

Category	Today		In 12-18 Months		
	Status Quo	Challenges	Needs	Opportunities	Solution Providers
<b>Supply Chain Management</b> (Channel-driven)	<ul style="list-style-type: none"> <li>- Wide range of capabilities required to implement</li> <li>- Many standards complicates solutions</li> <li>- Definition of SCM varies</li> <li>- Many points of integration</li> <li>- Historical "baggage"</li> </ul>	<ul style="list-style-type: none"> <li>- Real-time data exchange</li> <li>- Integration of systems</li> <li>- Adoption of systems and processes</li> <li>- "Be part of the family" (long term commitment, trust, sharing)</li> <li>- Lack of focus on value to customer</li> </ul>	<ul style="list-style-type: none"> <li>- Event management</li> <li>- Rapid, accurate information exchange</li> <li>- Gain trust</li> <li>- Connectivity to new areas such as R&amp;D</li> <li>- Platform for dynamic collaboration incorporating multiple standards</li> <li>- Flexible, easy-to-use and integrate, business-rule driven participation</li> <li>- Customer-driven solutions</li> <li>- Manage complex relationships</li> <li>- Ability to share supply-chain-management value among participants</li> <li>- Low barrier of entry</li> <li>- Knowledge sharing across the entire design-to-operations chain</li> </ul>	<ul style="list-style-type: none"> <li>- Small and medium B2B collaboration w/carrier firms</li> <li>- Interoperability of different eModels</li> <li>- Standardization</li> <li>- Time to Value solutions</li> <li>- Outsourcing and management of these services</li> <li>- New services for value creation</li> </ul>	Types of providers <ul style="list-style-type: none"> <li>• Enablers of interoperability</li> <li>• Aggregation point providers</li> <li>• Contract manufacturers</li> <li>• Global logistics firms</li> <li>• Big 5 consulting firms</li> </ul> Specific firms <ul style="list-style-type: none"> <li>• Ariba/Agile</li> <li>• SAP</li> <li>• Oracle</li> <li>• i2</li> <li>• Commerce-One</li> <li>• Atlas Commerce</li> <li>• FreeMarket/Adexa</li> </ul>
<b>Customer Relationship Management</b> Covering customers, suppliers and partners.	<ul style="list-style-type: none"> <li>- Definition of CRM is unclear</li> </ul>	<ul style="list-style-type: none"> <li>- "Live It" - Obtain longer-term relationships / trust</li> <li>- Share common goals</li> <li>- Maximize value of relationships</li> <li>- Define and implement solutions to problems</li> <li>- Implement total solutions, incorporating knowledge of customer base (which is kept current)</li> <li>- Privacy and Security</li> </ul>	<ul style="list-style-type: none"> <li>- Manage customer-like relationships</li> <li>- Economics (investment vs. return)</li> <li>- Ability to manage complex relationships</li> <li>- Manage customer segmentation</li> <li>- Provide access to CRM solutions for small and medium-sized organizations</li> <li>- Always- on, always-there infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>- Collaboration package around customer needs</li> <li>- Outsourcing</li> <li>- Customizable &amp; scalable solutions</li> <li>- Re-define corporate views to customer (which means a redefinition of core businesses)</li> </ul>	Types of providers <ul style="list-style-type: none"> <li>• Full-service, end-to-end providers</li> <li>• Big 5 consulting firms</li> </ul> Specific firms <ul style="list-style-type: none"> <li>• Siebel</li> <li>• Clarify</li> <li>• Oracle</li> <li>• Commerce One</li> <li>• Bowstreet</li> </ul>
<b>eMarketplaces</b> (Market-driven).	<ul style="list-style-type: none"> <li>- Instant messaging</li> <li>- Project room solutions</li> <li>- Decline in public exchanges (move to private)</li> <li>- Non-Mission critical processes on public exchanges</li> <li>- Reduction in funding of public exchanges</li> </ul>	<ul style="list-style-type: none"> <li>- Make use of information value</li> <li>- Limited value from public exchanges today</li> <li>- Unclear path to profitability</li> <li>- Integrate suite of tools</li> <li>- Security</li> <li>- Maintain brand</li> <li>- Integration of use of public and private exchanges for a company</li> </ul>	<ul style="list-style-type: none"> <li>- Standards or protocols</li> <li>- Moderate moderation</li> <li>- Knowledge management</li> <li>- Access</li> </ul>	<ul style="list-style-type: none"> <li>- Public exchanges must add value and privacy</li> <li>- Creating a knowledge pool</li> <li>- Turing information into new business models</li> </ul>	Types of providers <ul style="list-style-type: none"> <li>• Consolidated market places</li> <li>• New functionality providers</li> <li>• Infrastructure providers</li> <li>• TELCOs</li> <li>• Financial services providers</li> <li>• Aggregate Data Owners</li> <li>• Intellectual property brokers</li> </ul>

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The Future of Collaborative Business: Ranking Of Solution Providers		
Supply Chain Management	Customer Relationship Management	eMarketplaces
<p><b>Types of providers</b></p> <ul style="list-style-type: none"> <li>5 Enablers of interoperability</li> <li>4 Aggregation point providers / Mega aggregators</li> <li>3 Big 5 consulting firms</li> <li>2 Contract manufacturers</li> <li>Global logistics firms</li> </ul> <p><b>Specific firms</b></p> <ul style="list-style-type: none"> <li>7 i2 <a href="http://www.i2.com">http://www.i2.com</a></li> <li>2 SAP <a href="http://www.sap.com">http://www.sap.com</a></li> <li>1 Commerce One <a href="http://www.commerceone.com">http://www.commerceone.com</a></li> <li>1 Oracle <a href="http://www.oracle.com/.com">http://www.oracle.com/.com</a></li> <li>Atlas Commerce <a href="http://www.atlascommerce.com">http://www.atlascommerce.com</a></li> <li>FreeMarket/Adexa <a href="http://www.freemarkets.com">http://www.freemarkets.com</a></li> <li>Ariba/Agile <a href="http://www.ariba.com">http://www.ariba.com</a></li> </ul>	<p><b>Types of providers</b></p> <ul style="list-style-type: none"> <li>7 Full-service, end-to-end providers</li> <li>2 Big 5 consulting firms</li> </ul> <p><b>Specific firms</b></p> <ul style="list-style-type: none"> <li>6 Siebel <a href="http://www.siebel.com">http://www.siebel.com</a></li> <li>Clarify/Nortel <a href="http://www.clarify.com">http://www.clarify.com</a></li> <li>Oracle <a href="http://www.oracle.com">http://www.oracle.com</a></li> <li>Commerce One <a href="http://www.commerceone.com">http://www.commerceone.com</a></li> <li>Bowstreet <a href="http://www.bowstreet.com">http://www.bowstreet.com</a></li> </ul>	<p><b>Types of providers</b></p> <ul style="list-style-type: none"> <li>10 Consolidated market places</li> <li>5 Infrastructure providers</li> <li>1 TELCOs</li> <li>1 New functionality providers</li> <li>Financial services providers</li> <li>Aggregate Data Owners</li> <li>Intellectual property brokers</li> </ul>