Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

December 5, 2014

AIIM CONFERENCE 3½ MONTHS AWAY

AIIM International is expecting close to 800 paid attendees for next year's annual conference, which is set to run March 18-20 at the Manchester Grand Hyatt in San Diego, CA. The event has grown steadily each year since it was re-launched as an educational focused conference in 2012. New this year is that a ticket to the annual AIIM party and awards ceremony is included at no extra charge with a conference pass. The gala will be held on the USS Midway, a decommissioned aircraft carrier docked in the San Diego harbor.

For more information:
http://www.aiimevents.com

White paper available on TWAIN Direct

The TWAIN Working Group has published a white paper on its new TWAIN Direct initiative. Some of the goals of TWAIN Direct, as listed in the white paper are to
- support direct communication between applications and scanners
- simplify development
- support modern programming languages
- support the full functionality of scanners

The white paper is targeted at ISVs who want to include scanning functionality in their software. It states, "Applications represent the needs of the end users, and there are considerably more application writers than scanner vendors. Improving the development experience in this area offers the most potential for influencing the market. The expectation is that focusing on this segment will inevitably lead to benefits for the other segments."

For more information on TWAIN Direct, contact Erin Dempsey, Marketing Director, TWAIN Working Group, erin.dempsey@twain.org; PH (910) 574-6631.

Cloud Fax Market Exploding

In our market, scan-to-e-mail is often thought of as a fax replacement. And nobody you know would buy a dedicated fax machine these days, would they? This might lead you to think that the fax market, if not dead, is at least dying. The only thing is, that doesn't seem to be the case.

"We've been in business for 18 years," John Harrison, SVP of sales and marketing for **Concord Fax**, a developer of cloud-based fax software, told *DIR*. "And over the past four years, we've seen much more radical growth than we saw in the previous 14 years. It's been start-up like growth."

The key is that instead of utilizing more traditional fax technologies, users seem to be transitioning in droves to cloud-based fax—a technology which actually pre-dates the current cloud software craze by several years. "While we are seeing a decline in on-premise fax, especially in the use of fax servers, we are definitely seeing growth in cloud-based fax services," said Rick Stevens, director of enterprise marketing at **j2 Global**, the parent company for eFax. "I think you are seeing the end-of-life for fax servers. Nobody is really putting any innovation into fax server technology."

"Overall, in recent years, people have been getting more comfortable with cloud technologies," added Harrison. "Ten years ago, there was a lot more skepticism. In addition, businesses want to focus their IT resources on their core systems. When they look at their old fax servers chugging along, they realize it's not a good place for them to invest.

"Running a fax server can be fairly complex. You have a database to worry about, in addition to image formats and telecoms. A lot of businesses do not have experts in those areas, so why not have someone else do it for them? Ten years ago, they might not have trusted a cloud vendor with these types of mission critical applications, but that has changed."

Just to be clear, although eFax has probably the most well known consumer/SOHO cloud fax application, Stevens' focus is larger, enterprise accounts. This is also

Concord's target market. Both executives told *DIR* that healthcare represents their companies' largest vertical.

"Our key markets are regulated industries," said Stevens. "These include healthcare and legal, followed by real estate and banking and financial services. There is more security in analog transmissions. HIPAA compliance is a huge driver for fax use. You can't be e-mailing patient information around."

"More than 55% of our traffic is related to healthcare," said Harrison. "There are two primary reasons we still see fax used instead of e-mail. The most common one is that fax is so easy to use and so ubiquitous. Through fax, you can get a document from anywhere to anywhere, no questions asked.

"The second reason is security. Faxed documents are sent point to point—they are not relayed through servers. And both the sender and receiver get a timestamp, which is a differentiator. When you send an e-mail and receive e-mails, you might get times as to when each event occurred, but you don't know where that e-mail has been in between." (On a personal note, this week I had someone send me updated conference call information 10 minutes before the scheduled call. I received it three minutes after the call was scheduled to start.)

Harrison noted that the bulk of Concord's faxes don't involve paper. "The massive majority of our traffic is generated from business applications," he said. "On the delivery side, it involves accepting a fax and rendering it as a TIFF or PDF and then delivering it as an e-mail attachment or into a folder. You might say that there's almost no paper involved in fax anymore.

"The majority of our traffic is either at the start or end of a business process. This might include a patient referral being sent from a primary care physician to a specialist. We might be compiling the fax from information in an EHR system and delivering it to another EHR system."

Harrison added that Concord has approximately 35 partners, many of whom OEM the ISV's cloud fax technology. j2 has similar partnerships with ISVs, many of which are in the EMR market. "But we still do a lot of paper-based faxing," added Stevens. "One of our largest customers is a very large high-tech company. I think they have more MFP devices than almost anyone in the world. In general, most of their contracts require a wet signature, for which they utilize fax."

CONCORD AN ABBYY PARTNER

DIR was introduced to **Concord** at the recent **ABBYY** Technology Summit. The Seattle area ISV was a sponsor and had a booth in the exhibitors' area. "When our customers use our technology to receive faxes into their business processes as TIFFs or PDFs, ABBYY's technology will commonly be packaged with it to do some automated recognition," said John Harrison, SVP of sales and marketing for Concord. "It might be packaged with an EHR system, for example, to help extract data from incoming patient records."

Pricing for a cloud fax service is typically based on volumes and follows a subscription model.

According to Harrison, Concord's technology is typically installed as a replacement for traditional fax servers and does not compete very often against alternative messaging mediums, such as secure e-mail. "Typically our customers have a regulated business process that relies on fax, and they are looking for a better solution," he said. "They don't want to manage their own fax servers any more, and they might be dealing with paper faxing, which can be expensive and a nightmare from a security standpoint."

Added Stevens, "In general, our customers aren't really focused on the ROI. They are really just looking for a better model for sending and receiving faxes—and by utilizing eFax and an Internet connection, they can do that from anywhere. Cloud fax helps them improve their processes. Through APIs, cloud fax can be tied directly into back office applications.

"Cost is still a driver. Customers are not willing to spend more than they were before, but it's really about improving efficiency."

IS 3D FAXING ON THE HORIZON?

j2 Global, Inc., the parent company for eFax, has done a nice job diversifying itself in recent years. The Los Angeles-based company now has two divisions. Its Business Cloud Services Division offers a variety of technologies in addition to cloud fax. These include virtual phone, hosted e-mail, e-mail marketing, online backup, unified communications, and CRM solutions. j2 also has a Digital Media Division that was launched when it acquired Ziff-Davis in 2012.

j2 reported more than $500M in revenue in 2013 and recently reported 20% growth for Q3 2014. This included an EBITDA of $64.7M and operating margins of 30%. Cloud Services generated a little more than twice as much revenue as Digital Media.

But what about the future of its cash cow fax business? "We think it's a good sign that as 3D printing technology has developed, many of the devices include fax capabilities," said Rick Stevens, director, enterprise marketing at j2 Global. "I think that's an affirmation that fax technology will continue to remain relevant.

"Think about a manufacturer. If they don't have a 3D printer on site, every time they need parts, how are they going to send the information to the printer? It may be that faxing evolves from sending documents to other types of transmissions."

Harrison said that occasionally Concord will go up against a secure e-mail offering. "A customer might be looking for a more optimal way to integrate with their workflows," he said. "And there is a lot of value in secure e-mailing. Still, there is a high adoption curve and a business has to get its partners to subscribe to the same platform or service. That is where the concept starts to fall down. Imagine if you run a hospital that is trying to communicate with up to 2,000 special providers in its immediate community through a secure e-mailing platform." (Teaser: Our next story is about a protocol called Direct Messaging that attempts to create a better electronic messaging solution for the healthcare industry.)

So, what are the biggest challenges facing a cloud fax service provider like Concord? "Right now, it's an internal challenge of continuing to build our infrastructure to sustain growth," said Harrison. "Over the next two to three years, I think we'll just be trying to keep up with increasing market demand.

"After that, there's no doubt that within a five-yearish timeframe, we're going to get to a point where EHR systems are being integrated more effectively with each other. They're going to find a standardized way to exchange documents without using fax. That's on the horizon, but not something that is affecting our business today.

"The current fundamental problem is how to connect large providers like hospitals with the primary care physicians, blood labs, and physical therapists down the street. These smaller players have been slow to adopt EHR, and when they do, each specialty often relies on a different application. Until all those specialty systems can be integrated effectively with the large EHR systems, fax will still be there as the primary method of communication."

For more information:
http://www.concordfax.com/default.asp; http://www.j2.com

[*Editor's note: We originally interviewed long-time document imaging industry marketing executive Tim Dubes for this story, as he was working for j2 at the time. He has since accepted a position as director of marketing at **Ephesoft**.*]

Direct Messaging an Emerging Fax Replacement

Solving the problem of communication among healthcare providers is exactly what **Inofile** is trying to do. Inofile's cloud-based Kno2 product can

leverage the U.S. federally developed Direct Message protocol to facilitate exchange among providers with disparate platforms. Recently, Inofile, which already has a partnership with **Kodak Alaris** to integrate scanned documents with Kno2, announced a partnership with healthcare patient portal provider **Access My Records** (AMR).

Direct Messaging is an outgrowth of the U.S. federal's government's Direct Project which was launched in 2010. According to the Direct Project's Overview, "The Direct Project specifies a simple, secure, scalable, standards-based way for participants to send authenticated, encrypted health information directly to known, trusted recipients over the Internet." Its use is also encouraged through federal government reimbursement programs, which offer incentives to providers to meet various "Meaningful Use" standards.

On the most basic level, Direct Messaging is secure e-mailing for healthcare providers. Unfortunately, like most secure e-mail platforms, it can be difficult to use. "We launched Kno2 in February, specifically targeting it toward healthcare specialists whose EHR systems typically don't offer direct messaging capabilities," said Therasa Bell, president and CTO of Inofile. "These include student healthcare clinics, rehabilitation facilities, behavioral health specialists, and long-term care facilities.

"Let's say, for example, you operate a nursing home and you have three or four hospitals knocking on your door that want to give you a Direct Messaging address and log-in information. It can get complicated when you have multiple addresses and portals you have to deal with to retrieve your messages. However, if your facility is utilizing Kno2, you can counter that by giving the hospitals your own Direct Messaging address to use for sending files to you.

"These addresses are designed to replace fax numbers that are often used to initiate workflows in a healthcare facility. So, your billing department might have one direct messaging address, and whoever receives the lab reports, another. One of the Meaningful Use Stage 2 requirements is that 10% of communications with other providers need to go through Direct Messaging. Kno2 offers a means for accomplishing that."

Integration with a patient portal
The integration with AMR offers another avenue for meeting Stage 2 requirements. "AMR is a certified Meaningful Use Stage 2 patient portal," said Leonard Tambasco, CEO of Access My Records. "Our technology is designed to automatically create a patient portal utilizing information from Direct

Messaging. We are integrated with several HIEs (Health Information Exchanges), EHRs, and now Inofile.

"Basically, when a provider wants to share a record with a patient, they just need to include our Direct Message address as well as the patient information. Under the covers, we will utilize this to create a secure portal for the patient, who we will send an e-mail letting them know their record is available. Through our partnership with Inofile, if the doctor is sending a record to another provider using Kno2, we can offer them the option of making the record available to the patient through our portal.

"One of the requirements of Meaningful Use Stage 2 is that providers be able to show that 50% of their patients can communicate with them through a portal and that 5% are actively using it. We offer a way for the providers to achieve that at no cost."

AMR's revenue model is based on charging a small annual fee to patients for a premium version of the portal. "The premium service enables the patient to pull in records from multiple sources," said Tambasco. "We did a survey and found that 49% of people would be willing to pay $20 a year to have the ability to manage records from multiple locations in a single portal.

"Having to deal with three or four different doctors' portals can be very challenging (for the same reasons it's challenging for providers to deal with multiple Direct Messaging portals). Having a centralized record also gives the patient better capabilities for sharing records. This can be especially useful in areas like long-term or home healthcare for elderly patients who might have children that live out of state and want to see what's going on."

"The partnership between Inofile, AMR, and Kodak Alaris gives providers the capability to provide a portal of complete records, including paper records, to their patients, in a very automated fashion," said Bell.

Market coming together
Inofile's revenue model is for providers to subscribe to Kno2. "There are two sides to the gambit when implementing a Direct Messaging solution," said Bell. "The first is the financial incentives that are administered through Medicare and Medicaid reimbursements. The second is that it enables a provider to take the full leap into the technology vs. just doing what is necessary. Instead of becoming a victim of the changes brought on by Meaningful Use, they can benefit by making improvements like replacing their faxes."

"Faxing definitely creates a lot of anxiety in the healthcare community," added Jody Miller, director, healthcare solutions, Kodak Alaris. "You have to be sure you have the right fax number and the right person is picking up the record on the other end. Kno2 is a great solution that addresses these concerns through Direct Messaging."

All parties agree, however, that they do not expect patient portals and Direct Messaging to be adopted overnight. "Though we've been around and doing this for awhile [AMR was founded in 2005], the technology is finally catching up to our vision," said Tambasco. "I expect our portal to become more popular as we integrate tools like those developed by Inofile. We are also working on educating the consumers, doctors, and facilities managers to migrate from faxing by helping them understand that sharing information electronically is the future."

"Initially, we have identified specific markets that are more primed to needing this type of solution and have a higher demand," added Miller. "Behavioral health, for example, requires a high level of privacy, but most institutions in that area are still utilizing a lot of faxing."

"In the end, we will be targeting any healthcare provider that is sending documents to other providers and releasing them to patients through traditional methods," said Bell. "These include faxing, making photocopies, burning images to CDs—in many cases the providers have no other method for achieving distribution. This solution is really targeted at any providers struggling to release information effectively."

For more information:
bit.ly/InofileAMRKodakAlaris; http://directproject.org/; https://inofile.com/; http://www.accessmyrecords.com/

Parascript Latest to Jump into Auto-Classification Market

There has certainly been a lot of conversation in the market recently about document classification. No one seems to doubt there is a lot of value in applying auto-classification correctly. The question seems to be, how and which type of classification technology to apply, and where.

"There seems to a lot of confusion over what is available and what approach to use for specific projects," said Greg Council, VP of products and services for recognition vendor **Parascript**. "That's because there are multiple approaches you can

take.

"There's supervised, unsupervised, and rules-based workflows; there's also semantic and statistical approaches. At the recent **ARMA** (records management) conference, I think some of this confusion started to come to a head, as you had players in the e-discovery market showing up and talking about using their technology in traditional document management applications. Auto-classification has been around for decades—at least the scientific approach to it and some of the algorithms, but, in terms of market adoption, we are still early on."

Parascript, in fact, is brand new to the classification game. Council and Tatiana Vazulina, Parascript's senior product manager, recently gave us a preview of the Longmont, CO-based company's approach to auto-classification—with a product scheduled for release in Q1 of 2015. Parascript's goal is to have the most flexible auto-classification software on the market.

"We've segmented the market by the four different techniques we see being used," explained Council:

■ **document content:** "This includes linguistics and/or semantic approaches. They work well on electronic documents. For scanned documents, some sort of recognition has to be applied first."
■ **rules-based:** "This is a technique used by a lot of traditional document capture vendors. It involves looking for a particular word or phrase."
■ **document attributes**: "This utilizes file information, like when a document was created, last accessed, last modified, etc. It takes advantage of information around the document without having to peer into it."
■ **visual classification:** "This approach looks at an entire document and what is on it. **Beyond Recognition** [see *DIR* 9/28/12] is the ISV we think currently does the best job of it."

"Parascript plans to combine all four techniques in a single solution," said Council. "But, we also want customers to have the potential to just use one of them, or some of them. We want to create a platform that offers a comprehensive set of tools for classification."

In addition to techniques, Council noted that there are three typical classification workflows:

■ **supervised: "**This is typically used in e-discovery applications like predictive coding. It's very heavily sample based. It can be very labor intensive with a lot of prep work. And it typically calls for subject matter experts, not your typical

outsourced workers, to identify the attributes of documents and create groups."

■ **rules-based:** "This can either be automated or supervised. You typically need a reasonably good sample set to base your rules on, and then you have to locate words or phrases."

■ **unsupervised**: "This is a black box method that typically involves clustering. It can use one or several classification techniques. Basically, it involves pointing the technology at a file share full of PDFs and TIFFs and letting it run. It's typically used in cases where a business doesn't know what they have. On the output side, you end up with clusters of documents grouped by their attributes—like content and visual elements."

In keeping with his affinity for lists, Council listed several goals Parascript would like to achieve with auto-classification:

■ **Expand the market beyond a capture-centric approach:** "Yes, we want to apply classification in the realm of capture (where Parascript's legacy primarily is), but we believe it can be useful at multiple points in the information lifecycle. Many people in the market have been talking about how capture can be more than a front-end process, but we think we might have to drop the term 'capture' to get people to think outside that perspective." [***Editor's note:*** *If you recall, one of the more interesting lines of conversations we had at this year's AIIM show involved applying capture techniques to documents already in a repository—such as Box or Dropbox or some other easy-to-interface with cloud platform. We call this concept, "capture 'um all and let the software sort 'um out" and think this technique could be inherent in the next generation of document management. See* DIR *4/11/14.*]

■ **Apply methodology used in other Parascript products to solve document relevancy issues:** "One of the biggest challenges with classification is reducing errors and false positives. It's great to reduce labor through automation, but it's bad if your outputted data is bad. In the check capture market, for example, we are able to limit error rates to less than 1%. We plan to leverage our algorithms and voting methods to deliver classification solutions that can blend high accuracy with low error rates."

■ **Cover the complete discovery process:** "We want to enable customers to go from the most unknown documents sets to the most known documents. While there are vendors with good classification, users often need extensive sample sets. We want to make auto-classification simple from day one by offering both visual and content-based approaches. If it lives on a document, we want to

use it. This includes hand-writing—the type of recognition we are most well known for."

■ **Enable users to take a project-based approach:** "That means they can use our technology for supervised and unsupervised workflows and mix and match when needed, as well as plug in rules."

■ **Offer a component-based approach:** "We want users to be able to use and combine several different classification techniques. Everything we've developed ourselves is based on statistical models, which is where our expertise is. However, there are a lot of toolkits that offer capabilities like semantic understanding, which we could integrate with our technology."

Council cited three main applications that Parascript is looking at:

■ **document migration:** "Because of mergers and acquisitions or other reasons, a lot of businesses are required to consolidate repositories. In these cases, they don't seem to have a lot of patience for up-front prep work."

■ **document discovery:** "This is not the same as e-discovery—rather it can be done for compliance with government regulations. Companies have databases, file shares, and laptops everywhere. It's a very valid and popular need to have to sort through all these files and apply meta data or taxonomies."

■ **document control:** "This basically involves finding meta data and interacting with the OS to apply access controls to documents."

According to Council, Parascript has been developing its auto-classification for more than a year. "We started investing marketing and research resources into it about two years ago," he said. "What we are working on leverages our core strengths in pattern recognition. We are now

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PARASCRIPT CHANGES LEADERS

In August, **Parascript** named a new CEO, Dr. Alexander Filatov, who had been serving as president and CTO. Filatov, who has been with Parascript since it was founded in 1996, took over for Bill Pearlman, who was also with the company since its inception. Pearlman had served as CEO from 1996-2000, when he was replaced by Jeff Gilb, and then took over again after Gilb left in 2010.

Parascript also recently promoted Mark Gallagher to VP of sales. He replaces former **Kofax** executive Dwayne Ritchie. Prior to joining Parascript in 2011 as director of sales, Western region, Gallagher had worked in the ECM industry for Hummingbird, **Open Text**, Tower Software, and **HP**.

applying it to a broader set of use cases.

"We see this as the natural evolution of capture, but we are not going to be held back by only focusing on a capture-centric application."

DIR saw a preview of the technology, which basically involved taking a stack of unknown documents, automatically breaking them into clusters, and then labeling those clusters. Documents captured after that process was completed were automatically sorted into the correct clusters. "We are still working on the UI and will add rules functionality before it's released as a product," said Council. "But that development work is not keeping us from doing demos and proof of concepts. We are getting feedback now that we can use in the product."

Keeping toward its goal of flexibility, Parascript's auto-classification will be released in multiple packages. "It will be available as an SDK—our core business historically has been licensing technology to other technology providers," said Council. "It will also be made available through our partners as an on-demand Web service. Auto-classification will also be an option in our FormXtra capture platform. We are still working on pricing, but there will be on-demand as well as perpetual licenses available."

Council added that auto-classification could eventually take Parascript beyond its document-centric history. "We see a lot of opportunities in classifying items such as images," he said. "This could include applying techniques like logo matching, and tagging not just business documents, but stock photos. For auto-classification, we see document and information management as a starting point to launch into a number of different areas."

For more information:
http://blog.parascript.com/topic/classification

A Look at the New German E-Invoicing Standard: ZUGFeRD

With the backing of the several German government agencies, as well as a leading German technology trade association, the outlook for adoption of the new ZUGFeRD e-invoicing standard looks bright. First published in July, BITKOM recently issued a press release touting the standard as "accelerating the replacement of paper invoices." In addition to **BITKOM**, which boasts a membership of 2,200 companies, ZUGFeRD is

backed by the **German Federal Departments of the Interior and Commerce**.

"The final draft was published in July and we held a press conference at the time," said Jürgen Biffar, a BITKOM board member and the president of ECM software vendor **DocuWare**. "We waited to send out an English press release, because we were hoping to have an English version of the standard available. Currently, the standard is only available in German, but we are working on the English version."

What's unique about ZUGFeRD is that it leverages pre-existing PDF and XML standards to make it potentially universally usable. "There is an XML file embedded within the PDF," said Biffar. "This means that if you want to accept electronic data, all you have to do is set up your accounting or ECM system to accept the XML file. But, you don't have to, and you can work with the PDF just like you would a paper invoice."

The XML file is based on the UN/CEFACT Cross Industry data model (established in 2007). It includes information like supplier name, invoice number, date, amount, and payment instructions. "There are three different levels of support for ZUGFeRD: basic, comfort, and extended," said Biffar. "More XML fields are supported in the more advanced levels."

BITKOM had been working on a standardized e-invoicing format for several years. "But, we really didn't think it would be implemented until a couple of years ago when the EU changed its regulations," said Biffar. "In the past, there was a law that required everyone to apply electronic signatures to e-invoices. At the end of the day, that was too difficult and everyone ended up sending paper. Now that e-signature requirement has been abandoned."

Biffar estimated that in Germany about 90% of B2B invoices are sent on paper. "The ZUGFeRD standard is really aimed at the SMB, who are often suppliers to larger organizations," he said. "It really makes it simple for them to deliver invoices electronically."

Creating ZUGFeRD invoices can be accomplished in a number of ways. "A number of ISVs have developed SDKs to facilitate ZUGFeRD creation," Biffar said. "A lot of them are members of the PDF Association. Overall, there is a list of 80 ISVs who are supporting the standard on some level. From what we've heard, it takes anywhere from two to 10 person-days to integrate a ZUGFeRD SDK into an existing software program. "

Biffar said ECM vendors have been particularly supportive. "The more invoices that are exchanged

electronically, the easier it is to adopt ECM," he said. "The less that people have to worry about scanning, the more they are willing to switch from paper to electronic document management.

"The benefit of ZUGFeRD for ECM vendors is greater than that for ERP vendors. For ERP ISVs, it's just another feature they have to add. People are going to use ERP and accounting systems because they have to. For ECM vendors, ZUGFeRD support can be a selling point."

That said, the supporters of ZUGFeRD include **Sage**. "We are also seeing a lot of interest from end users," said Biffar. "One vendor of mid-market accounting packages is doing a series of road shows on the standard and had more than 700 people sign up, which they said was an unusually high number."

DocuWare supports ZUGFeRD in a couple ways. On the creation side, it offers an online service that can be used to produce the invoices from uploaded data. "On the receiving side, we have the ability to read the XML data and make it available in our workflow, along with the PDF file, for approval processes," said Biffar. "The data can then be uploaded into the accounting and ERP packages that we integrate with."

Pan-European potential
While ZUGFeRD is currently being targeted at the German market, there has definitely been discussion about establishing a European Union-wide e-invoicing standard. "In June, the European Union issued a directive saying that all government agencies should be able to accept electronic invoices within the next three years," said Biffar. "I don't think that the current version of ZUGFeRD would be able to support that, but version two or three, if we add some modifications to better fit with other countries' requirements….

"I think it will be at least five years before we have one e-invoicing standard for all of Europe. Some countries have already said they want to follow what Germany is doing, while other countries have been working on their own standards. There has been a lot of talk about how this all fits together, but it can get pretty complex."

Biffar added the language is not an issue with ZUGFeRD. "It doesn't matter what language the PDF document is in, the XML schema is all in English, which is considered a neutral language," he said.

Biffar concluded that the adoption of standard e-invoicing formats like ZUGFeRD could eventually marginalize e-invoicing networks like those run by market leaders **Ariba**, **Basware**, and **OB10**. [*Document capture ISV* **ReadSoft** *(which supports ZUGFeRD) also recently announced a network that integrates e-invoicing with paper capture, see DIR 5/30/14.*] "It's my personal opinion that if an e-invoicing standard can be established, with a good majority of adoption in Germany and Europe, traditional e-invoicing networks will become less valuable," he said. "But we are still at least a few years away from realizing that."

For more information: bit.ly/ZUGFeRDEngPR; http://www.bitkom.org/en/