

Australian Retail RFID Alliance Workgroup Meeting #2

8th November 2016



Anti-trust

Participants on GS1 Boards, committees, task forces, work groups, or other similar bodies, must always remember the purpose of the Board, committee, task force, or work group is to enhance the ability of all industry members to compete more efficiently and effectively to provide better value to the consumer or end user. GS1 activity almost always involves the cooperation of competitors; therefore great care must be taken to assure compliance with trade practices laws in Australia and in other jurisdictions.

This means:

- Participation must be voluntary, and failure to participate shall not be used to penalise any company.
- There shall be no discussion of prices, allocation of customers or products, boycotts, refusals to deal, or market share. (For the avoidance of doubt, this does not preclude discussion of GS1 prices, customers or products.)
- If any participant believes the group is drifting toward impermissible discussion, the topic shall be tabled until the opinion of lawyer(s) with experience in trade practices law can be obtained.
- Where appropriate, meetings shall be governed by an agenda prepared in advance, and recorded by minutes prepared promptly after the meeting.
- Where appropriate, tests or data collection shall be governed by protocols developed by GS1.
- GS1 reserves the right to seek opinion of lawyer(s) with trade practices experience on any matter or document arising out of any GS1 activity.
- The recommendations coming out of a GS1 Board, Committee, Task Force, Work Group, or other similar body are just recommendations. Individual companies remain free to make independent, competitive decisions.
- Any GS1 standards developed must be voluntary standards.

Agenda

| Time | Item | Who |
|---------|--|-------------|
| 9am | Welcome | All |
| 9:10am | Confirmation of Chairperson / Survey results | Sean Sloan |
| 9:15am | The Myer Plan | Gary Stones |
| 9:35am | The Matrix | All |
| 10:00am | Retailer update | Retailers |
| 10:30am | Break | |
| 10:45am | EPC Guidelines | Sean Sloan |
| 11:00am | Business Case Development | Sean Sloan |
| 11:30am | Next Steps / Close | All |

Welcome

Sean Sloan, RFID & Omni Channel
Manager

Purpose (reminder)

- Openly share best practice information
- Promote the benefits of Item Level RFID
- Aim to implement RFID using global best practice
- Fill in knowledge gaps along the way

Who's here

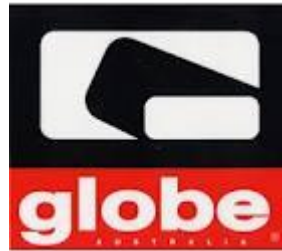
MYER

Super Retail
Group



SPOTLIGHT
ANACONDA

COUNTRY ROAD GROUP
COUNTRY ROAD MIMCO TRENER Y WITCHERY



Distinct apologies



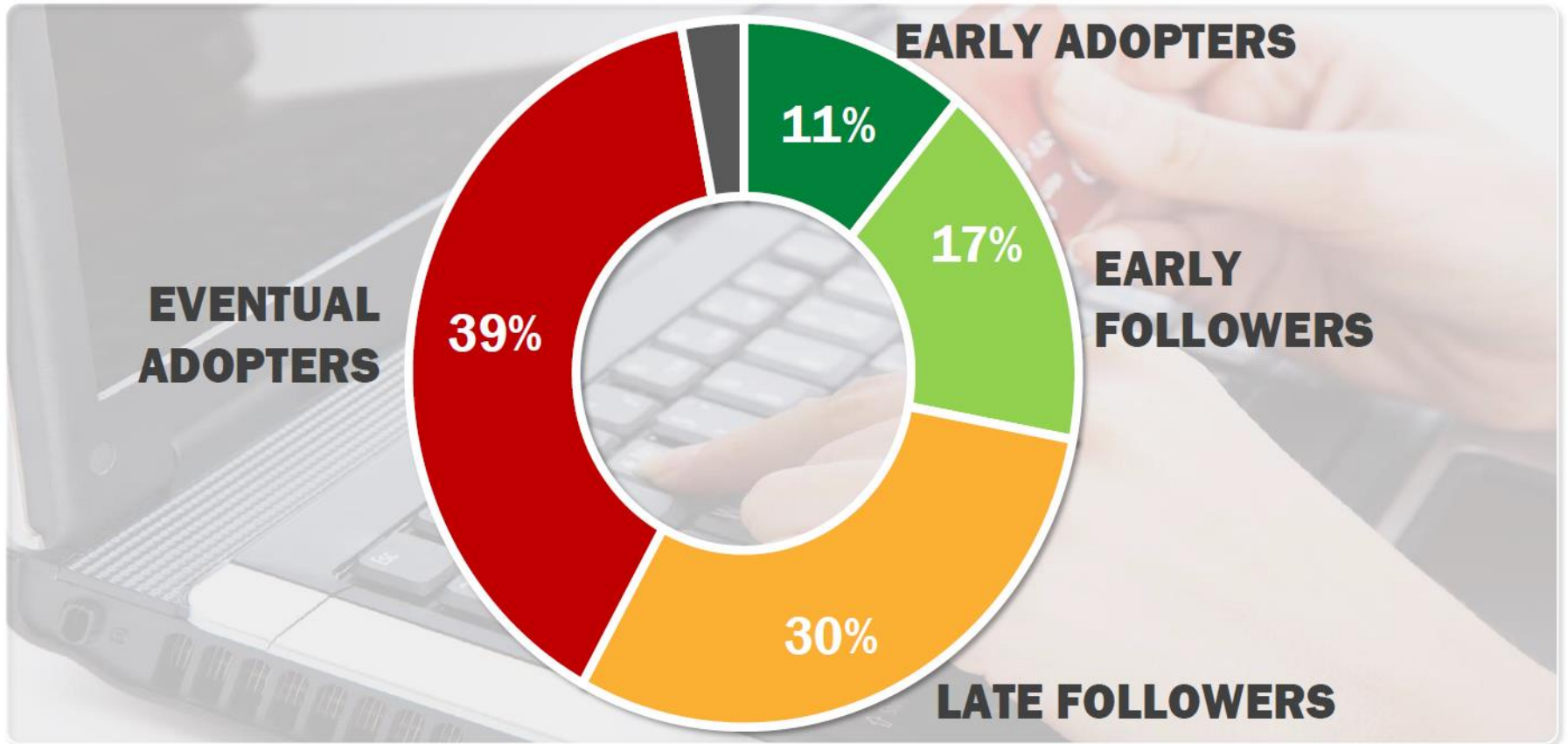
sass & bide



AUS. FASHION LABELS



The 'circle' of adoption



Survey Results

Sean Sloan, RFID & Omni Channel Manager

Survey outcomes (High level)

- Was the event valuable? 100% Yes
- Why did you attend?
 - Interest in implementing 35%
 - Sent by company 17%
 - Wanted to see what other companies doing 12%
 - Wanted to know what is happening in marketplace 35%
- Vendor session ratings: Average was 3.5 / 5
- Did the GS1 connection make sense? 100% Yes
- Are you planning to stay as part of group? 100% Yes
- Chairperson nomination: Gary Stones 93%!

Survey outcomes (Comments)

- *"The benefits of RFID and the realisation that RFID will have a positive impact on the sales and revenue for the business, by having greater visibility of stock on hand in our key customers stores, enabling to be never out of stock on core items"*
- Grant Feltham, Global Sourcing Manager, Skins
- *"Putting together proposal to present to manager to get the idea across"*
- Rebecca O'Sullivan, International Fashion Group
- *"A healthy understanding of the Australian marketplaces desire for RFID. Extended my knowledge of RFID and the feasibility of application within our industry sector (dismissed some of the "cost negative" rumours)"*
- Ben Wright, Pacific SC Innovation Manager, Nike Australia

The Myer plan

Mr Gary Stones, National Retail Operations Manager

The logo for Myer, featuring the word "MYER" in a bold, black, sans-serif font, centered within a white rectangular box.

The Matrix

Review of data provided by the group by retailer, by category

All Retailer update

Open Discussion

- Current Status
- Internal awareness levels Ie Buyers?
- Potential impediments
- Any misconceptions
- Logical starting points (Division / category / supplier)
- Benefit awareness
- ??



EPC Guidelines

What are the EPC Guidelines?

- Implementation guidelines
- How to implement tag data
- What to encode
- Based on well adopted, global standards
- Following leads from US & Europe
- Fluid and reactive to emerging needs
- Australia released these recently and they are free to download
- Australian document also includes Placement Guidelines
- Tag data is about the only standard customers need to make 'decisions' on (Vendors do the rest!)

GS1 standards – Apparel and General Merchandise

EPC-based RFID Item Level Tagging

Implementation Guideline for Companies in the Apparel,
Fashion and Footwear sector



Why the EPC Guidelines?

- Aimed to reduce any deviation to proprietary standards
- Less cost if all participants are using the same approach
- Less time lost reviewing separate identifiers / data
- Provides clarity to brands owners, be they retailers or suppliers, on what should be encoded into RFID tags

What are we seeking?

- GS1 is the local facilitator of the EPC Standards
- We can't support non-standards based implementations
- Therefore we need, at a minimum, retailers with open supply chains to openly endorse the use of the EPC standards
- In early 2017, we'd like to communicate to industry that participants of the workgroup are in support of the EPC Guidelines, thus providing a clear path for suppliers (and other retailers) adopting RFID
- May necessitate a review of the document by technical people.. Or even legal?
- This is critical to our ongoing support of the group and we seek your support, even if not immediately implementing

Business Case Development

A sample RFID ROI Tool



Microsoft Excel
Worksheet

Next Steps

Next steps...

- Agree on categories to focus on, and thus suppliers to target (Matrix)
- Who's missing: seek to grow group
- Role of vendors within the discussion
- Agree on EPC Guidelines
- Discuss option of broader communications
- Send out 2017 invites
 - Confirm / set 2017 meeting dates
 - Create a 'Standing' agenda
 - Seek alternate meeting locations for both Syd / Melb

2017 meeting schedule

2017

| JANUARY | | | | | | |
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| FEBRUARY | | | | | | |
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| AUGUST | | | | | | |
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| SEPTEMBER | | | | | | |
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| OCTOBER | | | | | | |
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| NOVEMBER | | | | | | |
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| DECEMBER | | | | | | |
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