



**Annual Report 2008-2009**



*Geese are a fascinating example of how a diverse group can successfully work together toward a common goal. Studies show that their method of flying in a “V” formation helps the whole flock travel farther than could any single bird flying alone. Each flap of the wings of one goose provides uplift for all the others.*

*The 108 Member Organisations of GS1 form a similarly efficient group. Each GS1 MO has unsurpassed insight into its local market and a full understanding of the special needs of its member companies. Every day, on every continent, a GS1 Member Organisation is finding a solution to a specific and very local issue. And yet, the 2,000 individuals who work for GS1 also share a true sense of community and a common focus. We are all travelling in the same direction toward the same destination.*

*And just like for a flock of geese, our interdependent federation will enable us to fly farther.*

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## Letter from the Chairman of the Board



In the past year, the environment in which we operate has become more volatile, unpredictable, chaotic, and ambiguous. GS1, like so many other companies and organizations around the world, is both directly and indirectly affected by

this challenging environment. The Chinese language ideogram for “crisis” is composed of two symbols that, when viewed individually, mean “danger” and “opportunity.” At GS1, we have considered the current economic crisis as just that – a combination of danger and opportunity.

### Seizing opportunities

For several years now, GS1 has been focused on leading change. During these past twelve months in particular, leading change has meant knowing how to seize opportunities in challenging times. We didn’t ignore the danger of the current economic crisis; we worked to find the opportunities in it, by being agile, by operating with discipline, by executing fundamentals with excellence, and by keeping in touch with our users, with each other, and with our external landscape. We delivered on our promises by choosing to focus on the few important things that we could control and driving them to completion.

### The importance of innovation

Furthermore, we have focused on innovation. We know that innovation matters in good times and tough times alike. It has never been more important to innovate, because by innovating, we create more value for more consumers, we stimulate growth, we prevent commoditization, we reduce costs, and we increase productivity.

### Long-term relationships

Partnerships are increasingly important to our success, and at GS1 we’ve been working at creating long-term, collaborative relationships which “grow the pie” for all partners in the value chain. These types of partnerships are characterized by shared purpose, mutual goals, simple

strategies, and complementary core strengths that build upon an enabling structure and an open-minded culture. We believe that collaborative business models and new ways of sharing ideas and technology will lead to joint value creation and long-term relationships.

### Turning crisis into opportunity

This year, at our annual GS1 Forum and at our General Assembly, I called upon all GS1 Member Organizations to act with urgency and agility, to focus on fundamentals, to lead change and to stay in touch with the external landscape. Most importantly, I asked that we continue to pursue our efforts to become a truly interdependent federation: a diverse group of separate entities working together to achieve common goals. Each GS1 MO has unsurpassed insight into its local market and a full understanding of the special needs of its users. Together we can leverage global learning and scale to be stronger and more efficient. Our organization is devoted to meeting both global and local needs and our dedicated people are constantly striving to create standards that enable global commerce. It is my continued honor and privilege to serve as the Chairman of the GS1 Management Board, because I truly feel that we can help our users turn crisis into opportunity.

**Robert A. McDonald**

President and Chief Executive Officer  
The Procter & Gamble Company

Chairman  
GS1 Management Board

## Letter from the President and CEO



Despite the challenging context – or perhaps because of it – the past twelve months were filled with significant accomplishments for our organisation. At GS1 Member Organisations around the world and at our Global

Offices in Belgium and in the United States, our teams worked harder than ever to meet the needs of our users, to benefit businesses and to improve people's lives. There were many success stories:

### We progressed on our Breakthrough Projects

Tremendous efforts have been made across our organisation to address key strategic issues by getting the approval of our Management Board and our General Assembly on our four Breakthrough Projects: Where to Play, Organisational Effectiveness, Sustainable Financial Model, and MO-GO Relations. These projects are a key element of our ongoing efforts to understand, assimilate and adapt to the new challenges and new opportunities of the world in which we live and work.

### Our core activities are stronger than ever

For thirty years, **GS1 Identification and BarCodes** activities have been changing the way the world does business. **GS1 DataBar**, for example, is off to a strong start in fresh foods, and we have adopted a phased launch plan for it to support both early adopters and smaller countries and companies. The teams of **GS1 eCom**, working at the GS1 Global Office and at GS1 Member Organisations around the world, have continued to collaborate with UN/CEFACT and are more involved than ever before in its governance and task forces. They will soon deliver the much-awaited version 2 of the UN XML Cross Industry Invoice. The **GS1 Global Data Synchronisation Network** saw a hearty 51% growth, with 3.7 million GTINs now in the Global Registry and successful forays into new sectors and industries. **GS1 EPCglobal** has increased its membership by 21% around the world, and a variety of companies are completing and extending EPCglobal pilot programs and moving forward into implementation. We've also worked on solutions for Electronic Article

Surveillance (EAS) and we're building guidelines for using the EPCIS standard to enable new levels of information sharing.

### We have advanced in new markets, services and solutions

Our work with targeted solutions and with sectors beyond fast-moving consumer goods has surged as well. In **healthcare**, for example, we have made tremendous headway. Our efforts to apply Automatic Identification and Data Capture (AIDC) application standards to all medical products are already bearing fruit and we will pursue them. We ratified and implemented the **Global Traceability Standard for Healthcare**, a major step; and we're working actively with the GS1 Global Data Synchronisation Network to ratify a healthcare extension there. We've developed a single strategy for our activities with the **transport & logistics** sector, and we're pursuing our collaboration with the World Customs Organisation through a joint working group devoted to the Unique Consignment Reference (UCR). Additionally, across a wide range of industries, we're seeing important endorsements for our **Global Traceability Conformance Programme**, as well, and good progress in our work on enabling extended packaging using solutions from **GS1 MobileCom**.

### The year ahead

This is going to be a year of important change for GS1. We will continue our work on our Breakthrough Projects, by implementing Organisational Effectiveness and the Sustainable Financial Model. We will complete the Where to Play study that will give us GS1's vision of 2020. Supply chain visibility and extending GS1's activity from B2B to B2C (mobile commerce) will be new and important spaces for us. Healthcare will continue to be an important activity; and food and product safety – including traceability, product recall and consumer information – will become a key focus for all. I know there will be even more success stories to come.

**Miguel A. Lopera**  
GS1 President & Chief Executive Officer

## Letter from the Chairman Emeritus



At GS1, our goal is to “See One Vision, Speak with One Voice, and Act As Organisation.”

The power in these statements comes from the action they require – see, speak, act – and the unity

they demand. They are more than just words – they are ideals that we earnestly pursue in everything we do. Indeed, these simple yet compelling statements can be applied to just one industry, to a set of trading partners, or to all constituents of a supply chain: any group of stakeholders can accomplish more as a united organization than any one entity could accomplish alone. Therefore, every community should continually seek to find alignment around the vision they see, how they speak to the world, and how they act in pursuit of shared goals.

Nevertheless, our organization is diverse, fast-paced and global ... which can sometimes make it difficult for us to remain connected and equally informed about what is going on and what is happening next. So, how do we rise above all of the transformation going on around us? How do we become a truly interdependent federation? In addition to clear and consistent communication, we act on the direction the Chairman of the GS1 Management Board, Bob McDonald, has given us:

### Focus on what matters most

Everything we do must contribute to meeting the needs of our users, so we work hard to align our people and our strategies. This allows us to focus on the few meaningful things: great things happen when our people are given the opportunity to spend more time talking about our users and less time on disruptive activities.

### Be clear about what is not changing

Although we face an accelerating speed of change, there is something that remains unchanged – our Basic Beliefs, the guideposts of our community that will support us as we continue to pursue our objectives. These beliefs remain the strength of GS1: We are a neutral, not-for-profit

organization. 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 – our employees and associates – are our most important asset.

### Continually work on our core strengths

Global standards development, identification, global reach and cross-cultural communication are what we do and must continue to do better than anyone else. Indeed, our Global Standards Management Process – through which we engage all stakeholders and constituents at the appropriate time for support and approval – is an example to the world.

### Leverage structure and scale

This means ensuring that we are doing the right work at the global, regional, and local levels.

### Build upon our strong vision and mission

The success we’ve known and the success we are certain to see in the future are all built upon the ideals expressed in the GS1 Vision and Mission. At GS1, our vision is a world where things and information about them move efficiently and securely for the benefit of businesses and the improvement of peoples’ lives, everyday, everywhere. Our mission is to be the neutral leader enabling communities to develop and implement global standards by providing the tools, trust, and confidence needed to achieve our vision.

Thank you for all you do to see, speak, and act as one.

**Tim Smucker**

Chairman and Co-Chief Executive Officer  
The JM Smucker Company

GS1 Chairman Emeritus

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## **GS1 Products and Services**

**GS1 BarCodes and Identification**

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**GS1 EPCglobal**





## GS1 BarCodes & Identification

### Sally Herbert

President, Standards & System Development.  
President, GS1 GDSN Inc.

In the past year, we've seen GS1 BarCodes experience the greatest adoption curve in our 30-year history. There are a number of reasons for this. For example, our work on Automatic Identification & Data Capture (AIDC) is moving from being focused on brand identification (GTIN only) to being more focused on data about business objects. Our teams are simultaneously supporting GS1 DataBar and GS1 DataMatrix adoption and migration, sometimes with the integration of GS1 EPCglobal RFID. And finally, we've been working hard to engage the healthcare, fresh foods, and customs sectors; and we're supporting GS1's MobileCom initiatives.

### Many notable achievements

This year proved to be challenging, but GS1 users and staff worked hard to make adjustments and begin developing broader adoption initiatives. Notable achievements include:

- A strategic project called **Integrated AIDC**, designed to develop the As-Is and Future State for GS1 AIDC technology (printing, scanning, reading);
- Several major steps toward the **integration of barcodes and RFID** with the first GS1 General Specifications Application Standards to specify the use of barcodes with optional RFID supporting healthcare; as well as the collaboration of several GS1 workgroups seeking greater alignment between the Tag Data Standard and the GS1 General Specifications;
- The official designation as GS1 Keys of two new Application Identifiers, the **Global Shipment Identification Number (GSIN)** and the **Global Identification Number for Consignments (GINC)**, after work with the World Customs Organization;
- A strengthening of our **alliance with AIM Global** to now include seminars, a monthly newsletter column, and joint meetings between our technical communities;
- An initiative to **manage the proliferation of multiple barcodes** on consumer packaging
- The creation of an **AIDC test facility** in concert with AIM Global and Ohio University, to answer barcodes specification questions coming from users and GS1 MOs.

### Great adoption and a "fresh" focus for GS1 DataBar

GS1 DataBar has offered many opportunities for suppliers



and retailers alike, but certainly some of the most interesting use cases revolve around the fresh food supply chain and a range of global initiatives around food safety and food traceability. This is likely because GS1 DataBars can carry information about brands, expiration dates, lot numbers and country of origin – and yet are still small enough to be put on individual pieces of fruit. Indeed, GS1 DataBar sightings are occurring all over the world. Half of all tomatoes and 60% of all apples in the United States now have a GS1 DataBar on them. Full-scale retailer/supplier rollouts are underway in North America and success stories also pour in from Australia, Chile, France, Germany, Japan, and the Netherlands.

Based on a report conducted in 2008, the GS1 Advisory Council and the Executive Committee of the GS1 Management Board agreed to a plan for **GS1 DataBar adoption:**

- By **2010**, GS1 DataBar standards will be available for use for all trade items when there is bilateral agreement between trading partners. The specific focus will be on fresh products scanned at the retail point of sale.



*"The benefits of implementing GS1 DataBar will truly be achieved when all trading partners are aligned to a common solution. This is why it's so important that all retailers engage in a GS1 DataBar implementation program."*

### Eric Biddiscombe

Senior Director Planning, Produce Business Unit  
Loblaw Companies Ltd.

- Then, by the target date of **2014**, GS1 DataBar standards, including attribute information (using GS1 Application Identifiers), can be used globally by all trading partners in an open environment and on any product. At a minimum, in 2014, retailers should be able to scan a GS1 DataBar and process GTINs to their databases. Country-by-country adoption dates will allow early adopter nations to move forward, but provide additional time for other nations to get ready. As a result, this plan supports both the needs of medium/large retailers, who wish to benefit quickly from GS1 DataBar investments, and those of small/medium retailers, who may require more time to make the transition.

### Authentication: moving from tactical to strategic

For the traditional GS1 membership - FMCG and retail - tracking or authenticating at the item level has not been a major requirement. However, for new sectors such as healthcare, customs and others, there is a greater requirement for accountability. How can GS1 better enable our members to ensure border security and patient safety and combat counterfeiting? Furthermore, how can we effectively reduce the impact of unauthorised number resellers on the future landscape? How can we minimise "human error" mistakes? Authenticated GS1 Keys and accurate data supporting those keys are a requirement for GS1; they will be important differentiators in what is becoming a complicated global landscape of data, and vital to our sustainability. As a result, we have launched an Authentication Service Project to enhance the GS1 systems that register, validate, and securely share

very basic information about GS1 Keys to ensure they are legitimately part of the GS1 System. This will support proof of identity to a verifying party, which in turn helps to preserve a user's investment in GS1, protect our core assets and provide growth opportunities.

### Common infrastructure, common processes, common benefits

In the 1970s, and even the 1980s, many said EAN/UPC alignment was impossible. Now some say the next step in AIDC – providing common infrastructure, systems, and processes for benefits in consumer safety – is impossible. But if our first 30 years proved anything, it's that GS1 is always prepared to move beyond impossible.

We strongly believe that 'common' is the vision, and we have set 2014 as the goal: 2014 is the date when all trade item scanners, everywhere in the world, should support GS1 DataBar and all AIDC systems should support GS1 Application Identifiers. 2014 is also being discussed within GS1 Healthcare as a common global adoption target for use of GS1 DataMatrix at pharmacies, hospitals and other places where regulated healthcare trade items are scanned.

By 2014, we expect to see that our efforts to promote the deployment of a common infrastructure will yield the common systems required to support common processes, which in turn; will produce common benefits for businesses and consumers.

## Sally Herbert

President, Standards & System Development.  
President, GS1 GDSN Inc.

When companies use the predictable structure of GS1 eCom electronic business messaging standards, they find that they can communicate business data rapidly, efficiently and accurately, no matter what kind of hardware or software they have.

"eCom" is a GS1 term used for Electronic Data Interchange (EDI) technology, referring to the transfer of structured data, by agreed message standards, from one computer application to another, by electronic means and with a minimum of human intervention.

GS1 eCom provides two complementary standards for business messaging: GS1 XML and GS1 EANCOM. They both allow a direct link between the physical flow of goods and information related to them and are a key component of just-in-time manufacturing and quick response customer-supplier links.

A January 2009 survey of 80 GS1 Member Organisations revealed that more and more companies have taken the steps to see the benefits GS1 eCom can bring. Our eCom standards are today widely implemented across all continents of the globe: GS1 EANCOM, for example, is live at almost 84,000 companies in 43 countries; GS1 XML standards have been implemented in 31 countries by more than 21,000 companies. Particularly notable growth was seen in the European region, where 'GS1 in Europe'



Member Organisations have been working diligently to share with their users the benefits of our business messaging standards.

### User companies continue to increase

The interest and adoption of GS1's standards for business document exchange is constantly growing, further confirming the benefits that companies can get from this type of business integration.

The chart here illustrates the implementation of GS1 EANCOM, GS1 XML and Web EDI in the last four years, as well as the forecast for 2009.

It is clear here that GS1 EANCOM is far from being an old or obsolete technology; indeed, its users continue to grow, their numbers passing the 100,000-company mark this year and expected to charge toward 120,000 in the months ahead.

After a period of modest growth at its launch, the relatively new (at least as compared to EANCOM) GS1 XML standard has really exploded in the last two years, surpassing our predictions. GS1 XML adoption figures are expected to continue an upward curve in 2009.

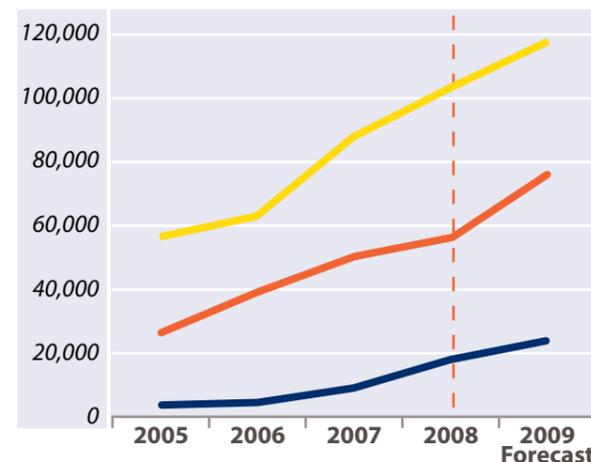


figure 1: eCom Adoption 2005/2009

■ EANCOM ■ GS1 XML ■ WEB EDI

*"We have identified significant cost savings already from the rollout of our automated goods receipt system. With the implementation of GS1-compliant advanced shipping notices at the pub level, we have been able to avoid unnecessary costs by spotting any ordering, delivery and invoicing errors in advance."*

**Richard Pratt**  
Commercial Director, Mitchells & Butlers Pubs, UK

Some companies and government agencies, especially those with a large number of SMEs as their suppliers, use "eProcurement" systems built around portals and web forms (i.e., Word or PDF forms that they publish on their website for suppliers to download and use.) Although there are currently no true global standards specifically for these web forms, many companies create their proprietary web form solutions based on GS1 standards. Our chart shows that this Web EDI implementation is also growing at a brisk rate, which indicates how smaller companies and organisations are increasingly embracing eCom-based information exchange, as well.

### Continued collaboration with UN/CEFACT

For many years GS1 and GS1 MOs have been engaged in UN/CEFACT, the United Nations Centre for Trade Facilitation and Electronic Business, to ensure that the GS1 message standards and their methodology of development are aligned with UN standards.

The UN/CEFACT forum is a neutral, open environment where a wide range of standard and business experts from around the world meet and develop horizontal standards which cut across industry verticals. This type of international activity reduces the possibility for divergence between standards in the private and public sectors, thereby facilitating process and messaging interoperability.

By working within the UN/CEFACT framework, GS1 is building strategic relations with key industry standards

organisations. We are embracing and embedding globally trusted standards, such as ISO, into GS1 standards, and in doing so we are improving the robustness and credibility of the GS1 system.

In 2008, representatives from GS1 were voted into some of the most influential positions at CEFACT, a forum where many of the world's leading companies and governments converge, discuss and resolve issues that influence global trade practices. To best serve our members in ensuring that GS1 keys, attributes and best practices are embedded in the UN standards, GS1 is actively present at CEFACT work sessions and meetings to influence and accelerate development of the UN XML vocabulary and message sets.

While GS1 EANCOM is already based on UN/EDIFACT, we have in the past year further intensified our collaboration with the group as we work on a future version of GS1 XML, which will be a UN XML message subset.

### Cross Industry Invoice: top priority for 2009

While there are several initiatives ongoing at UN/CEFACT, the top priority for GS1 in 2009 is to deliver version 2 of the UN XML Cross Industry Invoice (CII). The first version of the CII was published in 2007, but over the last year or so has been reworked to become a more robust document that can serve as a true cross-sector invoice. CII version 2 is one of the most eagerly awaited messages and once published, it will certainly be a milestone event for both UN/CEFACT and GS1.

# GS1 Global Data Synchronisation Network

## Sally Herbert

President, Standards & System Development,  
President, GS1 GDSN Inc.

It's been a year of growth and momentum for the GDSN, the GS1 Global Data Synchronisation Network.

The GDSN is built around the GS1 Global Registry®, GDSN-certified Data Pools, the GS1 Data Quality Framework and GS1 Global Product Classification, which, when combined, enable the secure and continuous harmonisation of data attribute values between two or more user systems. This results in data being the same, and hence reliable, in the connected systems.

The GS1 Global Office and GS1 Member Organisations accomplished important work in 2008-2009 on GDSN adoption and implementation. The past twelve months have been witness to both regional expansion and sector growth, as we continue to become a truly global network serving the needs of a global community. Our efforts remain focused upon ensuring that the GDSN grows in a steady and sustainable manner, so that it is always capable of supporting the needs of our user community.

A few numbers will tell this story better than words could. More than 1.5 million new items have been added to the GS1 Global Registry, bringing the total number of GTINs residing in it to the milestone figure of **3.8 million - this represents 52% annual growth!** Such solid growth of registered items is a direct result of the increased adoption and use of the GS1 GDSN around the world: the Network is now a point of exchange for more than **19,000 (24% annual growth)** registered trading partners, as compared to 15,500 last year. Finally, with the addition of two new data pools, there are now **27** GDSN-Certified Data Pools active in more than **70 countries**.

### A series of new releases

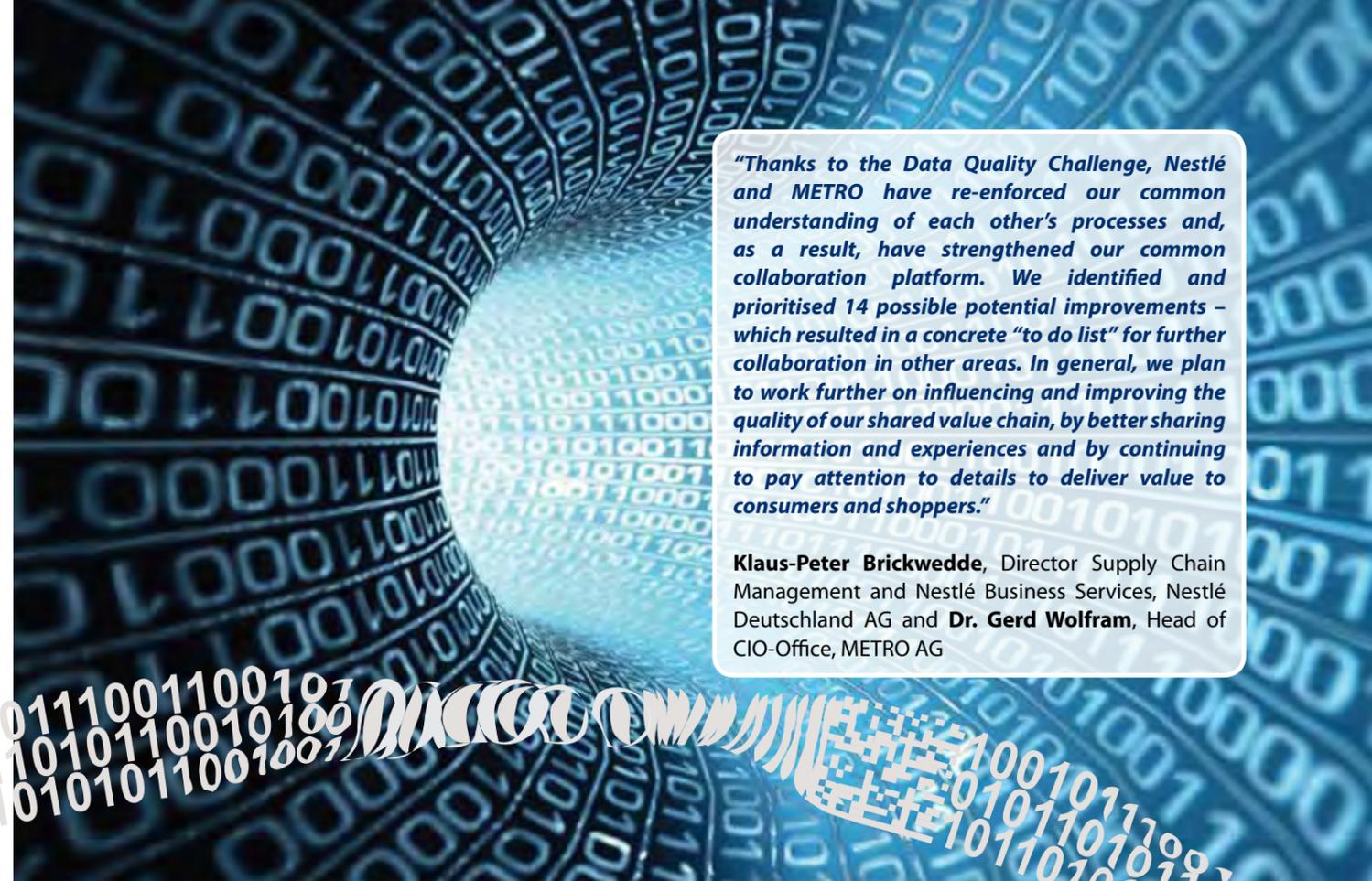
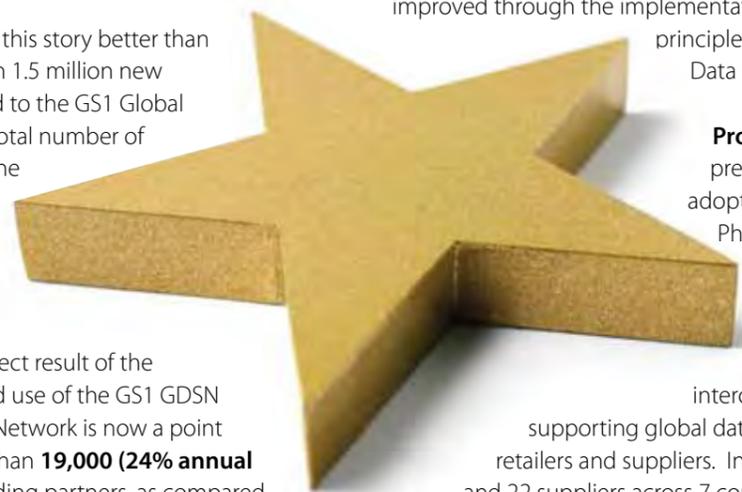
In March 2009, **Maintenance Release 3 (MR3)** was deployed into the GDSN, bringing changes to the Trade Item and Price Synchronisation messages as well as addressing over 30 other change requests. In

December 2008, a **new release of GS1 Global Product Classification (GPC)** was released into production. GPC is a classification system that gives buyers and sellers everywhere in the world a common language for grouping products in the same way. In March 2009, we launched our new **GPC-UNSPSC mapping tool**. GS1 GPC and UNSPSC® (United Nations Standard Products and Services Code®) are two alternative classification systems. Our mapping tool is a powerful web-based engine that allows users to search one classification system and find the equivalent code(s) (if they exist) in the other system.

### Collaborative programmes to support our success

Launched in the last quarter of the 2007-2008 year, the **GS1 Data Quality Challenge** has proven to be an important programme that has yielded useful best practices and created success stories. Indeed, in the past year, 16 GDSN trading partners successfully concluded Phase 1 of the Data Quality Challenge, collaborating to identify key areas within their relationship that could be improved through the implementation of data quality principles drawn from the GS1 Data Quality Framework.

**Project Etoile** is the premier focused GDSN adoption programme. Etoile Phase 1 demonstrated that the certified data pools in the GDSN network are interoperable and are supporting global data sync across major retailers and suppliers. In April 2009, 14 retailers and 22 suppliers across 7 countries were active in Phase 2 of Project Etoile. The programme builds upon the solid base of standards and guidelines in place to encourage creation of reliable master data management programmes, with a particular focus on the GS1 Data Quality Framework and on business process automation.



*"Thanks to the Data Quality Challenge, Nestlé and METRO have re-enforced our common understanding of each other's processes and, as a result, have strengthened our common collaboration platform. We identified and prioritised 14 possible potential improvements – which resulted in a concrete "to do list" for further collaboration in other areas. In general, we plan to work further on influencing and improving the quality of our shared value chain, by better sharing information and experiences and by continuing to pay attention to details to deliver value to consumers and shoppers."*

**Klaus-Peter Brickwedde**, Director Supply Chain Management and Nestlé Business Services, Nestlé Deutschland AG and **Dr. Gerd Wolfram**, Head of CIO-Office, METRO AG

### Beyond FMCG: the GDSN in new sectors

Growth beyond consumer goods has been another key focus this past year. Sectors such as healthcare, consumer electronics and hardware/do-it-yourself (DIY) now recognise that reliable data is a prime area of opportunity and have organised standards development activities. The healthcare sector has also embraced GDSN: GS1 Healthcare has in fact launched a user-led initiative to take significant steps towards the global use of GDSN for healthcare products (see pages 24-25 for more on this). GDSN, Inc. is working with representatives from each sector to meet their specific needs and any unique data requirements, because, although they each have their own requirements, they also share something in common with other industries using GDSN – a global supply chain that requires them to identify items and locations and exchange product information.

### The year ahead

Our most important ongoing work is always focused on adoption and implementation initiatives, outreach to new sectors and new regions, and improving data quality and critical business processes. However, we do also strive to adapt and update the standards that are the foundation for the GDSN. For example, based on the outcome of a GDSN User Group survey, the GDSN Board agreed at their June 2009 meeting that work should be undertaken on:

- **Improving price synchronisation** to provide the ability to send multiple price values on a single price record;

- Enabling users to **update key new item introduction information** preliminarily and later in the process to reflect final values
- **Enabling the** use and application of TI/HI attributes to synchronise data on the number of boxes/cartons stored on a layer (the TI) and the number of layers high that these boxes will be stacked on a pallet (the HI).
- Continuing to work on supporting **chemical ingredients attributes**, functionality that is key to allowing our user companies to meet their growing sustainability requirements. These specific projects will be given extra attention in the next twelve months.

### The GDSN needs you

GS1 Global Data Synchronisation Network standards are user-defined and user-driven; and as is the case for all GS1 standards, they leverage the GS1 Global Standards Management Process to adapt and evolve. Wide and active participation is critical to ensure the GDSN continues to meet the needs of its users. We encourage regional initiatives, and invite you to join our User Group. More than ever before, it is crucial to remember that GDSN is not merely about synchronising data, but also about enabling a robust set of attributes for synchronisation, working toward quality data, and most importantly about improving critical business processes and achieving efficiencies. Join us!

# GS1 Global Standards Management Process

## Sally Herbert

President, Standards & System Development.  
President, GS1 GDSN Inc.

At its simplest, the GS1 Global Standards Management Process, or GSMP, is about bringing a community of users together and providing them with a foundation of the application, technical and data standards that they need to yield business efficiencies. To that end, the GSMP team is constantly striving to fulfil the requirements and requests of GS1's user community. We are proud of the progress made in 2008, and we anticipate 2009 will be another year of community consensus and growth of the GS1 System of Standards.

## An increasingly rich and diverse membership

The GSMP has a rich and diverse membership. As of July 2009, GS1's premier standards management process counted 980 members representing more than 400 retailers, suppliers, hospitals, governments, associations, logistics providers, MOs and solution providers from all regions of the globe. Many of these members have been active participants in the GSMP for years.



## A year of significant accomplishments

It is, as always, impossible to list all of the work done by the hundreds of active members of the GSMP. Some of the major achievements of the past twelve months include:

- The creation and approval of a **Global Traceability Standard for Healthcare**.
- An expansion of programmes for GS1 Membership Organisations, and specifically the growth of our **Local Community Network (LCN)**, which breaks down language, time zone and geography barriers in order to provide the opportunity for trading partners who do not already participate in the GSMP to become engaged in the GS1 standards development process. The number of LCN members keeps increasing and now stands at 174 members from 8 countries.
- The launch of a **Traceability Business Requirements Group** to define multi-sector, global traceability standards and guidelines.
- The work accomplished jointly with the **American Hardware Manufacturers Association (AHMA)** to begin development of data standards to support this industry sector.
- The delivery of **Version 9 of the GS1 General Specifications**, an update which is easier to use and more transparent.
- The release of an **implementation guideline for AS2**, helping our users interpret how best to use the AS2 specification which addresses secure and reliable data transport.
- The deployment of **Maintenance Release 3** for the GS1 Global Data Synchronisation Network, providing numerous additions to synchronisation functionality.
- A variety of **process enhancements** including improvements to the GS1 GenSpecs process; significant updates to the Change Request system to improve visibility and tracking; a new MO Key Contact model

*Winston Churchill's quote 'We shape the buildings and then they shape us' is very appropriate for the process that GS1 is going through today. The integration of the breakthrough thinking that generated the EPC Tag and EPCglobal Network Standards with the GS1 GSMP will deliver a world-class standards engine that global users and country-based users will be proud of for years to come. The completion of the standards process integration will mark the end of the beginning of a new chapter for GS1 System adoption throughout the world."*

**N. Arthur Smith**, President GS1 Canada and Board Committee for Standards Member



to assure proper on-boarding of new trading partners; new processes for developing GS1 BarCodes and GS1 eCom standards which provide greater alignment across business units and improve the quality of delivery; and a new Architecture Group engagement model to assure integrity of the system; and a new process and structure for engaging different sectors, such as GS1 Healthcare, in standards development.

## The new GSMP: an integration of GSMP and EPC-JAG

Until recently, standards development for the Electronic Product Code (EPC) was managed separately from the GSMP via the EPC-JAG (Joint Action Group). While distinct processes in the past, the GSMP and the EPC-JAG shared a common mission: leading a global community in the development of global standards to improve the efficiency and security of the supply chain. In the first quarter of 2009, GS1 began an effort to join these two standards management processes for the benefit of GS1 users everywhere. The new GSMP will bring together the best practices from both of the two previously separate structures. Work is already underway on the creation of a detailed model under the auspices of a joint community steering team called the Interim Process Leadership Team. The collaboration is already yielding a variety of fresh ideas and positive actions and the migration to a common platform will begin upon approval of the final design in the fall of 2009.

## Customer satisfaction survey results

For the past two years, the GSMP has deployed a satisfaction survey to all of our users. This is certainly emblematic of how the GS1 standards process differs from others in the world. We are fully committed to the belief that our participants are our customers, and we are fully engaged in working collaboratively across our community for the continuous improvement of our processes, methods and modes of interaction.

The results of our survey demonstrate these commitments: 95% of survey respondents said that they rated the level of service they received from the GSMP's staff as good or excellent; 78% rated the efficiency of the GSMP process as good or excellent. Attendees of the March 2009 meeting of the new GSMP – a milestone event that brought together for the first time the teams of the former GSMP and the former EPC-JAG – were also surveyed, and a full 98% of them confirmed they will attend future GSMP events.

## Questions for the year ahead

In the year ahead, we will be asking ourselves how the GSMP can help companies address issues like carbon footprint and sustainability, and how we can better support GS1 MobileCom initiatives. However, our most important mission is to develop global standards that improve the efficiency and security of the supply chain.



## GS1 EPCglobal

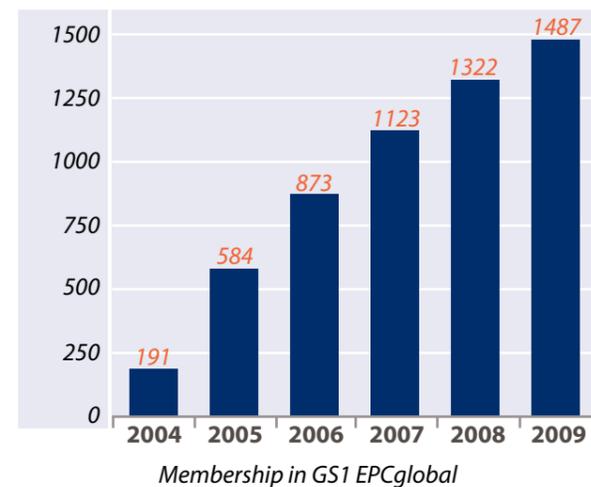
**Chris Adcock**  
President, Industry Engagement,  
President, EPCglobal Inc.

The EPCglobal community saw continued progress during 2008-2009. Technology and services based upon EPCglobal standards can transform business processes and enable new levels of engagement with customers and consumers, and there is an increasing awareness and understanding in the marketplace of all of the possibilities. Pilot programmes are running all over the world and, in many cases, full-scale implementation is underway.

As always, none of the year's success stories could have been possible without the time, experience and expertise of the many active members of the EPCglobal community. We are grateful to them for their dedication and ongoing hard work.

### Steadily growing

In June 2009, there were 1,487 subscribers in the EPCglobal community, representing companies whose global head offices are in 42 different countries. End users now represent over 70% of the community, with the rest mainly composed of solutions and services providers from hardware, software or integration fields.



### Event-related information with the EPCIS standard

GS1 EPCglobal's EPCIS standard enables the secure sharing of real-time information between trading partners, which allows businesses to monitor the location and state of individual items as they pass through the supply chain – thereby increasing visibility, safety, security, efficiency

and traceability. This standard answers four key questions about an item:

- **What** is it? (unique identification)
- **Where** is it? (location of reader)
- **When** was it there? (time, date)
- **Why** was it there? (What event was happening e.g. shipping, receiving, etc.?)

The initial set of GS1 EPCglobal standards established a strong base. However 2008-2009 has seen increasing and widespread use of the EPCIS standard to enable new levels of information sharing. Work has been ongoing in the Data Exchange Discovery Work Group to develop guidelines that enable data sharing between trading partners who have no previously established relationship but who may have a legitimate reason to receive the information, for example to support traceability or anti-counterfeiting solutions.

### Successful end to Phase 3 of our TLS pilot

The GS1 EPCglobal **Transport and Logistics pilot Phase 3** was completed and demonstrated the use of existing GS1 and GS1 EPCglobal standards with "real life" transportation and logistics services processes. It demonstrated how organisations across a global supply chain can exchange real-time event data and track shipments from a third party logistics provider in Japan to a distribution warehouse in the Netherlands. Phase 3 of the pilot made extensive use of EPCIS to capture and query data collected at strategic read points, and was extremely successful in proving the value of this information to all the actors involved in this global supply chain, including logistics service providers, port terminals, customs and the consignees. These partners and authorities had real-time access to information about products and shipments as they were travelling along the supply chain.

### Certification services expanding

The GS1 EPCglobal Certification Program is a standards-based compliance and interoperability testing program which was developed by the EPCglobal community to provide a neutral and authoritative source for testing EPC/RFID technology as well as information regarding certified hardware and software products and the vendors



*"EPC/RFID technology based upon GS1 EPCglobal standards enables accurate, immediate and cost effective visibility of information throughout the global supply chain. It is beneficial not only for manufacturers like us, but also for other supply chain players such as distributors, logistic service providers, and recycle operators. The most important thing, however is that our customers are set to benefit too."*

**Tatsuya Yoshimura**  
Technology Policy Affairs Manager  
External Relations Department  
Sony Corporation

who manufacture them. When companies know that the hardware or software they use conforms to GS1 EPCglobal standards, they use it more confidently. That's the goal behind our certification services. More than 100 hardware and software products have now been certified and a network of 11 accredited performance test centres has been established across the world.

### Work with public policymakers

The EPCglobal Public Policy Steering Committee (PPSC) and its working groups continue to support a policy environment at all levels that will advance the adoption of EPC technology and, as a result, strive to ensure that the EPCglobal community's voice is heard by policy makers around the world. Their **Guidelines on EPC for Consumer Products**, for example, focuses on practical aspects of implementation and addresses privacy concerns. The group also seeks to erase the lack of awareness about the benefits of EPC and RFID technology with its comprehensive global website dedicated to consumer information about EPC and RFID ([www.DiscoverRFID.org](http://www.DiscoverRFID.org)).

As one example of the way GS1 constructively supports the work undertaken by policy makers within the European Union and North America, this past year, we created with the Trans Atlantic Business Dialogue and the European American Business Council the "Transatlantic Symposiums on the Societal Benefits of RFID", which were held in both Washington, DC and Brussels. Both events were supported by the European Commission and the US Department of Commerce.

### Pursuing the strategic research agenda with Auto ID Labs

Significant progress has been made in pursuing the many research topics contained in the two-year (2008-2010) strategic research agenda undertaken by the global network of Auto ID Labs. This includes the publication of 35 white papers and the development of a free, open source EPCIS repository.

### The outlook for 2009-2010

The body of evidence that shows the value and benefits that can be achieved through the use of GS1 EPCglobal standards-based technology continues to expand. Implementation grows as companies seek ways to compete in all areas including the velocity, accuracy and agility of their supply chains. New levels of collaboration and information sharing are enabling business process transformations that have previously been unachievable. Key business challenges and opportunities such as traceability, anti-counterfeiting, authentication and recall solutions are being enabled by GS1 EPCglobal standards.

Everyone at GS1 EPCglobal is fully committed to expanding the GS1 EPCglobal standards infrastructure and driving its adoption and implementation: our work is not only about standards but also about delivering value to the global community we serve.

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**GS1 in the Global Healthcare Sector**

**GS1 in Transport, Logistics  
& Customs**

**GS1 Global Traceability Solutions**

**GS1 MobileCom Solutions**

**Strategic Alliances  
& Collaborations at GS1**



## Chris Adcock

President, Industry Engagement.  
President, EPCglobal Inc.

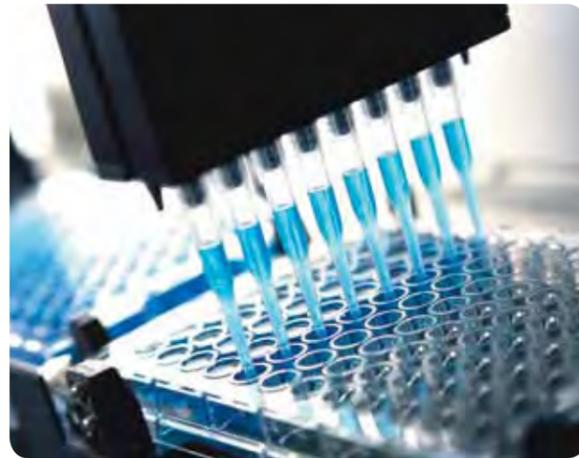
The global healthcare sector is focused more than ever before on patient safety, supply chain security, traceability and efficiency, and GS1 Healthcare is leading the way into a new era of sector-wide implementation of standardised supply chain solutions. The cost and complexity of diverse national regulations, proprietary service offerings and incompatible solutions has led the community to call for the definition and adoption of global, open and neutral standards – and that’s where we come in. At the Global Office and at GS1 Member Organisations around the world, we are working to address safety and efficiency concerns in the healthcare supply chain, including medication errors, counterfeiting and product recalls.

### GS1 Healthcare: Global vision, local action

Established in 2005, GS1 Healthcare is our global, voluntary user group developing standards for the healthcare supply chain and advancing global harmonisation. Healthcare stakeholders can engage in our global user group and/or in one of the 20 local user groups in countries on every continent, including new 2008-2009 additions Belgium, Denmark, Japan, Mexico and Slovenia.

Three yearly global GS1 Healthcare conferences provide a unique neutral and international platform for the sector’s stakeholders to meet, to gather the latest on industry and regulatory developments, and to leverage the broad expertise present. Last year, over 200 participants from more than 20 countries attended each of our three successful conferences – including the first one ever in Asia-Pacific (Tokyo, Japan), the first one ever held in a hospital (Speising Hospital, Vienna, Austria), and the first one ever webcasted live and thus viewed by an additional 1,000 offsite participants (Washington DC, USA).

In summer 2009, GS1 Healthcare elected a new Leadership Team; its members hail from companies and organisations whose diversity demonstrate the breadth of this sector: Abbott Laboratories, Alcon Laboratories (Nestlé), Baxter, B. Braun, Covidien, GlaxoSmithKline, Johnson & Johnson, McKesson, Medtronic, Novartis, Novation, Pfizer, Premier, Robert Ballanger Hospital (France) and Smiths Medical.



### Tremendous advances in standards development

The past year has been extremely prolific in accomplishments and output in standards development for the healthcare sector.

Certainly one of the more important achievements was the ratification of the **Global Traceability Standard for Healthcare (GTSH)** and its Implementation Guidelines. The GTSH provides a foundational framework that describes the traceability process and defines the minimum requirements for all stakeholders, independent from technologies, organisation size or operational sophistication. As a global open standard, the Global Traceability Standard for Healthcare was defined to counter costly and inefficient non-standard solutions. The GTSH will enable maximum interoperability between traceability systems across the healthcare supply chain and across borders.

Work has also moved forward on the first global **Automatic Identification and Data Capture (AIDC) Application Standards for healthcare**. Work groups have finalised both the product grids, representing which product should carry which product data; and the decision trees, one representing which carrier and symbology should be used for any given product and another representing human-readable information. GS1 Healthcare has also initiated work groups in the GS1 Global Standards Management Process (GSMP) to define specific requirements for the identification of



small instruments, of patients and caregivers, of physical locations and legal entities, and of blood derivatives. Another work group is developing implementation guidelines.

The healthcare sector has also recognised the potential of the GS1 Global Data Synchronisation Network (GDSN), and as a result, GS1 Healthcare has worked to enhance current GDSN standards to meet its specific needs. Work teams have completed a gap analysis and have built a GDSN data model based on users’ needs. The global GDSN pilot in Australia and the United States has demonstrated how the GDSN supports the exchange of information across countries and multiple data pools. GS1 Healthcare has also successfully finalised the first phase of the global **GDSN Implementation Initiative** to accelerate adoption and implementation of global data synchronisation in healthcare. In a little more than a month, seven suppliers and eleven demand participants registered their Global Location Numbers (GLNs) in the Global Registry of the GDSN; 580 GTINs were loaded in the Global Registry; and 275 subscriptions (requests from the data recipients to receive the registered information) were received. The work group will now build on the success of this first phase and expand participation.

### Reaching out to regulators

GS1 Healthcare is a recognised, open and neutral source for regulatory bodies and other governmental authorities seeking input and direction for global standards in healthcare for patient safety, supply chain security and efficiency, traceability and accurate data synchronisation. The GS1 Healthcare Public Policy Work

Team develops collective input and obtains feedback from GS1 Healthcare. This work team recently published two public policy fact sheets with recommendations on important topics (medication errors and counterfeiting); the team also maintains an overview of the global regulatory requirements on AIDC, data synchronisation and traceability and other important directives and guidelines from stakeholder groups. Country dossiers are being developed and will be continuously updated and maintained.

### The year ahead

GS1 Healthcare will continue its ongoing efforts to develop standards which fulfil the specific needs of the healthcare sector, and will also strive to lead the sector to implementation through the efforts of GS1 Member Organisations around the world and local GS1 Healthcare user groups, providing a platform for all participants in the healthcare supply chain worldwide to work together and advance global standards in healthcare.

**“Healthcare is a global business where supply chain partners exchange goods and information. Global standards are key success factors for process improvements. But even the best standards won’t be beneficial if they are not used across the entire supply chain: Healthcare providers need to get ready to use these global standards.”**

### Dr. Meinrad Lugan

Member of the Management Board of B. Braun  
Melsungen AG  
Member of the Board of Eucomed

## GS1 Transport, Logistics & Customs

### Chris Adcock

President, Industry Engagement.  
President, EPCglobal Inc.

For several years now, GS1's work in the logistics, transport and customs sectors has been fostering interoperability and improving the visibility that companies have over their operations. GS1 standards provide a common global language, which is crucial for security, collaboration and innovation; they enable a wider access to knowledge; and they facilitate the transfer of information along the international logistics value chain. At the GS1 Global Office and at GS1 Member Organisations around the world, it has been a busy year of developing and promoting such standards.

### Phase II of our UCR pilot with the WCO

The World Customs Organization (WCO) and national Customs administrations place a high priority on enhancing the security of global supply chains as well as facilitating global trade. In 2006, a group of wine and spirit producers, Customs authorities and GS1 Member Organisations undertook a high level proof-of-concept pilot which demonstrated how using a GS1 ID Key as the WCO's Unique Consignment Reference (UCR) during cross-border shipments provided better predictability of information, enhanced security, reduced compliance costs and overall improved traceability.

In the past year, GS1 continued its work with the WCO on Phase II of this pilot, which covered more complex scenarios such as using GS1 standards to identify multiple logistic units travelling under one commercial contract. The work resulted in a variety of concrete results, many focused around CenComm, the secure WCO communication channel. In the UK, the work is driven and coordinated by the Wine and Spirits Trade Association, which has played a focal role in the industry for many years.

### GINC joins GSIN in the GS1 family

One of the concrete results of Phase 1 of the WCO pilot was the creation of the GS1 Global Shipment Identification Number, or GSIN, an application identifier used by a seller or consignor to identify grouped transport units travelling under one commercial order. We have since also officialised the GS1 Global Identification Number for Consignments, or GINC, which can be used by freight forwarders or carriers.

### Collaboration with ISO

The WCO's UCR Guidelines recommend the use of the ISO 15459 standard – previously known as the "license plate" – for identifying items that need to cross borders. On behalf of the WCO, and to ensure that the GS1 GSIN meets all the requirements of this ISO standard, GS1 has launched a change request in the appropriate ISO committee to enhance ISO 15459. The final draft for a new international standard is approaching its completion and soon GSIN will be officially compliant to ISO 15459.

Successful work was also accomplished by GS1 EPCglobal teams working on Phase III of a transport and logistics pilot project: more details about this are available on pages 20-21.

### The year ahead

In the months ahead, GS1 Transport, Logistics & Customs teams will be working to integrate all current developments in the sector and to have an even more holistic approach towards the industry. They will be devoting time and attention to the topic of container identification standards. The teams will also strive to strengthen their working relationships with the B.I.C., the non-governmental organisation responsible for the allocation and management of the identification of freight containers in international trade; and they will review opportunities within the postal sector via work with the Universal Postal Union.

***"We have undertaken groundbreaking collaborative work thanks to the commitment and leadership of GS1. The cross-border trials run in the wine and spirits industry demonstrated that business and customs can work together to address supply chain security and trade facilitation. When implemented on a full scale, the best practices we identified will simplify and enhance information and data exchange with border agencies and across our supply chain."***

**John Corbet-Milward**  
Head of Technical and International Affairs  
Wine and Spirits Trade Association

## GS1 Traceability

### Chris Adcock

President, Industry Engagement.  
President, EPCglobal Inc.

Traceability is a fundamental business process in supply chains. It supports various needs such as regulatory requirements, consumer safety, recalls, product quality management, patient safety in the healthcare sector, visibility, efficient logistics, product authentication, anti-counterfeiting policies, waste management and brand protection. Some form of traceability is already a legal requirement in certain sectors in the United States, Canada, and the European Union as well as in some countries in Latin America, Asia and Africa. But beyond mandatory traceability, more and more industries are voluntarily deploying traceability programmes to improve efficiency, to help protect their brands and to ensure that their food, drugs, medical devices or toys are safe. In short: traceability is now a vital part of the supply chain.

But traceability can only be achieved successfully if it is built upon global standards that can act as the foundation for clear, understandable exchanges for everyone involved. And that's where GS1 comes in. Implementing a traceability system requires a holistic view of the supply chain, which is best attained by deploying a common business language built upon the GS1 System. The GS1 Global Traceability Standard (GTS) makes traceability systems possible on a global scale, for both small and large organisations, all along the supply chain, no matter how many companies are involved, no matter what enabling technologies (barcodes, RFID, EDI, Internet...) are chosen.

At the GS1 Global Office and at GS1 Member Organisations around the world, 2008-2009 was a year of hard work and incredible progress in developing and deploying traceability projects, programmes and pilots.

### Verifying traceability programmes

Companies that manufacture consumer products invest considerable resources to establish the value of their brands and meet the demands of their partners, their customers and local regulators. GS1 has developed the Global Traceability Conformance (GTC) Programme to support their efforts. It defines, in a measurable way, the essential elements and best practices for the production and distribution of trade items acceptable to every industry worldwide. With the support of one of our many



trained GTC auditors at a local GS1 Member Organisation, companies can verify the quality and integrity of their existing traceability processes using the GS1 Traceability Checklist, a rigorous methodology supported by technical criteria and documentation.

The GTC will be officially launched in 2010, but there are already success stories from pilot programmes; as just one example, on page 36 of this document, read about the concrete benefits the Global Traceability Conformance Programme brought to a refrigerated warehousing company in Chile.

***"BASF Nutrition has long been committed to traceability because it helps our customers meet their customers' expectations for high-quality, safe products. Our traceability programme has been a real differentiator for us, so we're naturally very interested in the way the GS1 Global Traceability Conformance Checklist can help us verify and prove the quality and integrity of our traceability processes."***

**Dr. Christoph Günther**  
Head of Business Development,  
RBM Nutrition Ingredients Europe BASF



#### Notable progress with industry sectors

In the past year, GS1 has taken many steps forward with the fresh produce and healthcare sectors. Indeed, both sectors have adopted the GS1 Global Traceability Standard and have developed implementation guidelines.

Security, traceability and efficiency in **healthcare** are currently at the forefront of government regulations and industry concerns around the world; some key related issues include counterfeiting, product recalls, adverse event reporting, medication errors, and efficient logistics management. Unfortunately, many proprietary and often irreconcilably incompatible solutions are being (or have already been) proposed to national and international supply chain stakeholders. Global and open standards provide an effective and efficient way to properly meet these diverse demands. With the efforts and support of GS1 healthcare, the Traceability Standard for Healthcare (GTSH) was created and ratified through the GS1 Global Standards Management Process. As a global open standard, the Global Traceability Standard for Healthcare will help counter such costly and inefficient non-standard solutions. The GTSH provides a foundational framework which describes the traceability process and defines the minimum requirements for all stakeholders, independent from technologies, organisation size or operational sophistication. It will enable maximum interoperability between traceability systems across the healthcare supply chain and across borders. Implementation guidelines are now being finalized by a cross-industry work team.

**Fresh produce** is another industry sector where GS1 Traceability has made headway in the past year. In order to work, food traceability systems need to know everything that happens, at every step of the way, from the farm to the kitchen table. But with the increase in extended and highly global supply chains and the growing use of contract manufacturing, tracing food products from end to end has become more difficult. The GS1 Global Traceability Standard makes food traceability systems possible, on a global scale - no matter how many companies are involved or how many borders are crossed as food and food ingredients travel from one end of the supply chain all the way to the consumer. As just one example, read on page 39 of this document how an association of growers of aromatic herbs in Peru has benefitted from the GS1 Global Traceability Standard.

#### Join us!

As proof of both the demand for global neutral traceability standards and the success of the work we have done so far, in the spring of 2009, a **Traceability Business Requirement Group (BRG)** was launched in the GS1 Global Standards Management Process (GSMP), the collaborative group where GS1 standards are developed and maintained. This group is tasked with maintaining the GS1 Global Traceability Standard, adapting it so that it properly supports multiple industry sectors, developing guidelines for its implementation and maintaining the GS1 Global Traceability Conformance Checklist. Please join the Traceability BRG and help shape the traceability solutions that will benefit companies and consumers around the world. See <http://www.gs1.org/traceability> for more information.

## GS1 MobileCom

### Chris Adcock

President, Industry Engagement.  
President, EPCglobal Inc.

In just one short year, GS1 has made tremendous progress in engaging with manufacturers, retailers, solution providers, and mobile industry companies and associations about the many opportunities for using mobile devices in the supply chain.

Many mobile phones today can “read” barcodes and access the Internet, and as a result, they can bring information and services linked to a product directly to the consumer – which in turn brings the consumer closer to that product and its brand. GS1 is fully committed to helping brand owners, retailers and other stakeholders to create and deploy mobile applications and services that are built on the interoperable, scalable and cost-effective GS1 standards they already know, trust and use.

#### Communication and commerce, enabled by GS1

One clear demonstration of our commitment is the creation of **GS1 MobileCom**, a global forum for all stakeholders interested in mobile commerce and mobile communications. The group’s Steering Committee represents companies from all parts of the supply chain and all regions of the globe: Nestlé, Kraft, Johnson & Johnson, Wal-Mart, METRO, Carrefour, GS1 Colombia, GS1 Hong Kong and GS1 France. GS1 MobileCom will be working to enable consumer and enterprise services and to ensure mobile devices can properly collect and access data.

#### Achievements in Extended Packaging

The first focus of GS1 MobileCom was on a foundational application called Extended Packaging: by using the camera of a mobile device to read a barcode, a consumer can obtain more information about a product than its manufacturers can print on the outside of the packaging (such as allergen information, language translations, recipes or detailed use instructions). In February 2009, the Group published an Extended Packaging Pilot Handbook. The handbook’s goals are to drive experimentation and to explain which GS1 standards and infrastructure can be used for Extended Packaging services now. A dozen pilots driven by local GS1 MOs are already underway in Europe, Asia, South America and northern Africa: through them, mobile devices are being used to access nutrition

information, verify the authenticity of luxury goods, check for proper Eco or Halal certifications, perform price comparisons, and more.



#### The time to get started is now

One of GS1 MobileCom’s main goals for the year ahead is to make sure that brands and retailers understand that the EAN/UPC GS1 BarCodes they already trust can be used today to drive pilots and trials. The group will also be producing a white paper specifically addressing the ways that retailers can engage consumers via a mobile-friendly in-store environment. Furthermore, members will contribute to the GS1 Multiple Barcodes Work Group, created to study the cases where there is more than one barcode on a single package, and others will work to define the business case for coupons and promotions. Watch [www.gs1.org/mobile](http://www.gs1.org/mobile) for updates across the year.

**“Communication to and from mobile devices is absolutely strategic for engaging with consumers and business partners. Mobile Extended Packaging in particular is rich with potential for developing innovative services and creating new ways of engaging with consumers. But we must have open global standards and infrastructure. We’re working with GS1 to help make that happen.”**

**Vanderlei Santos**  
eBusiness Project Manager, Nestlé



## Strategic Alliances & Collaborations

**Eric Decroix**  
Chief Marketing and Corporate Services Officer

Partnerships are a “win/win” activity in an ever more global world, and GS1 has been striving to develop strategic alliances and collaborations with many influential industry organisations. Our work is off to a strong start.

GS1 collaborates with a variety of companies and organisations, including:

- Other **international standards bodies**, such as ISO and UN/CEFACT, where our efforts are focused on ensuring GS1 standards are endorsed and supported so that they benefit from greater legitimacy and international recognition;

- **Inter-governmental bodies**, such as the European Commission, the World Customs Organization, the World Health Organization, and others with whom we share the same appreciation for global standards and the same concerns for the safety and security of people and places;

- Other **multinational user groups and sector-based organisations**, such as the Association for Automatic Identification and Mobility (AIM Global), the Consumer Goods Forum (CGF), and others with which we collaborate to promote global standards;

- **Global Solution Providers**, such as multinational companies who provide software, hardware and services conforming to GS1 standards;

- **Trade associations** from around the world, with whom we work via the **GS1 Public Policy Steering Committee** to inform local policy makers working on regulations that can impact standards and their implementations.

Two of our accomplishments of the past year deserve particular attention. The first is the completion of the **BRIDGE project**. BRIDGE – Building Radio Frequency Identification Solutions for the Global Environment – is a European Union-funded project addressing ways to resolve the barriers to the implementation of RFID and EPCglobal technologies in Europe. A series of work packages was set up to identify the opportunities, establish the business cases and perform trials and implementations in various sectors. Work officially drew to an end in June 2009, although there remains a final series of meetings to share the results and outcomes. See [www.bridge-project.eu](http://www.bridge-project.eu) for more information.

A second noteworthy accomplishment is the launch of a **Global Solution Provider Programme**. A wide range of companies use GS1 standards as a key part of the solutions and services they provide to their customers. These businesses want to be able to establish relationships with all 108 GS1 Member Organisations so they can share information about their offers with GS1’s end users around the world. That’s where the GS1 Global Solution Provider Programme comes in. Its participants benefit from worldwide visibility across GS1, easier access to global and local GS1 teams and services, and opportunities to promote their brand. Interested? See <http://www.gs1.org/collaborations/solution> for more information and an online application to join.

The shared values and common objectives we have with all of our partners, and our effective and collaborative relationships with them truly help us to fulfil our mission. For more information and to see updates of our progress across the year, visit the **new GS1 Collaboration Network** website at <http://www.gs1.org/collaborations>.



- Update on our Breakthrough Projects
- Organisational Effectiveness
- Sustainable Financial Model
- MO-GO Relations
- Where to Play

## Breakthrough Projects

Our “Breakthrough Projects” are a key element of our ongoing efforts to understand, assimilate and adapt to the new challenges and new opportunities of the world in which we live and work.

Business has become global. The Internet has become pervasive. Ecology-driven initiatives are transforming the supply chain both upstream and down. The challenging economy is putting pressures on GS1 and on our users. Our work is being transformed by the specific needs of industries outside of the realm of fast-moving consumer goods. As we face this new context, we must ask ourselves difficult questions about who we are, what we do, how we are structured, and what our organisation stands for.

In 2007-2008, we launched work on four projects designed to ask and answer four such questions:

- Where should we play: What should we stand for in the future? What are the new sectors and new opportunities for GS1?
- How should the GS1 Global Office be organised and governed so we best fulfil our mission?
- What is the financial model that will allow us to continue to grow?
- How should the Global Office and the Member Organisations interact to offer a homogenous quality of service to our users?

The year 2008-2009 has been extremely productive and fruitful in determining some of the answers.

### Where to Play

This project is built upon our knowledge that the world is changing: The way consumers interact with products is evolving, and so is the supply chain. There are new kinds of advertising and new kinds of mobile devices and services. Most significantly, more and more companies will sell their products and services on the web. Indeed, the Internet will surely be at the centre of global commerce in the future. Internet-centred trading of goods will increase. The mobile Internet will become key.

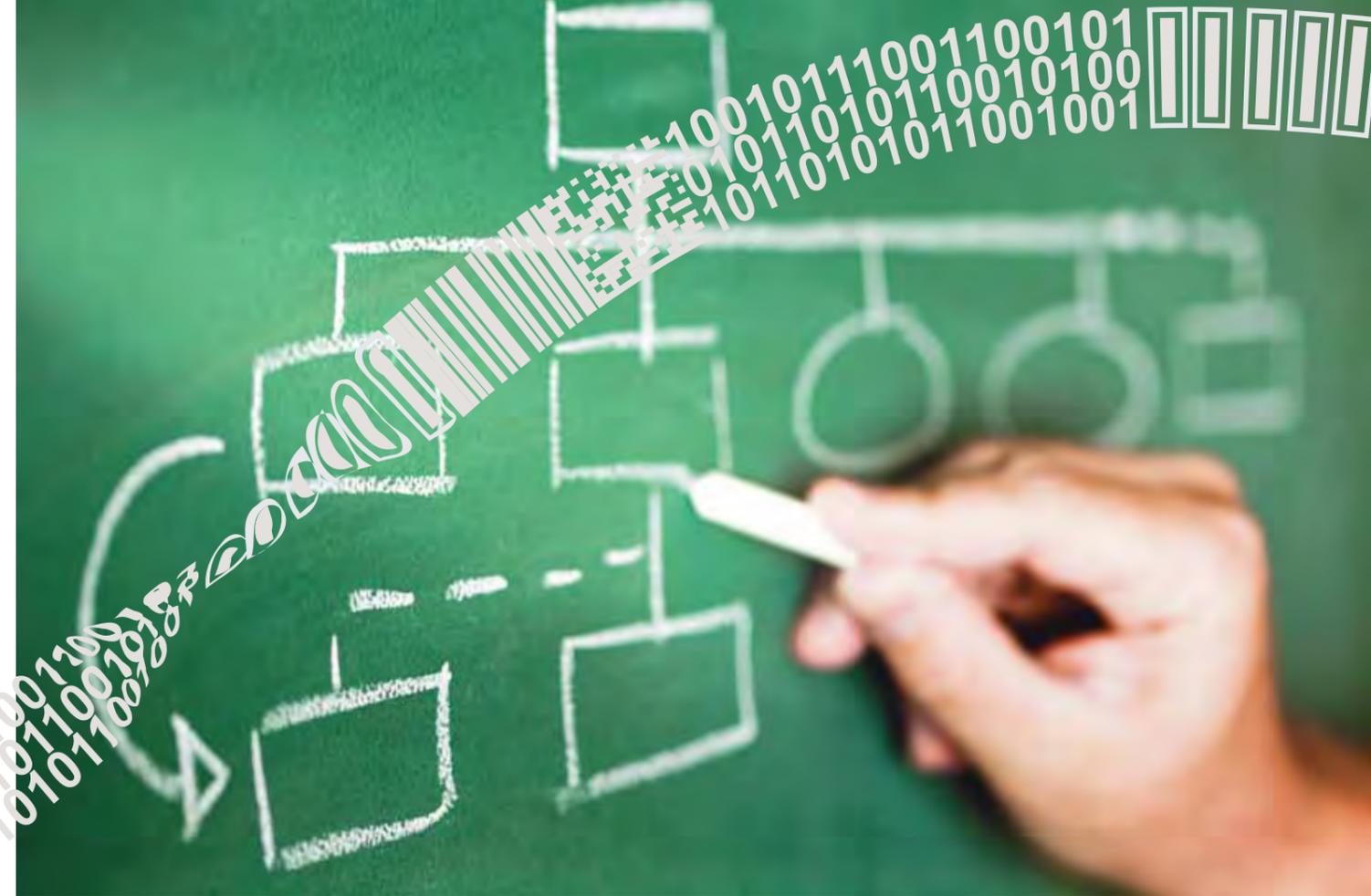
This is the crux of our “Where to Play” breakthrough project: What strategic choices do we need to make to achieve our Vision and Mission and further strengthen our success in the next 10 years? Part of this project requires us to ask ourselves what the future will be like. Of course, no one at GS1 has the answer to that question – but we do have the ability to make some educated guesses. The Future Value Chain of 2020 will certainly be concerned with health and wellness, sustainability, “smart” shopping (with a B-to-C dialogue between brands and consumers), global sourcing, minimizing inventories and real-time visibility.

There are a number of ways GS1 can respond to these needs and concerns. The biggest opportunity continues to be the expansion of our existing identification system to provide our core users with new services and solutions. Coming right behind this is an opportunity to serve new industries and processes that require global identification but do not yet use GS1 standards. Next is our ability to provide visibility over objects in the value chain, enabling new levels of information sharing. Finally, the inevitable rise of the “Internet of Goods,” a sub-set of the Internet of Things, will provide opportunities for mobile and B-to-C applications and services.

### Organisational Effectiveness

Our Organisational Effectiveness project set out to identify any necessary changes to our organisation, our business process and our governance; and as a result to determine what structure would allow us to deliver more effective support and greater value to our customers around the world. It also endeavoured to create a more effective and relevant standards development process. This project was much more than just a simple reorganisation: we looked at all of the processes, principles of operation and interactions between teams as well.

To do this, we examined our existing base of surveys and lead many work sessions with key GS1 team members around the world, to get input from a wide variety of stakeholders. After studying all the data and feedback,



a high-level organisational design plan was drawn up, along with details for work on business process and change management plans.

Instead of silo-style business units by product line, GS1 is now organised in three main groups:

One group is devoted to **Industry Engagement**, to ensure we present one single face to all sectors and all industries, so we can provide solutions that are perfectly adapted to our users’ needs. This group is focused on ensuring that our solutions are not technology-focused, but rather that they help customers with the problems they need to solve. Underlining our wish to meet the particular needs of our different sorts of users, the Industry Engagement group is divided into sector-specific activities (CPG/Retail, Healthcare, Transport & Logistics...).

The second of the two newly created groups is **GS1 System Development**, a single integrated team devoted to developing and maintaining the entire GS1 System of Standards. Work has already begun on merging formerly separate GS1 and GS1 EPCglobal standards development activities and work teams; read more about this on page 18. Beyond the significant efficiencies engendered, structuring our standards development in this way will also help us optimize costs.

The third group is devoted to providing strong **Support to GS1 Member Organisations**, because once a GS1 standard, solution or service has been deployed, we need to provide ongoing support for its subsequent adoption and use. We do this through training and education, certification, a “Help Desk,” and other activities that help our MOs to help their users. Prior to the breakthrough project, this sort of support was split across different business units, for reasons that were valid at the time but are no longer necessary. Now, all MO support will be delivered through a single integrated MO Support team.

### Sustainable Financial Model

The genesis of this breakthrough project was a study undertaken on GS1’s behest by The McKinsey Group in 2007-2008. It revealed our financial model at the time to be overall sound but nevertheless infused with several troubling realities. For example, although revenues either covered total costs or occasionally created a limited annual surplus, some of the newer products and services in development would generate a deficit and thus were not self-sustaining. Without changes to our model, the financial burden to support these newer offers would have been disproportionately concentrated among only a few Member Organisations. Furthermore, the existing model would not have generated the resources we would need to fund any additional initiatives.



# CONTENTS

## GS1 Standards in Action

The GS1 System of Standards is created collaboratively by experts from companies across the supply chain. Every day, at our 108 Member Organisations in countries on every continent, some 2,000 GS1 team members are working to help businesses get the most out of the GS1 System. These next pages share a few of the last year's many success stories.

In response to these concerns, this breakthrough project set out to define a different approach so that current initiatives and new initiatives alike would be properly funded. Several different funding models were proposed by the McKinsey study, but ultimately the GS1 Management Board approved deployment of a **single fee system** for the going concern, where all MOs would pay a flat rate pegged to a percentage of their revenues. This model is perfectly in line with our "interdependent federation" concept as well. A "gliding path" framework has been laid out to move progressively from the current method to this new funding model. A "venture capital" model, funded by interested users and Member Organisations, may in the future be deployed for specific projects.

### MO-GO Relations

The globalisation of today's supply chain requires an equally global consistency in the presentation and delivery of our services with a uniform alignment and coordination across geographies, whether we're working with local SMEs or with multinationals. Many GS1 initiatives are local adaptations built upon a global framework. However, our current structure is not always clear on the respective roles and duties of our Global Office (GO) and our Member Organisations (MO).

This dilemma was the starting point for the "MO-GO Relations" breakthrough project. Through it, we seek to provide GS1 MOs with right level of support and training to maximise the quality of GS1 services to users across geographies, and ensure the optimal execution of GS1 initiatives both local and global. Improvements to our operational processes are also a concrete opportunity to strengthen GS1's development plans and better fulfil our users' expectations.

In 2007-2008, work was concentrated on two main tasks: A study of MO-GO ongoing relations, and efforts to align our annual operational planning. These past twelve months saw fine-tuning of a list of basic core (mandatory) services and optional services that may be fulfilled by any MO with support from the Global Office, with a clear split of responsibilities between the two. Work to continue to refine these action items and to incorporate them into our strategic planning processes is underway.

### More work ahead

Enthusiasm and energy for pursuing and deploying these Breakthrough Projects remain high across the GS1 Management Board, the Global Office, and all of our Member Organisations. We expect that the year ahead will continue to be active and productive.



## GS1 Chile

### Ensuring traceability in the food supply chain

Chile is striving to be recognized as a world-class food and feed exporter. This goal is, in fact, explicitly declared as a national policy. To reach this objective, however, every participant in the Chilean food supply chain – from agricultural producers to companies which commercialise products – must be committed to meeting the requirements of the different markets to which Chile wishes to export its products. For example, to export food to the United States, Chile must meet the stringent requirements of the US Bioterrorism Act; similar regulations oversee exports to the European Union and Japan.

In 2007, GS1 Chile added the Global Traceability Conformance programme to the services it offers to its members, as a means to help Chilean companies fulfil the international food safety requirements (regulations, standards and commercial requirements) regarding traceability. Leading Chilean refrigerated warehousing company Icestar came to GS1 Chile to discuss their traceability system, which they had implemented in order to better know the location, temperature and status of all the pallets in their stock, from the moment they entered the warehouse until they leave.

Icestar wanted their traceability system to be fully based on the GS1 Global Traceability Standard, and they wanted to be able to prove it.

GS1 Chile performed an assessment of Icestar's traceability system using the methodology established by the GS1 Global Traceability Conformance Programme. GS1 Chile then worked with Icestar to make a few modifications to processes and systems.

In November 2007, after this audit and work cycle, Icestar was the first company in Chile to be awarded the GS1 Chile Global Traceability Conformance Seal. Icestar has seen a number of benefits from this. The main one, no doubt, is the fact that they can now fulfil the traceability requirements of all the various international standards and regulations they must meet. They have confidence in their system and the data it produces. Their traceability system is fully compatible with other standardised traceability systems. But Icestar

has also discovered a sales and marketing tool in their Conformance Seal: it has strengthened the loyalty of their existing customers and helped them capture new ones.

Pleased with these benefits, in 2008, Icestar performed another assessment process with GS1 Chile in order to renew and extend their Global Traceability Conformance Seal.

GS1 Chile has been pleased to be able to serve its member companies in this way: the GS1 Global Traceability Conformance programme gives them the ability to act as a neutral outside party with the experience and the tools necessary to verify and, if necessary, correct traceability systems. In this way, they help ensure the safe flow of food-related information in the supply chain and help generate benefits in logistical efficiency.

For more information about GS1 Chile, visit their website at [www.gs1chile.org](http://www.gs1chile.org)



## GS1 Kenya

### Building fundamentals in an emerging market



GS1 Kenya was created in 1999, and since then has been fulfilling its role of improving efficiency and visibility in the supply and demand chains across the country.

GS1 Kenya's main activities include providing legitimate numbers and ensuring the correct use of GS1 BarCodes, and communicating widely about the important role of the GS1 System.

GS1 BarCodes are already present on certain imported products and are used wherever available. However, many products, both imported and locally-produced, do not have any barcodes at all.

One of GS1 Kenya's targets is to have 100% scan rate at all Kenyan points of sale, thanks to having proper GS1 BarCodes in the right place on all products, and having them scan right the first time and every time. To help make this happen, they have undertaken a long-term measurement plan and are sharing results with Kenyan retailers.

For example, Nakumatt is a Kenyan supermarket chain with 26 stores and more than 3,000 employees. A GS1 Kenya-led study of the 2003/2004 Nakumatt product portfolio showed that for a total of over 54,000 products, only 58% had inherent barcodes: 45% were imported products and 55% local products. 30% of the imported products did not have barcodes, and 50% of the local products did not have barcodes.

GS1 Kenya then worked out the cost scenario for creating barcode stickers in-house for the products that arrived at Nakumatt without barcodes – with auto-adhesive thermal labels becoming quite affordable, it is indeed possible to create barcodes in each store, at a limited cost and a great potential benefit.

Assuming that each of the 26 stores would need 1 computer and 1 printer at a cost of 120,000 KES (Kenyan shillings) per store, the total cost to the retail chain for this equipment would be 3,120,000 KES (about €30,500 euros, or \$40,000 US dollars). Then, estimating the costs of labels, labour, overhead, variable costs such as electricity, and



amortisation of the investment, they arrived at the very small figure of 2 KES per barcode printed in-house – the equivalent of \$0.02 or €0.02, a very small cost indeed, especially as compared to the benefits it brings.

GS1 Kenya performed a similar study of checkout time at Uchumi supermarkets, another Kenya retail chain. 66% of the products they sampled had a scannable barcode and were scanned, and thus 34% had to be keyed in manually. It took on average a full 7 seconds to key in an item, as compared to a mere 1 second to scan. Properly scannable barcodes clearly represent a tremendous potential to save time, move more customers through the checkout per hour, and improve the customer experience.

GS1 Kenya's careful studies have led them to conclude that the annual cost of poor or absent scanning of barcodes at the point of sale is 85,000,000 Kenyan shillings, while the potential annual supply chain savings to be gained from enabling end-to-end scanning is 1,450,000,000 KES.

And in part thanks to GS1 Kenya's diligent efforts, Kenyan retailers have taken steps to reduce these unnecessary costs and in turn reap the benefits: the CEOs of both Uchumi and Nakumatt supermarkets (as well as a chain of bookshops) have sent out letters to their suppliers indicating their commitment to GS1 and their requirement that all products sold in their stores have proper, scannable GS1 BarCodes.

For more information about GS1 Kenya, visit their website at [www.gs1kenya.org](http://www.gs1kenya.org)



## GS1 New Zealand

### Rolling out EPC/RFID in kiwifruit

New Zealand's first major commercial rollout of Electronic Product Code RFID was in 2008 in the kiwifruit industry. GS1 New Zealand Professional Services designed, and gave close ongoing support to the implementation of a system that enables EastPack Ltd, one of New Zealand's largest post-harvest operators, to track and trace every pallet across 5 packaging lines and 49 cool stores.

Each year, EastPack Ltd sorts, packs, stores and forwards to export a significant share of New Zealand's \$1 billion-plus kiwifruit crop. The kiwifruit supply chain presents major logistical challenges. Significant bonuses and penalties from ZESPRI, the industry's exporting arm, are attributed to pack houses that can (or cannot) respond to hour-by-hour orders for kiwifruit with specific attributes. Pack house operation involves fruit going into cool storage, sometimes for weeks, then being retrieved to meet the requirements of particular orders, sometimes only hours before it is due on board a ship. Industry insiders say the height-of-season 24/7 logistics of tracking and retrieving particular pallets in tightly-packed cool stores are "nightmarish."

In early 2007, EastPack turned to GS1 New Zealand for a better way to meet these challenges.

In broad terms, the solution GS1 recommended was simple: place EPC/RFID tags on pallets and RFID readers



on forklifts; capture data electronically whenever a forklift picks up or drops off a pallet; identify where in the store these activities are occurring; and instantly transmit the data back to the inventory management system – and all this without any manual intervention.

Innovative components include a high-resolution digital camera mounted to the roof of the forklift that can determine its location from special ceiling-mounted DataMatrix bar codes. At every pick-up and drop-off of a pallet, the location is matched to cool store coordinates (room, row and position) and combined with the pallet identity (SSCC) and a time-stamp into a business event that is transmitted wirelessly back to the management system in real time.

The results of an initial pilot were impressive. The accuracy rate for data capture exceeded 95% and the forklift-mounted cameras enabled pallets to be located to within 20cm of their exact positions. These results led to EastPack's decision to proceed to full rollout before the start of the next season – a very tight timeline of only a few months.

EastPack have now implemented the solution throughout their 49 cool stores, processing 80,000 pallets in a season. Data in the first season showed the contribution that the EPC/RFID solution has made to increased sales, cost savings, increased operational efficiency and more motivated workforce. EastPack also confirmed return on investment within their first EPC-enabled (2008) season.

The value of the solution lives in EastPack's vastly improved ability to locate particular pallets in a store, and to quickly retrieve them for export at optimum times and with minimum reshuffling of other pallets. Their management system already held data on all fruit received for packing; now it also holds real-time information on the location and status of that fruit by pallet. Data mining promises further optimisation, and there are also opportunities for wider EPC application in the entire New Zealand kiwifruit supply chain.

For more information about GS1 New Zealand, visit their website at [www.gs1nz.org](http://www.gs1nz.org)

## GS1 Peru

### Enabling traceability for native producers' associations



In the global world in which we work, traceability and best practices are key issues to developing value-added services and helping companies both large and small be more competitive. This is particularly true in Peru, which is signing free trade agreements with many economies around world, making competitiveness a key element to sales success. Peru is experiencing an export "boom": total exports increased more than 30% per year between 2001 and 2007.

The social and economic role of SMEs in Peru is very important; indeed, they represent 46% of GDP, 70% of employment and 98% of total enterprises. Yet, according to local statistics, small and medium sized Peruvian companies often have low productivity and suffer from information and technology gaps and infrastructure inequalities. This, in turn, leads to problems with competitiveness.

To help combat this problem, GS1 Peru strives to develop solutions adapted to SMEs.

For example, in the second half of 2007, GS1 Peru oversaw a project and provided technical assistance in Arequipa, a region in the southern portion of the country. The project benefitted an association of 615 aromatic herb producers who live and work some 3,000 to 4,000 meters above sea level, producing 300 tons of herbs such as thyme, rosemary, mint, oregano, and others for export to Europe.

GS1 Peru helped this group to identify the strengths, weaknesses, opportunities and threats behind implementing traceability best practices using global standards. GS1 Peru then helped establish a traceability process map for the aromatic herbs supply chain, including points of control, registries of information and responsibilities; as well as a set of traceability templates and guidelines for each point of their supply chain. GS1 Peru also oversaw the training of the growers and producers, not only on traceability processes, agricultural best practices and standards concepts but also on using the traceability templates.

The main benefit was certainly the 80% time savings seen when retrieving upstream batch information.



Furthermore, in 2008, the system passed a critical test with flying colours when a European client's quality control laboratory identified a problem that caused the export process to be halted. Immediately, teams in Peru carried out their own analyses, testing all the processes along the exact path that the flagged batch had travelled, using the standardised traceability registries filled in at each point of the supply chain; they quickly ruled out the possibility of any local contamination. With this information, the client launched another analysis that came back negative: it turned out the source of contamination was their own quality control laboratory. This concrete business case boosted the sense of trust the client felt toward the producers; they recently renewed their commercial agreement through 2013.

GS1 Peru oversaw a similar traceability and logistics best practices project in 2008 in Piura, a region in the north of the country, with producers of organic coffee and brown sugar (called panela). This panela organic brown sugar process is, in fact, the first Peruvian traceability process to be granted the official GS1 Peru Global Traceability Conformance Seal.

For more information about GS1 Peru, visit their website at [www.gs1pe.org](http://www.gs1pe.org)

## Financial Statements

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#### Key Financial Statistics: Global Revenue

GS1 Member Organisations 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 2008-2009 was slightly higher than the prior year by 0.9%. Excluding the impact of currency due to the strengthening of the Euro, the year-over-year growth then stands at 4.6%. This compares to a growth of 3.5% last year. Regionally we see some differences, with strong growth in MEMA, Australia, China, Russia and Latin America, but declines in Japan and the United States.

Effectiveness and the Sustainable Funding Model (see pages 32-34), we expect fees to decrease slightly or remain essentially stable for the next several years. Our 2009-2010 budget calls for a decrease of €0.6M or 2% versus the year before.

#### GS1 Global Office: Fee Evolution

Looking at the historical trend, we can see that after a period of transformational change in GS1, with the startup of EPCglobal and GDSN, we went through a more stable phase in terms of the evolution of our fees. The reduced funding of EPCglobal as it moved beyond the initial start-up phase brought the 2008-2009 GS1 Global Office revenues to €24.9M, a reduction of €0.7M or 3% versus the year before. With the implementation of Organisational



#### GS1 Consolidated - FY 2008/09 Actuals for the period ending 30/06/09

Figures in thousands of Euros	Consolidated	GS1 CO	EPCglobal Inc. (100%)	GDSN Inc.
<b>Revenue</b>	<b>24,855</b>	<b>16,867</b>	<b>6,223</b>	<b>1,764</b>
<i>Fixed/Recurring Expenses</i>	2,771	1,496	847	428
<i>Discretionary Expenses</i>	8,223	4,883	2,480	860
<i>Payroll Expenses</i>	13,768	10,288	2,896	585
<b>Operating Expenses</b>	<b>24,762</b>	<b>16,666</b>	<b>6,223</b>	<b>1,873</b>
<b>Operating Result</b>	<b>93</b>	<b>201</b>	<b>0</b>	<b>(108)</b>
<i>Other Revenue / (Expenses)</i>	628	628	(0)	0
<b>Result for the period</b>	<b>721</b>	<b>829</b>	<b>-</b>	<b>(108)</b>

Notes:

'1) Consolidation based on budget rate (1,40 USD/EUR)

'2) EPC Inc. & GDSN Inc.: Preliminary results not yet audited

## GS1 Management Board Members

### Income Statement and Headcount

Our consolidated Income Statement shows a positive result of €721K for the fiscal year ending June 2009. We continued to build a reserve from our base business (managed from the GS1 Central Office), to cover current and future investments in new technologies and applications, and also to have the necessary reserves in case of adverse currency fluctuations. In just six years, we have built a cumulative surplus of €6.9M. The EPCglobal Income Statement was break-even, as it is based on a cost-recovery funding model. As for GDSN, while the final result was a small loss of €0.1M on a GAAP basis, it was

break-even on a cash basis as we started the transition to a new service provider for the hosting and maintenance of the Global Registry.

In terms of types of expenses, our main investment remains our people, with 82 employees on the payroll at the end of June 2009, slightly up from prior year but moving towards 77 by the end of the next fiscal period. Discretionary spending, which includes travel, consulting, marketing and large user meetings/events (Global Forum, GSMP/JAG events, ECR) was 6% below last year and declined for the third year in a row.

### Global Coverage Revenue By Region

Figures in thousands of Euros	Actuals 2003	Actuals 2004	Actuals 2005	Actuals 2006	Actuals 2007	Actuals 2008	Growth	
							%	Excl. FX
<b>Asia Pacific</b>	24,555	25,616	33,679	34,069	35,008	36,699	4.8%	5.1%
<b>Latin America</b>	16,737	19,707	24,306	23,060	24,953	24,122	-3.3%	9.1%
<b>North America</b>	52,774	52,834	74,254	68,005	59,893	60,402	0.8%	0.2%
<b>Middle East/ Mediterranean/Africa</b>	2,727	3,187	4,033	4,015	4,342	5,248	20.9%	35.0%
<b>Europe</b>	64,796	72,887	79,595	85,452	89,860	89,486	-0.4%	4.5%
<b>TOTAL</b>	<b>161,588</b>	<b>174,231</b>	<b>215,868</b>	<b>214,601</b>	<b>214,056</b>	<b>215,956</b>	<b>0.9%</b>	<b>4.6%</b>

### Historical perspective

Figures in millions of Euros	02/03 Actuals	03/04 Actuals	04/05 Actuals	05/06 Actuals	06/07 Actuals	07/08 Actuals	08/09 Actuals	09/10 Budget
<b>GS1 Central Office</b>	6.3	7.2	11.6	13.8	16.4	16.7	16.9	22.4
<b>EPCglobal Inc.</b>	-	3.2	5.4	7.2	7.8	6.7	6.2	-
<b>GS1 GDSN Inc.</b>	-	-	0.6	3.2	2.5	2.2	1.8	1.9
<b>Total GS1 Global Office</b>	<b>6.3</b>	<b>10.4</b>	<b>17.6</b>	<b>24.2</b>	<b>26.6</b>	<b>25.6</b>	<b>24.9</b>	<b>24.3</b>
<b>Staff</b>	31	35	58	76	79	79	82	77
<b>Cumulative Reserves *</b>	<b>(0.0)</b>	<b>1.6</b>	<b>2.0</b>	<b>3.2</b>	<b>4.6</b>	<b>6.3</b>	<b>6.9</b>	<b>6.9</b>

\* where Reserves are defined as reported net result; could be invested in cash, fixed assets or receivables

Member	Title	Company
<b>Robert A. McDONALD</b>	Chairman of the Board Chief Executive Officer	Procter & Gamble
<b>Zygmunt MIERDORF</b>	Vice-Chairman of the Board Member of the Board of Management	Metro AG
<b>José LOPEZ</b>	Vice-Chairman of the Board Executive Vice President of Operations	Nestlé S.A.
<b>Miguel LOPERA</b>	Ex-officio Member President and CEO	GS1
<b>David CALLEJA URRY</b>	Chairman & CEO	GS1 Malta
<b>David CHING</b>	Senior Vice President	Safeway Stores
<b>J. Alexander M. (Sandy) DOUGLAS</b>	President	Coca-Cola North America
<b>Bruce EDWARDS</b>	CEO	DHL Exel Supply Chain
<b>Rollin L. FORD</b>	Executive Vice President and Chief Information Officer	Wal-Mart Stores, Inc.
<b>Christopher J. FRALEIGH</b>	Executive Vice President & CEO Food & Beverage	Sara Lee Corporation
<b>Pierre GEORGET</b>	Chief Executive Officer	GS1 France
<b>Carlos Mario GIRALDO</b>	Chief Executive Officer	Almacenes Exito S.A.
<b>Takao IWAMOTO</b>	President	AEON Global SCM Co. Ltd.
<b>Sonny KING</b>	Chief Executive Officer	Advantage Sales & Marketing
<b>Philippe LAMBOTTE</b>	Senior Vice President Global Customer Service & Logistics	Kraft Foods Global, Inc.,
<b>Seung-Han LEE</b>	President and CEO	Samsung Tesco Co. Ltd
<b>Meinrad LUGAN</b>	Member of the Board of Management	B. Braun Melsungen AG
<b>Rodney McMULLEN</b>	President and COO	The Kroger Company
<b>Maria PALAZZOLO</b>	Chief Executive Officer	GS1 Australia
<b>Michael POLK</b>	President Americas Region	Unilever
<b>Jörg PRETZEL</b>	Chief Executive Officer	GS1 Germany
<b>Sergio RIBINIK</b>	Chief Executive Officer	GS1 Brazil
<b>Milt SENDER</b>	Chairman	Daymon Worldwide
<b>Ajit SHETTY</b>	Corporate Vice President Worldwide Operations	Johnson & Johnson
<b>N. Arthur SMITH</b>	Chief Executive Officer	GS1 Canada
<b>Joseph SPAGNOLETTI</b>	Senior Vice President and CIO	Campbell Soup Company
<b>Hironu UENO</b>	Chief Executive Officer	GS1 Japan
<b>Zong-nan WANG</b>	Chairman	Bright Foods (Group) Company Ltd.

## GS1 GDSN Inc. Board of Directors

Member	Title	Company
<b>Milan TURK</b>	Chairman of the GS1 GDSN Inc Board Managing Director, Global Customer eCollaboration	Procter & Gamble
<b>Nihat ARKAN</b>	Chief Executive Officer	SA2 WorldSync GmbH
<b>José Maria BONMATI</b>	Chief Executive Officer	GS1 Spain
<b>Rafael FLOREZ</b>	Chief Executive Officer	GS1 Colombia
<b>Rob FUSILLO</b>	VP Information Systems	Wal-Mart
<b>Sally HERBERT</b>	President	GS1 GDSN, Inc.
<b>Lionel LECHOT</b>	GLOBE Program Manager	Nestec Ltd
<b>Terry MOCHAR</b>	Global Business Development Director, B2B	Reckitt Benckiser plc
<b>Ramesh MURTHY</b>	Vice-President, Inventory Replenishment	CVS/pharmacy
<b>Bob NOE</b>	Chief Executive Officer	GS1 US, 1SYNC
<b>Nigel ORCHARD</b>	Global Solutions - VP Applications	Unilever
<b>Maria PALAZZOLO</b>	Chief Executive Officer	GS1 Australia
<b>John PHILLIPS</b>	Vice-President of Customer Supply Chain and Logistics	PepsiCo
<b>Ron RUDOLPH</b>	Chief Technology Officer	Edgenet, Inc.
<b>Pat SALMONESE</b>	VP & GM, Product Master Data Management Business Unit	GXS
<b>Antonio SALTO</b>	Global Director B2B	Kraft Foods Inc.
<b>Gerd WOLFRAM</b>	Managing Director	MGI Metro Group, Information Technology GmbH

## EPCglobal Inc. Board of Governors

Member	Title	Company
<b>Richard CANTWELL</b>	Chairman Vice President - Internet Business Solutions Group	Cisco Systems
<b>Chris ADCOCK</b>	President GS1 Industry Engagement and EPCglobal Inc.	GS1
<b>Didier CHENNEVEAU</b>	EVP & Chief Supply Chain Officer	LG Electronics
<b>Alan ESTEVEZ</b>	Principal Assistant Deputy Under Secretary of Defense Logistics and Materiel Readiness	Office of the Secretary of Defense
<b>Claus GARBISCH</b>	Senior Vice President Global Business Development	DHL Supply Chain - DHL Solutions GmbH
<b>Mark JAMISON</b>	Vice President – Supply Chain	Kimberly-Clark Corporation
<b>Louis KRATZ</b>	Vice President, Corporate Logistics & Sustainment	Lockheed Martin Corporation
<b>Zygmunt MIERDORF</b>	Member of the Board of Management	METRO AG
<b>Kiyoshi NISHITANI</b>	SVP, Corporate Executive	Sony Corporation
<b>Jörg PRETZEL</b>	Chief Executive Officer	GS1 Germany GmbH
<b>Kurt W. REBER</b>	Head Third Party Operations - Global PharmOps	Novartis Pharma AG
<b>Sergio RIBINIK</b>	Chief Executive Officer	GS1 Brasil
<b>Mr. Michael ROSE</b>	Vice President, Supply Chain Visibility Worldwide Supply Chain	Johnson & Johnson
<b>Dr. Sanjay E. SARMA</b>	Associate Professor, Mechanical Engineering	Massachusetts Institute of Technology
<b>Peter SCHNEIDER</b>	Director ITM Enterprise Architecture, Governance & Chief Technology Officer	Daimler AG
<b>Milan TURK, Jr.</b>	Managing Director, Global Customer eCollaboration and Program Leader, Global EPC initiative	Procter & Gamble
<b>Hiromu UENO</b>	Chief Executive Officer	GS1 Japan
<b>Carolyn G. WALTON</b>	Vice President of Information Systems Division	Walmart Stores, Inc.
<b>Limin ZHOU</b>	Vice President	Haier Group

## GS1 Leadership Team



■ ■ ■ ■ The members of the GS1 Global Office Leadership Team report to Miguel A. Lopera, President and CEO of GS1.

From left to right:

**Chris Adcock**, President of Industry Engagement, President of GS1 EPCglobal Inc.

**Eric Decroix**, Chief Marketing and Corporate Services Officer

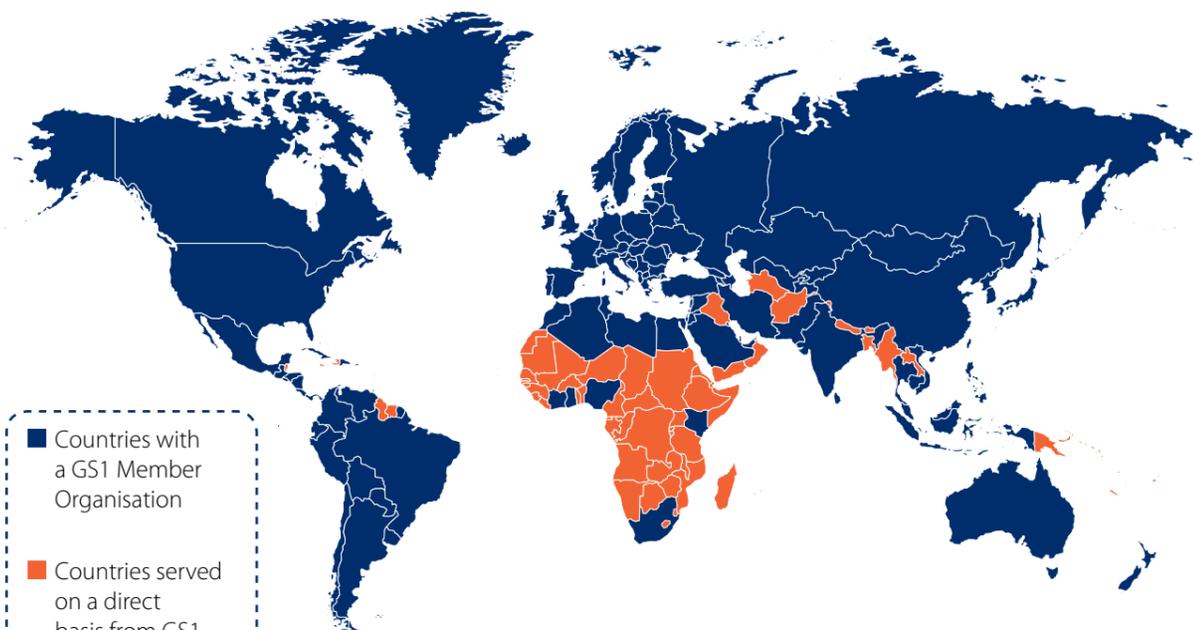
**Susan West**, Chief Human Resources Officer

**Sally Herbert**, President of GS1 Standards Development, President of GS1 GDSN Inc.

**Miguel A. Lopera**, President and Chief Executive Officer

## GS1 in the World

108 Member Organisations serving 150 countries: Local services, global reach.



■ Countries with a GS1 Member Organisation

■ Countries served on a direct basis from GS1 Global Office

## GS1 Member Organisations

The following information was correct when we went to press. For the most up-to-date information, please visit <http://www.gs1.org/contact>

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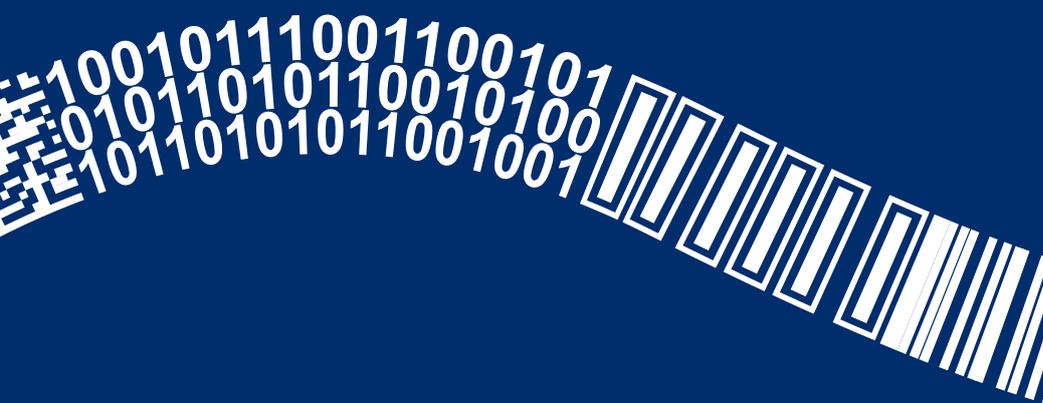
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