



# Annual Report 2006/2007



DRIVING ADOPTION OF GLOBAL STANDARDS THROUGH ONE VI



## VISION, ONE VOICE, ONE ORGANISATION.

At GSI, our vision is a world where things and related information move efficiently and securely for the benefit of businesses and improvement of peoples' lives, everyday, everywhere.

Our mission is to be the neutral leader enabling communities to develop and implement global standards providing the tools, trust and confidence needed to achieve our vision.



The Global  
Language of Business



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*"The GS1 continuum of standards is an incredible business resource that has proven to be an exceptional value for more than three decades."*

## Letter from the Chairman



In the beginning, we launched a single bar code standard with a promise to develop its potential by maintaining its integrity, supporting its community of large and small users alike, and creating value wherever possible through new and expanded uses.

### **An Expanding Commitment; An Enduring Legacy**

Over the years, we have backed our commitment by reaching out and responding to the marketplace. One primary product line has become a wealth of technologies and user-driven standards. Fragmented market concerns have become part of one global vision. And multiple national entities have begun speaking with one voice and acting as one organisation through GS1.

And perhaps nowhere is our continuum better characterised than by one fact of which I am immensely proud. At the heart of our standards still beats the same inaugural bar code that was first scanned 33 years ago; as robust, sound and relevant to users of every size today as it was then.

### **Our Innovation Continues**

Bar codes made things easier and more efficient. Electronic business messaging made things faster and more accurate. And today, we continue to concentrate on eliminating the disruptions in new and innovative ways so business can focus on the customer.

This year's report is full of developments that move us further along that continuum. The President and CEO's message details how we are actively driving adoption efforts and promoting value creation that comes along with our business solutions, not only in the markets where we have traditionally operated, but in new markets like healthcare. We are also honing our organisation to present one face to the customer and thereby more effectively representing our vast offerings.

Our Chairman Emeritus does an excellent job of summarizing the people and culture that continues to make GS1 unique in the global community. Our beliefs, values and core competencies have helped us span the decades and provide a solid foundation for continued success.

### **A Financial Model for the Future**

But there remains another challenge that we must all address together. The needs of a rapidly shifting and expanding market have brought a realization to the Board that we must rethink our historical financial position and move toward a sustainable financial model.

Our original financial model is outdated and outmoded by the dramatic changes we have all undergone in the past three decades. So much more is expected, and so much more is being delivered. To ensure that our continuum of standards remains strong, healthy and relevant, I have directed the organisation to pursue a process to revisit our financial model. This process will be transparent and inclusive of our entire stakeholder community. It will also be in keeping with our vision and values

What we seek is an equitable model where the benefits and responsibilities are shared by everyone across the community. In the coming months, you will hear more about this crucial initiative. I welcome your input and your ideas. Together, we can make sure that the vital resource we have in GS1 remains available and viable to each and every constituent it serves.

As Chairman, I remain indebted to the GS1 Community around the globe for their dedication and willingness to work toward our single vision. The Member Organisations, our users, and the staff and management of GS1 have combined collaboratively to produce an organisation that not only is highly effective at what it does, but also highly rewarding in its impact on the world around us. I am honoured to be your Chairman, and I look forward to another exceptional year in the continuum.

*Donny Wegman*

*Danny Wegman  
Chairman*





**Making  
our Vision  
a Reality**  
GSI Strategy

**Annual Report  
2006/2007**

**The global  
language of  
business**



# Letter from the Chairman Emeritus



We are beginning to see one vision. We are learning to speak with one voice. And, more than ever before, we are acting as one organisation. Together, we share the goal of accomplishing more.

## Vision and Mission

At GS1, our vision is a world where things and related information move efficiently and securely for the benefit of businesses and improvement of peoples' lives, everyday, everywhere.

Our mission is to be the neutral leader enabling communities to develop and implement global standards providing the tools, trust and confidence needed to achieve our vision.

Our **Member Organisations** have helped lead this effort by assisting us in articulating the vision and mission and assuming responsibility to communicate that vision and mission with all of their constituencies throughout the world.

## Core Competencies

Our **member companies** (our users), whom we serve, recognize the power and value of the following core competencies that are required to deliver our vision and mission.

- **Global Standards Development**  
Effectively manage the global, user-driven development and implementation process to deliver high quality, easy-to-implement standards to industry and solution providers
- **Identification**  
Provide a system of unambiguous numbers to identify goods, services, assets and locations in support of automated and secure supply chain processes
- **Global Reach**  
Maintain and develop a global network of national affiliates which deliver high quality standards-oriented services to their members
- **Cross-cultural Communication**  
Develop and maintain a broad range of communication capabilities which enable effective two-way communications between GS1, its affiliates, its membership and the wider community

## Visibility and Permission

Finally, I would like to express gratitude for the people in the Member Organisations and all the companies that are dedicated to providing the visibility in our supply chain that gives each of us the permission to do what is right for our consumer.

A handwritten signature in black ink that reads "Tim Smucker". The signature is fluid and cursive.

Tim Smucker  
Chairman Emeritus



*"GS1 is in an excellent position to continue to provide the world-class standards we represent in 150 nations around the globe."*



## Letter from the President & CEO



**GS1 has grown to be the most widely used supply chain standards system in the world.** Our concerted efforts at driving adoption have expanded our core business standards and generated opportunities for new sectors under our technologies and solutions.

### Evolution at the Core

Robust identification remains one of our core competencies. Our value propositions and growth factors have performed extremely well in the marketplace, and we are moving to respond to additional needs with evolutionary developments like our GS1 DataBar symbology (*pages 16-17*). With this ultra-small 2-D barcode, small items, variable measure products, coupons and other special scanning needs will be a reality at the point of sale by January 2010.

Our Global Standards Management Process (GSMP) also continues with great strength (*page 30*). The program assures all our stakeholders of a sustainable model for GS1 standards growth, management and support application by sector and technology.

### Innovation on the Leading Edge

Innovative approaches to business challenges are an integral part of our success. From next-generation technologies and business solutions, to exceptional global collaboration among our stakeholders, and extensive support for an ever-increasing circle of adoption around the world, GS1 is advancing.

The Global Data Synchronisation Network (GDSN) demonstrates the scope of this effort (*page 19*). There are now more than 13,000 global users registering and/or synchronising data and over 1.7 million items in the Global Registry. Project Etoile, a worldwide pilot program to validate the veracity of global synchronisation in the marketplace, is also moving the needle (*page 20*). We anticipate sharing the dashboard results of this leading edge project with the entire community upon completion.

### Driving Implementation

Implementation efforts are also focused at GS1. We are working closely with our communities, providing tools and technologies necessary to implement full solutions based on GS1 standards throughout their enterprises.

One example is our ongoing work with the Electronic Product Code Information Services (EPCIS) standard. This past April, the EPCglobal Board ratified the complete initial suite of global standards, allowing companies to carry out implementations based entirely on EPCglobal standards (*page 23*). With the EPCIS in place, EPCglobal is in a place to truly drive implementation to community at large.

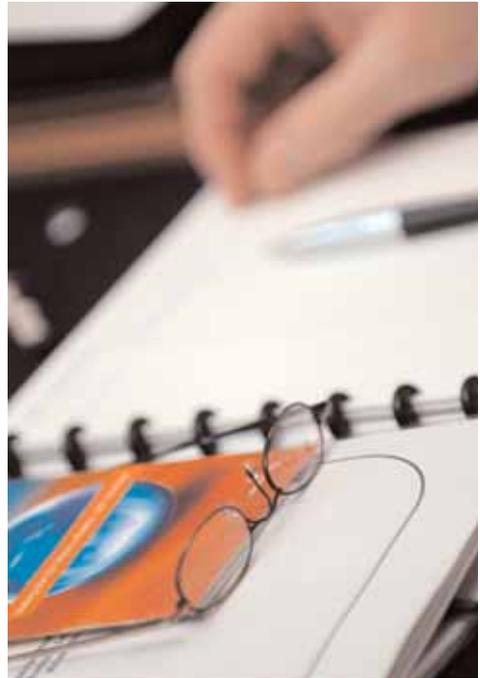


### **Healthcare and Beyond**

GS1 continues to reach out to new sectors and new industries. In 2007, GS1 brought together key members of the Healthcare sector into single global user group, and they agreed to use a unified roadmap to work with and through GS1 to solve their supply chain issues (*page 39*). We welcome our new relationship with this vital sector, and we look forward to working closely together for a very successful future.

### **The Value in Adoption; The Value in Sustainability**

Our focus for the future must be two-fold. We must continue to drive for wider adoption of our standards through sharing value propositions and promoting responsive business solutions with measurable ROI. And we must work with all of our stakeholders, large and small, to help develop a sustainable financial model, so that we might successfully support the continued growth and maintenance of the GS1 System (*page 53*). With these two components secure, we will assure the viability of our system for generations to come.



### **Esteemed Professionals Make It Happen**

My gratitude and sincere appreciation go out to the professionals that make the GS1 System work. Thank you to our Member Organisations for their willingness to embrace change and work toward our common vision. Thanks to our new, trimmed GS1 leadership team and the staff they direct, a team that is now equipped to support our members better than ever before. I also gratefully acknowledge the strategic leadership of our Chairman, Danny Wegman, the inspiration of our Chairman Emeritus, Tim Smucker, and the dedication and tireless support of our Board. Because of the efforts of each of these dedicated professionals, GS1 is in an excellent position to continue to provide the world-class standards we represent in 150 nations around the globe.

Miguel A. Lopera  
President & CEO



## Performance and Perspective

GS1 BarCodes and Identification

GS1 GDSN

GS1 EPCglobal

GS1 eCom

Operational Improvements

New Solutions and Services



*“GS1 DataBar provides the industry the capability to transform the fresh foods supply chain by leveraging standardised product identification at the point of sale. In addition, the current coupon system will be transformed to better enable manufacturers and retailers to process and clear coupons with greater speed and accuracy.”*

**Patrick J. Walsh**  
Vice President, Industry and Trade Development  
Food Marketing Institute

## GS1 BarCodes and Identification



The GS1 BarCodes & Identification business is undergoing the most significant set of changes in its 36-year history. GS1 Identification, as measured by GS1 membership, grew at slightly over 4% last year. The raw number growth alone is significant when considering a base of over 1.3 million members. But the expansion potential represented in the statistics more closely mirrors strong growth for a new business, not an organisation in its fourth decade. In this light, the forecast is extremely bright.

There are five key areas that will impact strategic growth in the coming year. To effectively move forward, the organisation is targeting these areas with an attempt to understand the strengths we already have and the potential challenges that may confront GS1 in the near- and far-term future.

They are:

- **The unique value proposition behind GS1 Identification**
- **Positioning GS1 Identification for growth**
- **Key business metrics and their impact**
- **Opportunities, challenges and how GS1 is responding**
- **Evolution of GS1 BarCodes technology**

### **GS1 Identification Value Proposition:**

GS1 Identification grows each year because identification is a core to computing, is strategic to system accuracy and access, and because computing is trending global.

With GS1's global reach, it commands a special position among the world's companies to support international demand for globally unique identifiers. With organizations in 108 countries, GS1 overcomes human network and cultural or language barriers while surfacing local requirements that can be met in a globally-cohesive way. Equal in importance to this "reach" is the inherent understanding by companies and government institutions of the strategic importance of identification systems and a trusted, neutral party at its core. In our ever-connected world, GS1's not-for-profit status allows it to serve as an industry partner who manages identification requirements and practices in a globally connected way while maintaining neutrality and a commitment to serve companies of every size.

### **GS1 Identification Growth Factors:**

Beyond the value proposition, three additional factors are propelling growth.

- The number of sectors which are mobilizing to adopt GS1 Identification at a global level is important because global adoption means growth in all countries in ways that are interoperable and build critical mass. Significant activities include adoption in healthcare (see page \_\_\_ on healthcare adoption), migration from commodity to trade item identification of fresh foods, and use of GS1's logistic identification solutions by the World Customs Organization.



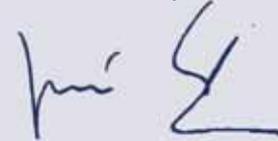
- GS1 staff around the globe now number in the thousands and their individual reach uncovers new and exciting ways to use GS1 Identification. The GLN Strategy Project while focused on Global Location Numbers (GLNs), made this application growth visible and again this will be the subject of enhanced development.
- Beyond local application growth, some macro or “global” applications are emerging for GS1 Identification. Examples of these include mobile commerce, waste management, utilities, virtual identification, and customs declaration.

#### Additional GS1 Identification Metrics to Consider:

Beyond our 1.3 million members, other measures of GS1 Identification growth include:

- The total number of GS1 Member Organisations (MOs) has increased to 108. This is the result of GS1 Benin, GS1 Nigeria, GS1 Pakistan and GS1 Tajikistan joining our organisation and further extending the global reach of GS1 Identification.

***“The GS1 Identification system is the foundation to bring our business world together for the benefit of our industry and our consumers. At Nestlé, we fully support this strategic asset which really contributes to our capacity to operate on a global basis; this is why we have embedded the GS1 Identification system into our GLOBE best practices and systems.”***



**José Lopez**

Executive Vice President of Operations,  
Nestlé S.A.

*Member of the GS1 Management Board*

- “One-Off” numbers, a new factor, has not been measured to date. These numbers are assigned to products, parties, and locations one at a time by Member Organizations without requiring the company to become a GS1 member. We have discovered this business for GS1 is significant and growing. GS1’s true reach may extend to several million of additional companies, but understanding the baseline will be the subject of further research in 2007-8.

#### GS1 Opportunities & Challenges:

In 2006-7, the GLN Strategy Team determined, and the GS1 Board and MOs confirmed, that GS1 required a broad, proactive GS1 Identification Strategy that addresses four strategic factors:

- Do we have *capacity* to meet demand?
- Is our numbering system *integrity* secure?
- Do we have a way to *authenticate* all legitimate GS1 numbers for the systems, sectors, and networks of our future?
- Are we competitively positioned for growth?

To support the development of this “living” strategy, the GS1 Board approved a high priority initiative called Manage & Grow GS1 Identification.

#### Evolution of GS1 BarCodes Technology:

Until 2006, GS1 supported two primary bar code symbology families: EAN/UPC and GS1-128. In the past year, GS1 made two major decisions regarding an additional bar code that will join EAN/UPC at retail Point-of-Sale: First, the organisation officially changed the developmental name of the symbology from Reduced Space Symbology (RSS) to GS1 DataBar, and second, it adopted it for use of on all trade items by January 2010.



## 2D BarCodes Use Growing

GS1 DataBar pilot activity began occurring in multiple regions during the year, and major North American retailers began planning for national roll-outs on loose-produce items. The small size and increased information content possible with GS1 DataBar is driving its significant momentum. Among its many uses, it is being seen as a solution agent for fresh foods, the product category in grocery that is a major differentiator and one that provides the highest margins. Some examples of the business space include:

### From GS1 DataBar's smaller size:

- Better shrink, category, and traceability management tools for loose produce marked with GTINs
- More package panel space for consumer communication
- Increased POS productivity when EAN/UPC bar codes currently printed under specifications are replaced by the smaller GS1 DataBar

### From GS1 DataBar's ability to carry more information:

- Enhanced tools for management of variable measure products sold at point-of-sale
- Enhanced tools for traceability and food safety
- Coupon solution for the US market

GS1 DataBar is buzzing more and more in industry circles as retailers leverage the consumer- and supplier-accepted tool to solve old problems in new ways.

Beyond GS1 DataBar, there is an increasing industry demand for 2-dimensional "matrix" symbols. This demand has expanded beyond GS1 DataMatrix to include interest from the Asia-Pacific region for additional matrix bar codes like QR Code. GS1 believes it is critical to understand the business drivers behind this new bar code technology, and we are taking proactive steps to manage global evolution and readiness.

The new 2D "matrix" symbols are becoming very popular due to their small size, ability to carry a high volume of information, and their capacity to be printed at high-speeds.

However the symbols do have one significant limitation. They currently require camera-based scanners and may not be scanned by typical high-volume retail scanners. In the coming year, GS1 will advance the level of market knowledge and technology trade-offs for these new tools in order to maintain the delicate balance between marking and scanning of bar codes in retail and healthcare applications.



## Summary

GS1 BarCodes and Identification is gearing up to develop a sustainable model for GS1 identification growth, to manage the growth of new bar code technologies, and to support application growth by sector or technology. With the 30 year anniversary of EAN's founding and the 35th anniversary of the adoption of the EAN/UPC bar code, it was a year to reflect on our enormous success, to take stock in our situation, and to begin visualizing the world of benefits GS1 Identification can make in the lives of consumers in the future.



***"The greater benefit of Global Data Synchronisation is accurate data, on time and complete when needed. This increases speed to shelf and streamlines our promotion processes. It requires hard work and true business process change, but we believe the investment will yield efficiencies and savings."***

**G rard Lavinay**

Managing Director of Group Organisation Systems & Supply  
Carrefour

*Member of the GS1 Management Board*

## GS1 GDSN



Sally Herbert  
President,  
GS1 GDSN, Inc.



The GS1 Global Data Synchronisation Network (GDSN) is a global, Internet-based solution that enables trading partners (e.g. retailers and suppliers) to synchronise item data, resulting in a single view of master item data, updated continuously throughout the supply chain. At the centre of the GDSN is the GS1 Global Registry® serving as a directory to identify where GS1 standards based item information is held globally across certified data pools.

The GS1 Global Registry enables efficient, scalable, standards-compliant global data synchronisation in a many-to-many trading partner environment ensured by the uniqueness of the Global Trade Item Number® (GTIN®) (item) and Global Location Number (GLN) (trading partner). Data pools, a single point of entry to the GDSN, provide suppliers and retailers with data readiness and on-boarding services, education, and GS1 standards-compliant synchronisation of product (item) and trading partner (party) data. The GDSN and the GS1 Global Registry enable this item data to be securely exchanged between local and global trading partners enabling companies to realise cost savings and increased supply chain efficiency. Benefits include decreased invoice disputes, reduced order discrepancies, reduced shipping errors, lower transportation costs, faster speed to market for new products, and fewer out-of-stocks.

The year 2006-2007 demonstrated solid, measured growth for the Global Data Synchronisation Network (GDSN) thanks to the continued commitment and collaboration of the user community across the globe. The established base of data synchronisation standards and trading partner implementation drove the GDSN Global Registry adoption numbers to double – tallying over 13,000 global users. Local and regional data synchronisation with GS1 System standards increased dramatically in the past year, also.

Synchronisation in a local market is often the first step for many small to medium companies in joining the global network and using the Global Registry. The number of trade items registered has also grown significantly. The GS1 Global Registry contains over 1,700,000 products representing threefold growth in 12 months. This year's data pool certification event qualified four additional data pools into the GDSN. The 23 certified data pools represent over 38 countries around the globe including in North America, South America, Asia, Europe, the Middle East, and Africa.

GDSN, Inc. shifted the focus in 2006-2007 from building a large number of new standards functionality to aiding data pools, Member Organisations (MOs) and users in implementation and adoption activities. GS1 did introduce an updated standard for interoperability between data pools and the GS1 Global Registry: BMS 2.1 (Business Message Standard version 2.1) for Item Synchronisation in January. GDSN, Inc., working in partnership with leading users and data pools, then implemented the Price Synchronisation Standard into the network in June 2007.





Industry reports and leading users expect greater financial return to be achieved as companies expand the scope of data synchronisation from item data to include price data. Due to the fact that the majority of poor quality orders and invoice deductions are due to inaccurate pricing information, the benefits of data synchronisation will be even more pronounced. With the completion of these standards, plus flexible attribute support in the GDSN, users can synchronise on virtually any type of trading partner information.

**Focus on Adoption:** Project Etoile – a choreographed adoption programme with 7 global retailers, 17 multinational manufacturers utilising 7 data pools in 6 countries – was launched. The primary project focus is to work through implementation and interoperability barriers and therefore enable an easier path for adoption by a broader user base. This project is intended to complement other GDSN market development activities well-beyond 2007. Etoile will identify implementation and interoperability learnings that can be shared with other data pools, trading partners and industry sectors.

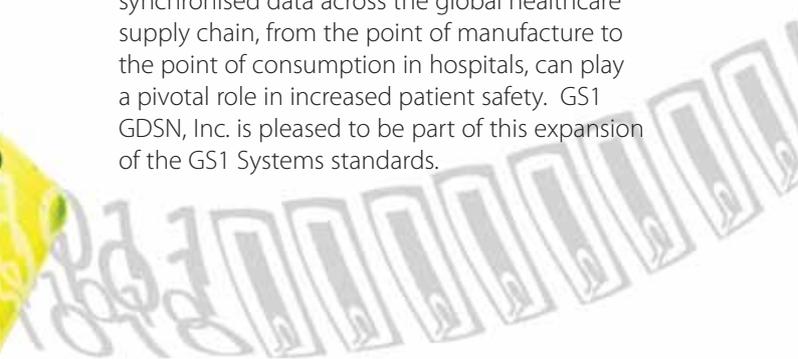


This year, several major European retailers formally began GDSN initiatives after aligning internal systems, processes and organisations to support data synchronisation with key trading partners. Retailers hold the key to the future of GDSN growth and this momentum is expected to yield substantial growth in 2007-2008.

**It is all about Data Quality:** Companies engaging in data sync have realised that they must ensure that accurate data is synchronised, otherwise they are just enabling the rapid, seamless exchange of – bad data. Increasingly, as consumers gain access to product information in-store with mobile computing devices and the like, the speed of access will magnify the effects of this inaccurate data at a very sensitive point in the supply chain – the point of consumption.

GS1, together with industry associations and users, developed the Data Quality Management Protocol in early 2006-7. In concert with the GS1 System Standards for Measurement Tolerances, it provides guidance regarding measurement tolerances, determination of relevant sample sizes, data accuracy, and something as simple as agreeing on how to measure the height of a flexible package. The GS1 Data Quality Protocol incorporates a data quality management system to validate the existence and effectiveness of key data management business processes. In addition, it offers several options to show compliance by offering rules for self-declaration and an inspection procedure to physically validate product attributes. The self-declaration tool is now available and the certification programme is under development. The 108 Member Organisations of GS1 will utilise the protocol as they develop and enhance data quality services offered to their customers around the world.

Expansion of GDSN and GPC activities into the Healthcare sector will be a prominent activity in the coming year. This industry is mobilising to leverage the network, GS1 identification standards, and product classification on a global basis. Accurate, uniformly-classified and synchronised data across the global healthcare supply chain, from the point of manufacture to the point of consumption in hospitals, can play a pivotal role in increased patient safety. GS1 GDSN, Inc. is pleased to be part of this expansion of the GS1 Systems standards.



***“The completion of the Price Synchronisation standard was a major GDSN milestone in 2006-2007. Users, GS1 Member Organisations and Data Pools worked together to make it a robust Global solution. Price synchronisation will enable trading partners to synchronise on accurate price and promotion information, and reduce costs associated with invoice pricing inaccuracies. This is another area where users will see the true value of data synchronisation.”***

**John Phillips**

Vice-President of Customer Supply Chain and Logistics  
PepsiCo  
Member of the GS1 GDSN Board of Directors



This has clearly been a year of promising growth. As we look ahead into fiscal year 2007-2008, we see continued focus on implementation, further building the foundation for retailers and suppliers of all sizes to truly leverage the GDSN globally and locally.

GDSN, Inc. will continue to grow the collaborative GDSN user community, and integrate GDSN more tightly with the GS1 business units: EPCglobal, DataBar, eCom and NetSolutions.

**GLOBAL PRODUCT CLASSIFICATION (GPC):**

The Global Product Classification system provides a classification methodology for the GDSN. Sellers and buyers require a common language to group products the same way, globally. Having a standardised and consistently implemented classification system enables global search and reference, category analysis and global data synchronisation. GPC is a mandatory within the GDSN and provides depth and breadth across 36 categories.

Under the leadership of the user community, GS1 launched an initiative to align GPC with another classification system, United Nations Standard Products and Services Code (UNSPSC). UNSPSC is a global, multi-sector classification system supporting primarily spend analysis and procurement. Alignment is progressing with the two systems which will run in parallel and will be interoperable. GPC will remain in place providing the necessary classification depth required for GDSN. Both user communities have access to the other system without having to invest effort in their own mapping. GS1 will release the cross-reference tools in the December 2007 timeframe and remains committed to maintaining this alignment into the future.





*“Sony is looking to RFID to add value in many areas, from tracking products all the way through the product life cycle to providing new opportunities to consumers and businesses. EPCglobal plays a critical role in ensuring the global standards infrastructure is in place to drive confidence in the use of technology and to enable the solutions we wish to pursue.”*

**Dr. Mario Tokoro**

SVP, Corporate Executive

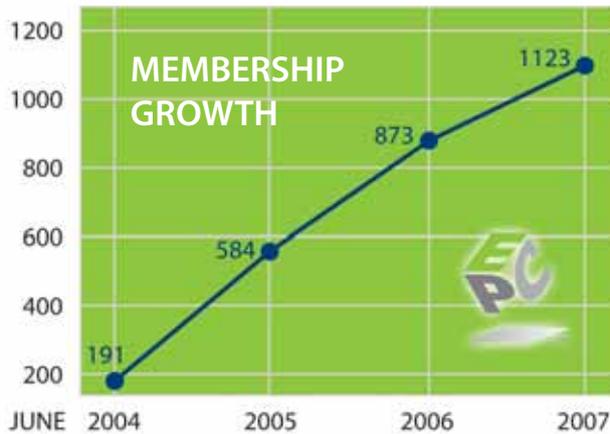
Technology Policy & Relations

Sony Corporation

Member of the GS1 EPCglobal Board of Governors



Chris Adcock  
President,  
EPCglobal, Inc



Once again congratulations and thanks are due to the members of the EPCglobal community for another year of incredible progress. Companies around the world have been engaged in completing and extending pilot programs as well as, in many cases, moving forward into the implementation phase. The EPCglobal community has finalized the development of an initial set of standards that can underpin the use of the technology around the world. I am very grateful to the many individuals who donate their time, experience and expertise to fulfilling the aims and ambitions of EPCglobal.

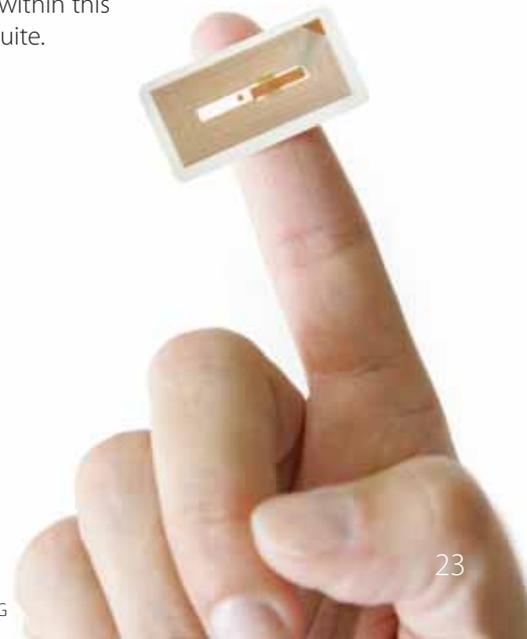
The EPCglobal community continued its growth and expansion around the world. As of June 2007, the EPCglobal community has grown to 1123 members whose global head offices are located across 38 countries. Over 60% of the community is now represented by end users with the balance being composed of providers of solutions such as hardware, software or integration services. EPCglobal's broad geographic and multiple-industry profile ensures that the work that is undertaken is directly relevant to the real needs of companies and organizations around the world. In response to this ongoing expansion, the EPCglobal community was reorganized in October 2006 to enable greater effectiveness and collaboration across the entire EPCglobal structure.

### Complete suite of standards now ratified to allow companies to complete implementations based entirely on EPCglobal standards

In April 2007, the EPCglobal Board of Governors ratified the EPC Information Services (EPCIS) standard which completed the initial suite of global standards developed by the EPCglobal community. This means that the identification of objects, data capture, and sharing of information can now be undertaken based on global standards that have been developed to meet user's requirements. With the ratification of EPCIS, we now have the standard that could be referred to as "the key to unlock the information door." EPCIS is an interface standard that allows two entities to share information easily. It defines how information relating to four key questions should be shared:

1. What is it (identification)
2. Where is it (location)
3. When was it there (time)
4. Why was it there (process step e.g. receiving).

These four seemingly simple question areas are critical to allowing companies to forge ahead with their adoption of this technology based upon the innovative solutions embodied within this standards suite.





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### **Rapid expansion and use of certification services drives confident technology use based upon EPCglobal standards**

Since the award of the first certification marks in September 2005, EPCglobal has continued to expand and evolve its range of certification services. Certification is a critical component of ensuring that companies can use hardware and software confidently in the knowledge that it conforms to EPCglobal standards. Up to the end of June the following results were achieved:

- Hardware conformance – 21 hardware devices (readers, integrated circuits) certified
- Hardware interoperability – 13 hardware devices (readers, printers, tags) certified
- Software conformance – 20 software certification tests completed

In the future, both hardware conformance and interoperability will be combined under one certification mark. This is a natural evolution in our testing approach given the interdependency of the two types of testing in order to meet the needs for market confidence in certification testing. In addition we expanded the number of Performance Test Centers around the world. These test centers enable end users to ensure the readability of their tagged shipments before sending them through their global supply chains and are increasingly important as implantation of the technology expands.

### **Effective management of public policy issues ensures a framework which allows the EPCglobal community to further develop its piloting and use of RFID technology**

The Public Policy Steering Committee (PPSC) and its working groups continue to develop open dialogues with key stakeholders, including consumer organizations, legislators and regulatory bodies. The PPSC works proactively to inform and educate interested parties and in 2004 EPCglobal developed Guidelines to provide a responsible basis for the use of Electronic Product Code technology. These guidelines can be found at [www.epcglobalinc.org](http://www.epcglobalinc.org) and cover the areas of

consumer notice, choice, education and the approach to record use, retention and security. EPCglobal is working to evolve the practical implementation of these guidelines as part of its ongoing efforts to ensure that stakeholder's needs are being met.

### **Substantial Progress in Europe and Asia provides a framework of regulation that allows global use of RFID technology based upon EPCglobal standards.**

RFID, like any other wireless technology, is subject to laws and regulations that determine the radio spectrum that can be used and how it should be used. These regulations are set by competent authorities in each country. EPCglobal has been working with technical experts and regulators in many countries in order to harmonize the regulations worldwide. Substantial progress was achieved in 2006-2007, moving from 76 to 92 percent of the world's economy having adequate regulations in place for using RFID at the Ultra High Frequency specified by the Gen 2 protocol.

The approval of regulations in China in May 2006 was an event that companies around the world had been waiting for since China is a critical element of many global supply chains. The entire Asia-Pacific region is now RFID-enabled, opening the door to massive RFID implementations that are expected in the coming years. Excellent progress was made in Europe as well. In November 2006, the European Commission issued a formal decision to enforce the adoption of regulations in all European countries. Furthermore, a breakthrough solution



***“Delighting the consumer starts with winning at the First Moment of Truth - the point where the shopper chooses what to buy. Using the EPC based on EPCglobal standards delivers the actionable visibility to ensure we can win at that crucial First Moment of Truth.”***



**Richard Cantwell**

Vice President, Auto ID  
Procter & Gamble

Member of the GS1 EPCglobal Board of Governors

was devised and agreed upon by the European telecommunications Standard Institute (ETSI) to use the limited spectrum available for RFID in a very efficient way, including the elimination of the Listen Before Talk (LBT) requirement. This recent development is expected to be implemented in the laws of all European countries during the first half 2008. It will enable a virtually unlimited number of readers to run in the same environment without causing any interference.

**Adoption of RFID technology based upon EPCglobal standards broadens across multiple industries with many companies starting to move from pilots to implementation.**

EPCglobal's work with a wide range of industries has broadened the use and understanding of the technology and its role in delivering value through effective process change. Both the Consumer Electronics and the Apparel, Footwear and Fashion industries were effectively integrated into the EPCglobal community during 06/07. Work continues with a range of other industries such as Chemicals, Packaging and Aerospace to define the work they wish to undertake and to ensure a relevant mass of the industry supports the desire to work within the EPCglobal community.

Pilot projects are important precursors to broad scale implementation. EPCglobal estimates indicate that there are over 2000 pilots currently underway around the world and a very significant one of these was the Phase 1 pilot of the Transport and Logistics group. This pilot involved many companies and examined the implementation of EPCglobal standards based technology (including Gen 2 and EPCIS) across the supply chain linking China and Japan via Hong Kong. The pilot results showed the applicability of EPCglobal standards across a complex international supply chain. Phase 2 of this pilot project will be undertaken later in 2007.



During October of 2006, a broad group of leading companies representing retailers, movies, music, software and gaming industries formed the EPCglobal Media and Entertainment Interest Group to define requirements and guidelines for the adoption of Electronic Product Code (EPC) and Radio Frequency Identification (RFID)-based solutions for the Media and Entertainment industry. This group launched pilot programs in both North America and Europe utilising the EPC and RFID technology that will be completed in 2007. The goal of the pilots is to create industry guidelines based on EPCglobal standards that can be affordably applied to DVDs, games, and software. The participants in this program represent more than fifty percent of the distribution and sale of these products worldwide. The group will also utilise EPCIS to provide data analytics to identify opportunities for improving operational effectiveness and efficiency.

It is also evident that many companies have now completed their use cases and ROI calculations which have driven them to broaden and deepen existing programmes or to embark on major implementations with their trading partners as we have seen, for example, in the European retail industry during the early part of 2007.





### **2007 / 2008 OUTLOOK**

The activities of the EPCglobal community resulted in very significant progress being made during 2006/2007. This was reflected in the completion of the initial suite of standards as well as the relentless progress of companies moving through the piloting phase to implementation. Every indication is that this progress will continue and accelerate. The use of RFID technology based upon EPCglobal standards is uncovering opportunities that have never before been realisable with other technologies. RFID can be disruptive in that it usually requires fundamental reassessment and change to existing processes. This can be challenging at a time when companies have so many issues to contend with.

However, the growing bank of evidence shows that the value is there in manufacturing, in retailing, in driving supply chain improvements as well as sales increases, in delivering on the promise of “patient safety” and value for consumers, in ensuring fast and accurate movement of goods around the world, and in enabling people to perform their jobs effectively and securely. The applications are almost endless, and it just takes commitment and some vision to open up new opportunities. All this has been made possible by the incredible work of the EPCglobal community.

In 2007/2008, we will continue to see ever closer collaboration between the work of EPCglobal and the work of the larger GS1 organization. This is already happening in the linking of the EPCglobal and GSMP standards development processes. EPCglobal is also fortunate to have the contribution of academic research through the Auto ID Labs who participate in EPCglobal workgroups and delivered 23 white papers on a broad scope of relevant topics during the last year. Finally I am grateful and indebted to the staff of EPCglobal. Their commitment, dedication, passion and sheer hard work have been critical to enabling the wider EPCglobal community to pursue its strategies and goals. We are all totally committed to the purposes of expanding the EPCglobal standards infrastructure and driving the adoption of this remarkable technology.



*“Unilever is a long-standing supporter of GS1 standards and we recognise the value that they bring to our business. A good example was seen recently in our European and Latin American businesses who used the eCom communication standards to support the harmonisation of our upstream supply chain processes.”*

**Michael Polk**

President Americas Region  
Unilever  
Member of the GS1 Management Board

### THE GS1 eCOM STRATEGY

GS1 eCom is continuously being refined and expanded to meet new demands. There are also increasing numbers of XML solutions available on the market, both proprietary and standardised. As a result, it is becoming more difficult to get a clear overview of current and future eCom solutions. One of the major tasks for the eCom Business Unit over the last year has been the development of an eCom strategy. This document was approved by the GS1 General Assembly in May 2007.

The main principles have been that it must:

- Be business rather than technology driven
- Provide GS1 member organisation and user companies with an explanation of how the different parts of the eCom standards fit together
- Describe the way forward for eCom development and activities

The result is a comprehensive document covering all aspects of electronic business. Apart from providing short and long term views on the eCom standards, it also details strategic recommendations for implementation, marketing, development and strategic relations. The 37 recommendations contained in the document can be summarised in three high-level areas.

#### 1. Decoupling technology and business needs

Emphasis should shift from XML vs. EANCOM vs. X12, etc, to harmonising and standardising business processes and semantics. In the short term, this will significantly cut cost in handling multiple syntax standards. In the long run, it will provide a viable migration path towards a single standard.

#### 2. Increased implementation support

Although technical development will continue, more focus on implementation support is needed to fully capitalise on the last year's investment in standards development.

#### 3. Integration with the GS1 system

With the rapid development of GS1 regarding new sectors, master data alignment (GDSN), event tracking (EPC) and the introduction of complex GS1 solutions such as traceability, eCom's role and participation in this system must be reevaluated and redefined.



### **Focus on UN/CEFACT**

A cornerstone in the eCom strategy is an increased engagement in UN/CEFACT and alignment with its standards. For UN/EDIFACT this has been the case on both accounts for many years, but UN/CEFACT is now releasing the next generation of standards for electronic business and trade facilitation. This entails methodologies for business process modelling, XML Schemas and Core Component technology. Particularly the latter has rendered much attention since it is the first major initiative to create a syntax neutral semantic standard.

Apart from providing the tools needed to implement the GS1 eCom strategy, the UN/CEFACT standards are increasingly becoming a prerequisite when users choose eCom standard, notably in the public sector. To respond to these needs, GS1 has significantly increased its engagement in UN/CEFACT working groups and taken leadership positions in the management and the supply chain groups.

### **GS1 eCom in the public sector**

The use of eCom in the public sector has until now been low compared to private companies. This is rapidly changing in many parts of the world. Some countries are even legislating the use of electronic exchange to speed up adoption. There are also several countries starting to harmonise national laws and practices with other countries in their region, which provides new opportunities for more efficient eCom solutions.

Many Member Organisations are responding to these opportunities by setting up projects in the areas of customs, public procurement and agriculture. To support these, the eCom Business Unit has launched an eGovernment project with a primary focus on eProcurement. The project will update the eCom standard through the GSMP process when required, but the main focus will be on information sharing, marketing and education. As a first deliverable, a brochure aimed at raising the awareness of GS1 eCom solutions for eProcurement has been published.



## Operational Improvements



Vicente Escribano  
Chief Operating Officer

The system comprises a multilingual delivery platform and a content management system allowing Member Organisations to deliver courses in their native language. To date Learn has been implemented in over 32 countries and has been translated in more than 15 languages. Due to a strong focus on content development, a portfolio of more than 13 eLearning courses is currently available on GS1 Learn. The number of students has quadrupled in less than 2 years, and GS1 now has more than 4000 students registered on the system who have accomplished more than 50,000 training hours online.

In line with the training strategy, GS1 has linked its eLearning content to a variety of classroom courses in order to strengthen the knowledge of the GS1 System in the Member Organisations so that, in turn, they can offer training and certification services to their members. Classroom sessions comprise advanced and expert level training content. Several sessions were held at the Global Office in Brussels and in liaison with Member Organisations and Solution Providers.

Training content is authored by a team of faculties each chaired by a course director using local and global subject matter experts.

### **Moving forward: Rapid eLearning, eLibrary**

In keeping with current trends and the growing portfolio of GS1's products and services, the training team plans to deploy 'Rapid e-learning' as part of its core offering. Rapid eLearning is emerging as the fastest-growing category of online training and is generally defined as web-based training that can be created in weeks with shorter modules.

To strengthen its classroom offering, GS1 also plans to set up an eLibrary which is a central online repository containing training kits, concept animations, case studies, quiz banks and web links to enable MO's to offer a high quality range of training and education services at low cost.

参与GSMP, 使GS1标准在中国商品  
流通和进出口贸易中发挥更大作用。

陈刚  
2007年8月24日

***"Through our participation to the GSMP, we can ensure a perfect fit of the GS1 standards to the Chinese import and export market needs."***

### **Chen Gang**

Deputy Administrator of the  
Standardisation Administration of China

### **OVERALL OPERATIONS**

2006/07 has been a year of tremendous progress in Operations. From the launch of GS1 DataBar, through the approval in May of the eCom strategy, to the re-launch of Learn and the reinforcement of Customer Service, Global Operations has strengthened its positioning as the back bone of our activities. We have reorganized the Global Standards Management process (see details below) into a more agile and user-friendly fit. And we have established a new Solutions Department, whose role is to help develop strategy and the solutions to address business needs in a more transversal and holistic way.

### **Training & Education Blended Learning**

GS1's new training strategy aims at delivering Blended Learning which combines different types of technology-enabled experiences (or combines technology-enabled products) with face-to-face classroom-based experiences. Part of GS1's training delivery mechanism is enabled by Learn – a web-based training administration platform that allows 108 Member Organisations to deliver training content on a 24-hour basis irrespective of where users are based around the world.



### **MO Customer Services - [www.gs1.org/helpdesk](http://www.gs1.org/helpdesk)**

The MO Customer Services team at GS1 was set up to serve the needs of GS1 employees at Member Organisations and at the Global Offices in Brussels and Princeton. This team provides up-to-date technical and implementation support to GS1 MOs on the entire GS1 portfolio, including new solutions and services, in order to improve overall GS1 MO service levels.

MO Customer Services support is complemented by an Online HelpDesk Service which is one single portal to reach subject matter experts for assistance. A set of more than 400 Frequently Asked Questions is also available, with significant additions and updates, including but not limited to BarCodes, DataBar, Datamatrix, eCom, GSMP, Traceability EPC updates, Healthcare and so forth.

In addition the role of the Customer Services team is instrumental in providing technical and implementation expertise by publishing and maintaining guidelines and tools such as the GTIN/GLN Allocation Rules websites, the DataBar Starter Kits, BarCode Verification manuals, and the XML user guides.

### **Best Practices**

Materials and tools developed for use in one country can often be adapted for use elsewhere in the world. To this effect, the Global Office Customer Service team has developed an action plan to further develop MO Best Practices. As part of this plan to enable GS1 MOs to gain access to each other's best practices via a central repository, a "Best Practices Bank" will be available in GS1 Online.

The aim is to enable GS1 MOs to share their services, their good ideas, and their successful programmes so that everyone can take better advantage of the experience and work of others. Sharing best practices will help us embrace one vision, harmonize our individualities with one voice and work collectively as one organization.

### **Business Planning**

GS1 has developed new strategic and operational plans to support the revised GS1 Mission and Vision. The long-term strategies have been defined in the 3-Year Plan 2007-2010, and the short term is captured in the 1-Year Plan 2007-2008. With all GS1 Business Units following a common planning process, business planning has proven to contribute to the overall efficiency of business management within the GS1 Global Office.

### **GSMP (Global Standards Management Process)**

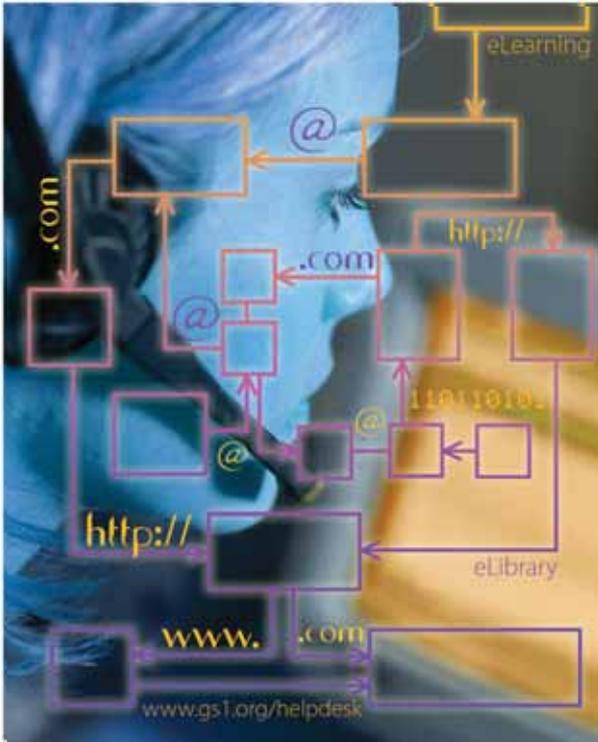
Since it was created in 2002, the GSMP has been the engine that powers the entire GS1 System of standards. It is an open and transparent process made possible by the participation of companies who wish to improve the efficiency of supply chains.

The GSMP brings together users from all industries and from everywhere in the world to identify needs for standards, gather business requirements, document best practices, obtain consensus on solutions, and then develop and implement the resulting supply chain standards.

In line with the GS1 pledge to continuously improve this process for the benefit of all users, a number of enhancements have been made:

- The GDSN and Master Data BRGs (Business Requirements Groups) and the GDSN (Global Data Synchronization Network) Guidelines Team agreed to merge into one group consenting to inter-related work efforts.



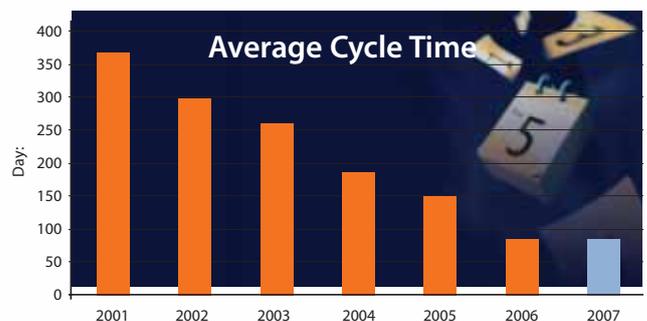


- The eCom BRG successfully transitioned from five individual business requirements groups into a single business requirements group. Members from the old groups are now working together.
- The EANCOM TDT (Technical Development Team) successfully merged with the eCom BRG to support all electronic commerce standards creation and maintenance under a single eCom requirements group.

Over the past year GSMP has delivered the following key achievements:

- **Launch of the GSMP MO Franchise Pilot:** While still a prototype, this methodology has already allowed GSMP to tackle the issue of time constraints especially for the Asia Pacific companies and Member Organizations. The pilots has shown that it is possible for numerous companies to link existing MO user groups to the GSMP via a common global agenda. It has strengthened the connection between the GS1 Global Office and the GS1 Member Organisations.
- **Formation of the GSMP Healthcare GTIN Allocation Rules Work Group:** Leverages GSMP's multi-sector work group process. The work group has created the first healthcare standard and is finalizing changes to the General Specification originated by the new industry. The group works closely with GS1 Healthcare.

- **Facilitation of a UN/CEFACT conformance project:** Will lead to GS1's use of UN/CEFACT's methodologies and has already led to increased participation in UN/CEFACT teams (for example, the approval of GS1's first submission of Core Components).
- **Drafting of GS1 Architecture Principles:** Will set the stage for more effective collaboration across business units and EPCglobal, improve the methods of standards development, and become the basis for a "solutions based" approach.
- **Delivery of a GDSN Trade Item Implementation Guide:** The definitive source on how to implement GDSN data. It has been fully endorsed by the GMA/FPA, which is made up of the world's leading branded food, beverage and consumer products companies.
- **Delivery of GDSN Package Measurement Rules and Tolerances:** A global a solution to a problem that has affected data accuracy for years; the large variety of pallet shapes that exist in the marketplace.
- **Delivery of a GDSN Imaging Standard:** Allows trading partners to more accurately communicate product image data, an important aspect of efficient plan-o-gramming.
- **Launch of a new GSMP website:** Includes the GS1 Standards Knowledge Centre, which serves as an online information resource containing standards documentation, white papers, operations manuals, and all other documentation that supports GS1 standards.
- **Achieving Process Efficiency Gains:** GSMP continues efficient execution of Change Requests to maintain an average cycle time of 95 days.



## New Solutions and Services



### Building a library of solutions

GS1 Solutions are bundled packages of GS1 Standards and Services that integrate together to meet a business need. They facilitate the adoption of GS1 Standards by addressing top business issues or opportunities in the market and showing how the GS1 System supports them. GS1 Solutions make it easier and provide objective criteria for each sector and each company to decide which tools and standards to implement with its business context.

Last year, the GS1 Architecture initiative re-envisioned the GS1 Portfolio as a standardized infrastructure framework. It optimises available and emerging technologies to support evolving business processes. Building on it, the focus this year is to agree on the 3-5 year strategy to develop a library of Solutions. As part of that, GS1 is consolidating existing solutions: Traceability and Upstream Integration in collaboration with GCI. An R&D effort has been launched in Mobile Commerce.

### Mobile Commerce, be ready for new shopping experiences anywhere, anytime

GS1 Mobile Commerce aims to provide open standards to link product information with consumers and businesses through mobile devices. Three billion people own a cell phone in the world : no longer just phones but mobile devices that can read barcodes, RFID tags and access Internet. Imagine...

Consumers could:

- get more information about product ingredients
- check products are genuine
- get further product instructions
- get information about allergens
- pick up coupons electronically

Business could:

- understand consumers better
- have another sales channel
- strengthen loyalty programmes
- simplify reordering

At the kick-off meeting on June 19 2007 in Paris, representatives of the FMCG, retail, healthcare and mobile industry agreed on common goals – building the market place by clarifying business cases and making sure the technology is cheap and simple to use.

### Traceability: the crucial foundation for visibility on the physical flow

In September 2006, a user-friendly version of GS1 Global Traceability Standard was published. All companies can now refer to the same document with their upstream and downstream business partners. Full chain traceability can be ensured with several tools: GS1 128 bar codes or EPC RFID tag, EDI Despatch Advice or EPCIS for example. Training is now available to GS1 organisations of all countries. As of June 2007, over 20 countries have expressed their support for the implementation in various contexts such as regulatory compliance, anti-counterfeiting, healthcare and fresh food sector. The next step is to help companies ensure their conformance to the Global Traceability Standard.

### Conformance and Certification: ensuring the right implementation

The bar codes certification framework was delivered in June 2007. It provides a consistent methodology to assess the quality of bar codes across the world. By using it, manufacturers, retailers and GS1 organisations ensure a good experience for the shopper at the point-of-sale and avoid the time lost when employees have to search for the price of the product. The certification framework for eCom messages will be developed in 2007-08.

### Net solutions: better serve GS1 members

GEPIR and Data Driver are two enablers of GS1 Solutions complementarily with GDSN Global Registry and EPC ONS. GEPIR is the global registry of GS1 members. It is the way to validate keys and to find the owner of any product or location code for one million companies in over 100 countries. The quality of the service is under continuous improvement in order to support value-added services such as browsing for information linked to GS1 keys and check the code authenticity. Data Driver is a tool to help companies assign product and location codes (GTIN & GLN) and manage the information linked to those keys. The international version is under development.





New Developments

New Sectors

Strategic Alliances

GS1 Healthcare



### CUSTOMS

World Customs Organization (WCO) is the intergovernmental organization ensuring effectiveness and efficiency of Customs administrations across the globe. It represents 171 Customs administrations, covering 99 percent of global trade.

From initial collection of duties and taxes, Customs role has evolved greatly today to embrace such key topics as supply chain security, trade facilitation, and simplification and harmonization of customs procedures. Through the number of international agreements, policies and guidelines, including SAFE Framework of Standards, WCO Data Model, Unique Consignment Reference (UCR) Recommendation, WCO provides its members with the instruments to implement these objectives.

WCO realized that a holistic approach by Customs, as a key regulatory body, is required to optimise the securing of the international trade supply chain data, while ensuring continued improvements in trade facilitation. Customs is therefore taking steps to develop co-operative arrangements with other government agencies, trade and transport.

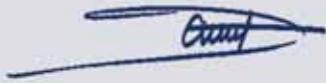
GS1 and WCO have a strong history of cooperation and share a common belief in the value and importance of making information available to all parties across supply chains, as early as possible. A majority of GS1 users' business operations involve international trade, and thus customs.

Over the past year GS1 assumed the role of Project Manager for the WCO high profile proof of concept international project on the use of Serial Shipment Container Code (SSCC) as UCR. In June 2007, GS1 together with the Customs authorities of the UK and Australia reported its successful completion to the WCO.

This project represented pioneering collaborative effort between Customs and trade, and was first example of cross-border UCR application. It demonstrated that the SSCC can be used as UCR, and as the electronic staple linking all key elements in the supply chain: transport, financial and commercial references, it provides the Customs administrations with the access key to this data. The acceptance and usage of one global standard throughout all participants of the international supply chain would greatly facilitate trade.

Proven successful on identification of bulk shipments with SSCC, the participants agreed that there are very good reasons to extending the trial, introducing additional stakeholders and complexity as necessary, such as extending trial to other countries and testing GS1 identification key to split loads (deconsolidation) and national distribution.

***“Our pilot test with GS1 demonstrated that their Serial Shipment Container Code can be used as a UCR to provide Customs Administrations and other stakeholders with the key data they require through the international supply chain.”***



**Michel Danet**  
Secretary General  
World Customs Organisation

As a result of this project WCO reconstitutes the UCR Correspondence group to reconsider practical aspects of the UCR application; GS1 launched the group to review the existing Auto ID solutions to meet the need for identification of complex shipments.

In the current work on the project new areas for collaboration between GS1 and WCO where identified:

- Auto ID solutions beyond SSCC,- including GTIN and GLN and its link to UCR and other WCO initiatives
- Message developments of WCO Data Model Project team and liaison of GS1 developments in eCom
- Mapping of GS1 Global Product Classification with WCO Harmonized system
- Linking EPCglobal activities with WCO initiatives in RFID identification.

Currently WCO and GS1 work on the development of a Memorandum of Understanding, which will define the broad framework of cooperation between the two organizations. It will set the foundation for development of mutually beneficial programs, projects and activities, reciprocal recognition of WCO and GS1 standards, and development of appropriate technical collaboration in the future.



## LOGISTICS

More than ever, Logistic Service Providers have to operate in international and complex environments. GS1 global standards enable these companies to improve tracking, tracing and overall efficiency, mainly through use of business messaging standards (XML and GS1 EANCOM) improving visibility and interoperability through the process and taking unnecessary costs out of the supply chain.

The GS1 logistics Forum brings together the various stakeholders such as CPG manufacturers, transporters, customs, dispatch agents, storage companies and retailers, in order to lead the standardization efforts. After one year of operation, the Forum has now completed its report labeled Logistics Interoperability Model (LIM). This model defines standardized ways for each partner in the logistic chain to communicate, taking into account their various business processes and data communication needs. It also drives alignment at all levels of the chain, from master data to financial settlement.

The initial LIM was focused on Road Transportation in Europe. It will now be extended to other regions as well as to maritime and air transportation.

## Strategic Alliances



### BRIDGE

The Building Radio frequency IDentification solutions for the Global Environment (BRIDGE) project is being supported by the European Union with €7,5 million funding. It is a three year initiative that started in July 2006 and it is coordinated by GS1. The Project has the objective to research, develop and implement tools to enable the deployment of RFID and EPCglobal applications in Europe. It involves 30 organisations from twelve countries in Europe as well as China.

During the first year, Problems and Requirements analysis were conducted in seven key areas: anti-counterfeiting, pharmaceuticals traceability, textile industry, food manufacturing, re-usable assets, products in service and item-level tagging in retail for non-food products.

On the technical side, the BRIDGE project comprises four working groups concentrating on RFID Hardware, Network lookup services, Network supply chain control and Security. The RFID Hardware group has lodged a patent on "Self Resonant electrically small antenna"

and an OEM low cost reader has already been developed. A reader chipset and a low cost portal reader will be produced. A requirements analysis and technical design documents for Discovery Services have been developed and will contribute to future standards development activities on Discovery Services led by EPCglobal. The Security working group has issued a comprehensive Security analysis documenting the requirements for enabling open and collaborative RFID-based business applications.

The horizontal activities include Training, Dissemination activities and Innovation and Policy reports. The training requirement analysis has been completed and Concept animators (multi-media learning objects that illustrate the use of RFID/EPC and their applications) have been produced. BRIDGE has developed high-level reports analysis related to the evolution towards the ubiquitous presence of the technology as well as the impact that this technology will have on policies that are governed by the European Institutions.

In 2007-2008, while the research on hardware and software will continue, comprehensive pilots will be run in six different sectors. The lessons learned from the pilots are expected to be very useful to stimulate the implementation of the technology.

For more information visit [www.bridge-project.eu](http://www.bridge-project.eu)

### NATO

The Technical Co-operation Agreement between the North Atlantic Treaty Organisation (NATO) and GS1 enables direct contributions by NATO to the establishment of GS1 standards. On an equal basis, the agreement formally enables GS1 to contribute to the standardisation activities of the NATO community. All the current NATO standards dealing with automatic data capture and electronic data interchange make use of GS1 standards. The Serial Shipping Container Code (SSCC) and the GS1 Logistics Label are used intensively by the armed forces in a number of NATO member and partner countries. EANCOM is also heavily used for communicating transactions related to procurement and to logistic operations. There is a growing interest for using RFID in the defence sector and the EPCglobal set of standard solutions will be duly considered.



## ISO

GS1 is a user driven standard organisation that does not work in isolation. Over the years, many interactions occurred with ISO technical committees, resulting in a significant number of ISO standards making due reference to GS1 standards.

Getting relevant GS1 standards recognised as ISO standards brings several benefits. It addresses the requirements of many GS1 Users who want to ensure that the standards they apply are formally recognised by an official standard body. They want standards that are compliant with public authority mandates that tend to recommend ISO standards. There are also direct benefits for GS1. We can learn from interacting with other standard bodies and develop synergies with communities that contribute to ISO developments.

A strategy defining the GS1 relationships towards ISO has been developed. It recommends that we continue and strengthen our involvement in the ISO committees where we are already present. This work is lead by GS1 Global Office but it involves GS1 Member Organisations who have an essential role at the national level. It further recommends embedding the relations with ISO into our GS1 standard development processes where and when appropriate. Finally, we will pay a particular attention to marketing. The recognition of GS1 standards by ISO is a very powerful asset that needs to be adequately promoted and exploited.

GS1 currently enjoys an active liaison with ISO in the following areas: Automatic Data Capture, Electronic Business, Healthcare informatics, Packaging, Information and Documentation (including Books and Magazines industry).

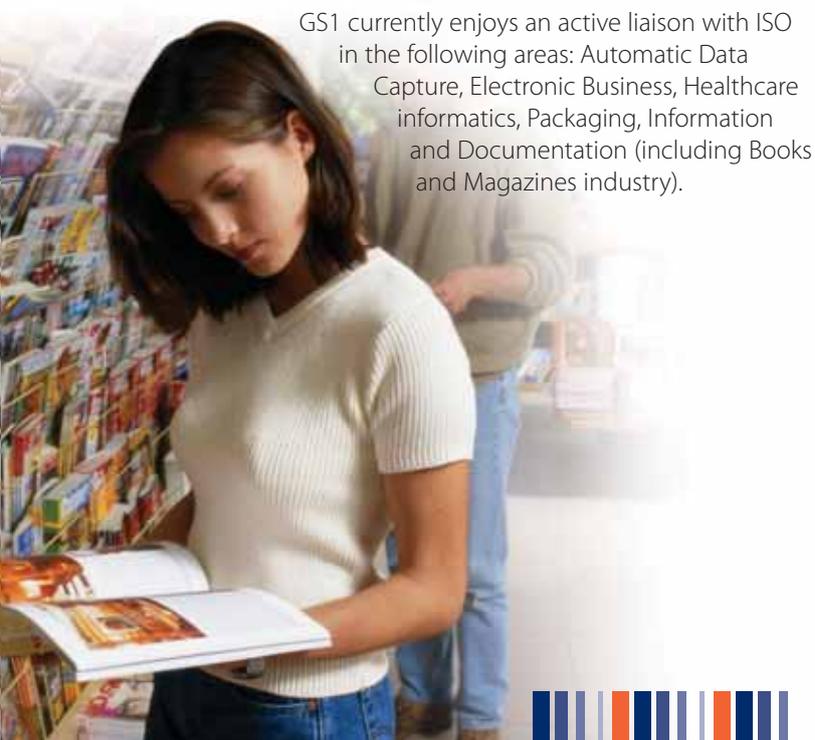


## UN/CEFACT

UN/CEFACT is generally accepted as the only standards organisations for base eBusiness standards with a truly global and multi-sectorial reach. GS1 has been actively involved in this organisation since the 1980s and EANCOM is a fully aligned subset of the UN/EDIFACT standard.

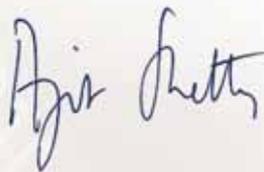
A global GS1 eCom strategy was developed and formally approved in May 2007. It makes largely provision for strengthening the involvement of GS1 Global Office and Member Organisation staff in the UN/CEFACT proceedings. Some of the key actions that are being taken and will continue being implemented in 2007-2008 include the following:

- GS1 MOs will engage themselves with their local UN/CEFACT head-of-delegation or agency to contribute to the UN/CEFACT process at local level.
- The GS1 EANCOM team will remain actively involved in the development and maintenance of UN/EDIFACT.
- A global project has been launched to ensure full alignment of the GS1 standards with UN/CEFACT's equivalent standards. A compliance model with UN/CEFACT will be defined and the necessary changes will be implemented in GS1 eCom standards and processes.





*“Preventing counterfeiting and ensuring traceability are global challenges in the Healthcare sector. Therefore, they require global solutions. GS1 Standards provide the foundations needed to tackle those key priorities.”*



**Dr Ajit Shetty**

Chairman and Managing Director  
Janssen Pharmaceutica N.V.

Member of the GS1 Management Board



***“Accuracy of the product data exchanged is crucial in the relationship between hospitals and their partners. GS1 offers an excellent platform for designing global harmonised solutions to improve patient safety as well as efficiency of the supply chain.”***

A handwritten signature in black ink that reads "Joe Pleasant".

**Joe Pleasant**

Chief Information Officer  
Senior Vice President  
Premier Inc

*Member of the GS1 HUG Leadership Team*

### FACTS & FIGURES

- 9,500 dispensing errors with potential to harm patients occur per year in a 735-bed hospital.
- The WHO estimates 10% of all drugs to be counterfeit on a worldwide level.
- Over 20 million people in the U.S. have at one time taken a drug that was eventually recalled.
- Healthcare expenditure is currently reaching more than 8.5% of GDP in the E.U., and could reach as much as 16% by 2020 due to medical progress and ageing population.

Global automatic identification standards in healthcare will improve patient safety and increase the efficiency and integrity of the healthcare supply chain. GS1 and the Healthcare user community are committed to facilitate the development and implementation of open and neutral standards that will improve patient safety through the optimisation of the healthcare supply chain.

Effective automatic identification and linkage of patients, products, caregivers, and locations will:

- reduce medication errors by ensuring the 5 patient rights: the right patient gets the right product at the right time, in the right dose, and using the right route.
- enable traceability to ensure effective product recalls, improve inventory management and manage waste
- decrease counterfeiting by enabling product authentication
- increase supply chain efficiency contributing to keeping costs under control





## 2006/2007:

### A YEAR OF SIGNIFICANT ACCOMPLISHMENTS FOR GS1 IN HEALTHCARE

#### JULY 2006

##### **GS1 HUG endorses the GS1 System of Standards.**

The GS1 Global Healthcare User Group, a voluntary and open group formed by leading pharmaceutical and medical device manufacturers, wholesalers, hospitals, and trade associations, chooses GS1 as their sole system of standards in Healthcare.

#### SEPTEMBER 2006 - JUNE 2007

##### **Many GS1 Member Organisations establish local Healthcare User Groups.**

Local User Groups facilitate the gathering of local requirements and promote and support the local adoption and implementation of GS1 standards. Australia, Austria, Canada, Chile, France, Germany, Macedonia, Malta, New Zealand, Serbia & Montenegro and Switzerland have all already established a local User Group. More countries are planning to launch a local User Group in 2007/2008..

##### **GS1 develops strategic alliances.**

To join forces promoting global supply chain standards, GS1 establishes partnerships with other organisations, including trade associations, such as EUCOMED (European Medical Devices Association) and IHF (International Hospital Federation), and other standards bodies, such as HL7 (Health Level Seven).

#### DECEMBER 2006

##### **GS1 HUG agrees on a Global Standards Development Roadmap.**

The User Group agrees on a Roadmap for the development of global AIDC Application Standards to become available in 2008. The Work Teams have been restructured accordingly.

#### JANUARY 2007

##### **Two new Work Teams are launched in Brussels: Data Synchronisation and Product Classification.**

##### **The EPCglobal Community ratifies the Pedigree Messaging Standard.**

#### MARCH 2007

##### **The U.K. Department of Health recommends that GS1 standards should be adopted throughout the NHS.**

The government clearly sees "real improvements to patient safety when using coding systems to match patients to their care". By adopting auto-identification and data capture systems, a series of hospitals are now already spending less money and saving more lives.

#### APRIL 2007

##### **The Council of Europe's Expert Group on Safe Medication Practices makes a strong recommendation to use the GS1 System.**

The Expert Group makes a strong recommendation to European Healthcare organisations and other related stakeholders "to update the national and European legislative framework to require labeling of every single unit of use of all licensed medicinal products... The data matrix bar code should contain a GS1 GTIN in addition to the expiry date and batch number."



### **GS1 HUG advocates global approach for Automatic Identification Standards in Healthcare.**

To fully realise health and economic benefits, standards need to be truly global. Local needs are incorporated into global standards, but local standards will jeopardise the realisation of such benefits:

- Local standards hinder interoperability and compatibility, which significantly reduces the economic benefits.
- Additional R&D may have to be devoted to meeting heterogeneous local standards. This R&D could otherwise have been deployed to innovative activities.

GS1 HUG issued a Position Statement promoting this global harmonization process. GS1 is also working with regulatory bodies around the world to achieve such harmonisation.

#### **JUNE 2007**

### **GS1 HUG and EPCglobal HLS IAG agree to join forces.**

The two existing User Groups within GS1 (the GS1 Global Healthcare User Group and the EPCglobal Healthcare & Life Sciences Industry Action Group) agree to join forces and to form one united group "GS1 Healthcare". This means one vision, one roadmap and one voice. A single group for our users to be engaged in and a single source for regulatory bodies and associations to work with. This integrated group aims to kick-off on 28 October 2007 in London.

### **The GSMP Community ratifies the Healthcare GTIN Allocation Rules.**

This is the first major milestone in defining the Healthcare Application Standards for Automatic Identification and Data Capture

### **A new Work Team for Traceability in Healthcare is launched in Orlando.**

### **GS1 HUG issues on investment recommendation for hospitals and pharmacy retailers to invest in camera-based bar code scanners.**

The specific needs of Automatic Identification in Healthcare require camera-based bar code scanners. This will facilitate the future adoption of global standards for automatic identification in the Healthcare supply chain, in particular when using GS1 DataMatrix, a 2-D bar code.

#### **2007/2008:**

### **A PROMISING YEAR FOR GS1 GLOBAL STANDARDS IN HEALTHCARE**

Global AIDC Application Standards will become available in 2008. The GTIN Allocation Rules Standard have already been ratified. The other Work Teams have made great progress in defining business requirements for Auto-ID Data and Serialisation. They are now working intensively towards the Healthcare Application Standards.

GS1 and its User Community will continue and will even increase their efforts promoting the adoption and implementation of the GS1 System of Standards in Healthcare. GS1 will further leverage its global network of Member Organisations to engage more local stakeholders, in particular to engage hospitals and pharmacy retailers and advocating global harmonization with local regulatory bodies and associations.

EPCglobal will continue to work full force ahead with the Healthcare sector to address RFID specific critical needs, including an Air Interface Standard for item level tagging, Serialization (the format of the EPC on the tag), the decommissioning of tags, and Network Security.

The Work Team Traceability will further develop a Traceability Solution for medical products based on the GS1 Global Traceability Standard and responding to evolving regulatory requirements. Several regulatory bodies around the world have been issuing regulations that will require traceability and electronic pedigree of medical products.

The Healthcare sector continues to discover inefficiencies in its supply chain due to incorrect product data not aligned with all trading partners. These errors are not only costly (e.g. additional administration to reconcile and inaccurate rebates), but also jeopardize patient safety because of postponed treatment. Furthermore, divergent projects on medical catalogues are developing across the world, but none are global. That is why the User Group decided create two Work Teams, Data Synchronisation and Product Classification, to develop global standards. The goal is to leverage and utilize GDSN's existing infrastructure and processes.

All of the above will be realized by one unified User Group, GS1 Healthcare:

- A single group for our users to contribute to and to follow up.
- A single source for regulatory bodies and associations to work with.
- Aligned standards development processes, but still taking into account the specific needs of different solutions





## GS1 Standards in Action



Canada

**GS1 Canada, A Leader  
In Product Imaging Solutions**



Korea

**GS1 Korea Serving An  
Accelerating Role In Adoption  
Of RFID By Korean Industries**



New Zealand

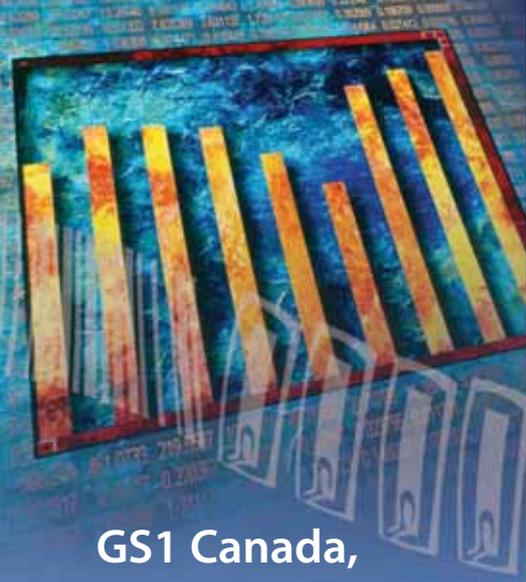
**GS1 New Zealand  
'Hammers Home' Quality in DIY**



UK

**GS1 UK: Connecting for Health  
"Bulk Numbers Arrangement"**





## GS1 Canada, A Leader In Product Imaging Solutions

### Opportunity Assessment

In response to Canadian industry's demand for a single source of standardized product images for planogramming and promotional purposes, GS1 Canada collaborated with retailers, vendors and associations to develop ECCnet Image & Validation (ECCnet I&V) services, which capture, measure, validate and store accurate product images, as well as dimensional data.

ECCnet I&V's databank of more than 86,000 unduplicated images and dimensional data is available to all Canadian industry sectors. To date, more than 20 retailers and approximately 1,500 manufacturers in the grocery and foodservice industry have engaged in ECCnet I&V services to improve supply chain efficiencies. GS1 Canada is the only GS1 member organization to achieve critical mass in the grocery sector and to normalize members' product data.

### Importance of GS1 Standards

In 2003, GS1 Canada introduced standards for normalized product descriptions for its ECCnet I&V Planogram Images service, nutritional data attributes for the Foodservice industry and a new high-resolution Marketing Images service for print and online promotional efforts.

Most notably, GS1 Canada's collaboration with the Voluntary Interindustry Commerce Solutions (VICS) Association to develop a new global standard for digital product image and dimension specifications was published as the *GS1 Product Image Specification* in February 2007.

### Business Benefits

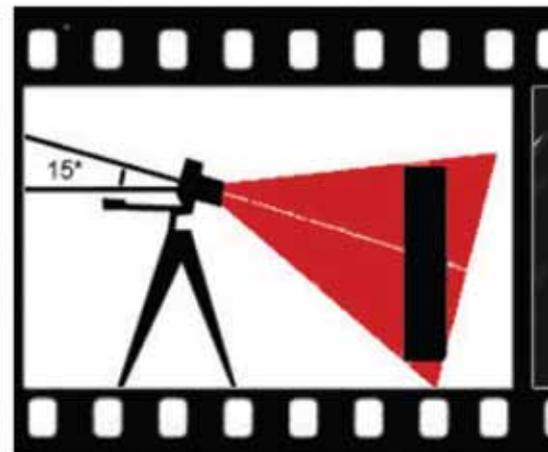
Beyond complying with global standards, GS1 Canada's ECCnet I&V services benefit Canadian companies by:

#### 1. Improving supply chain efficiency with a 'one-stop-shop' for product images.

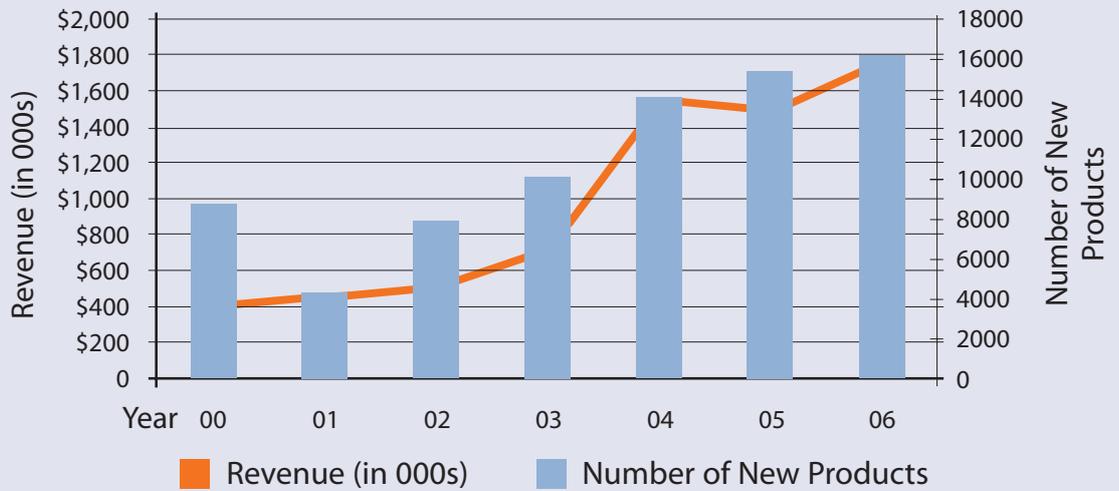
Vendors save time by sending their products to only one location to reach all customers and retailers receive single-source access to up-to-date product images and dimensional data, which ECCnet I&V verifies to ensure they are correct and complete.

#### 2. Maximizing products' selling potential by emphasizing data integrity.

ECCnet I&V produces high quality, standards-based marketing images for advertising initiatives, foodservice product image cards (PICs), category completions and store audits.



## ECCnet I&V Growth Summary (2000-2006)



Employing state-of-the-art technology, ECCnet I&V captures product images according to industry requirements and tests product bar codes to maximize scanability and prevent penalties for bar code scanning errors.

**3. Providing accessible business solutions around the country and around the clock.** ECCnet I&V levels the playing field for vendors of all sizes to do business, regardless of their location in Canada. Members receive access to their marketing images 24 hours a day, seven days a

week through secure Internet access, as well as access to online planogram image-viewing tool Public Search Browse & Download (PSBD).

**4. Saving members money through astute strategic management.** GS1 Canada reduced image capture fees by 85 percent (from \$292 CDN per product to \$45 CDN per product) since inception. Further saving retailers and manufacturers tens of millions of dollars, ECCnet I&V services enhance members' shelf management and category management initiatives by ensuring that trading partners use clean data.

By identifying image and dimensional requirements for certain sectors in Canada, GS1 Canada laid the foundation for new global standards for product image and measurement specifications that will facilitate the international industry's adoption of accurate data in a synchronized, standardized world.



# GS1 Korea, Serving An Accelerating Role In Adoption Of RFID By Korean Industries

RFID technology is rapidly moving from promise into practical marketplace solutions in Korea, thanks in part to a five-year long project called the **RFID Promotion Center**.

The RFID Promotion Center is the industry-focused initiative established by GS1 Korea in collaboration with government, academia, and the Korean business sector. Conceived and launched in 2004, the project was designed to promote the speedy adoption of EPC-based RFID technology by Korean industries. At its core, it featured six key areas of concentration for practical market-based deliverables:

- Pilot Projects
- Performance Test Center
- Standardization
- Leaders Group & Industry Forums Activities
- Training Programs
- RFID/EPC Website

### Expanding the Market

As a result of the concerted effort of the stakeholders in the RFID Promotion Center, the Korean RFID market has been growing rapidly over the past half-decade. Market size as represented by sales is projected to double over last year's totals, reaching US\$ 472 million in 2007, according to

recent government research reported in RFID Journal Korea. And the total number of EPCglobal subscribers place Korea in 5th place worldwide.

### In Focus: The Business Benefits

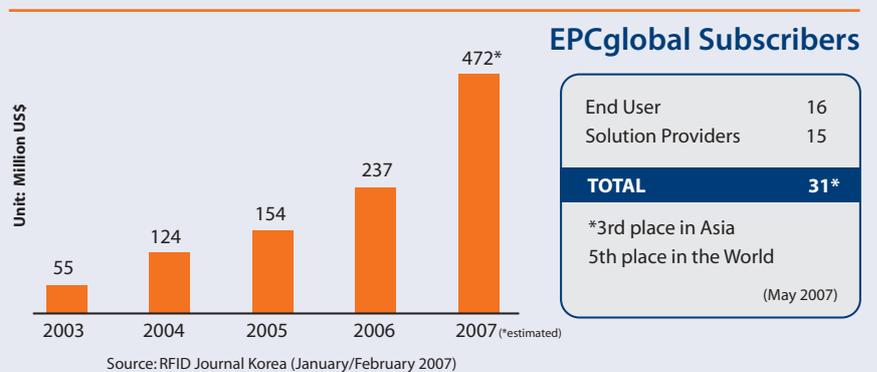
The market success of GS1 Korea's RFID Promotion Center can be measured in business benefits achieved in each of the six key areas of concentration outlined for the project.

### RFID Pilot Projects

In order to verify the effectiveness of RFID/EPC and develop business models to accelerate adoption and implementation, GS1 Korea helped coordinate pilot projects in multiple sectors, specifically logistics, retail, apparel and healthcare. These pilots have proven successful in early runs, and have been responsible for several important industry developments:

- In April 2007, GS1 Korea was able to produce a 'Standardized Application Template & ROI Analysis Tool' based on the findings in the pilot programs. The tool can be used by companies exploring the possibility of adopting RFID/EPC.
- Based on the results of the pilots, GS1 Korea will provide a 'One Stop Service' for RFID/EPC which will focus on customized implementation guidelines for companies in early stage of adoption.

## Market Status



### Performance Test Center

The concept of a Performance Test Center to support developers and users of RFID equipment was vital to the overall mission of the RFID Promotion Center. GS1 Korea was able to work with local universities to establish three such centers in major cities throughout the country, including Seoul, Pusan, and Suncheon. The centers are in limited operation, with initiatives underway to bring them into full operation within six months.

- All centers are currently providing preliminary testing services for conformance and interoperability
- Capital projects are also currently underway in all centers, installing facilities for dynamic performance testing
- Once dynamic testing facilities are operational, centers will apply for EPCglobal accreditation

### Standardisation

In its core competency role, GS1 Korea worked with our global system to help establish a foundation for developing the RFID technology in compliance with global standards.

- Made a definitive contribution to assigning UHF band (908.5 ~ 914 MHz) in 2004 (GS1 Korea officially requested the government to approve UHF as it coordinated the first RFID pilot using UHF in Korea)
- Leading standardisation efforts on all fronts, including the adoption of 25 ISO standards as Korean Standards

### Leaders Group & Industry Forms

The RFID Promotion Center has mobilised forces to create an environment for enhancing awareness and commitment to RFID in the marketplace through several industry-related programs:

- GS1 Korea organized the RFID Leaders Group of CEOs from a variety of industries including retail, automotive, textile, and CPG, to enhance top management's awareness and encourage their commitment

- Industry Forums of working-level managers were also organized to share global updates and encourage discussion on implementation details
- The annual RFID Awards Ceremony was created in 2006 and was held again in 2007.

### Training Programs

Training is at the center of the outreach efforts of the RFID Promotion Center. To date, the center has developed a number of opportunities for stakeholders to learn about RFID/EPC:

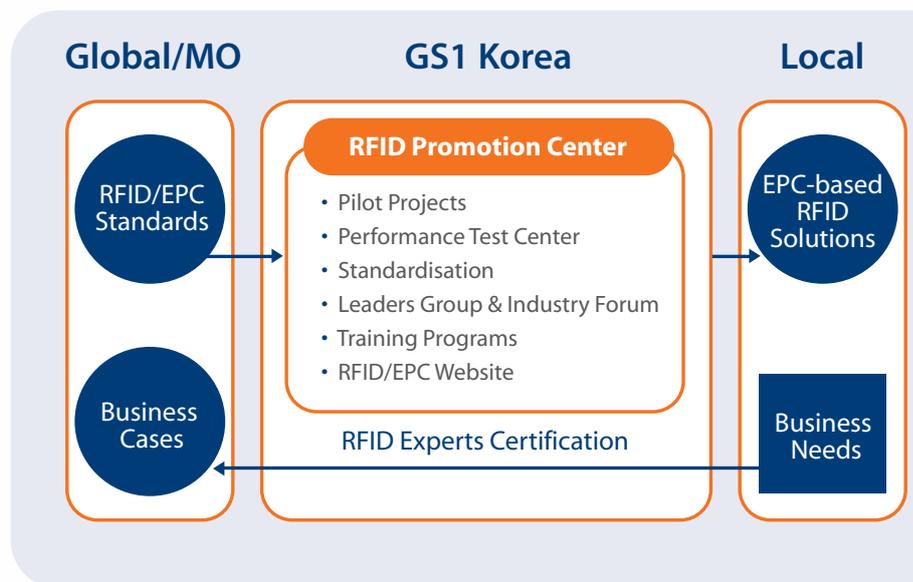
- This year, the Centers have created a program of 10 courses to satisfy demand. In 2006, the Centers offered 9 sessions which were attended by 340 professionals wanted to learn more about RFID.
- The Centers are currently in additional course development with seven universities across the country
- A Joint Certification Program for RFID Experts is being developed in cooperation with CompTIA USA

### RFID / EPC Website

Adoption is also being fostered by the development of a GS1 Korea website targeted at RFID and EPC. The on-line resource offers a comprehensive collection of information and publications as well as a thorough compilation of activities, events and conferences. Visitors to the site will find:

- A dedicated website provide the latest information on RFID / EPC
- Detailed information and registration opportunities for the annual RFID/EPCglobal Conference (in operation since 2004)
- A total of eight publications on RFID/EPC standards and implementation available for download or standard delivery.

The bottom line is that the RFID Promotion Center is effectively supporting Korean industries in the development and implementation of EPC-based RFID technology. And GS1 Korea continues to take a bridging role between global standards and local industry.





## GS1 New Zealand 'Hammers Home' Quality in DIY

### Background

DIY is New Zealand's national pastime. All Kiwis love building things and modern NZ DIY stores are now not just the preserve of men, but destination stores for the whole family.

DIY is an attractive sector for GS1 NZ: large (\$15b turnover), dominated by NZ-owned chains (so decisions can be made quickly & locally), heavy investment in technology and 'big box' stores with tens of thousands of SKUs. There was only one problem: in 2005 GS1 NZ had no history of engagement with the sector, little business and no DIY retailer members!

### Our Engagement Strategy

In early 2005 GS1 New Zealand decided to initiate with the hardware/DIY sector. A sector analysis was completed using a modified Porter's Five Forces methodology coupled with an analysis of where GS1 could add immediate value by either 'avoiding a pain or making a gain' for the customer.

### Initiation

Visits were made to stores collecting information from observation and interviews. It became clear that bar code quality was a major problem, and where GS1 NZ could unarguably offer expertise and services.

General Manager-level staff at the retail head offices were approached. All but one chain rebuffed our approach, denying that they had any problems. However, Allan Gray, General Manager from the largest chain, Placemakers, was not convinced that they had a problem, but was happy to be "proved wrong."

### Penetration

Placemakers contracted GS1 to conduct an in-store survey of scan quality. 9% of total SKUs were tested using verifiers, with 70% failing verification. Placemakers realized that the best approach was to allow GS1 to share the information with their competitors and all work together to improve POS integrity.

All five players major chains participated in the Hardware Action Group (HAG) and learnt who GS1 was, the survey results and its implications. As Stephen Pye, Placemakers' Group Marketing and Merchandising Manager commented "Point of sale scanning is not a nice to have... it is a must have. Scan failure hurts the retailer, the customer and the supplier. It is great to see all five major retailers working together to solve this'."

Outcomes included:

- A contract (value \$20,000) for another large sector-wide survey. This revealed an astonishing 6.8% no- or very poor-scan rate
- A seat on the GS1 NZ board
- A supplier education programme, dedicated DIY seminars and articles in trade magazines
- Paid-up membership for all 5 retailer chains

### Radiation

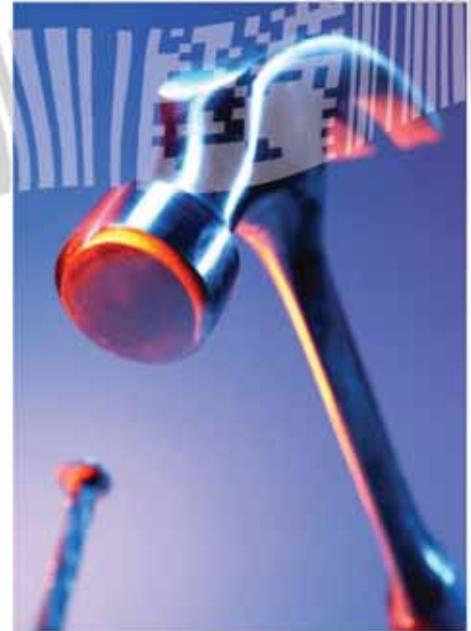
The relationship between GS1 NZ and the sector has deepened and radiated:

- Progressive introduction of mandatory verification
- 'Star' speaking slots, and heavy attendance from the sector, in our annual conference "Connecting the Dots"
- Retailers working with GS1 NZ to explore technologies such as data sync and GS1 DataBar

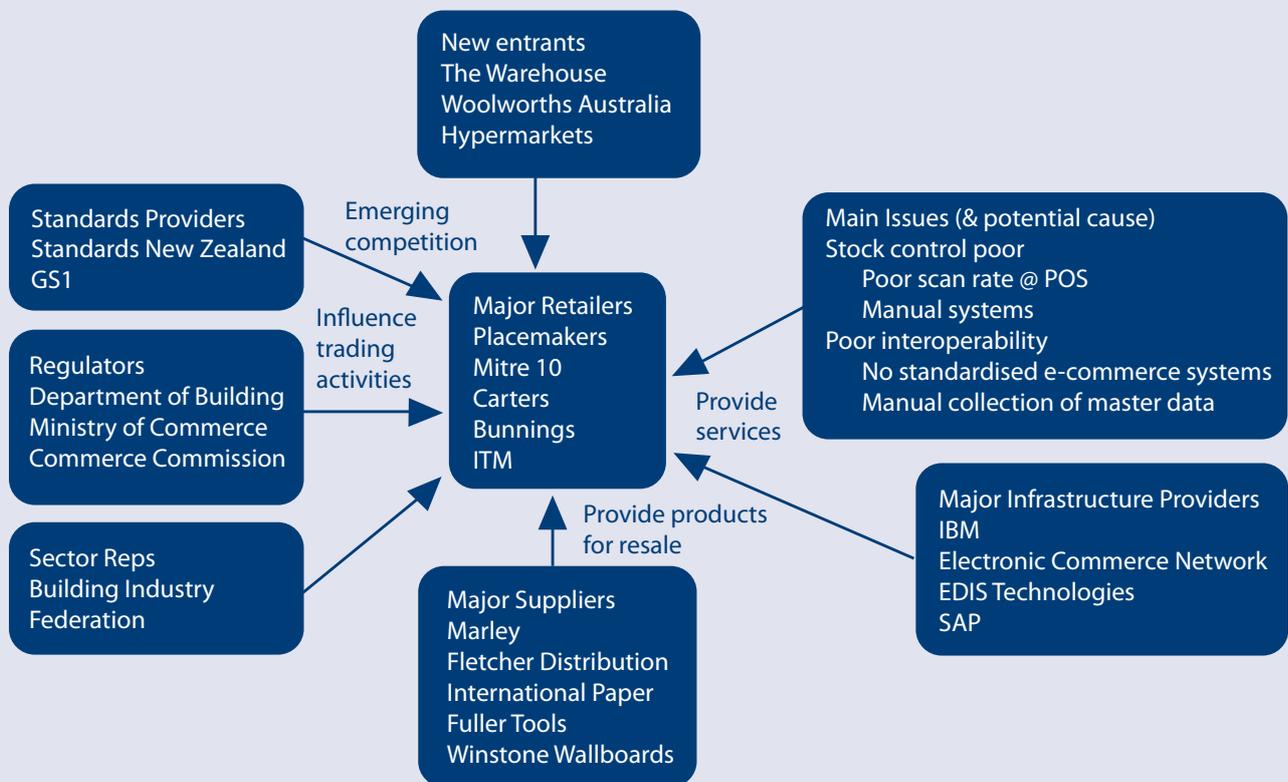
One of the most challenging steps was mandated verification. It was impossible to have concrete mixers, cement, pipes, heavy power tools etc couriered to GS1! We developed an entirely new service delivery and pricing model which has been well received. Now, GS1 technical staff call on hardware suppliers and verify products *en masse on site* using mobile computing/verification devices, real-time access to central systems via advanced 3G data networking. As Damien Sidebottom from Specialised Sales & Marketing commented "From our point of view, it worked extremely well. The process was very convenient in terms of logistics and timing. There was an awful lot of scanning required but by the end of that day, I had received verification reports on every product scanned."

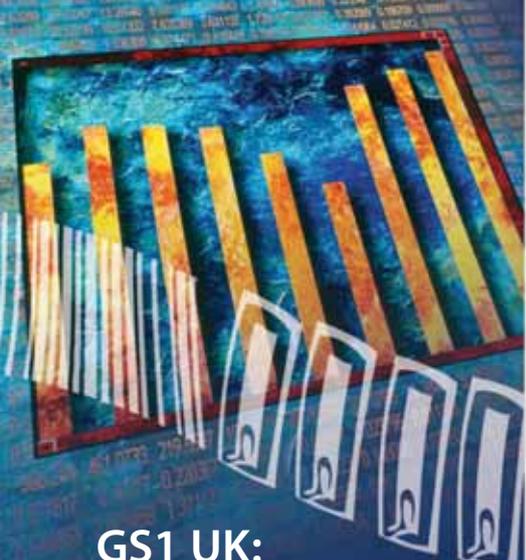
**Summary**

By the end of 2006, GS1 NZ has conducted over 4,000 hardware verifications, accounting for substantial incremental revenue. GS1 NZ now has productive engagement with the retailer and supplier communities, proactive activities and an expanding membership base. This engagement illustrates the commitment of GS1 NZ to demonstrate leadership, deliver value and improve the supply & demand chain of an important sector.



**New Zealand Hardware Sector Analysis - Modified Porter's Five Forces Model**





## GS1 UK: Connecting for Health “Bulk Numbers Arrangement”

### Opportunity Assessment

GS1 UK identified opportunities in healthcare for the increased and improved use of the standards in 2002. It had been striving to penetrate the healthcare market, but it was proving very difficult to establish mind-share and create the agenda for change. This was despite recognition of the contribution GS1 standards would make to enhanced patient safety (saving people lives) and the paradigm shift in efficiency improvements.

Progress was slow due to the absence of ownership within the community for policy, existence of and confusion about a plethora of other coding structures in healthcare, and a lack of a decision maker to “mandate” and define a specification for the use of AIDC and barcoding techniques.

Through the passion, persuasion, persistence and patience of Gary Lynch, now GS1 UK CEO, supported by his Board and management team, GS1 UK invested time and effort over a 3 year period working with key stakeholders in the Healthcare market to establish a consensus that GS1 standards for AIDC and bar coding were essential for improved healthcare services. In 2005 GS1 UK initiated a strategy to:

### 1. Establish a policy directive.

Working with key stakeholders the objective was to enable the UK Minister of Health to agree to mandate an agreed strategy. After a meeting with the Minister in January 2005 it was agreed that the Department of Health would set up, immediately, an Early Adoption Team to investigate the feasibility of such a mandated policy. Despite the distraction of a UK election in 2006, and a change in Minister, in February 2007 Lord Hunt, Minister for Quality in Health, announced, “We have recommended that the GS1 System should be used for coding in healthcare, both by manufacturers of medicines and devices, and by NHS organisations. This recommendation will be supported by co-ordinated action from a number of agencies.”

### 2. Drive the mass adoption of GS1 identifiers in the NHS.

Connecting for Health (CFH) is developing IT systems (NPFIT) supporting Electronic Patient Records, ePrescribing and eBooking (appointments) across the NHS in England. Rather than attempting to “sell” an identifier or company prefix to each hospital in England (with vast consequential cost of sale), GS1 UK developed a highly innovative sales strategy to sell a block of 500 prefixes into the NHS. This would not only bring GS1 standards to the very heart of the NHS in England but also provide clear direction regarding data standards to the whole healthcare sector. GS1 UK packaged up a portfolio of products and services including identifiers as well as consulting, a Helpdesk service and training. The agreement, signed in February 2007, represents the largest group membership subscription ever made by GS1 UK.

### Importance of GS1 Standards

Different standards for coding had developed over time through voluntary action across the industry. Usage of GS1 standards in the medicines sector was more widespread. The NHS needed a more consistent, systematic approach to identify assets, items and patients within healthcare settings. GS1 standards provide the UK NHS' communities with a unique, independent, open, fully supported and globally accepted mechanism to enable automatic identification and traceability of assets throughout the supply chains. "The GS1 System is both global and open and it offers the most appropriate coding structure for most applications in the NHS" (Coding for Success – Department of Health). Going forward the GS1 Healthcare User Group (HUG) will be an important forum for further development.

### Benefits

GS1 standards provide real improvement to patient safety matching patients to their care resulting in fewer medication errors, a reduced risk of wrong-side surgery, a more accurate track and trace of surgical instruments, equipment and other devices, and much better record keeping. Use of codes in managing supplies and purchasing can cut costs dramatically as well as improving efficiency. Coding is also a weapon in the fight against counterfeit products.



It will create a huge momentum for the adoption of GS1 standards in the UK healthcare settings, sending a clear signal of direction to all users, suppliers and solution providers. This is expected to result in a significant increase in members and membership subscriptions to GS1 over the next two to three years and offers the potential to provide added value services such as training, consulting and global data synchronisation services.

This UK development will undoubtedly impact positively on the adoption of GS1 standards in other countries around Europe, with the Department of Health keen to become active in the GS1 Global Healthcare User Group, as developments in the UK NHS are often viewed as being a benchmark for the European healthcare sector.



## General

GS1 Financial Statements

GS1 Board Members

Leadership Team

Membership



## GS1 Financial Statements



Michel van der Heijden  
Chief Financial Officer and President,  
New Sectors & Healthcare

### **Sustainability**

At the beginning of 2005, GS1 embarked on a complete overhaul of its finance function. The last two years saw significant improvements in transparency and predictability, two key ingredients for a successful partnership with our internal stakeholders at the Global Office and the Member Organization (MO) community. The transformation was largely driven by the implementation of changes in our financial processes and funding principles. Today, we have the financial tools in place that enable us to control and report our expenses with a high degree of confidence. We also have a stable Financial Model which allows the MO's to clearly determine their fee rate without any surprises.

Still, we must recognize that the evolution of our organization will inevitably challenge our current methodologies in the area of finance. As we continue to find new ways of delivering value to our users, while pursuing some exciting opportunities into new sectors, we will be confronted with an increased need for financial sustainability. Over the course of the year, we developed a fully integrated planning model, which allows us to seamlessly align our financial forecast and long-term plan with the agreed GS1 project priorities. We also enhanced our cash planning capabilities and investment strategies. Creating a sustainable financial model to support GS1's core sectors and the expansion into new sectors will be one of our key priorities in the next months. At the same time, we will be looking to develop an approach for making decision on how to engage new industries and have a transparent process for resource allocation. Solid execution of strategy is all about fact based decision-making and choices.

### **Key Financial Statistics: Global Revenue**

GS1 Member Organizations around the world are funded by their local members through annual membership fees and sales of services. Consolidated in euros, the total revenue in fiscal year 2006/07 was essentially unchanged from prior year at -0.3%. If we exclude the impact of currency due to the strengthening of the Euro, our year over year growth then stands at 5.5%.

This compares to a growth of 13.9% last year, which had been favorably impacted by the one-time effect of the 1SYNC merger. Regionally we see some important differences, with a strong performance in MEMA, Asia Pacific and Europe, but some challenges in Latin America and North America, particularly in the United States and Brazil.

### **GS1 Global Office – Fee Evolution**

Looking at the historical trend, the numbers confirm that after a period of transformational change in GS1, with the startup of EPCglobal and GDSN, we have now entered a more stable phase in terms of our fees evolution. The overall growth of global revenues combined with the investment in EPCglobal has brought the 2006/07 GS1 GO revenues to €26.6M, an increase of €2.4M or 10% versus the year before. Going forward, we start to manage our core activities on a more going-concern mode, while continuing to invest in EPC and expand into new sectors. Our budget 2007/08 calls for an increase of €1.0M or 4% versus the year before.

### **Income Statement and Headcount**

Our consolidated Income Statement shows a positive result of €1,314K for the fiscal year ending June 2007. We continued to build a reserve from our base business (GS1 Central Office), to cover current and future investments in new technologies and applications, but also to have the necessary reserves in case of adverse currency fluctuations. The EPCglobal Income Statement was break-even, as it is based on a cost recovery funding model. As for GDSN, the final result was also break-even as a shortfall in revenue due to non-participation of some data pools was offset by tight cost controls.

In terms of types of expenses, our main investment remains our people, with 79 employees on the payroll at the end of June 2007, moving towards 88 by the end of the next fiscal. Discretionary spending, which includes travel, consulting, marketing and large user meetings/events (Global Forum, GSMP events, ECR) was essentially unchanged versus prior year.

**GS1 Consolidated**  
**FY 2006/2007: YTD Actuals for the period ending 30/06/07**  
(€ 000's)\*

	Consolidated	GS1 CO	EPC Inc. (100%)	GDSN Inc.
<b>Revenue</b>	<b>26,618</b>	<b>16,365</b>	<b>7,780</b>	<b>2,473</b>
Fixed/Recurring Expenses	2,775	1,492	763	520
Discretionary Expenses	9,578	4,210	4,175	1,193
Payroll Expenses	12,748	9,149	2,840	759
<b>Operating Expenses</b>	<b>25,101</b>	<b>14,851</b>	<b>7,778</b>	<b>2,472</b>
<b>Operating Result</b>	<b>1,517</b>	<b>1,514</b>	<b>2</b>	<b>1</b>
Other Revenue/(Expenses)	(203)	(201)	(2)	-
<b>Result for the period</b>	<b>1,314</b>	<b>1,313</b>	<b>-</b>	<b>1</b>

\*: Consolidation based on monthly spot rates

**Global Coverage Revenue by Region**

(€ 000's)

	Actuals '04/'05	Actuals '05/'06	Actuals '06/'07	Budget '07/'08	Growth	
					%	Excl. FX
Asia Pacific	24,555	25,616	33,679	34,069	1.2%	7.6%
Latin America	16,737	19,707	24,306	23,060	-5.1%	2.6%
North America	52,774	52,834	74,254	68,728	-7.4%	3.3%
Middle East/Mediterranean/Africa	2,727	3,187	4,033	4,015	-0.4%	12.6%
Europe	64,796	72,887	79,595	85,452	7.4%	7.2%
<b>TOTAL</b>	<b>161,588</b>	<b>174,231</b>	<b>215,868</b>	<b>215,324</b>	<b>-0.3%</b>	<b>5.5%</b>

**Historical Perspective**

(€ Millions)

	00/01	01/02	02/03	03/04	04/05	05/06	06/07	07/08
GS1 Central Office	3.9	5.0	6.3	7.2	11.6	13.8	16.4	16.1
EPCglobal Inc.	-	-	-	3.2	5.4	7.2	7.8	8.6
GS1 GDSN Inc.	-	-	-	-	0.6	3.2	2.5	2.9
<b>Total GS1 Global Office</b>	<b>3.9</b>	<b>5.0</b>	<b>6.3</b>	<b>10.4</b>	<b>17.6</b>	<b>24.2</b>	<b>26.6</b>	<b>27.6</b>

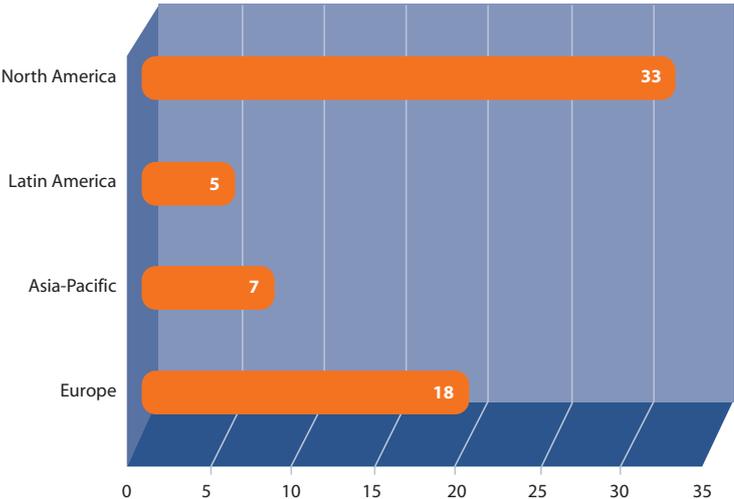
# GS1 Board Members

## Board of Directors

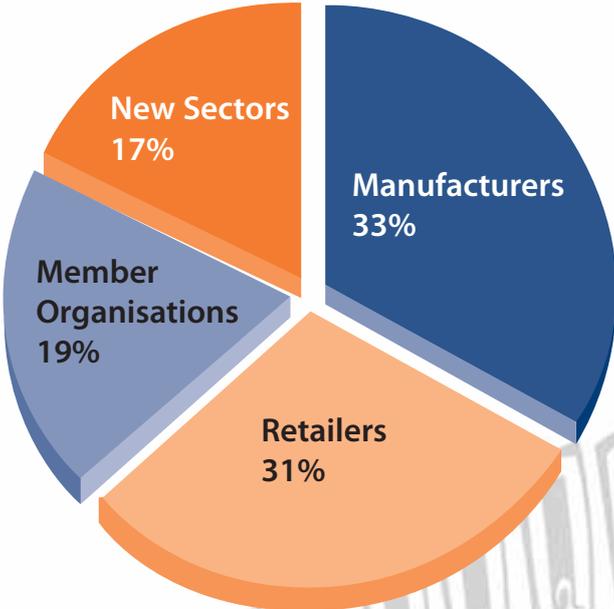
The Board members of GS1, EPCglobal and GDSN are fully behind our global Vision and Strategy. These individuals provide the inspiration and leadership to drive our global organisation forward and we thank them for their continued commitment and contribution.

The members of our Boards are business leaders from across the globe from the Member Organisations, consumer goods manufacturing and retail and new sectors including healthcare, transport, aerospace, defense and IT. Both multinational and small-to-medium sized companies are represented.

## Boards Membership per Region



## Boards Composition





## GS1 Management Board

Member	Title	Company
Danny WEGMAN	GS1 Chairman Chief Executive Officer	Wegman's Food Markets, Inc.
Robert A. McDONALD	GS1 Vice-Chairman Vice-Chairman and COO	The Procter & Gamble Company
Juan Antonio SANFELIU	GS1 Vice-Chairman Chief Executive Officer	Manufacturas Antonio Gassol, S.A.
Timothy SMUCKER	GS1 Chairman Emeritus Chairman and Co-CEO	The J.M. Smucker Company
Seung-Han LEE	President and CEO	Samsung Tesco Co. Ltd
Miguel LOPERA (Ex-officio member)	President and CEO	GS1
Aziz BULGU	Chief Executive Officer	Migros Türk T.A.S.
Linda DILLMAN	Executive Vice President Risk Management, Benefits Administrator & Sustainability	Wal-Mart Stores, Inc.
Bruce EDWARDS	Chief Executive Officer	DHL Exel Supply Chain
Christopher J. FRALEIGH	Executive Vice President & CEO Food & Beverage	Sara Lee Corporation
Elzbieta HALAS	Chief Executive Officer	GS1 Poland
Takashi INOUE	Chief Executive Officer	GS1 Japan
Sonny KING	Chief Executive Officer	Advantage Sales & Marketing
Philippe LAMBOTTE	Senior Vice President, Global Customer Service & Logistics	Kraft Foods Global, Inc.
Gérard LAVINAY	Managing Director of Group Organisation System & Supply	Carrefour Group
Alain LE GOFF	Executive Vice President of Supply	Reckitt Benckiser
José LOPEZ	Executive Vice President of Operations	Nestlé S.A.
William L. McCOMB	Chief Executive Officer	Liz Claiborne Inc.
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Michael POLK	President Americas Region	Unilever
Jörg PRETZEL	Chief Executive Officer	GS1 Germany
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Milt SENDER	Chairman	Daymon Worldwide
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Clem ERHARDT	SVP, Secretary & General Counsel	GS1 US
Rafael FLOREZ	CEO	GS1 Colombia
Pierre GEORGET	CEO	GS1 France
Ron GILBERT	Director, Item Management Systems, Information Systems Division	Wal*Mart
Sally HERBERT	President	GS1 GDSN, Inc.
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Dave HUTCHINGS	Director, GIS B2B	Kraft Foods Inc.
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## GS1 Leadership Team



(Left to right): Sally Herbert, President, GS1 GSDN Inc; Eric Decroix, Chief Marketing Officer; Vicente Escribano, Chief Operating Officer; Miguel A. Lopera, President & CEO; Susan West, Chief Human Resources Officer; Chris Adcock, President, GS1 EPCglobal Inc; Michel van der Heijden, Chief Financial Officer and President, New Sectors & Healthcare.

## Our Beliefs and Values

### BELIEFS

#### What are our fundamental principles?

- We are a not-for-profit organisation
- We are neutral from the business partners
- We are user-driven and governed
- We serve all companies, both multinationals and SMEs
- We are a platform for collaborative agreements between business partners
- We believe that our people – employees and associates – are our most important asset

### VALUES

#### How do we behave?

- Inspirational leadership
- Passion for delivering the best results
- Innovation
- Trust & integrity
- Teamwork & collaboration



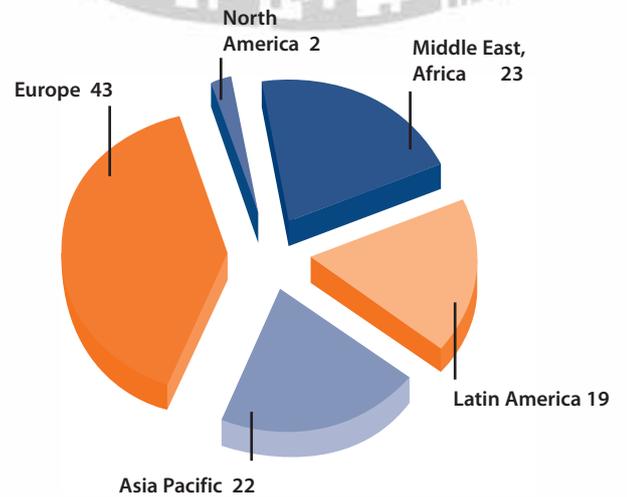
# GS1 Membership

## GS1 Member Organisations per continent

GS1 was founded in 1977 by 12 organisations from Europe. Japan was the first country to join GS1 from outside Europe, in 1978, followed by Australia in 1979.

At the GS1 General Assembly meeting in Seoul in May 2007, GS1 welcomed 4 new member organisations from Africa and Asia: GS1 Benin, GS1 Nigeria, GS1 Pakistan and GS1 Tajikistan.

On its 30th anniversary, GS1 with 108 national member organisations can claim to be a truly international organisation with global reach.



## GS1 Member Organisations



- Countries with a GS1 Member Organisation
- Countries served on a direct basis from GS1 Global Office (Brussels)

- 108 GS1 Member Organisations
- 39 additional countries served on a direct basis from GS1 Global Office in Brussels
- Over one million user companies
- GS1 standards used in multiple industry sectors

**108 Member Organisations. 150 Countries served. Local services, global reach.**



The following information was correct at time of going to press. For most recent information, please visit our website at <http://www.gs1.org/contact/worldwide.php>

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The GS1 Strategy Booklet provides the core elements of the most widely used supply chain standards in the world.

### CORE COMPETENCIES

What must we do better than anyone else?

- Global Standards Development**  
 Effectively manage the global, user-driven development and implementation process to deliver high quality, easy-to-implement standards to industry and solution providers
- Identification**  
 Provide a system of unambiguous numbers to identify goods, services, assets and locations in support of automated and secure supply chain processes
- Global Reach**  
 Maintain and develop a global network of national affiliates which deliver high quality standards-oriented services to their members
- Cross-cultural Communication**  
 Develop and maintain a broad range of communication capabilities which enable effective two-way communications between GS1, its affiliates, its membership and the wider community



## What we focus on to deliver our strategy?

### STRATEGIC FOCUS

- **Governance**  
Align the strategies of the GS1 Management Boards around the world
- **Management Board - Senior Executives**  
Maintain a strategic, business perspective by ensuring GS1 and MO Board leadership is at the Senior Executive level
- **Sustainable Financial Model**  
Design a financial model that can support both ongoing operations and provide investment for future GS1 growth
- **Public Policy**  
Maintain an open and productive dialogue with legislative, regulatory, media and other key constituencies
- **Drive Adoption of GS1 Standards**  
Prove and document the business cases for implementing GS1 standards and solutions
- **Grow New Sectors**  
Prioritize new sectors; align organization, processes and resources to support their unique needs and enable their growth
- **One Face to the Customer**  
Transform the GS1 customer experience to one that is focused on solving business problems with a “best solution” mindset; streamline contacts

### OPERATIONAL IMPROVEMENT

- **Vision Alignment & Communication (Internal and External)**  
Continue to simplify GS1 messages and ensure consistency – See One Vision, Speak with One Voice & Act as One Organization
- **Branding**  
Build and strengthen the GS1 brand around the world with all of our offerings
- **Integrated Portfolio of Products, Services**  
Build a portfolio that is fully integrated
- **Organization Effectiveness**  
Create a great place to work for great people
- **Strengthen Strategic Alliances**  
Determine which partnerships can deliver the most benefit to our users; focus resources on optimizing these mutual relationships

*Continually refreshed based on GS1 priorities.*





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