ANNUAL REPORT
2012 · 2013

40 YEARS OF
THE GLOBAL LANGUAGE OF BUSINESS

1973   2013

40 YEARS AGO

"One small scan for a man, One giant leap for mankind."

CONTENTS

Letter from
the Chairman

Mike McNamara
Chief Information Officer, Tesco
Chairman, GS1

In April 1973, industry leaders selected the GS1 bar code as the single standard for product identification. Forty years later, over five billion GS1 bar codes are scanned every single day, on every continent, around the world.

By working together, these visionary leaders of the organisation now known as GS1 shaped the landscape of the global market. Because of the foundation they built, companies around the world today have increased visibility across their supply chains. Quite simply, the GS1 bar code transformed the world by creating a global language of business.

That beep brings benefits

The GS1 System of Standards has provided a globally agreed-upon, uniform way to identify, capture and share information throughout the supply chain. GS1 solutions have become the foundation of business processes for more than one million user companies. These optimised methodologies connect organisations across geographical and cultural boundaries, allowing users to leverage the power of information to improve people's lives everywhere.

Beyond the bar code

In the forty years since that first beep of a bar code, GS1 has added other innovations to its global language of business. To meet the demands of users, the GS1 System of Standards today also includes GS1 DataBar and a variety of other robust bar code symbologies designed to enhance business processes. GS1's work with the Electronic Product Code (EPC) using Radio Frequency Identification (RFID) tags facilitates increased visibility and efficiency throughout the supply chain and higher quality information flow between companies and their trading partners. GS1 eCom Standards – which provide clear guidelines for creating electronic versions of all sorts of business documents so that trading partners can smoothly exchange information electronically – have revolutionised the speed and accuracy with which transactional data can be exchanged.

The GS1 Global Data Synchronisation Network provides a powerful environment for secure and continuous synchronisation of accurate data and enables companies who do business with each other to always have correct information in their systems.

Driven by demands from users in sectors besides retail, GS1 Standards now also play an important role in the healthcare sector and in the fields of transport, logistics and customs. They enable traceability, support sustainability programmes and contribute to product recall and anti-counterfeiting actions; and will soon enable more accurate and relevant search and discovery on the Web.

The global language of business

Across the pages of this document, you will read about some of GS1's major accomplishments in the past twelve months. It has indeed been an extremely fruitful and productive year. It is an honour to take on the Chairmanship of GS1 as the organisation celebrates forty years of the Global Language of Business. At Tesco, the relevance of GS1 is undisputed. We ship about a billion items every single week from a global network of farms and factories to our stores all over the world. To get the stock levels just right, to maximise efficiencies, to keep our costs down and to best serve our customers, we need a global language of business: we need the GS1 System of Standards.

Letter from the Vice-Chairman and Chairman Emeritus

Timothy Smucker
Chairman of the Board, The J.M. Smucker Company
and Vice-Chairman & Chairman Emeritus, GS1

The GS1 community has achieved exponential growth while preserving a 40-year legacy. The dedication and passion of the people at GS1 Member Organisations are exemplified in their commitment to developing standards and solutions to improve commerce across multiple industry sectors. As a neutral, not-for-profit, user-driven organisation, GS1 is powered by the millions of member companies, industry organisations and technology providers that complete the GS1 community. Thank you, everyone, for your collaboration and resource contributions including talent, energy and ideas.

Unchanging values in a changing world

The acceleration of change today is unprecedented. We are faced with world economic changes, changes in world politics, "Big Data", the explosion of social networking and changing consumers. Despite the challenges of change we are facing – and indeed because of them – there are certain elements of our strategy that should not change: our beliefs, our values, and our commitment to "See One Vision, Speak with One Voice, and Act As One Organisation".

We must change what we do without changing the outlook or behaviours that brought us to where we are today. Our values and beliefs should remain constant and our commitment diligent and steadfast. As a diverse organisation, staying connected can be a challenge; but we can rise above all of the fast-paced change going on around us by maintaining focus and aligning our people and our strategies.

New mindset, new opportunities

It is hardly possible to go through a day without touching on the realities of the global market place. Opportunities for standards are expanding in a shrinking world! Increased regulations for food safety demand visibility. Healthcare is a global and governmental priority in every country. Consumers are asking for more and more information anytime, anywhere. Global standards can enable the connection between the flow of goods and services and the flow of information.

As you know, it is important to recognise that "every person makes a difference." Each of us is the single most important ingredient in determining whether change is successful or not. Successful change depends on whether we can adapt individually and whether we as a GS1 community can adapt together.

Ready for change

We appreciate your continued commitment as we evolve to our next level of excellence. The best is yet to come!

Key Message	How You Can Help
Change what you do	Pursue new opportunities in global commerce, food safety, healthcare, and financial services
Don't change who you are	Be consistent with our beliefs, our values, and our commitment to "see one vision, speak with one voice, act as one organisation"
Strengthen our core competencies	Embrace diversity and inclusion through our global standards development, identification, global reach, and cross-cultural communication
Leverage structure and scale	Do the right work at the global, regional, and local levels
Take it personally!	Managing change is an individual issue: **every person makes a difference!**

Letter from the President and Chief Executive Officer

Miguel A. Lopera
President & Chief Executive Officer, GS1

For forty years, GS1 Standards have been helping companies solve business challenges and improve the lives of people everywhere. At GS1, this anniversary year has presented the perfect occasion to undertake a review of our strategy to make certain that we will be delivering high value to our users for another forty years and beyond. We have engaged McKinsey & Company to provide an outside eye and to ensure all our stakeholders are involved.

Strengthen our core

The vital work we do enables visibility in the supply chain – a critical goal for enterprises, because better visibility can measurably reduce costs and improve operational performance. An important priority for the years ahead is to strengthen our core activities by continuing to provide excellent service to our main strategic sectors: retail, healthcare and transport & logistics. The potential benefits are significant. For example, an independent report recently published by McKinsey & Company has quantified the huge benefits – both in lives and in financial value – of implementing one single global standard across the healthcare sector.

Collaborative work with the CGF

We are also taking steps to strengthen our collaboration with the Consumer Goods Forum (CGF). One joint effort now underway is the Next-Generation Product Identification (NGPI) project: our teams are working to understand the challenges facing today's approach to product identification, and exploring various ways to accurately communicate minor product variations (including ingredient and/or packaging changes) without requiring a potentially costly change to the product's Global Trade Item Number (GTIN).

A new GSMP

Our success in the years to come will be built upon standards developed through an improved Global Standards Management Process (GSMP).

The GSMP team is deploying a range of actions that will allow GS1 to have a truly best-in-class process for building and ratifying standards.

A key player in the digital world

Today's consumers are increasingly demanding real-time product updates and the ability to scan bar codes with smartphones to obtain information about product origin, ingredients and more. That is why another priority for GS1 is to become a key player in the digital world through our GS1 Digital program. GS1 Digital is a framework of GS1 projects to adapt GS1 Standards and Services for the Web. Included in this framework is GS1 Source, devoted to providing accurate product information to e-commerce services on computers, smartphones and tablets. GS1 Source standards also help companies comply with government regulations, such as European Union Food Information Regulation 1169 concerning food products sold online. These efforts are complementary to our priority of driving toward 100% data quality and working every day to ensure the information we provide is trustworthy and authentic.

Gratitude to so many

I extend my thanks and appreciation to so many who made our first forty years possible, and without whom our next forty years could never be a success: the users and service providers who make our efforts meaningful, and colleagues at the Global Office and at GS1 Member Organisations around the world who make us a world-class interdependent organisation. Thanks to the work of all of you, GS1 is continuously extending its reach and its impact as the Global Language of Business.

Sectors

As part of our mission to provide users of the GS1 System with visibility into their supply chains and answers to their unique business needs, we are engaged with the global communities of several specific industry sectors.

Paul Voordeckers
President, GS1 Industry Engagement and EPCglobal Inc.

Retail & Consumer Goods

Working with industry at the "speed of business"

■■ ▮ ■ In the retail and consumer goods sector, change is the "new normal." The lines between online and offline shopping continue to blur, and today's consumers shop in stores, on computers and on smartphones or tablets without considering these channels as distinct from each other. Quite simply, people search for products, make comparisons and pay for their purchases wherever, whenever and however they wish.

This is the very definition of omni-channel retailing, a consumer-focused form of commerce that global market research firm ICD Retail Insights qualifies as "an immersive and superior customer experience."

For GS1, this changing landscape is an opportunity to add value. We are enabling and guiding the retail sector through this transformation, so that business partners can achieve true visibility into their supply chains. Increasing visibility is a critical business strategy, because it has been shown to measurably reduce costs and improve operational performance.

A recent Aberdeen study revealed that 63% of companies with predominantly global supply chains rank supply chain visibility as a high priority for improvement. In the retail space in particular, visibility brings benefits as diverse as improved food safety through better product traceability, or a better clothes-shopping experience through increased inventory accuracy.

And as consumers become empowered by technology, they demand immediate access to accurate product information, whether in store or online. Manufacturers want to provide the right details about their products without disturbing the supply chain. GS1 Standards and Solutions can help achieve this goal, too.

Successfully meeting these challenges will not be easy. At GS1, we believe that organisations are at their best when working to meet the needs of a swiftly changing marketplace.

The untapped potential of standards in the retail sector

A 2013 study of consumer goods manufacturers, retailers, service providers and analysts produced by Capgemini Consulting with GS1 and The Consumer Goods Forum revealed that that wider adoption of standards is key to both supply chain efficiency and meeting new consumer needs.

100% of executives who participated in the study indicated that changes in consumer behaviour will have the greatest impact on the industry's supply chain in the coming decade. **70%** called for wider standards adoption across the value chain.

50% want GS1 to take a global governance role to support implementation and adoption priorities.

The study also calls on the sector to plan to embed standards in new business processes right from the start.

More about our activities in this area at **www.gs1.org/retail**

Key initiatives of 2012-2013

- Strengthened cooperation and collaboration with the Consumer Goods Forum, including work on GS1 Source, traceability and Next-Generation Product Identification (NGPI) projects
- Launched partnerships with external groups, including the Open Mobile Alliance (OMA) and the Near Field Communication (NFC) Forum
- Ratified the Collaborative Packaging Artwork Standard for sharing artwork between brands and graphic design studios
- Supported our user communities – and local implementation efforts – with a number of position papers, guidelines and deployment kits
- Learn more about our work and accomplishments in mobile and Web-based commerce, fresh foods, foodservice, traceability, product recall, anti-counterfeiting and more topics concerning the retail and consumer goods sector later in this document

Sectors

Healthcare

GS1 wins the endorsement of more than 45 leading healthcare stakeholders

In a year marked by a changing healthcare regulatory landscape and several patient safety crises, the benefits of GS1 global standards in healthcare have never been clearer.

To ensure the security and integrity of the healthcare supply chain, it is increasingly obvious that country-by-country solutions are neither sufficient nor effective. Indeed, McKinsey & Company's 2012 study "Strength in unity: The promise of global standards in healthcare" highlights the urgency of aligning on a single global standard.

Governments in many countries are developing regulations for the traceability of medicines and a number of pilot projects, readiness studies and roll-outs built upon GS1 Healthcare standards are well underway (see case study page 47).

Identifying items in the healthcare supply chain is a key part of traceability. With their small size and high capacity, GS1 DataMatrix bar codes are particularly suited to healthcare.

GS1 is now working to provide GS1 DataMatrix with the ability to encode not only an item's Global Trade Item Number (GTIN), batch or lot number, expiration date and unique serial number, but also a URL link to a website housing leaflets, instruction videos and other information. In this way, healthcare product packaging can be marked with only one bar code, reducing the confusion, wasted time and errors associated with packaging containing multiple bar codes.

As the sector prepares for new regulations, unique device identification (UDI) remained an important topic. UDI will facilitate product recalls, allow post-market surveillance, support traceability, enable the wider use of electronic health records, offer stronger protection against counterfeiting and reduce errors. Today, GS1 Standards are compliant with the U.S. Food & Drug Administration (FDA) rule for UDI. GS1 will also meet the needs of the UDI regulations that are under development in the European Union and other parts of the world.

An opportunity for a safer healthcare supply chain

An independent report by McKinsey & Company has estimated the benefits both in lives and in value of implementing one single global standard in Healthcare:

Deploying global standards across the entire healthcare supply chain could save **22,000 to 43,000 lives** and avert **0.7 to 1.4 million patient disabilities**.

A standards-based system could prevent **tens of billions of dollars** worth of counterfeit drugs from entering the legitimate supply chain.

Because global standards allow for more efficiently managed ordering and replenishment processes, inventory levels in healthcare could be cut by **12% to 18%** without reducing product availability.

In short, global standards could enable overall cost reductions of **$40 billion to $100 billion** (€32 billion to €81 billion).

Download the McKinsey report, the 2013/2014 GS1 Healthcare Reference Book and more at **www.gs1.org/healthcare**

Key initiatives of 2012-2013

- Won endorsement of more than 45 leading healthcare sector stakeholders from around the world via a signed position paper
- Ratified GS1 'Level Below Each' Standard, creating identification for lower levels of packaging such as single-packed catheters or individual cells on multi-cell medication blister cards
- Ratified Patient & Caregiver Identification Standards to help identify the different parties engaged in the delivery of healthcare services
- Received "Way-Paver Award" at The unSUMMIT for Bedside Barcoding, recognising our exceptional contribution toward the adoption of bar-code-enabled point-of-care (BPOC) safety systems in healthcare
- Published fifth edition of GS1 Healthcare Reference Book featuring more than 10 implementation cases from across the world

Sectors

Transport, Logistics & Customs
Visibility and interoperability for better management and reduced costs

A 2013 Aberdeen report revealed an unprecedented increase in the use of Logistics Service Providers (LSPs) as supply chains become more globally connected. As goods move from manufacturers to points of sale, LSPs, freight transporters and their customers need to know precisely where their shipments are, all the time, so they can make sound business decisions.

With GS1 Standards for transport, logistics and customs, this sort of real-time, end-to-end visibility over the entire supply chain is now a reality. A wide range of pilot projects and fully deployed live implementations around the world have demonstrated how GS1 Standards deliver value to transport and logistics processes, including shipping, receiving, warehouse management, transport management, border procedure management and asset management. Thanks to GS1's standards and services for this sector, companies can work more efficiently, more sustainably and more competitively.

One particularly noteworthy achievement of the past year is the Cooperation Agreement on anti-counterfeiting that we signed under the auspices of our long-standing relationship with the World Customs Organization (WCO). We have been working to integrate the GS1 System into their IPM (Interface Public-Members) tool. A cornerstone of the WCO's anti-counterfeiting strategy, IPM is a permanent training and communication tool for supporting local Customs authorities in their fight against counterfeiting and piracy. In September 2012, the WCO and GS1 presented a mobile version of IPM, which enables users equipped with mobile devices to scan the GS1 BarCodes found on millions of products and then access trusted sources of information about them, so they can more quickly and reliably distinguish between genuine and fake products. GS1 and the WCO have already cooperated on a number of other mutually beneficial Customs-related issues.

Meeting the challenges of the modern transport and logistics sector

VR Transpoint, a leading Finnish transport and logistic service company, implemented a rail yard shunting management solution built upon GS1 Standards. By removing unnecessary work steps, reducing delays and eliminating errors, the firm has been able to make track yard operations **significantly more efficient.**

Japanese fresh food company Kibun uses wheeled metal trolleys that travel from location to location. Lost trolleys were generating costs and delays.

After implementing an asset management system built upon GS1 Standards: no more lost trolleys, and inventory can be done **in minutes instead of days**.

DHL, a leading express and logistics provider, says the benefits they have gained from investing in GS1 Transportation and Logistics activities have proven to be **much greater** than the investment required.

Brochures, case studies, videos and more at **www.gs1.org/ transportlogistics**

Key initiatives of 2012-2013

- Ratified GS1 eCom XML business message standards for transport, delivered associated implementation guidelines
- Ratified GS1 eCom XML business message standards for warehousing
- Delivered "GS1 ID Keys in T&L Implementation Guidelines"
- Supported the efforts of our Member Organisations by producing a Customs Engagement Starter Kit
- Pursued efforts to change image and awareness of GS1 in this sector, including delivery of a Marketing Visibility Kit for Transport & Logistics
- Held successful GS1 Transport & Logistics Workshop during Fall 2012 GS1 Standards Event in Dublin

Sectors

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New Industry Sectors

Foodservice and financial sectors discovering the GS1 System

In the past year, we have made real progress in our work to extend the benefits of the GS1 System to business sectors we have not traditionally served.

Our efforts in the global financial services sector's Legal Entity Identifier (LEI) initiative have advanced significantly. In response to the G20 objective to establish a global identification system for all parties engaged in certain financial transactions, the Financial Stability Board (FSB) initiated a joint public-private effort to tailor a system based on LEIs. GS1 team members serve as coordinators in the Private Sector Preparatory Group (PSPG), a body of private sector experts invited by the FSB to advise on the LEI initiative. The GS1 team is working to leverage our globally federated organisation, our individual country-by-country Member Organisations, our neutrality as a not-for-profit entity, and our vast experience in global identification systems. Recently, alongside FIX Protocol, CNRI and TahoeBlue, GS1 launched a web portal service to help identify issues that will eventually be addressed by the Global LEI System (GLEIS).

We have also moved forward in our work with the foodservice industry that distributes and sells food and related items to restaurants, hotels, hospitals and schools. The foodservice industry faces challenges in two primary areas: product identification and inaccurate product information. To meet market pressures and to comply with regulations, sector stakeholders need a non-proprietary way to identify, capture and share accurate product information so that it can be understood and used throughout their entire global supply chain. GS1 Standards can help achieve this goal. GS1 Member Organisations around the world are engaging with foodservice companies to support their transition from legacy systems and manual processes to automated processes powered by GS1 Standards. Initial feedback is very positive: foodservice stakeholders are quickly recognising the business benefits.

Extending the benefits of GS1 to new areas of activity

GS1 has ratified a new GS1 Identification Key for **Component and Part Identification**. This new standard can be used by original equipment manufacturers in the automotive sector to identify elements used to assemble cars and trucks. It can also fit the needs of any sector where similar business processes are used.

Teams at GS1 are studying how the GS1 System of Standards might respond to the unique needs of other new industry sectors as well, including **Web-based sellers** of goods, **brand licensors**, and **public sector** activities such as inter-governmental agencies or trade organisations.

Watch our media centre for the latest updates
www.gs1.org/about/media_centre

Sectors

Services & Solutions

The wide range of services and solutions built upon the GS1 System of global, neutral standards enables supply chain interoperability and visibility, which in turn allows partners to reduce costs, clear out complexity and achieve many other concrete business benefits.

Malcolm Bowden
President, Global Solutions and Data Excellence Inc.

GS1 Source

Accurate product information for consumer-facing digital channels

■■❘❘ ■ Without a way to share accurate digital product information, companies risk losing sales and damaging consumer trust. That is why GS1 is working to help brands, retailers and application developers make accurate product information available to e-commerce services on computers, smartphones and tablets. This activity – formerly known at GS1 as Trusted Source of Data (TSD) – is now officially called GS1 Source.

GS1 Source helps companies communicate with consumers in today's digital, multichannel world. Brand owners use GS1 Source to share information about their products via the internet. Application developers then integrate this product data in their web and mobile applications. GS1 Source provides the place to share trusted product information in digital format.

Over the past year, we have moved from pilot projects to full implementation. We have successfully developed and ratified standards for the GS1 Source framework and for the data that will populate it. We have deepened our engagement with organisations that intend to run data aggregation services based upon the GS1 Source

framework. We have also launched efforts to create a certification process for such services, to ensure the GS1 Source framework remains trusted, scaleable and interoperable after it launches in 2014.

Our work on GS1 Source is undertaken with the importance of data quality in mind and with the understanding that all data aggregators must be aligned with the GS1 Global Data Synchronisation Network (GDSN). Indeed, GS1 Source and the GS1 GDSN are two sides of the same coin.

GS1 Source standards also help companies respect government regulations. For example, when the European Union Food Information Regulation (FIR) 1169 takes effect in 2014, it will be mandatory to make available to consumers a significant amount of information about food products sold online; GS1 Source can help companies comply with this law.

Computers and smartphones are influencing and driving retail sales

In 2012, **more than 50%** of all mobile phone users in South Korea, Norway, Sweden, Australia, the UK and the US had a smartphone, according to an eMarketer report, which also predicts that worldwide smartphone penetration rates will hit **50%** by 2017.

The way consumers shop is changing. According to a 2012 Google/Ipsos study, **70%** of American consumers use their phones while in stores and **74%** have made a purchase as a result of using their smartphones.

The same survey revealed that over **50%** of sales in US retail stores were influenced by research the consumer had done online before or during the purchasing process.

A 2012 Forrester report predicts that **8%** of all 2014 retail sales will be made via e-commerce sites.

More about our activities in this area at **www.gs1.org/source**

Key initiatives of 2012-2013

- Published GS1 Source data and messaging standards
- Aligned GS1 Source data standards with EU Food Information Regulation 1169
- Established framework for a data aggregator certification process
- Began working with Open Mobile Alliance (OMA) to develop standards so that all mobile phones will be able to read all GS1 data carriers
- Continued work with NFC Forum seeking synergies between NFC technology and the use of GS1 Standards to better serve the developing needs of mobile commerce.

Product & Consumer Safety
Traceability, product recall and anti-counterfeiting with GS1 Standards

■ ■ ▌ ▌ ■ Ensuring the safety of consumers is an area of particular concern for regulators, manufacturers and retailers. A public crisis can have serious health, brand, legal and financial repercussions. The GS1 System of Standards is today more widely recognised than ever before for the many ways it helps enhance product and consumer safety.

The past year saw a real tipping point in the GS1 Global Traceability Programme. More than 20 GS1 Member Organisations can now offer GS1 Traceability Assessments, allowing companies to benchmark their existing traceability systems against global best practices (see page 49 for one example). An Assessment is often a first step towards deployment or further implementation of GS1 Standards for traceability.

Work accomplished this year has included significant engagements with inter-governmental agencies. GS1 facilitated the European Union's DG SANCO Product Traceability Expert Group and is actively engaged as a trusted advisor on product and consumer safety

to the Organisation for Economic Co-operation and Development (OECD), the Asia-Pacific Economic Cooperation (APEC), the Association of Southeast Asian Nations (ASEAN) and the World Customs Organization (WCO).

GS1 solutions can be of great help if items ever need to be quickly and effectively removed from the supply chain. We have updated the GS1 Global Traceability Standard (GTS) with a six-step product recall process, linking basic traceability to Business Message Standards.

Counterfeiting creates two sets of victims: those who believe what they have bought to be authentic and safe; and bargain hunters who buy counterfeits knowingly, without realizing that so many are unsafe and even dangerous. GS1 Standards, solutions and services provide the critical foundational layers to help combat the risks of counterfeits entering the legitimate supply chain and to keep consumers safer.

Efficient and effective processes help ensure consumer safety

Some **3,000** annual deaths are attributed to counterfeit products within the G20 countries, and **millions** of illicit or counterfeit pills sold via the internet are confiscated every year. GS1 is cooperating with the World Customs Organization on a tool that uses the GS1 System to quickly and reliably distinguish between genuine items and counterfeits.

The European Union's RAPEX system helps prevent the marketing or use of products posing a serious risk to the health and safety of consumers. The number of notifications in which the product is untraceable has **decreased significantly** in recent years. However, **20%** of products in 2012 were missing clear product identification. GS1 is facilitating an EU work group that helps ensure dangerous products are found and removed from the market.

More about our activities in this area at **www.gs1.org/traceability**

Key initiatives of 2012-2013

- Published Food Traceability Deployment Toolkit and conducted 5 traceability trainings globally
- Supported the OECD's launch of a global product recall portal using both GS1 Global Trade Item Numbers (GTIN) and GS1 Global Product Classification (GPC) bricks; this is expected to improve inter-governmental communications on consumer products safety and recall notifications
- Published whitepaper "The need for global standards and solutions to combat counterfeiting"
- Completed a 24-month EU project in which we provided research support and subject matter expertise to EU DG SANCO Product Traceability Expert Group
- Kicked off work in the GS1 Global Standards Management Process (GSMP) to meet requirements of the EU Fish Regulation (EC) No 1224/2009, paving the way to the development of global fish traceability guidelines

Services & Solutions

Sustainability
GS1 Standards as the common language for assessing sustainability

■ ■ ▮ ■   The business world's appetite for environmental performance information is growing. Indeed, sustainability is today considered a key driver of financial performance: 49% of Chief Financial Officers surveyed by Deloitte in 2012 saw a significant link between the sustainability performance and the financial performance of their companies. A full 94% of food and beverage company CFOs felt it was important or even very important to communicate with consumers about sustainability.

And yet, until recently, there was no coordinated global approach to measuring or evaluating sustainability. There are for example more than 400 environmental "labels" worldwide, 80 methodologies by which greenhouse gas reporting can be carried out, and 62 initiatives for assessing a product's carbon footprint.

GS1 is committed to supporting the drive for sustainable practices, and we have begun to position ourselves as a trusted provider of the standards, services and solutions that will support all stakeholders as they gather, exchange and evaluate data about the sustainability of their products and processes.

In the past year, in collaboration with the Consumer Goods Forum, we ratified and published the Global Protocol for Packaging Sustainability (GPPS). This new GS1 Standard includes more than 30 environmental, economic and social indicators for packaging sustainability, and so provides the consumer goods and packaging industries with a common language to discuss and assess sustainable packaging.

GPPS metrics are now part of a trade item's product information available in the GS1 Global Data Synchronisation Network (GDSN). Businesses will see cost reductions, reduced environmental impact, improved consumer perception and better decision-making. Consumers will appreciate the reduced environmental impact and lower product costs that reusable, recyclable and compostable packaging material make possible.

Consumers and investors increasingly demand sustainable practices

Consumers demand environmentally responsible practices: a 2012 Accenture report noted that **more than a third** of business executives surveyed said that they could not keep up with consumer demand for sustainable products and services, and **62%** declared that sustainable investments were motivated by consumer expectations for green products.

However, ensuring trustworthy information about sustainable practices is important: a 2011 GFK study revealed that **39%** of consumers suspect that business claims about the environment are not accurate.

Investors are interested in sustainability as well: the Carbon Disclosure Project had **35** investors with assets of **USD $4.5 trillion** (€3.15 trillion) in 2003, and in 2012 had **655** investors with assets of **USD $78 trillion** (€54.6 trillion).

More about our activities in this area at **www.gs1.org/sustainability**

Key initiatives of 2012-2013

- Delivered the Global Protocol for Packaging Sustainability, a new GS1 Standard to facilitate the exchange of critical sustainability data about product packaging
- Actively participated in a range of global and regional sustainability initiatives, including work with the Consumer Goods Forum, The Sustainability Consortium, the Sustainable Packaging Coalition, EU Product Environmental Footprint (PEF) and Organisation Environmental Footprint (OEF) pilot programme, the United Nations Environment Programme 10-Year Framework Programme and the Product Sustainability Forum's Waste & Resources Action Programme

Services & Solutions

Fresh Foods

Less waste, increased safety, greater variety

Fresh foods – like meat, dairy, deli and bakery products, fish, fruit and vegetables – account for slightly more than half of all supermarket sales. And yet, this is also a sector with one of the highest levels of shrinkage and waste, as well as one of the most challenging departments in a grocery store for stock management and product replenishment.

This is why so many leading food producers, retail chains and trade associations are collaborating through the GS1 Fresh Foods Industry Group to develop a standards-based approach for improving item-level identification, product information and data synchronisation, all specifically suited to the unique needs of fresh food products.

The potential benefits are significant: less waste, enhanced safety, improved quality of products on the shelves, better communication with shoppers and the capability to deploy automated replenishment systems, real-time inventory management and dynamic pricing.

The first step is to migrate the sector from Restricted Circulation Numbers (RCNs) to Global Trade Item Numbers (GTINs) with complementary Application Identifiers encoded onto GS1 DataBar bar codes. This allows the product information to include expiration or "sell-by" dates, lot or batch numbers, and prices based on an item's weight. The ability to process additional information about fresh foods at the point of sale makes the checkout process faster and more efficient. Recent food crises underscore the importance of really knowing what you are selling or buying.

In the past year, GS1 Member Organisations around the world have been supporting implementation efforts with fresh food retailers and producers. At the same time, our Fresh Foods Industry Group is developing implementation guides for the fruit and vegetable sector and identifying business needs and requirements for the meat, poultry and seafood sectors.

Fresh food standards help combat real business challenges

Food waste, recalls and outbreaks of foodborne illness account for **1.3 billion tons** of lost food and countless costs every year, according to the United Nations' Food and Agriculture Organization (FAO).

Mistakes in the fresh food supply chain sicken **more than 75 million** people a year, according to the U.S. Centers for Disease Control and Protection (CDC).

One-third of the world's fish is incorrectly identified, according to a report by Oceana, an international organisation focused on seafood conservation. In the U.S., DNA testing found widespread seafood fraud. Sushi restaurants had the most instances of misrepresented seafood at **74%**, followed by non-sushi restaurants at **38%** and grocery stores at **18%**.

More about our activities in this area at **www.gs1.org/freshfoods**

Key initiatives of 2012-2013

- Published Master Data Implementation Guide for the fruit and vegetable sector
- Launched work on Fruit & Vegetable GS1 Global Trade Item Number (GTIN) Assignment Guide
- Launched a Fresh Foods section on the GS1 Global Office website: **www.gs1.org/freshfoods**
- Actively supported sector stakeholders in their migration from Restricted Circulation Numbers (RCN) to GS1 GTIN

Services & Solutions

Order to Cash

Benefits for all parties with a paperless exchange of business data

■ ▮ ▯ ▮ ▮ The three most basic steps involved in the trading of goods are ordering, delivering and paying; a chain of events often called "order to cash".

Before internet access was as commonplace as it is today, the data, details and information needed to successfully complete the order-to-cash process were printed on various pieces of paper and sent up or down the supply chain by fax or by postal mail. It was an inefficient, time-consuming and error-prone process; as well as one that generated a need for many cubic meters of storage space to archive all these forms and documents.

GS1 has a proven way to entirely eliminate the paper from the order-to-cash process. Our GS1 eCom solution for electronic data interchange (EDI) replaces paper-based order forms, despatch advice notices, invoices and other documents with electronic business messages built upon GS1 Standards. Once deployed, companies see increased accuracy of their supply chain and reduced costs. Disputes are minimised, payment is swifter and overall visibility is greatly improved.

Both GS1 XML message standards and GS1 EANCOM® message standards can be used to support the order-to-cash process.

GS1 Member Organisations are fully engaged in deploying the GS1 Order-to-Cash EDI solution so that their user companies can enjoy the benefits of a paperless order-to-cash process. To support their work, a deployment tool kit was developed in collaboration with organisations and companies around the world. The tool kit provides many resources as well as step-by-step guidelines on how to understand the market and establish collaboration with strategic partners.

For an example of one of the many live implementations of GS1 order to cash, see page 48 of this document which offers details about how a German procurement and logistics firm saved time and money thanks to this GS1 solution.

Eliminating the paper brings many business benefits

GS1 Belgium & Luxembourg performs a yearly survey of their fast-moving consumer goods retailers. The most recent study revealed noteworthy year-over-year increases in the number of suppliers exchanging EDI messages. For example, among business partners exchanging more than two orders every week, **45%** were using GS1-powered EDI messaging to receive orders and return a despatch advice, up from only 28% despatch advice users the year before.

German cosmetics manufacturer Rudolf Lenhart has seen almost **€10,000** of savings a year thanks to the introduction of GS1-powered EDI. Beyond these significant cost savings, Rudolf Lenhart has also enhanced productivity, boosted customer satisfaction and generated additional market opportunities.

More about our activities in this area at **www.gs1.org/ecom**

Key initiatives of 2012-2013

- Actively supported implementation programmes of GS1 MOs in Belgium/Luxembourg, Brazil, Chile, China, Egypt, Italy, Jordan and South Africa
- Held successful training sessions in Chile and China
- Translated support documentation into Arabic, Dutch, French, German and Spanish
- Updated website to include the latest information

GS1 GDSN and Data Quality

Focusing on data quality and innovating the network

Allowing companies and organisations to fully leverage master data management by publishing data just once and then sharing it as many times as needed, the GS1 Global Data Synchronisation Network (GDSN) helps its users reduce errors, eliminate unnecessary costs, increase productivity and comply with regulations.

It has been an important year for GS1 GDSN teams as they continue working on the Major Release. This significant update will increase the Network's flexibility and agility, making it simpler and quicker to introduce new features and standards. It will be easier to on-board new companies from different sectors and to meet the needs of new or changing regulations as they happen. The Major Release will also enable a fuller description of products, providing for example details about sub-ingredients of a food product or about the components inside an assembled item.

The GS1 Global Registry, the GDSN's information directory, now contains more than 12 million registered items, doubling the number of GTINs in the last three years – a milestone that is another testimonial to the value of data synchronisation through the GDSN.

The GDSN is today being leveraged for programmes beyond its original business-to-business, retail sector scope. Many trials, pilots and deployments have shown how the GDSN helps the healthcare sector increase patient safety, enhance productivity and enable eProcurement. It also serves as a foundation for our GS1 Source framework (see pages 20-21). And it is a key element for our data quality initiatives.

Indeed, achieving 100% data quality is now foundational for GS1, as more and more of the information stored in GS1-operated services is used by application providers, end users and regulators. We have made data quality a top priority, and intend to intensify our efforts to support user companies with their data quality initiatives.

Measurable benefits for trading partners

Under the leadership of GS1 Colombia, a group of business partners in that country undertook a project to reduce and even eliminate supply chain complexity and inefficiencies. By synchronising master data through Logyca Sync, GS1 Colombia's GDSN-certified Data Pool, the partners found that the percentage of items delivered without problems increased from **83%** to **90.8%**, and lost sales from shelf stockouts dropped from **4.1%** to **2.8%** for fast-moving consumer goods, and from **7.3%** to **4%** in confectionery.

McLane Company provides supply chain solutions for stores and chain restaurants throughout the United States. They began synchronising data through the GS1 GDSN in 2004, and have since achieved faster time to market thanks to an estimated **69%** average improvement in new item set-up intervals.

New GDSN case study, plus redesigned and updated GDSN website at
www.gs1.org/gdsn

Key initiatives of 2012-2013

- Deployed GDSN Maintenance Release 5, bringing a range of improved functionalities, new attributes and extensions, and improved validation rules, including attributes covering sustainability and nutrition that will help meet regulations in these areas
- Created new Global Product Classification (GPC) bricks for beer, packaged water, after-sun care, soup additives, sauces, camping, alcoholic beverages, display stands, washer fluid, take-out containers, fresh fruits & vegetables and more
- Created 3 GDSN Industry Engagement User Group Sub-Teams, staffed by trading partners to support the Major Release work effort: a pre-pilot sub-team, a change management sub-team and a business value sub-team

Services & Solutions

GEPIR

A reliable, easily accessible way to look up business information

■ ■ ▮ ▮ ▮ A consumer wants to know the hotline number of the manufacturer of the product she bought. A retail buyer is looking to source new products. An application provider wishes to confirm who licenses a certain bar code number.

It is precisely for meeting real-world needs such as these that GS1 maintains GEPIR, the Global Electronic Party Information Registry. By simply typing a product bar code number, a physical location number or a shipment number into GEPIR's Internet-based interface, anyone can find related contact information.

Indeed, GEPIR can be used to look up basic contact details for almost 1.3 million companies that use GS1's unique numbering system.

The past year has seen a noticeable increase in the use of GEPIR globally, across many different sectors and for many different business processes. GEPIR has also achieved a meaningful accomplishment, and one that is a sign of its usefulness: today, every one of the 111 GS1 Member Organisations has data in the GEPIR network.

In December 2012, the GS1 Global Office GEPIR Hosting Services were successfully migrated to a more robust hosting environment. The computer systems used to operate the services were upgraded to the latest technology and there is a now a disaster recovery site in case of a catastrophic failure. The new infrastructure also brings additional flexibility, security and stability, further improving the user experience.

GS1 Global Office and Member Organisation teams have been working to improve the quality of the data communicated in the GEPIR Network via a dedicated conformance programme. We have also finalisedthe specifications for GEPIR 4.0, a release which will include the ability to resolve information about all GS1 identification keys, add additional functionality, further align GEPIR attributes with the GS1 Global Data Dictionary and establish a standard way to create more value-added services.

Test for yourself to see the benefits

The best way to understand GEPIR and to see the benefits GEPIR can bring to you or your company is to use it yourself.

Access GEPIR at **gepir.gs1.org** and simply enter into its user-friendly interface a **bar code number** (more formally known as the GS1 Global Trade Item Number, or GTIN); a **physical location** in the supply chain as identified by its GS1 Global Location Number (GLN); a **shipment** as identified by its GS1 Serial Shipping Container Code (SSCC); or a **company** as identified by its name and address.

The knowledge and information made available via GEPIR supports a wide variety of consumer demands and business needs.

We also have a short video that explains what GEPIR is and how it works, available at **http://youtu.be/NC3QLKZIAA0**

Download the GEPIR factsheet to learn more **www.gs1. org/docs/gepir/GEPIR_ Factsheet.pdf**

Key initiatives of 2012-2013

- Upgraded GS1 Global Office GEPIR Hosting Services infrastructure
- Launched pilot using GEPIR for Customs processes
- Increased GEPIR activity across all GS1 Member Organisations
- Launched work on developing a GEPIR Conformance Program

Services & Solutions

Standards & System Development

Standards and System Development is a core competency for GS1. We are working more closely and more intelligently with the community to ensure that the standards and services developed address the most pressing needs of industry, and that our development process becomes best-in-class.

Steve Bratt
Chief Technology Officer and President, Standards Development

GS1 Digital

Effectively and efficiently representing the GS1 System on the Web

Never before has product data been more readily available and more easily accessed. While much of the available data is confusing and perhaps even inaccurate, we expect data quality to improve significantly in the coming years, spurred by both regulations and consumer demand. We also expect to see brands and retailers identifying new ways to make product information visible to consumers, and we anticipate that consumers will want to use that information to search for and buy products that meet their particular needs.

GS1 has spent years listening to our user community on the topics of data visibility, data authenticity and access to data. Our Global Data Synchronisation Network (GDSN) ensures the sharing of information critical to supply chain efficiencies. Our GS1 Source framework supports the delivery of information about products that are scanned by a mobile device. We have a team working to define the next generation of physical product labelling.

However, only the Web can enable the exchange of the massive datasets of product information that consumers and search engines are beginning to demand; and only the Web can link this information to other interesting data (such as GPS locations or postcodes) to generate new consumer touch points.

But until brand owners and retailers agree on a standardised way to represent product data online, they will continue to have less-than-optimal searchability on the Web, because search engines will continue to have difficulty understanding the information that is published online.

That is why GS1 is working to identify and proactively meet our community's needs in this area, through a strategic, foundational initiative called GS1 Digital. This project is relevant to every GS1 sector and solution, and our work will ensure that the GS1 System can enable and facilitate commerce in the digital world as well as in the physical world.

A revolution is underway in consumer behaviour and habits

It took **22 years** for the **first 2 billion people** to connect to the Internet, and it will take only **5 years** for the **next 2 billion** to get online, says Gary Kovacs, CEO of Mozilla.

A 2012 Cisco report says that the number of smartphones, tablets, laptops and internet-capable phones on the planet will be **greater than** the number of humans by 2014.

Google says that it fielded an average of **5.1 trillion** searches every day in 2012, and that the indexed Web contained more than **4.3 billion** pages in mid-2013.

A 2012 eMarketer study revealed that commerce is losing its linearity: although most sales are still being made in physical stores, consumers are consulting **a variety of information touchpoints** (desktop computers, smartphones, tablets) before making a purchasing decision.

Watch the GS1 Global Office website for updates about our work in this area: **www.gs1.org**

Key initiatives of 2012-2013

- Launched an Industry Engagement Interest Group
- Launched a Technical Task Force closely connected to the Auto-ID Labs
- Held discussions across GS1 to find areas of confluence and alignment between the efforts of GS1 Digital and those of GS1 Sectors and Initiatives.

GS1 Global Standards Management Process

A transformed process to ensure we deliver a best-in-class experience

▪ ▮ ▮ ▮ ▪ The GS1 Global Standards Management Process (GSMP) is a comprehensive set of rules used by the community and by industry groups for the creation of globally agreed-upon standards and guidelines. These rules allow a community of stakeholders to reach consensus on user-driven standards.

Across the past twelve months, the GSMP team has undertaken an important project to assess our processes, benchmark them against those of other standards development organisations and identify the actions needed to allow GS1 to have a best-in-class process for standards development.

To this end, we have engaged in a three-part programme, called "GSMP Delivers", to transform the GS1 Global Standards Management Process.

The first part, GSMP InSight – a website where the GS1 community can view work group progress and status reports – has been successfully implemented.

GSMP Engage, underway now, aims to enhance work group interaction through new collaborative tools and processes. The goal is to expand global participation enabling a truly global dialogue, with simplified, easier to understand documents, agendas and meeting minutes.

A third aspect also now underway, GSMP Enrol, is striving to improve on-boarding services designed to welcome new participants and enhance their integration into the GSMP so they can be more quickly operational.

Our efforts in the year to come will strive to ensure tight integration between the GS1 Strategy, Industry Engagement and Standards Development teams. We will follow up on our standards development efforts with measurements of adoption and relevance. But perhaps most importantly, we will take steps to connect our work directly to both our community and to our strategy. Indeed, we know this is critical to our mission to be the neutral leader enabling communities to develop and implement global standards.

Collaborative work from the best people with the best ideas

Our Autumn GS1 Standards Event in Dublin, Ireland in October 2012 brought together **260** individuals from **103** companies and organisations, representing **28** countries.

Our Spring GS1 Standards Event in Dallas, Texas in March 2013 brought together **243** individuals from **100** companies and organisations, representing **25** countries.

For both Events, participant satisfaction ratings were very high, with over **90%** favourable results.

Join the GS1 Global Standards Management Process team, and be part of this group of volunteers who make what we do possible: **www.gs1.org/gsmp/participation**

More about the GS1 GSMP at **www.gs1.org/gsmp**

Key initiatives of 2012-2013

- Ratified and published 15 new GS1 Standards
- Ratified and published updates to 26 existing GS1 Standards
- Wrote, validated and published 8 interoperability or implementation guidelines
- Completely re-developed Global Data Dictionary, a repository of the data elements defined across all GS1 Standards
- Managed more than 330 Work Requests, an increase of 34% over 2011
- Increased the GSMP community by 33% in 2012, bringing together 332 people from all industries and from everywhere in the world
- All deliveries and accomplishments of the GSMP are available in the GSMP InSight reports at **www.gs1.org/gsmp/insight**

GS1 Identification Keys & Attributes

A unique reference for items, locations, assets and more

The GS1 System of Standards provides a way to identity items and places, to capture details about an item's movements, and to share that information both internally and with authorised business partners. Because it is a neutral global framework, it enables seamless interoperability among all stakeholders. Business partners can use the resulting real-time knowledge about their supply chains to make decisions that drive business value.

At the very foundation of this global language of business are GS1 Standards for Identification. GS1 Identification (ID) Keys are used to uniquely distinguish items, logistic units, documents, returnable assets and more as they move through the supply chain from manufacturer to consumer. GS1 ID Keys are also available for locations such as warehouses, factories, storerooms, shelves, racks or bins.

GS1 ID Keys can be complemented with GS1 Application Identifiers to add more detail such as batch numbers or expiration dates. Furthermore, GS1 ID Keys can be expressed in different types of data carriers, such as bar codes and RFID tags, as well as in different types of business messages such as EDI or XML.

In response to the needs of our users, in the past year we have released several new GS1 ID Keys and Applications Identifiers (AI), including a set of Patient and Caregiver Identification Standards to help distinguish the different parties engaged in the delivery of healthcare services and in doing so help provide greater patient safety.

To better support the needs of the transportation and logistics sector, a new GS1 Guideline has been published, providing guidance on the application of the GS1 Identification Keys on shipments, logistic units, equipment, locations and more.

Identification, a vital part of enabling visibility

The 2012 Consumer Goods Forum Compliance Survey revealed that **97%** of retailers and wholesalers identify their consumer units with a GS1 Global Trade Item Number (GTIN), the most well known and widely used of all the GS1 Identification Keys, and **75%** use a GS1 Serial Shipping Container Code to identify their pallets or unit loads. The survey also shares a variety of measurable efficiencies that are brought about by the use of GS1 Standards.

Starting in September 2013, all coupons in Belgium and Luxembourg will carry the GS1 Global Coupon Number encoded in a GS1 DataBar symbol. This represents the potential of **huge savings** for both coupon issuers and retailers. Furthermore, by enabling consumers to receive and redeem coupons electronically, the process is **quicker** and **more secure.**

Key initiatives of 2012-2013

- Released Patient & Caregiver Identification standards to help identify all parties engaged in the delivery of healthcare services and in doing so, provide greater patient safety
- Released Service Relation Instance Number (SRIN) which adds granularity and security to healthcare processes
- Published guidelines for the use of GS1 Identification Keys in Transportation & Logistics
- Released new Application Identifier for Origin SubDivision, which will allow companies to comply with regulations requiring consumer package of domestically grown produce to indicate prefecture of origin in text
- Launched collaboration with the Consumer Goods Forum on a Next-Generation Product Identification (NGPI) project in order to understand the challenges facing today's approach to product identification and to explore various ways to accurately communicate minor product variations, such as ingredient or packaging changes, without requiring a potentially costly change to the product's Global Trade Item Number (GTIN)

Standards & System Development

GS1 BarCodes & GS1 EPC/RFID

Providing the way to capture data for supply chain visibility

Once an item, location or logistics unit in the supply chain is given a unique identification number, there must be an automatic, rapid, efficient and globally-acceptable way to capture that information so it can be shared between business partners. GS1 BarCodes and GS1 EPC/RFID are data carriers providing access to this information.

GS1 offers different bar code symbologies to meet user needs. Already in use around the world, GS1 DataBar bar codes are enabling the reduction of in-store food waste by allowing retailers to offer automated markdowns at the cash register and to use real-time inventory management systems to maintain accurate stock levels at all times.

GS1 DataBar is a small data carrier that can be placed on items that cannot hold a standard-sized bar code, such as cosmetics, jewellery, individual fruits and vegetables and more. In order to reduce the time and money that are wasted when supermarket checkout employees struggle with unreadable bar codes, we developed guidelines for bar code conformance testing.

In today's marketplace, there is a growing trend of placing multiple bar code symbols on a single retail or healthcare package in order to provide different types of information. To address the potential confusion that this may cause, GS1 has developed guidance for the industry so there is consistency on what type of information can be found where on a package.

The GS1 Electronic Product Code (EPC) using Radio Frequency Identification (RFID) tags helps companies deploy more effective and streamlined processes. The past year has revealed the many concrete benefits that item-level RFID tagging brings to apparel and footwear, a complex and fast-moving sector with unique needs for innovative inventory management, shrink reduction and replenishment processes.

To simplify interoperability between GS1 BarCodes and EPC-enabled technologies, we created guidelines with best practices for reading, decoding and conveying data between bar codes and EPC/RFID tags, and methods for linking database records with GS1 ID Keys stored in an EPCIS structure.

Measurable savings and efficiencies from bar codes and EPC/RFID

A 2012 French study study found that using GS1 BarCodes leads to annual savings **of 6.59%** of retail revenue.

When a bar code doesn't scan correctly, a shopper often decides not to buy the product. After deploying a programme designed to improve bar code quality, GS1 Spain estimated that its user companies achieved savings of **€67M**.

The world's volume of EPC-enabled RFID tags is on track to show a nearly **20-fold** increase from 2011 to 2015, when **40 billion** tags will be used.

Thanks to item-level EPC/RFID tagging, Brazilian fashion retail group memove is seeing **300%** faster receiving and **100%** inventory accuracy. EPC/RFID-enabled self-checkout desks make the payment experience feel high-tech and modern in line with the brand's image, and also **60%** faster than it was before.

More about GS1 BarCodes at **www.gs1.org/barcodes** and about GS1 EPC/RFID at **www.gs1.org/epcglobal**
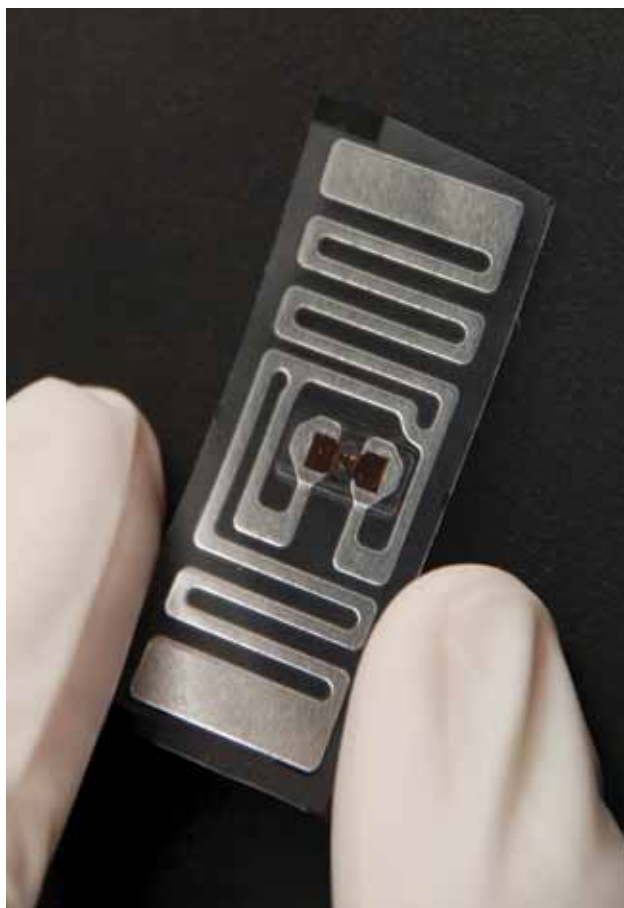
Key initiatives of 2012-2013

- Published standards on Multiple Bar Code Management Practices for Retail & Healthcare
- Published Bar Code Verification Guidelines, consolidating and clarifying GS1 BarCode conformance standards
- Published Bar Code-EPC Interoperability Guidelines and ran a pilot which proved that our solution responded to user needs
- Held 2 fruitful EPC/RFID workshops with stakeholders from the apparel and footwear sector
- Developed a comprehensive AIDC Test Plan to confirm or change bar code size and quality thresholds

GS1 eCom & GS1 EPCIS

Sharing information to ensure end-to-end supply chain visibility

■ ▮ ▮ ▮ The ability to exchange meaningful and efficient business messages and to accurately track items and assets are vital aspects of supply chain visibility.

Visibility – knowing exactly where things are, where they have been before, and why – enables a company to obtain real-time knowledge about the flow of products and transactions in its supply chain, and then use that information to make decisions that drive business value. To have visibility, stakeholders must be able to identify items, locations and assets, capture information about them, and share that information across the supply chain.

GS1 eCom standards allow business partners to share information about orders, invoices, planning, forecasting, performance, transport, logistics and more. The GS1 EPCIS standard allows business partners to share real-time information about physical events in the supply chain. Both GS1 eCom and GS1 EPCIS share data based on GS1 identification keys, no matter whether the items have GS1 BarCodes or EPC/RFID tags.

Together with the GS1 Global Data Synchronisation Network (see pages 30-31), GS1 eCom and GS1 EPCIS form the "Share" part of "Identify, Capture and Share", the foundational concepts of the GS1 System of Standards.

GS1 eCom and GS1 EPCIS are complementary. When used together, they can be powerful generators of business benefits. The physical movements of trade items or assets, recorded and shared via EPCIS repositories, enrich the business transaction information exchanged via eCom messages, and vice-versa.

Today, GS1 eCom and GS1 EPCIS Standards are used across the globe and across all business sectors to increase accuracy, efficiency, safety and security, and to provide a new level of visibility into the supply chain.

Increased adoption and real-world use are testimonies to benefits

According to an annual GS1 Global Office survey, GS1 eCom is today generating benefits for companies in 63 countries. In 2012, GS1's EANCOM® standard was implemented in 51 countries by more than 90,000 companies. Our XML standards were implemented in 34 countries by more than 28,000 companies.

The GS1 EPCIS standard was used in 2012 to share information in the New Zealand venison industry.

Trading partners tracked the movements of deer on a farm and a venison processing plant; and then followed cartons of meat sent by ocean freight to a retail location in Hamburg, Germany. The findings reveal that EPCIS is an effective way to enhance traceability and supply chain visibility.

More about GS1 eCom at
www.gs1.org/ecom
More about GS1 EPCIS at
www.gs1.org/EPCIS

Key initiatives of 2012-2013

- Released EANCOM® 2002, edition 2012, featuring many updates and additions requested by users
- Published GS1 XML 3.1 standards enabling warehouse management and packaging artwork design
- Published subsets of the UN/CEFACT XML standards, called Business Message Profiles, designed to complement current GS1 XML standard in sectors or regions where UN/CEFACT-based standards are required or favoured
- Launched EPCIS/CBV 1.1 Mission-Specific Working Group devoted to enabling EPCIS for traceability in fresh food, fish, automotive, stock-taking/cycle counting for apparel; completed Business Requirements Document
- Launched Event-Based Pedigree Mission-Specific Working Group whose efforts will begin with the pharmaceutical sector; completed Business Requirements Document

GS1 Member Organisations
in Action

At GS1 Member Organisations around the globe, GS1 team members work to help businesses and organisations seize all the benefits made possible by the GS1 System of Standards. Every year, many projects both large and small are successfully deployed. We are happy to share a few in the next pages.

More than **520** national and international pharmaceutical manufacturers have products registered in the system.

GS1 Argentina
Marking the way to better patient safety

One of the primary missions of Argentina's National Administration of Drugs, Foods & Medical Devices (ANMAT) is to improve patient safety by ensuring the legitimacy and quality of the pharmaceuticals consumed.

As part of this, Argentina has a national drug traceability programme designed to limit the use of illegal or counterfeit drugs. More than 3,000 medicines are required by law to have tamper-resistant packaging featuring a GS1 linear bar code, a GS1 DataMatrix code or a GS1 EPC/RFID tag, encoded with a GS1 Global Trade Item Number (GTIN) as well as a unique serial number.

The various actors in the healthcare supply chain – manufacturers, laboratories, distributors, logistics operators, pharmacies and more – are each identified with a unique GS1 Global Location Number (GLN).

As a result, from the moment any individual pharmaceutical product leaves the lab or the importer until it is dispensed to a patient, its unambiguously secure and authentic identity and location are recorded in real time in the ANMAT central database.

The system prevents the diversion or theft of medical products and removes the risk of having counterfeit drugs in the legitimate supply chain. It brings efficiency improvements and cost reductions. It will also facilitate an efficient and rapid recall.

The traceability system has been implemented on drugs used to treat cancer, AIDS, haemophilia, cystic fibrosis and many other critical conditions. It is also in use for various sedatives, psychoactive drugs and other substances that are too frequently abused.

The ANMAT programme has produced very favourable results, and is considered an international reference in the sector. In the coming years, the agency plans to broaden its scope to include implantable medical devices and pharmaceutical raw materials.

More about GS1 Healthcare
www.gs1.org/healthcare

More about GS1 Argentina
www.gs1.org.ar

GS1 MOs in Action

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The investment paid for itself in **less than 2 years** and continues to generate **savings**.

GS1 Germany

SMEs save time and money with GS1 Standards for EDI

Spedition Martin, a German firm specialised in procurement and distribution logistics, and Groupe GCF / Les Grands Chais de France, one of France's largest wholesalers of wines and spirits, have been business partners for many years.

The two companies wanted to move away from manual processes. They reached out to PROZEUS, an eBusiness initiative run jointly by GS1 Germany and IW Consult with the support of the German Federal Ministry of Commerce & Technology, devoted to helping small and medium enterprises go paperless thanks to GS1 eCom Standards for Electronic Data Interchange (EDI).

Spedition Martin and Groupe GCF wanted a win/win situation where both companies would see time savings from faster communication and reduced manual input of data; and cost savings from less postage and less printing.

In addition, they wanted to avoid errors by establishing standardised cross-border processes.

Their goals were successfully met simply by deploying two GS1 EANCOM® messages. Groupe GCF began issuing Electronic Transport Instructions (IFTMIN), messages from a shipper to a carrier/forwarder creating a transport contract for a consignment. On their end, Spedition Martin deployed electronic invoices (INVOIC) instead of paper invoices.

The introduction of these two electronic EANCOM® messages produced measurable savings in both time and money for both partners. The need for manual data entry was eliminated, inter-company communication was accelerated and accounting errors and incorrect shipments were drastically reduced.

After deploying IFTMIN messages with two other trading partners, Spedition Martin says that they have eliminated 80 minutes previously devoted to creating transport instructions every work day – time that can now be spent on activities that better serve the firm and its customers.

More about GS1 Standards for EDI
www.gs1.org/ecom

More about GS1 Germany
www.gs1-germany.de

The Hong Kong Centre for Food Safety had **2** official food alerts on average every month in 2012, including infant formula.

GS1 Hong Kong
The value of track-and-trace capabilities in the food supply chain

Food companies face consumer pressure to deliver food that is safe to eat. Companies know that brand integrity and consumer confidence are directly related to food safety and the ability to track products up and down the supply chain.

To address this, three Hong Kong-based companies – retailer AEON and manufacturers General Mills and Lam Soon – partnered with GS1 Hong Kong to review their existing traceability systems using a checklist of control points known as the Global Traceability Assessment. Carried out by trained auditors, the assessment is a key component of the GS1 Global Traceability Solution, which provides companies with a single, interoperable traceability process based on GS1 Standards.

Assessments were performed at an AEON Jusco store, a General Mills ice cream cake production plant and a Lam Soon flour, consumable oil and detergent warehouse. Although all three companies had internal systems in place to ensure product safety, this assessment – along with expert advice from GS1 Hong Kong – provided insight into how they could build globally recognised traceability systems based on standards to better identify, capture and share information.

For example, to better ensure product freshness and protect consumers' safety, GS1 Hong Kong recommended to AEON that they use GS1 DataBar on individual items of fresh produce, and Serial Shipping Container Codes (SSCC) where products are received. General Mills learned that it could enhance its product traceability by implementing identification on its work-in-progress containers using automatic capturing tools. As for Lam Soon, GS1 Hong Kong recommended they improve their product traceability capabilities by identifying raw materials with Global Trade Item Numbers (GTIN) and logistics units such as cardboard boxes with SSCCs.

More about GS1 Traceability
www.gs1.org/traceability

More about GS1 Hong Kong
www.gs1hk.org

Names & Numbers

We are pleased to share here the results of our 2012–2013 financial year, information about our governance and contact details for our GS1 Member Organisations around the world.

Philippe Wéry
Chief Financial and Administration Officer, GS1

Financial Statements

Key Financial Statistics: Global Revenues

GS1 Member Organisations (MOs) around the world are funded by their local members through annual membership fees and sales of services. Consolidated in Euros, the total revenues of GS1 MOs in 2012 amounted to € 308.4M, 10.6% higher than the previous year. Excluding the impact of currency rates, the increase is 11.4%, compared to 9.7% the year before. Regions have grown (without foreign exchange impact) very differently from each other: Asia Pacific at 9.1%, North America at 5.3%, Europe at 17.8%, Latin America at 8.2% and MEMA at 9.2%.

GS1 Global Office – Fee Evolution

In 2012–13, the GS1 Global Office's revenues amounted to €27.0M, an increase of €1.1M or 4.2% versus the year before. Because of the strong growth in global revenues and despite the new GDSN funding model and the declining MO percentage fee, our Budget 2013–14 foresees a modest increase in Global Office fees of 2.6% or €0.7M to reach €27.7M.

Income Statement and Headcount

Our 2012-13 revenues increased at €27.0M compared to €25.9M in 2011–12 while our operating expenses increased by 8.7% to €25.7M versus €23.7M the year before. The € 2.0M Operating Expenses increase is driven by (1) pay-roll expenses which grew by € 1.0M due to the increase in headcount, (2) discretionary spending, which includes travel, consulting, marketing and large user meetings/events, increased by €1.0M versus the prior year due to a number of special projects including the bar code 40th anniversary campaign. Our fixed expenses remained basically stable at €2.7M.

Our consolidated income statement shows a positive result of €1.6M for the fiscal year ending June 2013. Both our base business (managed from the GS1 Central Office) and GDSN contributed positively to this result. We continued to build reserves to cover and/or speed-up current and future investments in new technologies and applications, but also to have the necessary financial resources in case of adverse currency fluctuations. In the last ten years, we have built accounting reserves of €13.8M.

On a cash basis, we increased our reserves by €1.3M to reach €10.5M at the end of June 2013.

In terms of types of expenses, our main investment remains our people, with 80 staff members at the end of June 2013, an addition of 3 full-time employees compared to June last year.

GS1 Member Organisation Revenue: Growth by Region

	Growth 2012/2011 %	w/o FX *
Middle East/ Mediterranean/Africa	7.6%	9.2%
Latin America	3.2%	8.2%
Asia Pacific	7.7%	9.1%
North America	4.3%	5.3%
Europe	19.0%	17.8%
TOTAL	**10.6%**	**11.4%**

* Foreign Exchange Impact

GS1 Member Organisation Revenue: Historical Perspective

Figures in millions of euros
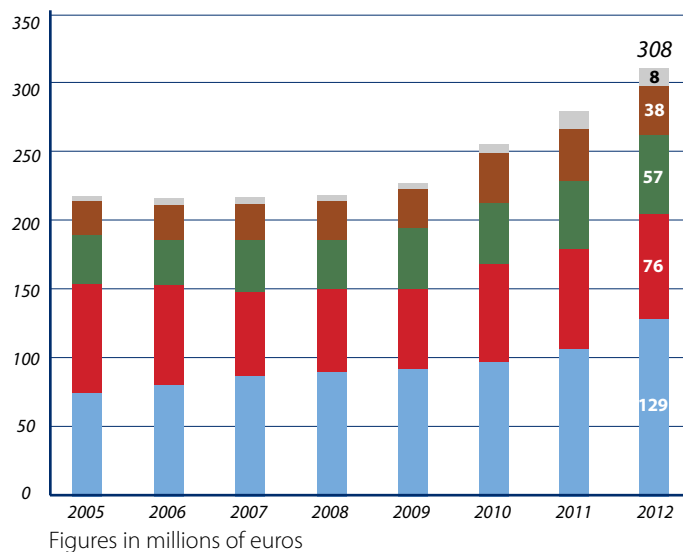
GS1 Global Office Revenue: Historical Perspective

Figures in millions of euros	05/06 Actuals	06/07 Actuals	07/08 Actuals	08/09 Actuals	09/10 Actuals	10/11 Actuals	11/12 Actuals	12/13 Actuals	13/14 Budget
GS1 Central Office	13.8	16.4	16.7	16.9	22.5	22.7	23.9	25.0	25.6
EPCglobal Inc.	7.2	7.8	6.7	6.2	-	-	-	-	-
GS1 GDSN Inc.	3.2	2.5	2.2	1.8	2.0	2.0	2.0	2.0	2.1
Total GS1 Global Office	**24.2**	**26.6**	**25.6**	**24.9**	**24.5**	**24.7**	**25.9**	**27.0**	**27.7**
Staff (FTEs)	76	79	79	82	74	72	77	80	83
Cumulative Reserves *	**3.2**	**4.6**	**6.3**	**6.9**	**8.1**	**10.2**	**12.2**	**13.8**	**14.5**

* where Reserves are defined as accumulated net results; could be invested in cash, fixed assets or receivables

GS1 Consolidated FY 2012/13 Actuals for the period ending 30/06/13

Figures in millions of euros	Consolidated	GS1 Central Office	GDSN Inc.
Revenue	**27.0**	**25.0**	**2.0**
Fixed/Recurring Expenses	2.7	2.4	0.3
Discretionary Expenses	8.5	7.5	1.0
Payroll Expenses	14.5	14.0	0.5
Operating Expenses	**25.7**	**23.9**	**1.8**
Operating Result	**1.3**	**1.1**	**0.2**
Other Revenue / (Expenses)	0.3	0.3	-
Result for the period	**1.6**	**1.4**	**0.2**

Notes: Consolidation based on budget rate (1.30 USD/EUR). Fiscal year 2012/13 ended 30/06/13

Names & Numbers

GS1 Management Board

Mike McNamara	Chief Information Officer Chairman, GS1	Tesco
Timothy Smucker	Chairman of the Board Vice-Chairman & Chairman Emeritus, GS1	The J. M. Smucker Company
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Long Chen	Chairman	China Resources Entreprise
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Doug Herrington	Vice President Consumables	Amazon
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Rhonda Levene	Chief Business and Financial Officer	Daymon Worldwide
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José Lopez	Executive Vice President of Operations & GLOBE	Nestlé
Meinrad Lugan	Member of the Board of Management	B. Braun Melsungen
Gary Lynch	Chief Executive Officer	GS1 UK
Silvester Macho	Chief Information Officer	METRO Group
William Rodney McMullen	President & Chief Operating Officer	The Kroger Company
Daniel Myers	Executive Vice President Global Integrated Supply Chain	Mondelēz International
Maria Palazzolo	Chief Executive Officer	GS1 Australia
Miguel Angel Peralta	Chief Executive Officer	GS1 Mexico
Joseph Phi	President	LF Logistics, A Li & Fung Company
Jörg Pretzel	Chief Executive Officer	GS1 Germany
N. Arthur Smith	President & Chief Executive Officer	GS1 Canada
Ed Steinike	Vice President & Chief Information Officer	The Coca-Cola Company
Hervé Thoumyre	Chief Information Officer	Carrefour
Hiromu Ueno	Chief Executive Officer & Senior Executive Director	GS1 Japan
Mark Wagner	President Operations & Community Management	Walgreens

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John S. Phillips	Senior Vice President, Customer Supply Chain & Go-To-Market Chairman, Data Excellence Inc.	PepsiCo Global Operations
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Malcolm Bowden	President Global Solutions & GS1 Data Excellence Inc.	GS1
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Ghislain Esquerre	Supply Chain Solutions & Services Center Director	Carrefour
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Maria Palazzolo	Chief Executive Officer	GS1 Australia
Sabine Ritter	Executive Vice President, Strategy, Industry Initiatives & Strategic Alliances	The Consumer Goods Forum
Pat. Salmonese	Senior Vice President, Business Integration Business Unit	GXS
Antonio Salto	Director Global Information Systems/B2B Master Data	Kraft Foods Inc.
Mike Wehrs	Chief Executive Officer & President of Scanbuy	Scanbuy
Tom Werthwine	Global Process Owner, Auto ID Technology & Data Standards	Johnson & Johnson Health Care Systems
Greg White	Director Business Process Services	The Procter & Gamble Company

EPCglobal Inc. Board of Governors

GS1 Extended Leadership Team, June 2013

GS1 Leadership

The GS1 Global Office Leadership Team is composed of the following people:

Miguel A. Lopera, President and Chief Executive Officer

Malcolm Bowden, President, Global Solutions and Data Excellence, Inc.

Steve Bratt, Chief Technology Officer and President, Standards Development

Patrick Vanlombeek, Chief Marketing Officer

Paul Voordeckers, President, Industry Engagement and EPCglobal, Inc.

Philippe Wéry, Chief Financial and Administration Officer

The GS1 Extended Leadership Team is composed of the following people (as shown in the photo above)

Seated, left to right: **Susie McIntosh-Hinson, Patricia Alhadeff, Audrey Kremer, Ulrike Kreysa, Anouk Chavel, Lynda Costa, Monica Walsh**

Standing, left to right: **Andrew Hearn, Valérie Depoortere, Peter Alvarez, Miguel Lopera, Jim Bracken, Anders Grangard, Nicholas Fergusson, Sean Lockhead, Robert Bersani, Cameron Green, Enzo Blonk, Steve Bratt, Mark Widman, Philippe Wéry, Malcolm Bowden, Elizabeth Board, Scott Gray, Kerry Angelo, Patrick Jonasson, Diane Taillard, David Buckley, Regenald Kramer, Robert Beideman, Patrick Vanlombeek, Paul Voordeckers, Lisa Sandberg**
(Missing from photo: Henri Barthel, John Keogh, Massimiliano Minisci)

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Names & Numbers

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