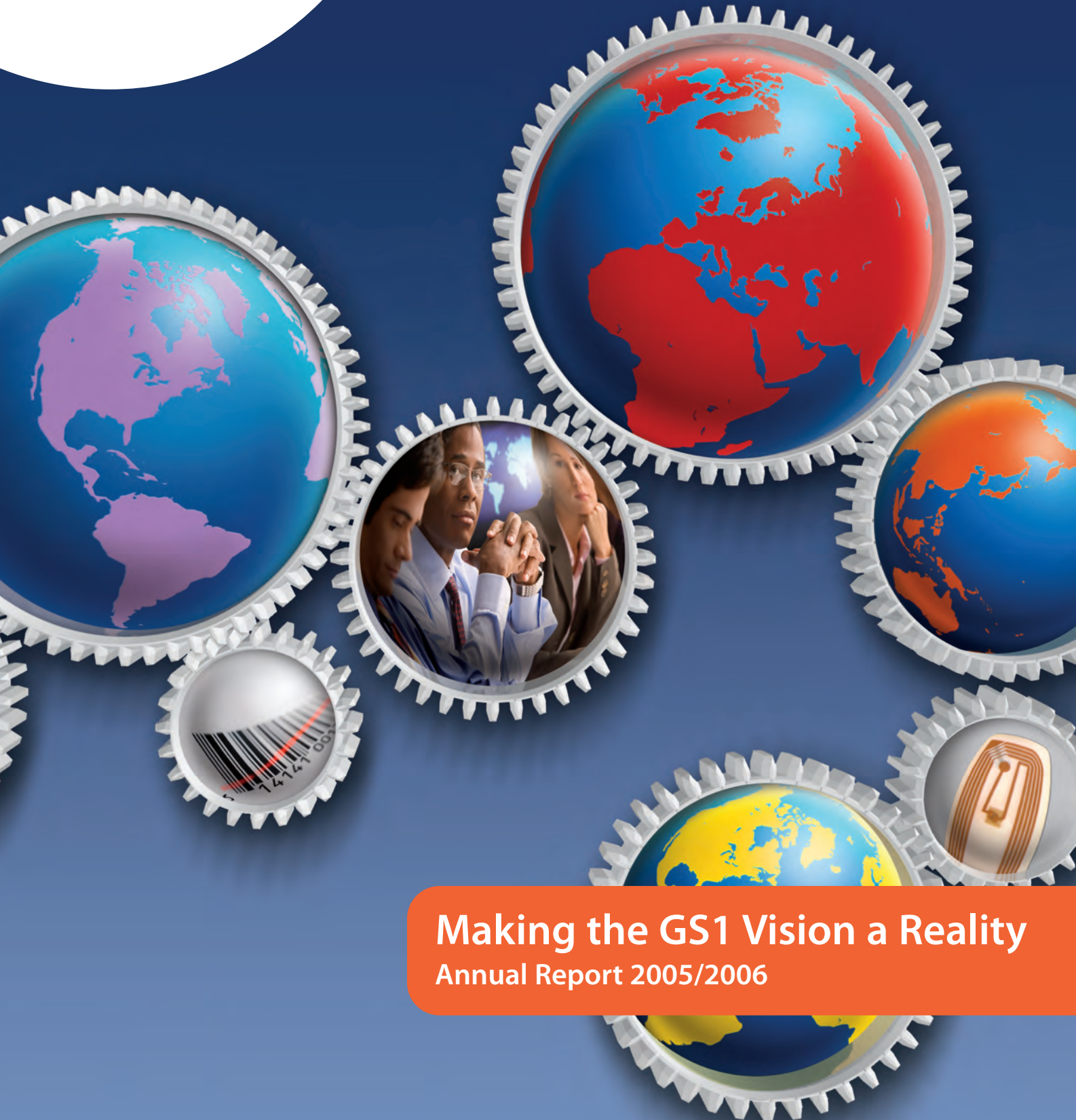




The global language  
of business



**Making the GS1 Vision a Reality**  
Annual Report 2005/2006



**GS1 is the most widely used supply chain standards system in the world.**

**GS1 is a fully integrated global organisation**

- 104 member organisations representing all points in the supply chain
- Over a million companies doing business across 145 countries

**GS1 operates in multiple sectors & industries**

- Over 20 represented sectors ranging from Fast Moving Consumer Goods (FMCG) to health-care, transport, defense, aerospace...





# Making the GS1 Vision a Reality

Letter from the Chairman .....	1
Letter from the Incoming Chairman .....	3
Letter from the President & CEO .....	4
<b>Performance and Perspective</b>	
GS1 BarCodes and eCom.....	8
GS1 GDSN .....	10
GS1 EPCglobal.....	14
New Services and Solutions.....	18
New Sectors .....	20
Operational Improvements .....	22
Strategic Alliances .....	26
<b>Practical Examples</b>	
GS1 China .....	31
GS1 Colombia .....	32
GS1 France .....	33
GS1 Japan .....	34
<b>General</b>	
GS1 Financial Statements .....	35
GS1 Board Members.....	38
Membership.....	43







## In This Report

We continue to increase the communication and visibility into and across the organisation. In this report you will find detailed financial reporting (pages 35-37), progress reports from each of our business units (page 7) and a list of the global business leaders represented on our Boards (pages 40-41).

We hope that the format and content of this 2005/2006 Annual Report gives you the opportunity to know and understand the global reach of GS1 and the significant impact we are achieving towards a more efficient supply chain.



## LETTER FROM THE CHAIRMAN



### Making Our Vision a Reality:

"Making Our Vision a Reality" is our most important goal at this critical juncture in GS1's development. Our credibility and momentum come from day-to-day achievements, both foundational and transformational, in pursuit of our vision.

### The Uniqueness of GS1:

As we recognise and appreciate the true uniqueness of the GS1 organisation, our vision is unified and sustained by our Basic Beliefs and Values. They are:

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

As we embrace these beliefs, we also embrace the diversity represented in the 104 member organisations. Our Governing Boards (Management Board, EPCglobal Board, GDSN Board) are comprised of leaders from 17 different nationalities, 6 different sectors, 13 manufacturers, 17 retailers, and 14 member organisations. (Throughout the report you will find statements from our board members supporting the GS1 standards and solutions.)

This diversity is a strength as we keep our common vision before us. As individual member organisations and as one global organisation, our unity comes from:

- Understanding our vision
- Appreciating and living our basic beliefs
- Embracing the strength found in our diversity
- Seeing one vision, speaking one voice: acting as one organisation

We are all inspired by examples of leadership. Danny Wegman, our incoming Chairman, is an example of a leader who sees not what is, but what can be. He understands GS1's vision, speaks about it passionately, and most importantly, puts it into action in his own organisation.

### Simple But Powerful:

"Simplicity is the ultimate sophistication," said Leonardo da Vinci. The substance of what GS1 does, is to connect the flow of goods and services with the flow of information. As we continue to build upon the time honored and trusted bar code, we will improve the ways and speed of collecting this information. The success will continue to be the recognition of simple successes in the everyday processing of invoices, control of inventory, and continuously replenishing store shelves safely and effortlessly.

### Visibility and Permission:

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

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

Tim Smucker  
Chairman







## LETTER FROM THE INCOMING CHAIRMAN



### **Seeing One Vision, Speaking With One Voice, Acting as One Organisation.**

So much has been accomplished by the constituents, customers and leaders of GS1, I am truly honored to begin my tenure as Chairman. The GS1 Community has unified around the world to engineer this remarkable period of creation. GS1 Leaders and Member Organisations have listened to customers needs and have learned how to enable Electronic Trading Communities that are beginning to eliminate disruption and transform the way we all do business. The GS1 Organisation has grown stronger in the core sectors that support and sustain the vision while developing significant expertise and momentum in emerging and strategic sectors. The members of GS1 have shared best practices openly and have embraced change and compromise in the spirit of creating a world vision. So much has happened to get us where we are today.

The tireless efforts of so many people and organisations have clearly positioned GS1 well to move rapidly from this remarkable period of creation and community development into one of adoption and value creation. The potential of this global community is unlimited because of the progressive membership organisations and world class leadership team. As a business leader, I am grateful to the entire GS1 Community for leading us to the point where we are today. As the incoming Chairman, it is with great honor and thanks that I begin my term.



Danny Wegman  
*Incoming Chairman*



## LETTER FROM THE PRESIDENT & CEO



Since adopting our GS1 Strategy two years ago, we have dedicated our efforts to develop, promote and propagate a single, worldwide system of open, multi-sectoral standards to enhance and improve supply and demand chain efficiency. I am pleased to announce that these efforts are meeting with tremendous success.

Never before in my professional career have I seen such dramatic, wholesale progress in such a short time. In a matter of 24 months, a massive movement toward global alignment on priorities, projects and resources has facilitated quantum leaps in realising our vision.

GS1 is now a strong, vibrant, standards-based community of 104 Member Organisations representing business interests in 145 countries around the globe. And great strides have been made to vest each and every member company within our MOs with tangible ownership of the system and its powerful, collaborative potential in their own enterprises.

As I travel from country to country and continent to continent, I see potent examples of our work in progress. There is a clear pride in membership. There is a boon to participation in work groups and in our standards factory (GSMP and EPCglobal) around the world. There is keen interest in emerging technologies and innovative applications using our standards. And everywhere there is a rising sense of trust and confidence in the ability of GS1 standards and our organisation to solve some of business' most pressing challenges.

**Among the highlights of the last year** was GS1 Management Board approval of Reduced Space Symbolology (RSS). This exceptional system provides for the identification of small items and variable measure products such as meat and produce within the

full scope of the GS1 System, and will go a long way to helping us support improved traceability in the supply chain.

The Electronic Product Code (EPC) also achieved a significant milestone. During the year, the International Organisation for Standardisation (ISO) approved the EPC Gen 2 protocol as an ISO standard, allowing us to reach out to many new companies in countries around the world. This development, along with a dramatic drop in EPC equipment prices, have encouraged a growing number of companies to implement RFID technology in their own supply chains, moving us closer to critical mass in the adoption of EPC worldwide.

Another highlight was the expansion of our data synchronisation efforts. Our Global Data Synchronisation Network (GDSN) became an active reality with more than 10,000 companies populating the network through seven interconnected data pools, with more on the way. And we achieved an agreed data quality protocol among trading partners which will further enhance the network's ability to perform at peak levels.

I am also happy to report that GS1 has a very promising pipeline of products and services in the works, including developments around traceability standards and our work with the Global Upstream Supply Initiative (GUSI) supporting the upstream efforts between manufacturers and their suppliers.



## Our vision is built on a legacy of strong leadership.

We will reach out and engage more global retailers in the GDSN. The power of a network is exponentially proportional to its user base, and we are committed to growing GDSN for true global benefit.

We will focus our energies on expanding the full functionality of the EPCglobal Network for existing sectors, and to on-board new sectors such as Aerospace and Automotive.

We will use our resources to facilitate a breakthrough in advancing Healthcare standardisation, working with the GS1 HUG to help align the entire Healthcare community behind these efforts.

We will work to better educate users on the integrated GS1 System architecture, explaining how our standards are interconnected and how investment in standardisation is protected when moving between standards.

We will promote innovative solutions such as RSS and EPC for supply and demand chain challenges.

And we will continue to embrace change, doing what is essential to build a world class organisation, both at our Global Office in Brussels and in the local GS1 Member Organisations around the world.

**Our vision is built on a legacy of strong leadership.** We have been fortunate to have a deep resource of talent working with us and for us around the world. In the Global Office. At the Member Organisations. And in work groups, committees and boards at every level. But I would be

remiss if I didn't single out the unique leadership abilities and exceptional passion of our outgoing chairman, Tim Smucker. Not only was Tim instrumental from the early stages of the talks that led to the union of EAN International and the Uniform Code Council and the creation of GS1, but he skillfully headed our new entity toward the global alignment we have today. He leaves a powerful legacy for us to follow as a chairman and we expect him to remain very close to GS1 in the future.

Our new incoming chairman, Danny Wegman, is also a man of great vision and leadership. He has been a voice for innovation and a strong advocate for GS1 standards, both in his own business and in the global movement toward one worldwide system. I am gratified to have two such able leaders during this most critical time in our development.

**GS1 is strong.**

**Our standards and services are global.**

**Our worldwide membership is aligned.**

**And our vision is becoming a reality.**

**Join us for the next chapter.**



Miguel A. Lopera  
President & CEO

Finally, I point to our expansion into new sectors as another sign that our standards vision is becoming a reality. The global Healthcare User Group chose GS1 as the sole system of standards for healthcare. The North Atlantic Treaty Organisation (NATO) signed a Technical Co-operation Agreement with GS1 to expand our standards efforts in the Defense and Aerospace industry.

### **There are still challenges ahead.**

Connecting the flow of information with the flow of goods on a worldwide scale is a difficult process, but our dedication remains firm and focused.







## Performance and Perspective



GS1 BarCodes and eCom

GS1 GDSN

GS1 EPCglobal

New Services and Solutions

New Sectors

Operational Improvements

Strategic Alliances



During the past fiscal year, the wheels of progress turned at an impressive rate in the BarCodes and eCom Business Units. Beginning with the GS1 Forum launch, staff from every corner of the globe began to organise their collective experience to expand the GS1 System in new applications like RSS for existing customers and to lay the groundwork for progress in new arenas like Patient Safety and eGovernment.

### **GS1 BarCodes and the GS1 Identification System**

GS1 BarCodes and the GS1 Identification System have delivered consumer benefits for over thirty years. Consumers trust and accept them; industry knows how to use them; and their growth potential increases every year as GS1 moves into new sectors and creates new solutions.

In short: the state of the GS1 BarCodes & Identification System is strong.

The momentum behind GS1 BarCodes activity around the world continues to carry the standards into new territory, both in terms of company usage and sector penetration. "The Benefits of Beep" campaign has produced result in awareness and recognition within GS1 community and beyond. Our brand message of "Save Time. Save Money. Live Life," resonates well with global audiences. With 100,000 GS1 BarCode "beeps" every second, the world's product consumers save time and money. And when these benefits are shared with patients through GS1's efforts in healthcare, it will provide opportunities for them to live life to its fullest.

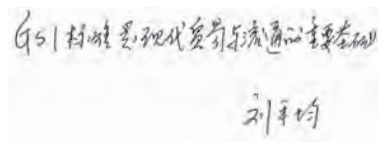


### **GS1 General Specifications Redesign**

One of the major projects currently underway within the GS1 Global Office with the support of many Member Organisations is the reorganisation of the GS1 General Specifications. This is *the* core standards document for the GS1 Bar Codes and Identification System. It is also used by all GS1 business units as both a reference document and as a base on which to develop new standards.

The benefits are expected to be a simplified document structure - making GS1 data, technical, and application standards modular and reusable. To this end, information in the new GS1 General Specifications format will be reorganised into simple categories such as Applications, Data, Data Carriers, Conformance and Rules.





"GS1 standards are the foundation on which modern trade and commodity circulation are built."



Liu Pingjun  
Administrator of Standardisation  
Administration of China

### GS1 Reduced Space Symbology - RSS

In June, the GS1 Board endorsed a global sunrise date of 1 January 2010 for a new bar code called Reduced Space Symbology (RSS). This marks the first time since the EAN/UPC bar code was adopted that GS1 has endorsed a bar code for global, open (unrestricted) trade item identification. The announcement followed a business case review by a global task force comprising retailers, fast moving consumer goods manufacturers, pharmaceutical companies, GS1 Member Organisations, and trade associations.

While EAN/UPC will remain useful for product identification, RSS enables expanded bar code implementation by meeting the objective of identifying small items and carrying more information than the current EAN/UPC bar code. With its smaller size, RSS will enable GTIN identification for hard-to-mark products like fresh foods and pharmaceutical products, as well as providing new support for shrink reduction and category management. RSS' ability to carry GS1 Application Identifiers like serial numbers, lot numbers, and expiration dates, opens the door to identification solutions supporting product authentication and traceability, product quality and effectiveness, variable measure product identification, and couponing.

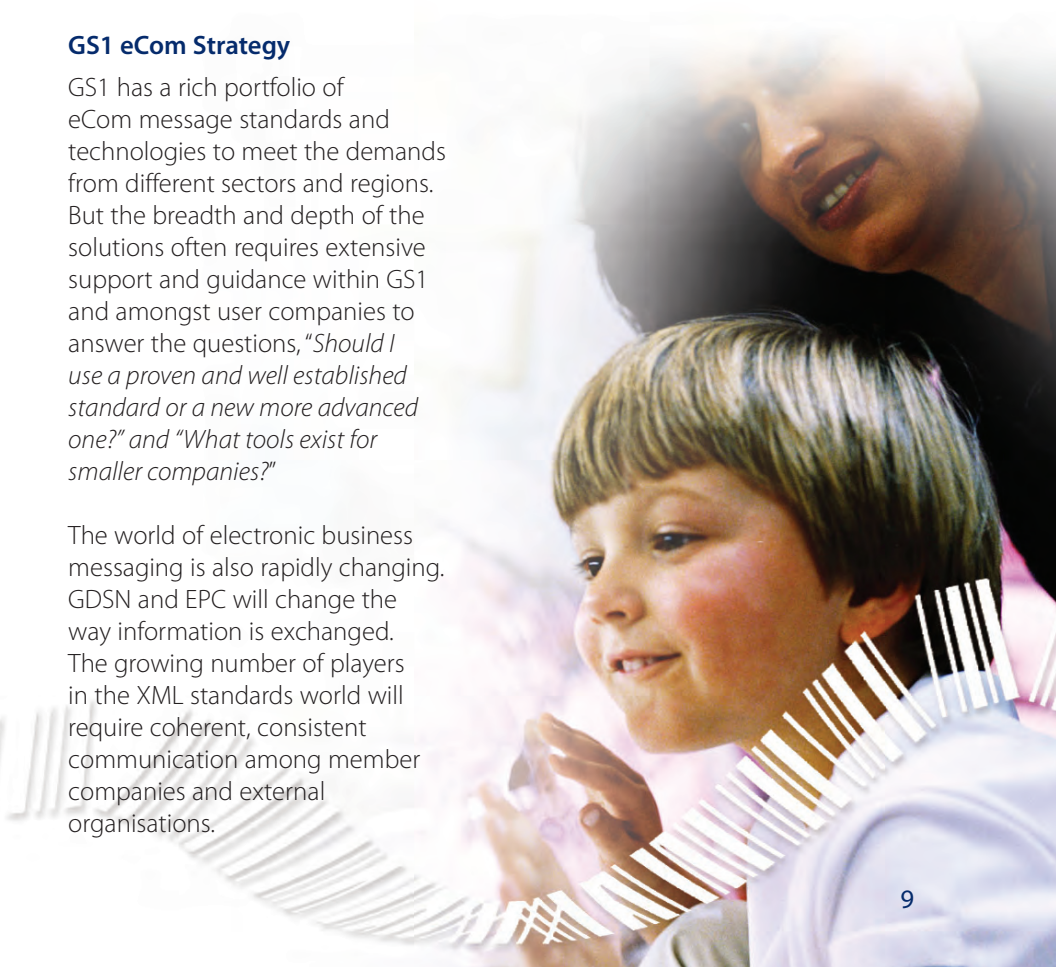
The adoption date of 2010 sets the goal for bar code systems to be capable of scanning RSS bar codes and processing GS1 Application Identifiers. Separate dates will be set for the use of the additional data for new application areas by global standards work groups. Initial priorities were established for identification of fresh food, variable measure, and pharmaceutical products sold at retail. In addition, research areas will be supported such as boosting GS1's variable bar code printing technology knowledge and expert network.

### GS1 eCom Strategy

GS1 has a rich portfolio of eCom message standards and technologies to meet the demands from different sectors and regions. But the breadth and depth of the solutions often requires extensive support and guidance within GS1 and amongst user companies to answer the questions, "Should I use a proven and well established standard or a new more advanced one?" and "What tools exist for smaller companies?"

The world of electronic business messaging is also rapidly changing. GDSN and EPC will change the way information is exchanged. The growing number of players in the XML standards world will require coherent, consistent communication among member companies and external organisations.

To meet these challenges, the GS1 eCom Strategy Initiative was launched with the aim to cover all strategic aspects of electronic business messaging and to be business driven. It will provide GS1 and its members with a clear understanding of how the different components in our eCom standards fit together as well as a high level roadmap for future development.





# Performance and Perspective







## PRESIDENT'S MESSAGE



Sally A. Herbert  
*President*  
GS1 GDSN, Inc.

In the past year, the Global Data Synchronisation Network has grown from 350 users registered in the GS1 Global Registry™ to more than 10,000 global, regional and local retailers and suppliers doing business in all continents across the globe.

For the first time in the history of the GDSN, the majority of users registered reside outside of North America. This represents the beginning of true global expansion of the network and, more importantly, a sizeable increase in the number of users benefiting from data synchronisation. The number of products registered has also grown significantly. The GS1 Global Registry contains over 830,000 products representing a noteworthy increase in business transactions across the network. This year also brought the successful execution of a data pool certification event that certified eleven additional data pools into the GDSN. The twenty data pools represent over 30 countries in North America, South America, Asia, Europe and MEMA, (Middle East, Mediterranean and Africa).

Underlying this growth is a movement that will surely transform how companies look at data. This year, GS1 announced the launch of The Data Quality Management Protocol, including best practices for suppliers and retailers to establish, implement, maintain and improve data quality management programmes in parallel with data synchronisation activities.

Data cleansing of internal product catalogues, item, supplier and customer masters can be a daunting task. However, experienced companies continue to use the implementation of the GDSN as a process to improve the quality of their data by focusing on targeted product categories and trading partners to centre the data cleansing process in the areas that deliver the best financial return.

Additionally, leading companies of all sizes are using the implementation of the GDSN, and the data cleansing process which it provides, as the foundational step in the rollout of other collaborative supply chain initiatives such as sales and promotion planning, CPFR, and activities via the EPCglobal Network®.

### **New Business Model Positioned the GDSN for Expansion**

In response to user demand, GS1 GDSN, Inc. launched a data pool funded business model in January 2006. This model replaced the trading partner subscription model which required all trading partners to pay a separate fee to GS1 GDSN, Inc. in order to benefit from the use of the GS1 Global Registry. The new model removed unnecessary barriers and allows the GDSN certified data pools to fully migrate their user community to the GDSN. The GDSN Board was expanded to allow for representation of commercial data pools. Additionally, the Data Pool Advisory Council became a formal Board subcommittee joining the other three subcommittees: Communications, Certification, and Finance, giving all certified data pools a direct voice at the Board level.

### **Launch of the User Group Ensures Global Representation in the Development of GDSN Business Standards**

In April 2006, GDSN, Inc. launched the global User Group closely followed by the launch of the Advisory Group. The mission of the User Group is to identify industry



business needs, define high-level business requirements, and provide input to the prioritisation of GDSN functionality designed to meet global and local needs. The Advisory Group is responsible for providing direction to the GDSN management team in matters related to business requirements gathering and standards development.



"Working with national GS1 organisations on data synchronisation, Unilever is seeing significant benefits across a range of processes. As these programs are integrated into GDSN, we anticipate gaining greater internal efficiency, which will improve the benefits for our consumers, our trading partners, and for Unilever."

Rudy Markham  
Unilever  
Member of the GS1 Management Board

The User Group consists of retailers, suppliers, GS1 Member Organisations and certified data pools representing Asia Pacific, Central, Eastern and Western Europe, Latin America, MEMA (Middle East, Mediterranean, and Africa) and North America. The group consists of equal representation between retailers and suppliers. The data pools and Member Organisations are uniquely positioned to provide input and to represent the small and medium size organisations which may not have the resources to participate in all development activities. The User Group has been instrumental in the development of the 2007 GDSN Release Plan designed to deliver the next set of functionality to drive further implementation of the network.

### Price Synchronisation

Industry studies indicate that synchronisation of price information along with item and location information brings greater financial return as companies expand the scope of data synchronisation and collaboration by further reducing costs within their supply chains. In May 2006, the Price Synchronisation project team completed the first global price synchronisation solution. The draft standard consists of a single message approach already in use by GS1 Member Organisation data pools outside the GDSN. The solution meets the global end user business requirements of the retailers and suppliers active on the Price Synchronisation project. The

draft-standard was made available in June 2006 to retailers, suppliers and their data pools for development and testing through an industry pilot. The industry pilot will test the standard to ensure it meets the end user business needs. The pilot, followed by data pool certification, ensures a fully-tested and proven standard prior to production launch by the end users.

GDSN, Inc. continues to work closely with the global community to bring this standard to fruition as quickly as the end users and their data pools can support its implementation.

### Other Key Achievements

- **Item Authorisation:** In July 2006 the Item Authorisation standard was tested and put into production. This standard will allow brand owners to better manage their inventory and supply chain by automating the process to authorise the sale of products to a specific region, country or even single store.
- **New Item Form:** This year GS1 GDSN, Inc. and the GSMP introduced the New Item Form process based on end user needs of retailers and suppliers. The New Item Form process automates the manual processes associated with the introduction of new items and accelerates the introduction of new products to market. Retailer use cases show that automation of the new item process accelerates the introduction of products to market by as much as two weeks.



“Sharing data in a standard way along the complete supply chain is the most efficient way to reduce stock while maintaining service levels. That’s why Carrefour has decided to accelerate the adoption of GDSN.”

José Luis Duran  
Carrefour

Member of the GS1 Management Board



- **Data Pool Certification:** The second data pool certification event was completed, and it launched over 20 certified data pools into the network. This presents a significant growth from the previous year of 10 certified data pools. Additionally, the third certification event was launched in 2006, further increasing end user access to the GDSN. The 2006 certification event consisted of optional and mandatory components providing a process to introduce functionality based on local, regional or sector-specific market needs.
- **Education and Awareness:** GDSN, Inc., working in close collaboration with end users, Member Organisations, and certified data pools, expanded the education and awareness program launched in late 2005 to include programs in Asia Pacific, Australia, and Latin America. The program consists of basis data synchronisation and end user case studies illustrating the financial value, operational benefits and lessons learned by experienced users. This program has been well received by the local users and will continue to be expanded to further educate emerging regions. Additionally, new marketing collateral was introduced showcasing retailer and supplier benefits, a GDSN and GPC overview and benefits as well as a *How to Join* guide. A completely re-written GDSN Guide was also introduced providing valuable information and step-by-step instructions on how to implement the GDSN.

- **Architecture Committee:** A GDSN Architecture Committee was launched in January 2006. The mission of the Architecture Committee is to advise the GDSN User Group, GDSN Inc, and GSMP on the technical design and implementation of business requirements and their impact on network integrity and performance.

#### Global Product Classification (GPC)

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

This past year the GPC Task Group under GDSN, Inc. leadership added 14 new categories and has 20 live in the GDSN. GS1 has made the decision to integrate the GPC system within the United Nations Standard Products and Services Code (UNSPSC) classification system in 2007. UNSPSC hierarchy will serve as the primary basis, with GPC providing the necessary granularity across key categories and sectors. The GPC structure will be preserved and will remain the classification system used within the GDSN.

#### GS1 Launches the Data Quality Management Protocol

In May 2006 GS1 announced the publication of the GS1 Data Quality Framework, including a best practice protocol for companies to establish, implement, maintain and improve their data quality management systems. GS1 and the Global Commerce Initiative (GCI), along with representatives from suppliers, retailers and industry associations, worked together as a team to establish the framework. Good quality data – data that is complete, consistent, accurate, time-stamped and industry standards-based – is foundational to collaborative commerce and global data synchronisation. The GS1 Data Quality Framework incorporates a data quality management system to validate the existence and effectiveness of key data management business processes. In addition, it offers several options to show compliance, by offering rules for self-declaration and an inspection procedure to physically validate product attributes. By improving the quality of data, trading partners reduce costs, improve productivity and accelerate the speed to market for new products. GS1 is responsible for updating and publishing the Data Quality Framework and provides overall stewardship. The framework also supports the GS1 System standards for measurement tolerances. The 104 Member Organisations of GS1 will leverage the protocol in the data quality services offered to their customers around the world.

## Performance and Perspective





## PRESIDENT'S MESSAGE



Chris Adcock  
*President*  
*EPCglobal, Inc.*

Congratulations and thanks are due to the members of the EPCglobal community for an incredible year of progress. The EPCglobal community has grown stronger with each passing day as an increasing number of organisations are embracing the vision of working together to create a global standards infrastructure for this remarkable enabling technology. The EPCglobal community is indebted to the many individuals who donate their time, experience and expertise to fulfilling the aims and ambitions of EPCglobal.

### **Public policy outreach**

The Public Policy Steering Committee (PPSC) and its working groups have established open dialogue with key stakeholders, including legislators and regulatory bodies. The PPSC works proactively to inform and educate interested parties about EPC technology, and to address matters regarding the responsible deployment of the EPC. Many political leaders and regulators are taking a pragmatic approach in supporting the use of EPCglobal standards-based RFID to allow organisations to transform their business processes, whilst ensuring that industry takes appropriate measures towards responsible implementation.

### **First standards-compliant hardware certified**

September 2005, EPCglobal awarded the first EPCglobal Certification Marks to seven solution providers, ensuring their products comply with EPCglobal technical standards. The Marks certify that the hardware products have been tested and will work according to the EPCglobal UHF Generation 2 Air Interface Protocol Standard ratified in December 2004. Certification enables companies that are implementing EPCglobal Standards to have easy access to objective and reliable information about EPC hardware.

### **Worldwide network of testing centres accredited**

September 2005, EPCglobal Inc awarded the first EPCglobal Performance Test Centre Accreditation Marks to four worldwide testing facilities. Additional testing facilities will be added to the list of accredited centres as they qualify. EPCglobal Performance Test Centres will make it easy for end users to ensure that their tagged shipments can be read before sending them through their global supply chains.

### **First software standard for EPC/RFID ratified**

September 2005, the Application Level Events standard, or ALE, was ratified. The ALE standard is essential for the continued build-out of the EPCglobal Network because it provides an important standardised approach for collecting, managing, and routing EPC data as items move throughout the supply chain. The standard will enable more efficient collection and movement of EPC Data, making supply chains visible and traceable in real time. The standard was developed by more than 100 leading companies within a work group of the EPCglobal Software Action Group.



"Metro Group is particularly proud of its EPCglobal Performance Test Center, created together with GS1 Germany. This type of collaborative initiative helps companies deliver benefits both for their trading partners and themselves."

Zygmunt Mierdorf  
Metro AG  
Member of the GS1 Management Board

### **The EPCglobal Architecture Framework report released**

October 2005, the Architectural Review Committee released a report entitled The EPCglobal Architecture Framework, which broadly defines the principles, standards, and components necessary to successfully develop and implement the EPCglobal Network.

### **Widening range of industries are taking advantage of the opportunity to participate in the EPCglobal community**

January 2006, saw the integration of the Transport and Logistics Action Group into the EPCglobal Community, with their first Action Group meeting taking place in Japan. In February, EPCglobal hosted the first global Apparel, Fashion and Footwear summit on EPC and RFID in Barcelona. A large number of leading global apparel and textile companies participated in this event to help identify how they could address issues specific to their industry by working together within the EPCglobal community. Further expected new action groups for 2006 and the early part of 2007 include: Aerospace and Defence, Automotive, Consumer Electronics, and Chemical

### **Expansion into High Frequency starts with healthcare industry**

May 2006, a High Frequency work group was launched to respond to the business requirements established by the Joint Requirements Group for item level tagging. It is anticipated that EPCglobal will also start work on other tag types, such as active tags, in the coming year. However, it is important to ensure that consistent standards are used for the communication of data through information systems and across networks regardless of the tag type which carries data into the system.

### **Gen 2 acceptance as an ISO standard**

June 2006, Gen 2 incorporation in the ISO standard 18000-6 Type C comes just 18 months after it was ratified as a hardware standard by EPCglobal in December of 2004. More than a dozen RFID readers, tags and integrated circuits have been certified as Gen 2 compliant by EPCglobal and are commercially available today.

### **EPCglobal subscriptions expanding globally**

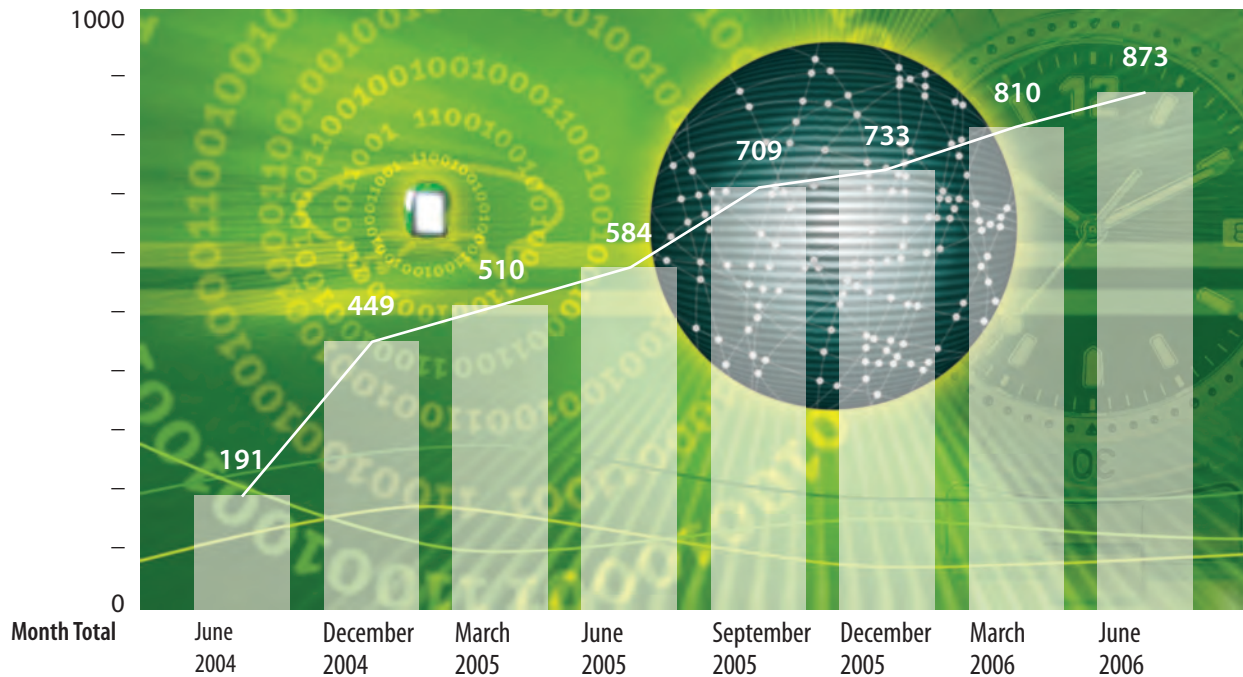
June 2006, over 870 organisations across the world have now joined the EPCglobal community. End Users now represent 54% of total subscribers.



"GS1's EPCglobal has created a collaborative environment for establishing standards and understanding best practices for use of the EPC capability. This enables P&G to operate globally with consistency, using GS1 systems as a foundation for building connections with our customers."

Robert A. McDonald  
P&G

Member of the GS1 Management Board



## 2006/2007 Outlook

As we look forward to another exciting year of progress and development we can see that the EPCglobal community has moved from a period of **"hope"** at the start of the decade as researchers and academics sought ways to use this incredible technology across a broad range of business applications; to a period of **"hype"** a couple of years ago whilst many were focused on the initial testing of ideas; to the period of **"implementation"** which is now starting to occur as leading organisations begin to use the EPCglobal standards based technology to exploit a wide range of opportunities.

## "This is no longer a take it on faith initiative."

Linda Dillman Executive Vice President Wal-Mart

EPCglobal is fortunate to have the contribution of academic research, through Auto ID Labs, and a wide range of highly innovative organisations that are overcoming the implementation challenges in order to allow effective implementation of the technology. Thousands of pilot tests have been conducted around the world and many organisations are now achieving the business benefits and returns on investment that they have been working towards. EPCglobal is totally committed in its purpose of working with its members to build a global standards infrastructure and to achieve the full potential use of the technology within and between organisations.



# Performance and Perspective

## New Services and Solutions







GS1's advancements in the areas of New Services and Solutions were geared to address long-standing challenges in the marketplace for both members and prospective members. Two highlights of the year focused on the cooperative efforts of multiple MOs and end users to deal effectively with a Global Traceability Standard as well as the vision of bringing GS1 System benefits upstream to the trading relationships between manufacturers and their suppliers.

### Global Traceability Standard

A GS1 team composed of industry experts from 18 countries has produced a global business agreement on generic requirements and a common way to describe the traceability process. The agreement takes into account the differences imposed by diverse legislative and business requirements as well as the set of diverging expectations in terms of enabling technologies. The need for such a standard emerged after an increase in legislation relating to traceability and growing concerns over counterfeiting.

GS1 members worldwide are expected to benefit from the new global standard defining traceability as a business process independently from the choice of

enabling technologies. GS1 thus opens the door for mass implementation of flexible and interoperable track and trace systems across companies, industries, supply chains and economies. Consumers and businesses will benefit from improved availability of timely and accurate data resulting from cost-efficient alignment of customer and supplier traceability systems.

### Global Upstream Supply Initiative (GUSI)

GS1 released a complete set of XML standards designed for the specific needs of upstream suppliers of ingredients, raw materials and packaging. They are the fruit of collaboration between GS1 and GCI Global Upstream Supply Initiative, and are based on the Upstream Integration Model (UIM) jointly developed by suppliers and manufacturers.

Implementing the UIM together with the newly released GS1 Standards will result in a highly optimised process and bring a wide variety of benefits, including improved levels of service, reduced inventory and lower administration, production and transportation costs.

The new standards complement the existing GS1 XML standards already available for retailers and manufacturers around the world and extend the benefits of standardisation to include upstream.



"Traceability is a key component of Kraft's approach to product quality and safety. The GS1 Global Traceability Standard will help Kraft further enhance its traceability programs, and is a great example of how the GS1 System can provide real benefits for companies and consumers alike."

Hugh H. Roberts  
Kraft Foods  
Member of the GS1 Management Board

# Performance and Perspective

## New Sectors



"Because we serve many companies and many people around the globe, trade without standards would be a nightmare for DHL. GS1 helps us to meet our targets and the targets of our customers everywhere, everyday."

**Bernd Flickinger**

*DHL*

*Member of the GS1 Management Board*



A primary vision for GS1 is the development and growth of new sectors using the GS1 System. During the past year, great strides were made in a number of new sectors, bringing the vision closer to reality.

### Global Healthcare User Group

The global Healthcare User Group (GS1 HUG™) has chosen GS1 as the sole system of standards in healthcare. The HUG is a voluntary and open group formed by 40 leading pharmaceutical and medical devices companies, wholesalers, hospitals and trade associations from around the world. The HUG's primary objective is to enhance patient safety worldwide through accurate and standardised product identification.

Accurate product identification is crucial to patient safety in three key aspects:

- avoiding medication errors by ensuring that the right drug is delivered to the right patient
- preventing the use of counterfeit drugs and medical devices
- allowing the traceability of medical products

After one year of successful operation of the GS1 HUG™, HUG officially announced on 26 July 2006 that it will use GS1 standards exclusively as the basis for its automatic product identification developments (Bar Codes and Radio Frequency Identification Product Tags).

Over the course of the next 18 months the HUG members will continue to promote the existing GS1 standards for their application and implementation in the healthcare sector. While the primary focus is on developing global standards for automatic product identification, the HUG will also be working on other topics such as serialisation, medical catalogues, data synchronisation, classification and e-commerce to make the healthcare systems safer and more efficient worldwide.



### GS1 in Transport and Logistics

GS1 has established a Logistics initiative with the vision to lead the development and implementation of the GS1 Logistics Solutions for Transport and Warehouse management with initial focus on FMCG.

Its objective is to achieve the benefits of integration of the global supply chains by fostering interoperability and addressing visibility and scalability, identified by participants as key issues for the sector. The current scope includes identification, bar coding, and eCom solutions in supply chain activities.

### GS1 in Customs

Based on the revised Unique Consignment Reference (UCR) recommendation of the World Customs Organisation, the UK Customs initiated a pilot to test the use of the GS1 Serial Shipment Container Code (SSCC) on the international flow of wine and spirits for Constellation and Diageo between the UK and Australia. After evaluation, SSCC proved to be compatible with the UCR recommendation and meeting UCR criteria. Both customs and trade identified potential benefits of leveraging existing identification systems and, as such, stressed the role of SSCC in global trade.

The project framework has been defined and parties ready to commence the pilot on transportation of bulk wine from Australia to the UK. The project team aims to provide first results in Q1 2007. Currently the pilot is focused on basic consignment transactions with the intention to address more complex scenarios of international transportation.

### NATO Technical Cooperation Agreement

The North Atlantic Treaty Organisation (NATO) and GS1 have signed a Technical Co-operation Agreement (TCA). Over the last few years, a number of GS1 Standards have been included within NATO Standards Agreements and Ministries of Defense have initiated a number of enhancements to GS1 Standards on NATO's behalf.

The agreement broadens the co-operation between the NATO and GS1 in the fields of supply chain standards and technologies. It formally enables direct contributions by NATO to the establishment of relevant GS1 standards. On an equal basis, the agreement formally enables GS1 to contribute to the standardisation activities of the NATO standardisation community.



"Protecting patient safety is an unquestionable priority for the Healthcare industry. The use of GS1 standards is at the foundation of our solutions to prevent medical errors and drugs counterfeiting worldwide."

William L. McComb  
J&J

Member of the GS1 Management Board



# Performance and Perspective

## Operational Improvements

### Core Competencies:

#### **Global Standards Development**

Effectively manage the global, user-driven development and implementation process to deliver high quality, easy-to-implement standards to industry and solution providers.

#### **Global Reach**

Maintain and develop a global network of national affiliates which deliver high quality standards-oriented services to their members.

#### **Cross-cultural Communication**

Develop and maintain a broad range of communication capabilities which enable effective two-way communications between GS1, its affiliates, its membership and the wider community.



## CHIEF OPERATING OFFICER'S MESSAGE



Vicente Escribano  
*Chief Operating Officer*

The staff and management of GS1's Global Office, along with representatives of our Member Organisations, worked closely together during the year to improve the understanding and delivery of both the architecture and internal operations of GS1. The traction generated across the enterprise has produced a number of significant results.

### GEPIR Strategy

The Global Electronic Party Information Register (GEPIR) is a distributed database that contains basic information on over 1,000,000 companies in over 100 countries.

At the time of its conception, GEPIR was a GS1 Member Organisation initiative to interlink the different membership databases in order to efficiently fulfill information requests from GS1 System end-users. Over time, some of the users discovered this service and started to directly connect into the GEPIR network to validate Global Location Numbers (GLN) and Global Trade Item Numbers (GTIN) that are manually captured in their ERP systems.

The aim of the GEPIR strategy is to enhance this service by motivating major software houses to include these validation processes into their product offerings. Furthermore, GEPIR has the ambition to become the future portal for Business to Consumer communication. Mobile technology is expected to enable consumers to scan GS1 bar codes. Via GEPIR consumers may be able to receive useful product information, such as cooking instructions or nutrition values.

### GS1 Business Planning

A new business planning process has been rolled-out within the GS1 Global Office. Besides contributing to the overall improvement of the business and financial management, the new business planning process now brings even greater transparency of global operations to the GS1 community.

All business units now follow a common planning process, which connects Long Term Strategies and Programs with Projects into a one year business plan. Updates are made through quarterly reports and include a dashboard with the status of the Top 10 Programs and projects.

### GS1 Architecture

The aim of this new initiative is to research GS1 standards and services and to provide a recommendation on how the components of the GS1 System portfolio should work together to support the existing global user community as well as the newly engaged industries.

One of the key deliverables is expected to be an outline of end-user business processes supported by GS1 standards and services and how they are related. Others include the relationships between various GS1 standards, inclusive of Bar Codes and Identification Systems, eCom, EPC and GDSN.

An integral part of the initiative is to identify future strategic opportunities and development of a GS1 key data translator prototype, which would demonstrate how GS1 Bar Codes relate to EPC tags.

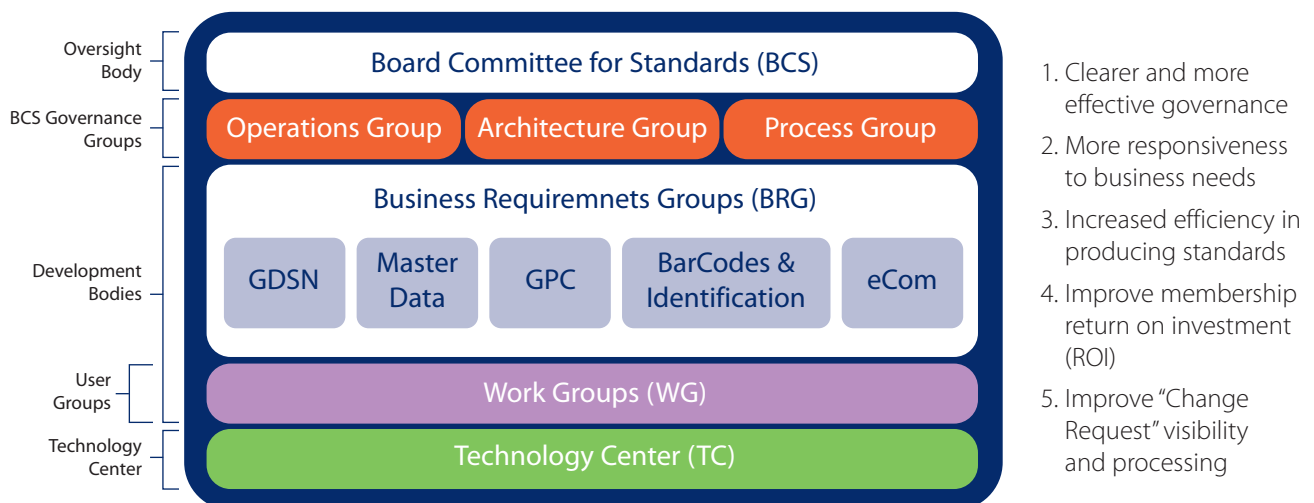




## GS1 Global Standards Management Process

Since it was created in 2002, the Global Standards Management Process (GSMP) has been the engine that powers the entire GS1 System of Standards. In line with the GS1 pledge to continuously improve this process for the benefit of all of its users, a number of enhancements have been made to achieve the following benefits:

The new, improved, organisational structure is depicted below.



These key changes are expected to provide the following benefits:

- GSMP Advisory Groups are replaced by three groups that support GS1 Management Board decisions: Architecture, Process and Operations. This will result in improved governance by directly connecting GSMP operations to the GS1 Management Board in order to meet industry priorities and ensure implementation commitment.
- A GS1 Architecture framework will guide the development of the entire family of GS1 standards to ensure their interoperability and eliminate eventual redundancies.
- Project Teams replace standing committees for complex work items. This will eliminate the "committee queue", ensure that business expertise is properly involved and improve the opportunities for participation.

As per the commitment to continuously improve the GSMP, the next steps include the establishment of a GSMP Charter, Conformance & Certification specifications, and a step change improvement in GSMP communications and membership management.





## Mentoring Programme

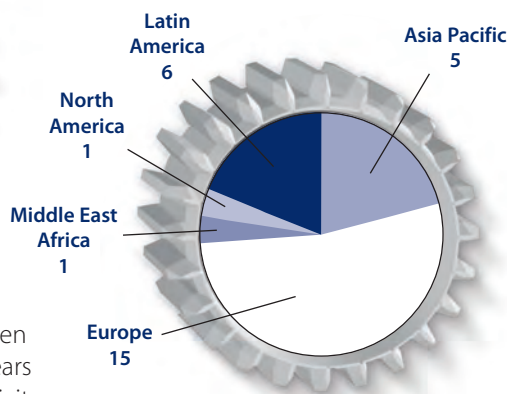
The Mentoring programme has been up and running for a number of years and is now a firmly established activity within the GS1 Member Organisation (MO) community. The Mentoring programme contributes to the goal of building a world-class GS1 organisation by:

- Leveraging knowledge and experiences within the GS1 MO community
- Creating a framework where young and developing MOs can ask for and receive support and advice from mature MOs
- Bridging the gap between mature and developing MOs
- Avoiding that developing MOs will have to 're-invent the wheel'
- Fostering a spirit of cooperation and sharing among the MO community
- Promoting consistency and quality in the services offered by all MOs

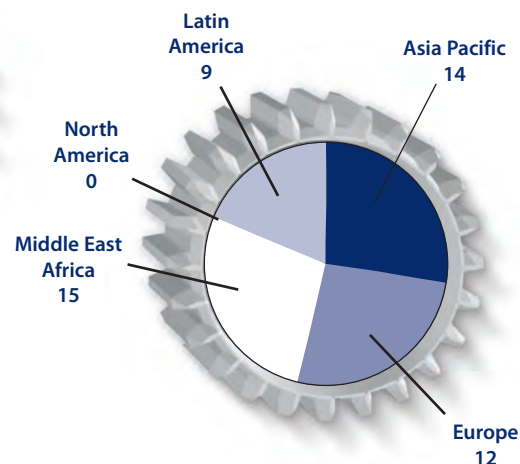
A survey conducted by the GS1 Global Office in October-November 2005 revealed that 80% of the MOs participate in the Mentoring programme and 92% of the MOs supported by a Mentor (Mentorees) are entirely satisfied with the support they receive. The role at the GS1 Global Office is to make sure that the Mentoring Programme runs as smoothly as possible. This is done by:

- Arranging and coordinating visits and contacts between the Mentors and Mentorees
- Maintaining an up-to-date list of Mentor and Mentoree contacts
- Conducting periodic surveys on the status of the Mentoring Programme
- Ensuring that the mentor-mentoree relationships remain relevant for the participating MOs
- Communicating Mentoring success stories to the GS1 community and giving recognition to the Mentors

## Mentors per Region



## Mentorees per Region



## Mentor and Mentoree Member Organisations

### Mentors

Argentina  
Australia  
Austria  
Belgium  
Brazil  
Colombia  
Costa Rica  
Croatia  
Denmark  
Finland  
France  
Germany  
Greece  
Guatemala  
Hong Kong  
India  
Ireland  
Italy  
Malta  
Mexico  
Netherlands  
Russia  
Singapore  
South Africa  
Switzerland  
United Kingdom  
USA

### Mentorees

Algeria  
Albania  
Armenia  
Azerbaijan  
Bahrain  
Bolivia  
Bosnia-Herzegovina  
Bulgaria  
Cambodia  
Cyprus  
Dominican Republic  
Ecuador  
El Salvador  
Estonia  
Georgia  
Ghana  
Guatemala  
Honduras  
Indonesia  
Iran  
Ivory Coast  
Jordan  
Kazakhstan  
Kenya  
Kyrgyzstan  
Kuwait  
Latvia  
Lebanon  
Libya  
Macau  
Mauritius  
Macedonia  
Moldova  
Mongolia  
Morocco  
Nicaragua  
North Korea  
Paraguay  
Peru  
Romania  
Saudi Arabia  
Slovenia  
Sri Lanka  
Thailand  
Tunisia  
Turkey  
United Arab Emirates  
Uruguay  
Uzbekistan  
Venezuela  
Vietnam

## Mentors awarded at the 2006 General Assembly

For the first time this year, a slot was included at the General Assembly event in Malta to award and give recognition to four GS1 champion Mentors. The MOs and CEOs who were awarded were:

Klara Karivan, GS1 Croatia  
Peter Gietelink, GS1 Netherlands  
Rafael Florez, GS1 Colombia  
Tan Jin Soon, GS1 Singapore

As the list of champions is long, the Mentor awards will become an annual event at the General Assembly.



Michel van der Heijden presenting Mentor Awards at the General Assembly to, (Clockwise) Klara Karivan, Peter Gietelink, Rafael Florez and Tan Jin Soon.

# Performance and Perspective

## Strategic Alliances







Collaboration. Partnership. Functional Alliance. The gears of the global supply chain work more closely than ever thanks to the driving force behind GS1 System's Strategic Alliances and Partnerships. Through innovative programmes, strong trade association relationships, and an expanding outreach effort on the part of GS1 and its Member Organisations, the vision of a fully aligned global standards community is becoming a reality.

### **Strategic Alliances and Partnerships**

For an organisation like GS1, adoption of the standards we develop in collaboration with the users is a clear Key Performance Indicator (KPI). For Retail and FMCG, GS1 already regularly reports progress in this area to the Board, using information received from the Global Commerce Initiative's (GCI) global scorecard and the data gathered through GS1 MO's. To stimulate adoption as broadly as possible, GS1 is developing the following main areas of focus:

1. Collaboration with trade associations and trade representation bodies,
2. Strategic partnership programme with Solution Providers,
3. Strategic alliances with other standard bodies, and
4. Programmes to broaden awareness and develop understanding amongst key governmental and non-governmental bodies.

### **Collaboration with trade associations and trade representation bodies**

GS1 has a long tradition of working hand-in-hand with the other trade associations and trade bodies in Retail and FMCG. The organisation has a close and productive relationship with GCI, with continued joint initiatives in the areas of Global Data

Synchronisation (GDS), EPC, Data Accuracy, Upstream (GUSI) and the use of key Identifiers and Message Communication. GS1 is closely involved with the Effective Consumer Response (ECR) and Voluntary Interindustry Commerce Solutions (VICS) Association initiatives. GS1 fully support their vision for a future in which products move through the global supply chain, seamlessly and efficiently, maximising value for manufacturers, retailers and consumers.

GS1 is developing relationships in new industries and sectors as the organisation expands. In the Medical Device sector of the Healthcare industry, GS1 is working closely together with AdvaMed (US Association of Medical Device Manufacturers) and Eucomed (European Associations of Medical Device Manufacturers and National Associations). As these are highly regulated environments, close alignment and working side by side with these well-respected associations is of key importance.

GS1's work with the Wine & Spirits industry is another example. A pilot is being conducted between the UK and Australia Customs for the import and export of wine in bulk. GS1 is working side by side with the WSTA (Wines and Spirits Trade Association) of the UK to make this pilot a success.





"By ensuring full alignment with other international standard bodies, solution providers and trade associations, GS1 provides truly global solutions in today's complex business environment."

Seung-Han Lee  
Samsung Tesco  
Member of the GS1 Management Board

On other fronts, GS1's relationship was intensified with ISBN (books) by assigning a member of the GS1 leadership team to the ISBN Board, and the organisation made substantive progress in initial discussions with IATA (airlines and airport operators) with regard to potentially tagging baggage and freight with EPC.

#### **Strategic partnership programme with Solution Providers**

A solid strategic partnership programme with Solution Providers (technology, process, supply chain, data pools) is of key importance for getting the standards solidly adopted in the supply chain. To these ends, GS1 has enlisted the support of sponsors such as GXS, SAP, IBM, Oracle/Retek and Accenture to help sustain the Global Forum, the GSMP user events, and other activities.

Solution Providers also play an important role in governance. A key Logistics Customer Service Partner (DHL) is a member of the Global Board. In the EPCglobal business, there is a broad working relationship with companies such as Cisco, who is both a solution provider and end user, and GDSN is broadly supported by the main datapools in Retail/FMCG (e.g. GXS, Agentrics).

Going forward, GS1 wants to become more pro-active and develop, together with the Solution Providers and Customer Service partners, a comprehensive global strategy of collaboration to support the efforts currently taking place disparately across the GS1 world. To that effect, the organisation has plans to appoint a dedicated senior member of staff to lead this important initiative. The key objective here is to ensure that these software and solution providers are developing their software products, technology solutions, and consulting offerings in consideration of GS1 System Standards, GPC and solutions.

#### **Strategic alliances with other standard bodies**

GS1's strategic alliance work with other standard bodies is of key importance for broad adoption. The organisation has a long-standing and well-respected working relationship with ISO and, as a result, a great number of the GS1 standards have been adopted as ISO standards.

Over the past year, great progress was made with the incorporation of the EPCglobal Gen 2 standard into the relevant ISO standard. Quite a number of GS1 staff, at the Global Office and MO level, are closely involved in ISO work and participate in the workgroups either as workgroup leaders or specialists. We also engage with ETSI (European Telecommunications Standards Institute) for work in EPC and UN/CEFACT (United Nations Centre for Trade Facilitation and Electronic Business) for alignment with GS1's Electronic Data Interchange standards developments using EDIFACT and XML as well as with the GPC (Global Product Classification) initiative.



"Data quality impacts both retailers and manufacturers and can only be resolved by a collaborative effort of understanding the impact of low data quality in both trading partners internal processes, solving those issues, and implementing processes to keep the data at the highest quality. Synchronising data through GDSN is our tool to keep that high quality data aligned with our trading partners."

Anders Moberg  
Royal Ahold

Member of the GS1 Management Board



Broaden awareness and develop understanding amongst **key governmental and non-governmental bodies**

GS1 recognises the key influence on commerce standards exerted by governmental and inter-governmental organisations. The main mission of these bodies is not to develop standards, but to regulate them; sometimes in all sectors, like the European Union, and other times in specific sectors like the FDA in the US.

GS1 has been active among these key influencers and booked initial success in a number of areas. GS1's leading role in the EU sponsored BRIDGE project, which promotes the use of RFID technology in the EU is a prime example. In the world of Customs, GS1 established a solid working relationship with the World Customs Organisation (WCO) and worked alongside them on UCR/SSCC projects. In defence, GS1 has signed an agreement with NATO. And in Healthcare, the GS1 Healthcare User Group (HUG) and the EPCglobal Healthcare and Life Science group

have been successful in engaging with the FDA in the US. HUG have also been working with the Japanese Health authorities and in meeting with the NHS in the UK.

EPCglobal Inc and representatives of various industry sectors that are implementing RFID and EPC technology have formed the EPCglobal Public Policy Steering Committee (PPSC) to foster open dialogue with key audiences around public policy and other important areas relative to EPC technology and the EPCglobal Network. The PPSC

and its working groups consist of representatives of industries and trade associations worldwide including healthcare, technology, food, consumer products, retail, and others. The PPSC works closely with committee members to address public policy issues and inform industry leaders, consumers, and legislators about the benefits of EPC technology.



## Practical Examples

**GS1 China**

**GS1 Colombia**

**GS1 France**

**GS1 Japan**







## GS1 System on Tracking and Tracing Beef Products in China

The first application of the GS1 system on tracking and tracing beef products in China produced benefits shared by both businesses and society at large.

### Significance

With the high speed development of the economy in the past 20 years, quality of life in China has greatly improved. One area of special concern has been food safety.

In recent years, food safety incidents have attracted a new, heightened sense of attention from the public and, as a result, the Chinese government has been focusing on new and innovative ways to solve these problems.

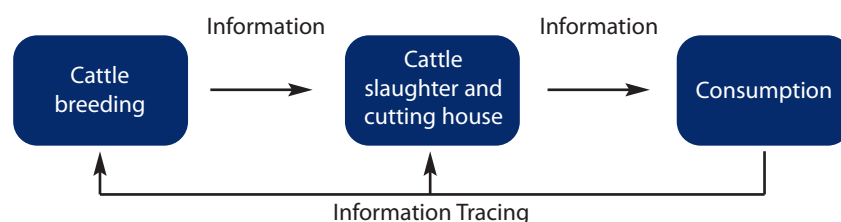
### Project background

GS1 China has seized this opportunity to make its contribution by developing a traceability system according to GS1 specification and traceability guidelines for beef products.

A project was developed by GS1 China leveraging a partnership with Beijing Jinwei Furen Muslin Food Co., Ltd, a private company engaged in the integrated business of beef cattle breeding, slaughtering, top-quality product processing and selling. The company supplies over ten thousand tonnes of beef products to the market in Beijing and over the whole country every year.

## The traceability process

The schematic diagram of the traceability system is as follows:



The flow of information is the key to the success of this project. The following procedure described the information process.

1. The diagram starts with the breeding farm making comprehensive records of epidemic prevention, feeds and disease treatment for individual cattle;
2. The slaughter house registers the quarantine information and slaughter approval information of the cattle and the cattle ear tag number;
3. After slaughtering is completed, the bar code is issued and correlated with general information about the individual cattle registered;
4. When cattle are prepared for butchering, the ear tag number is identified when the carcass enters the cutting line by scanning the bar code. By this time, new bar codes will be generated in lot quantity (used for traceability of information) and correlated with general information about the cattle;
5. After butchering, the bar codes used for the traceability of beef products are attached to the packaging of the beef product;

All information is circulated via the Internet. The trace codes of the beef products adopt the structure of GTIN + ear tag (or batch number). As for the beef products made using beef from several individual cattle, such as minced meat and fat beef meat, the code adopts the structure of GTIN + batch number.

### The results

A pilot was implemented in November 2004 and has produced a number of highly valuable benefits:

- The quality and integrity of the beef products as well as the reputation of the company were all greatly improved;
- Product sales increased by 12% compared to the previous year;
- Increased speed and efficiency were brought to the management of the company through the reduction of manual reporting.

Additionally, it also generated extensive social benefits:

- The awareness and reputation of GS1 China has improved and received great attention from many interested slaughter and processing businesses;
- In the construction of the China Food Credit Record System, an article regarding the traceability of food safety has been added to the star-rating of enterprise credit;
- The Agricultural Bureau of the Beijing Municipal Government has adopted the GS1 bar code as a means of traceability on the agricultural products manufactured under its supervision.

Generally speaking, the project has proved that the GS1 System works well in China.



## LOGyCA: Latin American Centre for Value Networks

LOGyCA, the Latin-American Centre for Value Networks, is a business laboratory dedicated to virtual simulation services, market research studies and specialised human talent training. The Centre was built on GS1 Colombia's "value network"\* training and consulting services for Colombian companies and more than 17 years of accumulated experience.

In 2005, the Centre served more than 18,000 people, including attendees from 12 countries, as well as visiting members of the GS1 Advisory Council.

The main services offered by LOGyCA were:

### 1. Training

- a. Customised training programmes:
  - i. Companies: Bavaria, Colsubsidio and Éxito.
  - ii. People trained: 1,200
- b. General training programmes:
  - i. Companies: 31
  - ii. People trained: approx. 450
- c. Thirty-three seminars with different companies in different cities around the country.

### 2. Market research:

The Centre provided a number of studies for multinational companies, including: consumer behavior studies regarding product changes, new product development, product exhibition design, competence analysis and advertising impact studies.

### 3. Consulting

- a. Companies: 25
- b. Projects: 31

- c. Subjects: automatic data capture, pharmaceutical unit dose implementation, redesign and simulation of extended value networks, warehouse design, etc.

### 4. EPC LAB:

LOGyCA has three main laboratory spaces: the supermarket, the hospital and the warehouse. There are two EPC implementations, one in the supermarket and the other in the warehouse.

- a. Supermarket: Smart shelf, product movement from the retailer back office to the POS area and capture in the receiving dock from the supplier.
- b. Warehouse: Capture at entrance, product flow along the conveyor belt and loading of trucks for delivery.

### 5. Other services

Other services are offered with the support of 72 partners. LOGyCA has agreements with 12 universities and has implemented 53 software applications implemented such as WMS (Warehouse Management System), TMS (Transportation Management System), ERP (Enterprise Resource Planning), etc.

The biggest challenges for 2006 are to ensure LOGyCA's premises are occupied at least 40% of the time, to get the EPC LAB accredited, to increase the number of the software applications used and to provide an unforgettable customer experience full of value through creativity and innovation.

### CABASnet: a platform for collaborative electronic commerce.

CABASnet is a multinational collaborative platform between clients and suppliers. Its objective is to offer solutions that reinforce and increase the efficiency of the value network through the exchange of relevant information. The solutions offered by

CABASnet are: Synchronisation, POS Sales and Inventory Data service, Global Registry and DAM (Digital Asset Management) for the trading partners involved.

At the end of 2005, CABASnet began offering its services in seven Latin-American countries, and right now, it is preparing to enter three new markets. CABASnet's electronic catalogue has been certified by GDSN Inc. and it is the only one catalogue in Latin-America that synchronises price information between trading partners.

### Recent RESULTS (statistics from the Colombian catalogue)

1. Synchronisation: 650 users. Among them, there are retailers; Carrefour, Éxito – Casino, Carulla Vivero, Cafam and Colsubsidio and suppliers; Procter & Gamble, Unilever and Colgate.
2. POS Sales and Inventory Data service: At the end of 2005, 501 companies useutilise CABASnet to exchange information about the number of GTIN's sold.
3. Global Registry: Acting as a certified catalog since 2005.
4. CABASnet Media: A tool for digital asset management.

### Expected results in 2006

Thanks to the commitment of the catalogue's main users, CABASnet has begun a process to extend its use. The objective is to get 2,800 companies to permanently use the Synchronisation service and the POS Sales and Inventory Data service through CABASnet.

In 2006 CABASnet will start measuring and formally following-up both logistics KPI's (e.g. On-Time, In-Full) that are affected by its use and its impact on the reduction of the out-of-stock levels.





## GS1 France Rewards Innovative Companies

Since 1994, GS1 France has been rewarding companies that have launched the most innovative services using GS1 standards.

A committee is convened every year to study business cases submitted by candidate companies. This selection team is made up of representatives from retail and manufacturing (including the previous year's winners) as well as journalists from the supply chain and logistics trade press. Candidate companies must have successfully carried out a project applying GS1 standards in electronic data exchange, electronic invoicing, traceability or any other of the many areas where our standards add value.

The most innovative and high-performance companies receive a trophy at a prestigious dinner and ceremony. In 2005, the Norauto group won a GS1 France Trophy for its exemplary use of GS1 eCom standards. Norauto is France's leading creator and distributor of automotive services for all makes of vehicles, with a large chain of equipment, maintenance and service outlets.

E-invoicing is one of the Norauto group's strengths. To set their project up, Norauto called for volunteer companies from its array of suppliers. Today the company handles 60% of its invoices in France using GS1 eCom.

In the initial phase of the project, Norauto selected suppliers who deliver directly to the group's different stores and who send a large number of invoices, such as tire, muffler and battery manufacturers.

Pierre Chatelain, Product Technical Support Manager for Norauto summarised the project this way: *"You have to communicate extensively with your suppliers before launching this technology, so that everything goes smoothly afterward. It's the necessary condition for the success of a project. Tests carried out by various governmental organisations here in France (internal revenue, fraud detection...) clearly demonstrated the value of the solution we chose."*

Norauto's e-invoicing services are now being extended to its European subsidiaries. The company uses the main French platform to store invoices from the eleven countries in which it has activities. *"We decided it was a better choice to share the tools we developed," notes Pierre Chatelain, "As a result, Norauto France is a true service provider! But it took a lot of work to get to this level..."*

Beyond the financial benefits, e-invoicing allows Norauto to avoid errors, to verify invoices, and to reduce the volume of storage necessary, while at the same time increasing the security of archived invoices. The quantity of disputes and follow-up calls has also been reduced.

One number that says it all: over 1.8 million merchandise invoices have been handled since the start of the project. Without an e-invoicing system built with GS1 eCom standards, that would be a stack of paper invoices twice as tall as the Eiffel Tower!

Norauto is today continuing to roll out services that use GS1 standards with a project for automatic orders.



*Norauto group honored by GS1 France Trophy*



## Application of GTIN for Intangible Products

Online music distribution system adopts GTIN

### Outline

In August 2005, a new service that uses the internet to distribute musical content was launched in Japan. The system was called iTMS (iTunes Music Store), which was run by a wholly-owned subsidiary of Apple Computer, Inc.

iTMS manages "sales units" (both tunes and albums) using GTIN. According to iTMS, GTIN allows all the tunes to be controlled globally and the codes facilitate synchronisation with hard copy products of the same contents.

As a result, the GS1 company prefix became mandatory for registration of tunes at iTMS. Japanese music performers began to knock on the door of GS1 Japan for application almost immediately. Since then, GS1 Japan has received 20 to 50 applications monthly, with the total number reaching around 240 as of April this year.

iTMS was launched in the US in 2003. Currently, it has covered more than 20 countries, in North America, Europe, Australia and Japan, and it continues to expand.

### How iTMS works and use of GTIN

The necessary procedure that music performers must follow is explained in Figure 1.

GTIN allocation is a three-step process:

1. GS1 Japan allocates company prefix to music performers.
2. Music performers allocate GTIN -13 to each tune and apply to iTMS for registration with GTIN-13.
3. iTMS add zero on the top of GTIN-13 and all the music contents are controlled by GTIN-14 inside iTMS.

When the contents are exactly same for CD/DVD and iTMS, the GTINs should also match. When they have different contents (for example, a promotional video is added), a different GTIN should be allocated.

### Features and advantage of the system

The Japanese Digital Music Market had revenues of \$300 million last year. This is almost double the previous year's figure. In addition to Apple, there are at least 20 online music services in Japan, including Microsoft, Yahoo, Goo, and Sony.

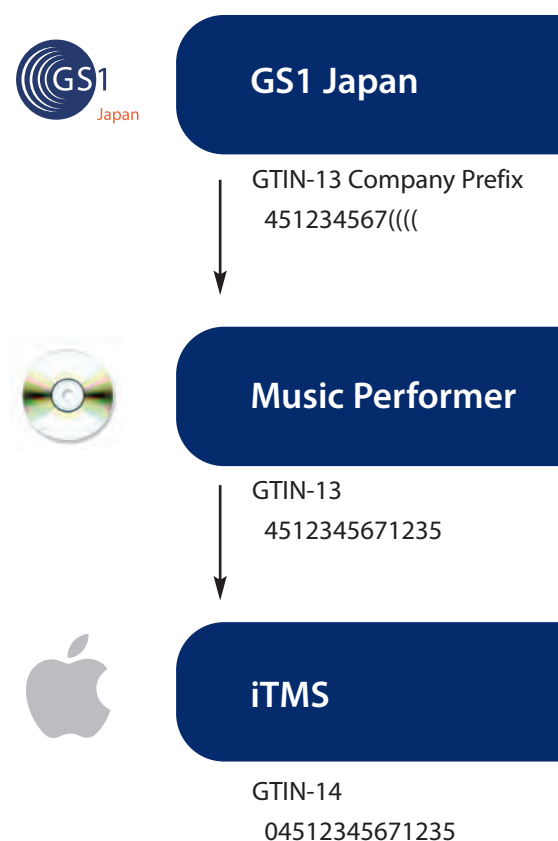
Online music services allow cost savings and this is a clear advantage for performers, reducing or eliminating their investments in making and promoting CDs/DVDs. In addition, there are no minimum production quantities or stock-keeping requirements. For the consumer, the advantage of portable digital audio players and easily downloadable music is obvious; and access to single tunes and albums at reasonable prices drive online sales higher.

### Future prospects

Over one million tunes are distributed at iTMS Japan. iTMS contains not only musical content but also monologues, novel readings, English lessons, etc. GS1 Japan expects more and more music performers and content providers to use the system as time goes on.

Further, distribution of virtual products via the Internet is expected to increase. In view of this, usage of GTIN would also increase thanks to its ability to manage product information globally and to link with physical products.

Figure 1





The background of the entire page is a composite image. It features several large, interlocking gears in shades of blue and grey. These gears are superimposed over a dark, textured background that resembles a satellite map of the Earth, showing continents and oceans. The overall color palette is dominated by blues, greys, and oranges.

General

## GS1 Financial Statements



## CHIEF FINANCE OFFICER'S MESSAGE



Michel van der Heijden  
*Chief Finance Officer*

### Predictability

The 2005/06 fiscal year has been another period of transformational change from a finance perspective. Now that full transparency has been solidly embedded into the way we work in GS1, we moved a significant step forward in terms of predictability. Predictability provides stability and creates trust, which in turn allows the organisation to concentrate on what is important, namely serving our stakeholders better, every day. To reach that goal, we worked on two fronts: on the Revenue side and on the Expense side

On the Revenue side, as the Global Office is still primarily funded by the Member Organisation (MO) community, the MO's need a Financial Model that determines their fee rate over a number of years, without surprise changes. As our overall GS1 business model has become more complex, stability on the Financial Model side is of key importance. Over the course of the year, we developed a long-term fee structure for the GS1 Central Office, which we will only change in case of a major redirection of the overall business model. For EPCglobal we developed a 2-year Financial Model, considering that the EPCglobal Business Model will still change as EPC gets more traction in the market. For GDSN we moved to a Financial Model with direct contribution by the Data pools.

On the Expense side, we have overhauled our financial processes to make sure that we not only look into the past (financial reporting), but also start looking into the future

(financial controlling). A combination of tools allows us now to have a 'real time' Risk & Opportunities list, so we can take the necessary corrective actions as time progresses. In addition, we have put more emphasis on aligning the financial forecast with the agreed GS1 project priorities, to make sure we can deliver on our promises.

### Going forward

Over the past ten years, firms are called upon to be good corporate citizens and report not merely on financial results, but also on how they service the community in which they operate, called 'triple bottom line' reporting (economic, environmental and social). As GS1 gets involved in more sectors as conduit of facilitating global trade, it will be important that we develop a proper Corporate Social Responsibility (CSR) report that deals with issues of globalisation, knowledge sharing and skill transfer in the different regions and countries where GS1 operates. We plan to develop a CSR strategy for GS1 and will work with other not-for-profit organisations to get guidance in this matter to better support our end users.



### Key Financial Statistics: Global Revenue

GS1 Member Organisations around the world are funded by their local members through annual fees for services provided. In the past this was called Financial Strength, but we now adopted our terminology to the more commonly known concept of Revenue. The fiscal year 2005/06 was a strong year in terms of year over year performance with an overall growth of 23.9%. To get the real picture of operational performance, we exclude the impact of currency due to the strength of the Euro, and our year over year growth then still stands at a healthy 13.9%, which compares favorably versus the prior year with a growth of 10.9%. Regionally we see some important differences, with a very strong performance in Asia Pacific and North America, with the impact of the 1SYNC merger, and some challenges in Latin America, in particular in Mexico.

### GS1 Global Office – Fee Evolution

Looking at the historical trend, the numbers confirm that we are going through a transformational change in GS1. The overall growth of global revenues as mentioned before combined with the investments in EPCglobal and GDSN have brought the 2005/06 GS1 GO revenues to €24.2M, an increase of €6.6M or 37% versus the year before. Going forward, we continue to invest but at a slower pace, as we start moving from a start-up phase to a more going-concern mode. Our budget 2006/07 calls for an increase of €3.3M or 14% versus the year before.



GS1 Consolidated	FY 2005-2006: YTD Actuals for the period ending 30/06/06			(EURO 000's *)
	Consolidated	GS1 CO	EPC Inc. (100%)	GDSN Inc.
Revenue	24,157	13,777	7,155	3,224
Fixed/Recurring Expenses	2,486	1,805	216	466
Discretionary Expenses	9,642	3,352	4,718	1,573
Payroll Expenses	10,875	7,785	2,220	871
Operating Expenses	23,004	12,942	7,153	2,910
Operating Result	1,153	836	2	315
Other Revenue / (Expenses)	91	93	(2)	-
Result for the period	1,243	929	0	315

Notes: \* Consolidation based on 1 EUR = 1,21727 USD

### Income Statement, Cash and Headcount

Our consolidated Income Statement shows a positive result of €1,243K for the fiscal year ending June 2006. We continued to build a reserve from our bases business (GS1 Central Office), to cover current and future investments in new technologies and applications, but also to have the necessary

reserves in case of adverse currency fluctuations. The EPCglobal Income Statement is break-even, in line with expectations. As for GDSN, the financial picture is starting to stabilise after having gone through a typical start-up phase with upfront investments, which will have to be recovered over the next few years.

In terms of types of expenses, not much has changed over the past years. Our main investment remains our people, with 76 employees on the payroll at the end of June 2006, moving towards 90 by the end of the next fiscal year. As for discretionary spending, travel and large user meetings/events (Global Forum, GSMP events, ECR, ...) continue to be the big ticket items.

### Global Coverage Revenue By Region (€ 000's)

	Actuals '04/'05	Actuals '05/'06	Budget '06/'07	Growth %	Excl. FX*
Asia Pacific	24,799	25,810	33,920	31.4%	21.8%
Latin America	16,737	19,707	24,306	23.3%	2.5%
North America	52,774	52,834	74,254	40.5%	22.2%
Middle East/Mediterranean/Africa	2,329	2,601	3,094	18.9%	10.8%
Europe	64,949	73,279	80,282	9.6%	8.3%
<b>TOTAL</b>	<b>161,588</b>	<b>174,231</b>	<b>215,856</b>	<b>23.9%</b>	<b>13.9%</b>

\* Excluding Foreign Exchange

### Historical Perspective Global Office (€ Millions)

	99/00	00/01	01/02	02/03	03/04	04/05	05/06	06/07
A. Fee Evolution								
GS1 Central Office	3.0	3.9	5.0	6.3	7.2	11.6	13.8	15.9
EPCglobal Inc.	-	-	-	-	3.2	5.4	7.2	8.5
GS1 GDSN Inc.	-	-	-	-	-	0.6	3.2	3.1
<b>Total GS1 Global Office</b>	<b>3.0</b>	<b>3.9</b>	<b>5.0</b>	<b>6.3</b>	<b>10.4</b>	<b>17.6</b>	<b>24.2</b>	<b>27.5</b>
B. Head Count Evolution								
Staff	19	18	20	31	35	58	76	90

General

## GS1 Board Members





## Boards of Directors

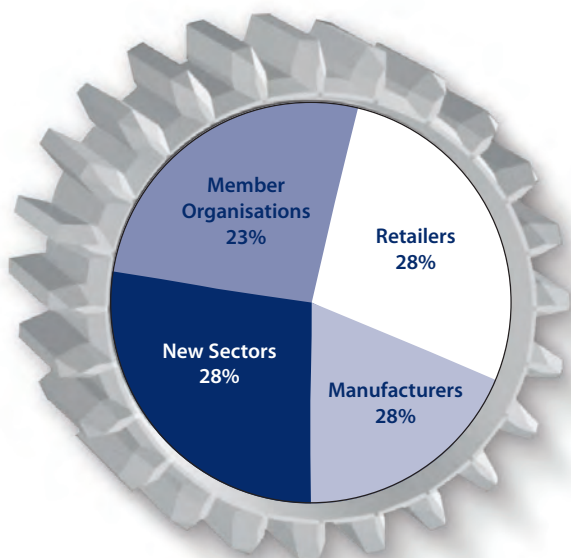
The Board members of GS1, EPCglobal and GDSN are fully behind our global Vision and Strategy. These individuals provide the inspiration and leadership to drive our global organisation forward and we thank them for their continued commitment and contribution.

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

In response to the commitment made to the GS1 General Assembly in South Africa in May 2005, the GS1 Board has adopted additional members from new sectors such as healthcare and transport in the past year. This trend will continue as GS1 expands the use of its standards beyond its traditional user base.

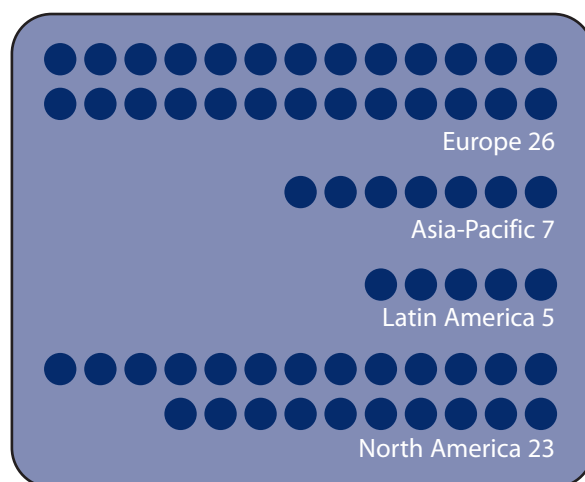
### The membership of the Boards is composed of

- Retailers 17
- Manufacturers 13
- New Sectors 17
- Member Organisations 14



## 1.2 Current Regional composition

- Europe 26
- Asia-Pacific 7
- Latin America 5
- North America 23





## GS1 Management Board

Member	Title	Company
Danny WEGMAN	Chief Executive Officer (GS1 Chairman)	Wegman's Food Market
Miguel Angel LOPERA	President and CEO	GS1
Juan Antonio SANFELIU	Chief Executive Office (GS1 Vice-Chairman)	Gassol
Seung-han LEE	President and CEO (GS1 Vice-Chairman)	Samsung Tesco
Timothy SMUCKER	Chairman and Co-CEO	J.M. Smucker Company
Linda DILLMAN	Executive Vice President Risk Management, Benefits Admin. and Sustainability	Wal-Marts Stores
Michael E. DI YESO	President and COO	GS1 US
José Luis DURAN	Chairman of the Management Board	Carrefour Group
Michel EECKHOUT	Executive Vice President and CIO	Delhaize Group
Bernd FLICKINGER	Chief Operating Officer	DHL Solutions
Elzbieta HALAS	Chief Executive Officer	GS1 Poland
Takashi INOUE	CEO & Senior Executive Director	GS1 Japan
Chris JOHNSON	Deputy Executive Vice President	Nestlé
William L. McCOMB	Company Group Chairman	Depuy (Johnson & Johnson)
Robert. A. McDONALD	Vice-Chairman Global Operations	The Procter & Gamble Company
Rudy MARKHAM	Chief Financial Officer	Unilever PLC
Zygmunt MIERDORF	Member of the Board of Management	Metro
Anders MOBERG	President and CEO	Royal Ahold
Maria PALAZZOLO	Chief Executive Officer	GS1 Australia
Jörg PRETZEL	Chief Executive Officer	GS1 Germany
Gonzalo RESTREPO	President	Almacenes Exito
Hugh H. ROBERTS	President International Commerce	Kraft Foods
Wanderlei SARAIVA COSTA	Executive Director	Mogiana Alimentos Group
Enrique VITALE	Chief Executive Officer	GS1 Argentina
Zong Nan WANG	Chairman	Bright Foods (Group) Company Ltd.



## GS1 GDSN Inc. Board of Directors

Member	Title	Company
Neil CAMERON	Global CIO (Chairman GS1 GDSN)	Unilever, PLC
Sally HERBERT	President	GS1 GDSN Inc.
Frederic BEYNEIX	B2B Strategy & Development Director	Carrefour
Lori BIGLER	Manager, Business Technology Standards	The J.M. Smucker Co.
Colin COBAIN	Group IT Director	Tesco Stores Ltd
Ross CURTIS	Senior Vice President, Global Sales	GXS
Michael DI YESO	President & COO	GS1 US
Michel ECKHOUT	Executive Vice President and CIO	Delhaize Group
Rafael FLOREZ	Chief Executive Officer	GS1 Colombia
Pierre GEORGET	Chief Executive Officer	GS1 France
Tahira HASSAN	Senior Vice President, Strategic Supply Chain	Nestlé S.A.
David HUTCHINGS	Senior Director, Business-to-Business	Kraft Foods Global Inc.
Sylvester MACHO	Managing Director/Member of the Board MGB	Metro Group
Maria PALAZZOLO	Chief Executive Officer	GS1 Australia
Jorg PRETZEL	Chief Executive Officer	GS1 Germany
Christopher SELLERS	Chief Executive Officer	Agentrics
Marianne TIMMONS	Director e-Commerce	Wegman's Food Markets
Milan TURK	Managing Director/Customer eCollaboration	The Procter & Gamble Company
Ruud VAN DER PLUIJM	VP, B2B E-Commerce	Royal Ahold

## EPCglobal, Inc. Board of Governors

Member	Title	Company
Richard CANTWELL	Vice President Auto ID (Chairman of EPCglobal)	The Gillette Company
Chris ADCOCK	President	EPCglobal
Teruaki AOKI	Sr. Executive Vice President & Executive Officer	Sony Corporation
Steve COUSSINS	Chief Executive Officer	GS1 UK
Peter CUVIELLO	Vice President and Managing Director	Lockheed Martin
Alan ESTEVEZ	Assistant Deputy Under Secretary of Defense	Office of the US Secretary of Defense
Rollin L. FORD	Executive Vice President and Chief Information Officer	Wal-Mart Stores
Claus GARBISCH	Sector Head Consumer/Retail	DHL
Takashi INOUE	CEO & Senior Executive Director	GS1 Japan
Richard LAMPMAN	Senior Vice President Research	Hewlett-Packard
Zygmunt MIERDORF	Member of the Management Board	Metro
Mohsen MOAZAMI	Vice President & Global Managing Director	Cisco Systems
Cheryl A. PERKINS	Senior Vice President & Innovation Officer	Kimberly-Clark Corporation
Kurt W. REBER	Head of Global Supply Chain Management	Novartis Pharma
Sergio RIBINIK	Chief Executive Officer	GS1 Brazil
Michael P. ROSE	Vice President RFID/EPC	Johnson & Johnson
Sanjay SARMA		Oat Systems



## GS1 Leadership Team



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





General

Membership



INTERNET

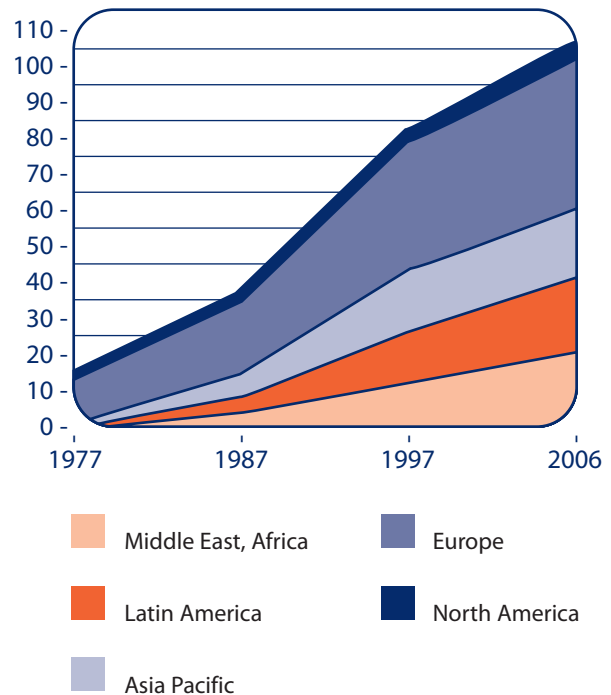


## GS1 Membership

GS1 has evolved from a modest 12 member European-based organisation in 1977 to a truly international organisation today with 104 Member Organisations spanning the entire globe. This year we welcomed 3 new Member Organisations representing Ghana, Albania and the Ivory Coast, and we expect to add more members to our GS1 family in 2007.

### GS1 Member Organisation Growth 1977-2006

Our Member Organisations, staffed by 1,700 professionals, are delivering the GS1 standards and services to over 1 million users companies representing 20 industry sectors. An impressive 5 billion transactions are registered on a daily basis. Companies that are not served by a GS1 Member Organisation may obtain GS1 services and support directly from our Central Office in Brussels. At present, 39 countries are served on a direct basis.

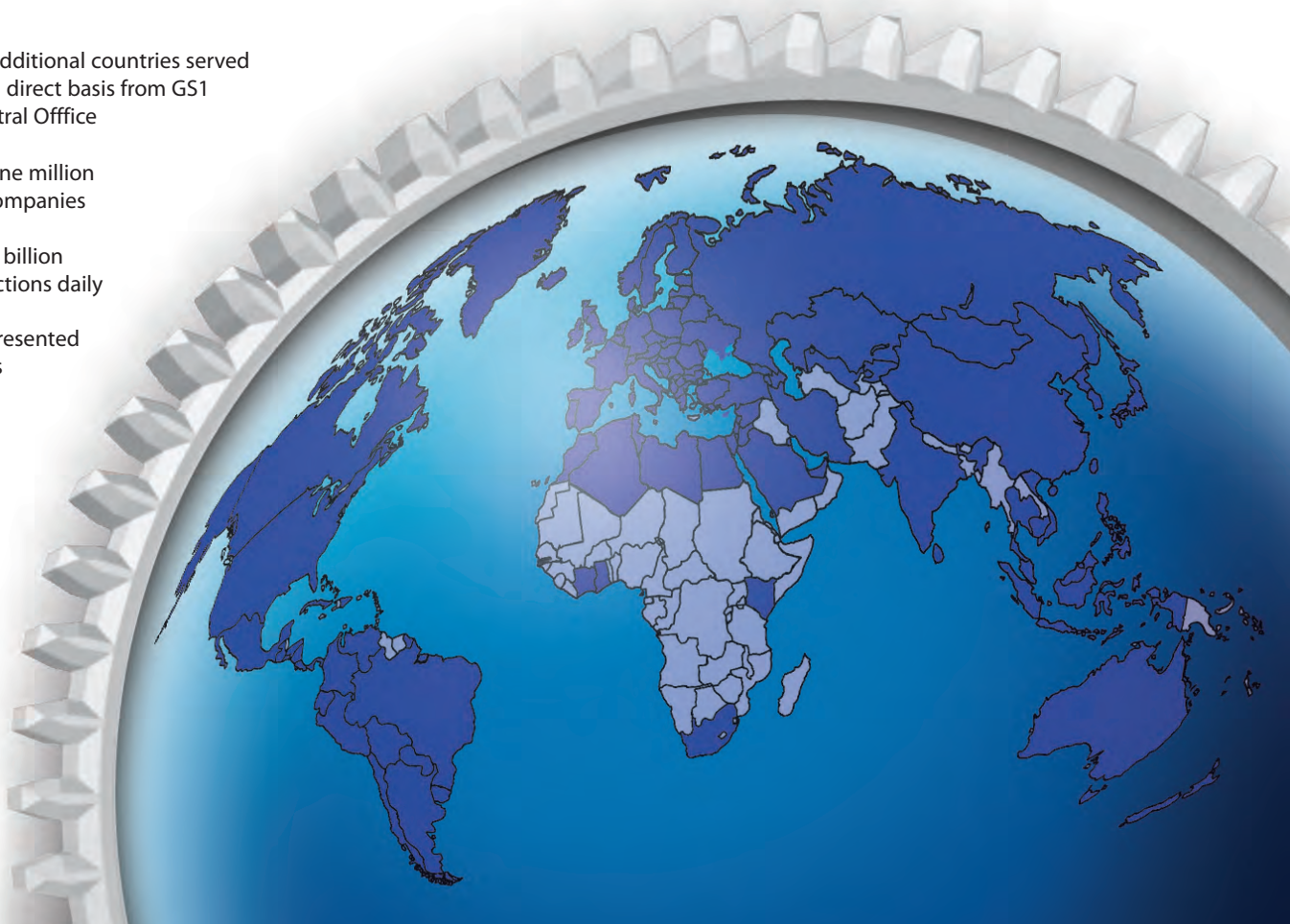


## GS1 in the World

104 GS1 Member Organisations  
1,700 GS1 staff worldwide

39 additional countries served  
on a direct basis from GS1  
Central Office

- Over one million user companies
- Over 5 billion transactions daily
- 20 represented sectors







## GS1 Member Organisations Contact Information

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

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# GS1 Strategic Issues

**The process continues.** As GS1's Vision continues to evolve into a practical, business-driven reality, key strategic issues emerge as points of concentration. During the months ahead these issues provide clear focus as we "Make Our Vision a Reality".

## Strategic Focus

- Governance
- Management Board: Senior Executives
- Roles: Align, Communicate, Resources (Financial and People)
- Public Policy
- Mass Adoption of Data Synchronisation and EPCglobal with Clean Data
- Prioritise new sectors

## Operational Improvement

- Vision Alignment and Communication – Internal and External
- Branding
- Integrated Portfolio of Products, Services and Sectors
- Organisation Effectiveness
- Strengthen strategic alliances





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