



GS1

Industry & Sector Strategy

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Where do we play actively today?

1. Globally:

1. **Retail Industry** including all the sectors that are present in a global retailer:

1. Fast Moving Consumer Goods
2. General Merchandise
3. Hardlines
4. Footwear, Apparel, etc.

2. **Healthcare Industry**

1. Over-the-Counter (OTC) Pharmaceuticals

2. Locally:

1. Transport and Logistics
2. Defense
3. Public Administrations
4. Others



Overall Objective of the Industry Strategy

Lead the Design and Implementation of the GS1 Standards in New Industries & Sectors that:

- Add value to our core industries
- Add value to the local GS1 organizations
- Are self-sustainable



Industry Strategy: Guiding Principles

- “GS1 is the most widely used supply chain standards system in the world”
- GS1 is the only standards organization with a Proven System and with a Global footprint and implementation capability
- Priorities:
 - Core Industry Retail: **foundational** to the GS1 System. Additional sectors in Retail (all type of consumer goods e.g. Footwear & Apparel, Books, Consumer Electronics,...) are clear priority.
 - Core Industry Healthcare: **extensive involvement** over the past 5-10 years with GS1 system, primarily through OTC (over the counter drugs). Additional sectors now ready to implement globally (Prescription Drugs, Medical Device, Biologicals,...) heavily supported by user community
 - Other Industries: **focused involvement** with parts of the GS1 system, primarily with EPCglobal. User driven initiatives
 - Adjacent Industries: **supporting** our core industries, either by Upstream or as Conduit to the supply chain. User driven initiatives



An Overview

Ultimate Goal:



Core Industries:

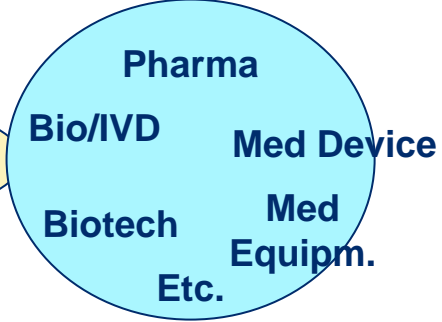
Retail

Healthcare

Sectors:



Adjacent Sectors



New Opportunity Industries:





GS1's Brand Architecture



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OVERALL BENEFIT: Improving efficiency & visibility in supply and demand chains

GS1 SOLUTIONS & SERVICES USING GS1 STANDARDS
Solutions: POS / Inventory Management / Asset Management / Collaborative Planning / Traceability
Services: Global (GSMP, GEPIR, Global Registry, Training and Accreditation) & Local (e.g. Certification, Implementation, Training)

System - Integrated system of standards

BarCodes

Global standards for automatic identification

Rapid and accurate, item, asset or location identification

eCom

Global standards for electronic business messaging

Rapid, efficient & accurate business data exchange

GDSN

The environment for global data synchronisation

Standardised, reliable data for effective business transactions

EPCglobal
Powered by GS1

Global standards for RFID-based identification

More accurate, immediate and cost-effective visibility of information

GS1 Identification Keys (e.g. GTIN, GLN, SSCC, GRAI, GIAI, GSRN, EPC) & Attribute Data (e.g. Best Before Date)



Healthcare

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The healthcare standards environment *within GS1*

Within GS1, several groups currently treat the topic of healthcare. They are:

**EPCglobal US
Health Life Science
Business Action Group
(HLS BAG)**

Managed by EPCglobal with global scope and reach

Focused on RFID standards and technol. applications and Regulatory issues

Members include pharmaceutical manufacturers, medical device manufacturers, US medical wholesalers, US retail pharmacies, FDA, hospitals, associations, solution providers.

**European
Healthcare Initiative
(EHI)**

Initiated by GS1 Europe.

Focused only on European countries and concerns.

Participants include pharmaceutical manufacturers, medical device manufacturers, medical wholesalers.

**GS1 Global
Healthcare User Group
(GS1 HUG)**

Managed by the GS1 Global Office.

Global scope, global reach.

Treats regulatory matters.
Members include pharmaceutical manufacturers, medical device manufacturers, hospitals, medical wholesalers, associations, regulatory bodies.

The issues: overlapping membership, confusing if not conflicting messages.



What we are doing



1. Develop and gain broad alignment to a **single global healthcare strategy and execution plan**, across GS1 and its membership
2. Establish GS1 as "the" global source of healthcare standards
3. Dedicate appropriate resources
4. Create a suitable revenue model
5. Focus on patient safety: the prevention of medical errors and counterfeiting
6. Develop an aligned strategy for regulatory affairs that builds on our potential to influence stakeholders
7. Communicate internally and externally



- **Start work on joint work package on Serialization: work group kicked-off September 21**
- **GS1 to lead 'integration project' of all Healthcare initiatives and drive towards one Strategic Roadmap: bring together HUG and HLS Leadership Teams to work out the plan**
- **Make decision on value to the Users of “one” meeting: no change for Jan/Feb meetings, combined meeting at U-Connect in June 2007**

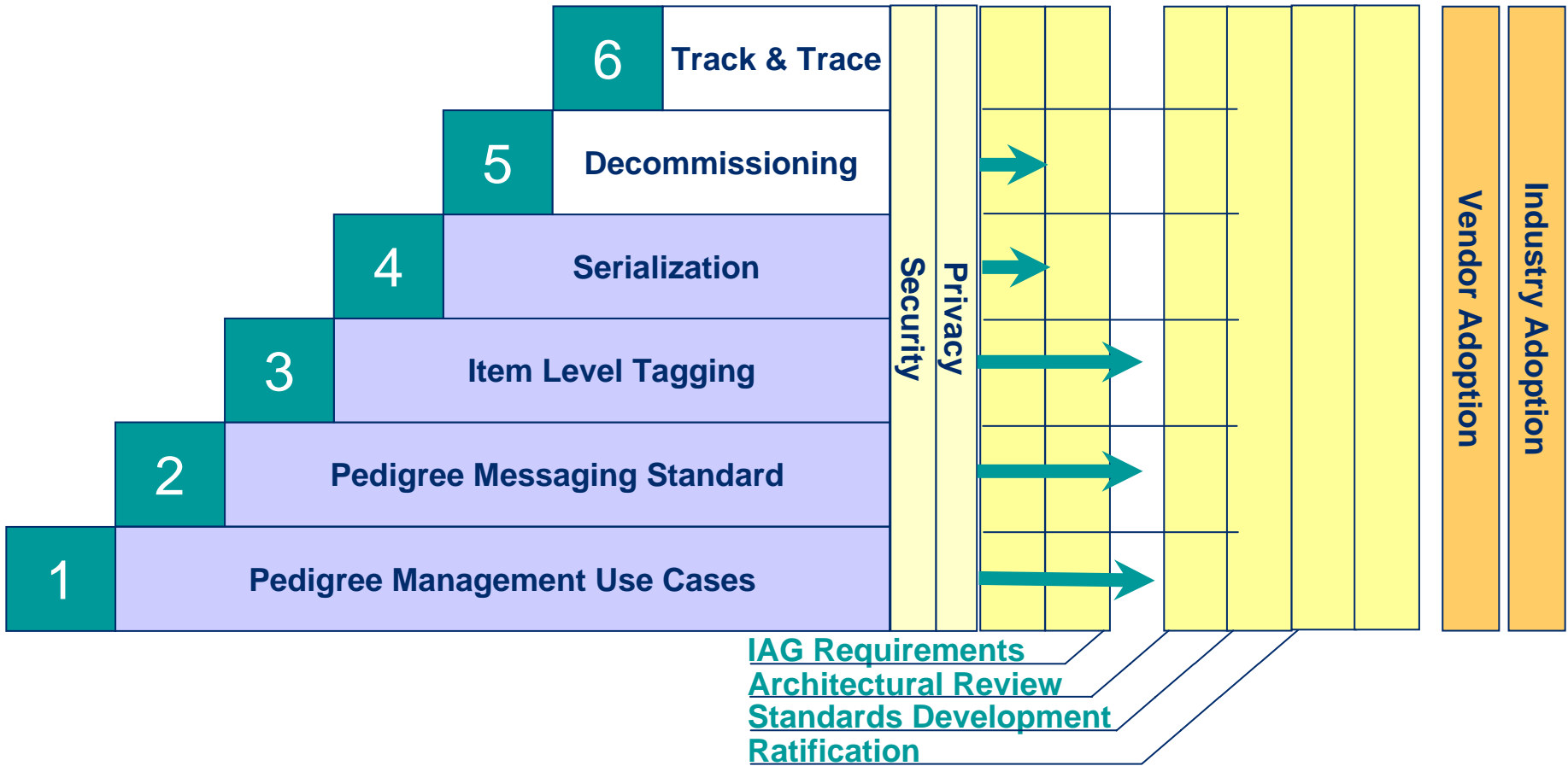


We commit to build a single global healthcare strategy across GS1.





HLS Roadmap to Standards





HUG Roadmap to Standards

Milestones

A1	26 Jul 06	Adopt existing GS1 Application Standards in Healthcare
A2	31 Dec 07	GSMP: Prioritised AIDC Application Standards
S1	31 Oct 06	GSMP: GTIN Allocation Rules for Healthcare
S2	31 Mar 07	GSMP: Healthcare Business Data AutoID Standard
S3	30 Jun 07	GSMP: Healthcare Product Serialisation Standard
S4	30 Sep 07	GSMP: Healthcare Data Carrier/Scanning Standard

B1	28 Feb 07	Business Case for Packaging/Marking AIDC
X8	xx Jan xx	
X9	xx Jan xx	
	xx Jan xx	
11	xx Jan xx	
12	xx Jan xx	



2006

2007

2008

A1

S1

B1

S2

S3

S4

A2

GTIN Allocation

Business Case

AutoID Data

Carriers

Serialisation

AIDC Application Standards

Product Classification

Product Data Dictionary

Healthcare Data Synch

eCatalogue