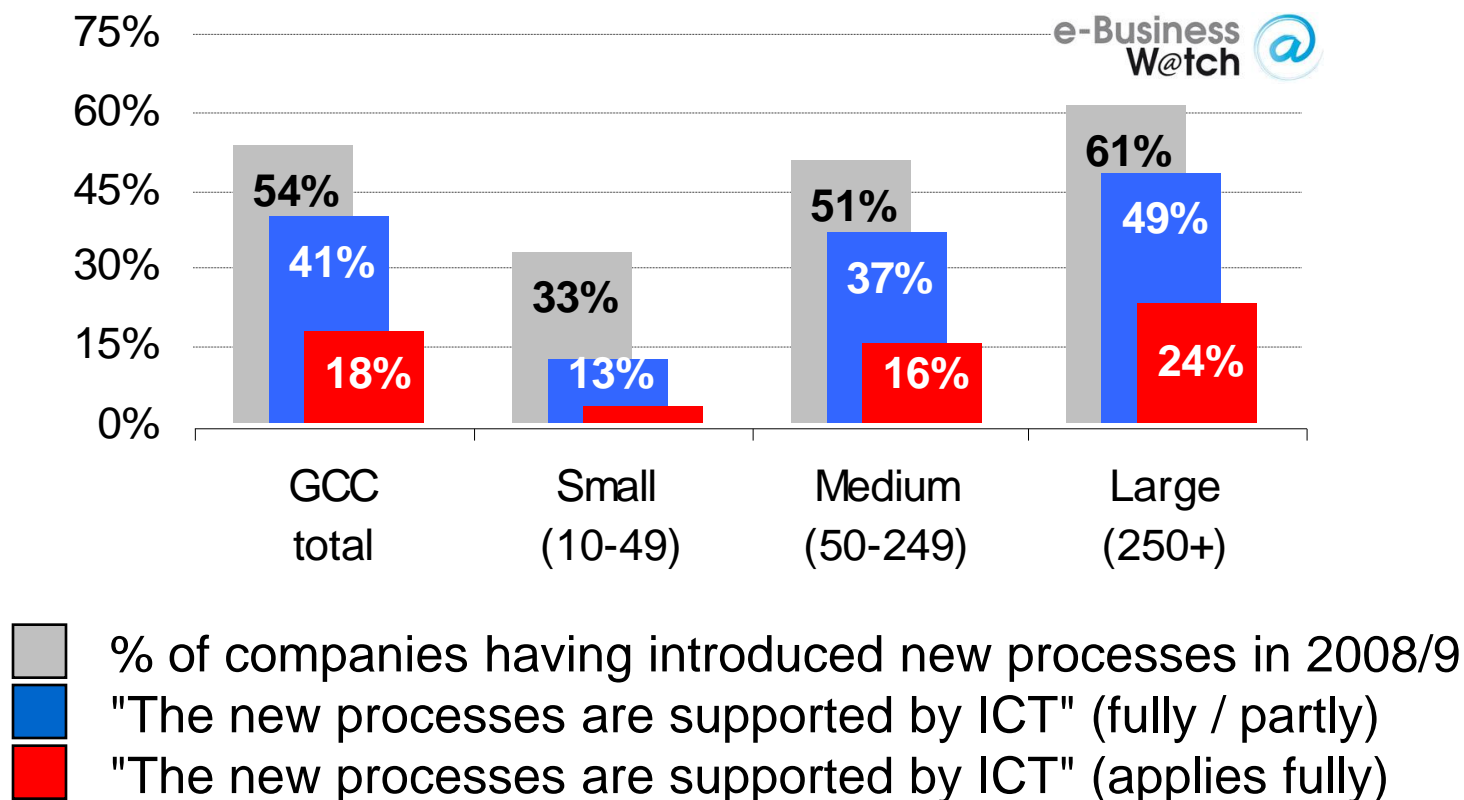


General e-business trends

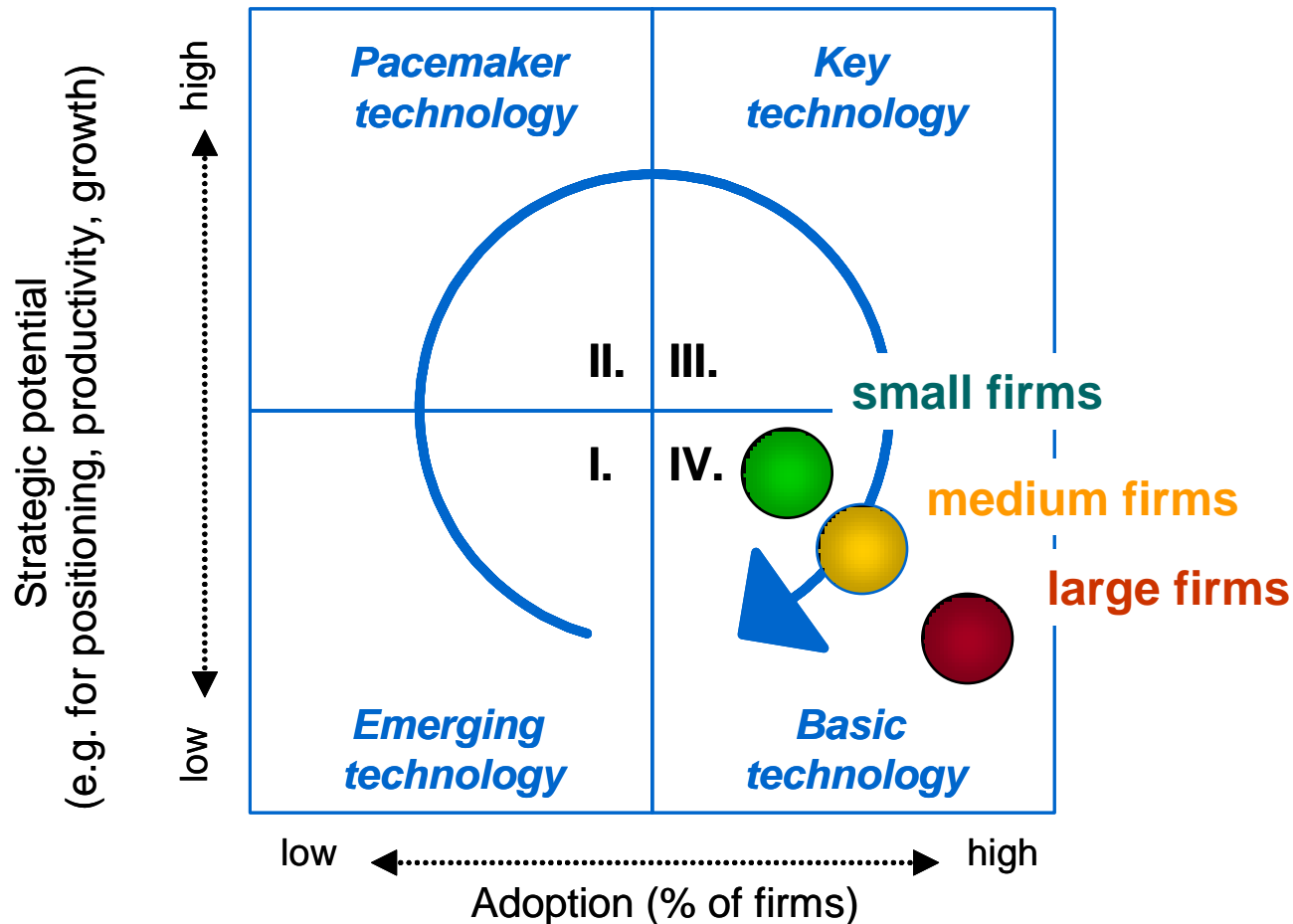
- **Improved quality of companies' ICT infrastructure**
- **Externally: focus of activity is shifting from accomplishing transactions ("e-commerce") to providing services**
- **Main internal benefits: improved processes**
 - **Better information management**
 - **Improved transparency of processes**
- **Outsourcing & e-intermediaries**
- **ICT and innovation inseparably linked**

ICT as a major enabler of process innovation

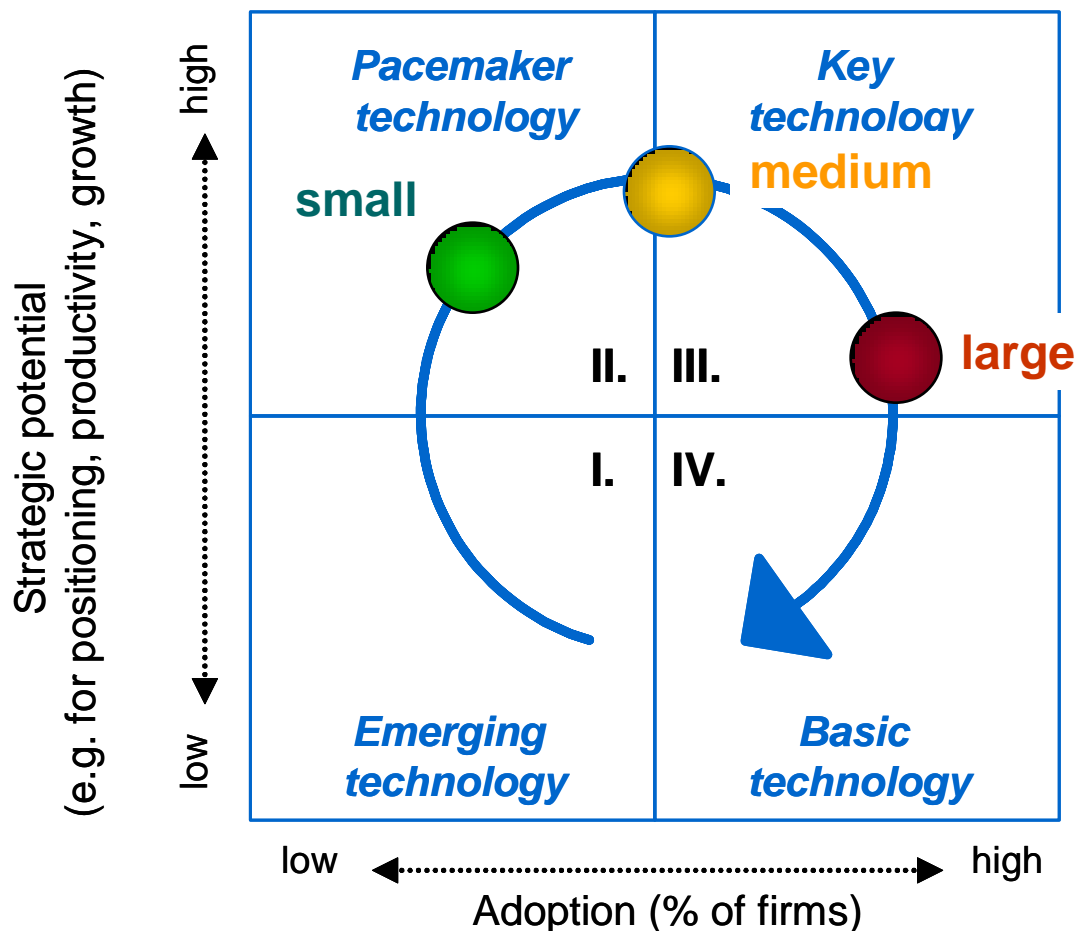
Example: Glass, ceramics and cement industry (2009)



Basic ICT infrastructure – a commodity



Advanced e-Business processes – the digital divide



Key action lines to bridge the digital divide

- **For EU innovation & economic policy**
 - Stakeholder coordination
 - Reduce uncertainty and risk - continuous improvement of legal framework (European dimension)
- **For industry associations & businesses**
 - Strategic approach to e-business
 - Take a critical look at value chain & business processes – what could be improved? ("Kaizen"!)
 - Focus on customers – what matters for them?
- **Other issues**
 - Promote wider use of e-standards

Summary

- **Digital divide** between 'simple' and advanced e-business activity
- **Good progress in ICT adoption**, but:
 - Technology (hardware & software) in itself is not the key parameter;
 - **business processes** matter
- **Advanced e-business is typically closely linked with process innovation** in the company
 - ... and thus the basis for product innovation
- **Accelerating advanced e-business capabilities as a means to strengthen Europe's competitiveness**

"Process need" as a key driver of innovation

*" 'Opportunity is the source of innovation' ...,
'Necessity is the mother of innovation.' "*

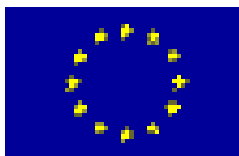


**Peter F. Drucker (1909 – 2005),
in: "Innovation and Entrepreneurship"**

More information

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A research project led by

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All sector studies of 2008 available at
[http://www.ebusiness-watch.org/
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