WEDNESDAY MAY 31ST
EUROPEAN EPC COMPETENCE CENTER GMBH (EECC) MAINSTRAßE 113-119, 41469 NEUSS

Time	Session
12:00pm	**Arrivals, Light Lunch and Coffee**
12.30pm	**Welcome, Introductions, Agenda Overview & Meeting Expectations** *John Fonteijn, Chair, ECR Community Shrink & OSA Group*
1:00pm	**Welcome to EECC** In an interactive tour of the EECC Innovation Centre, gain new perspective from EECC leadership on the current state of RFID, new technology developments, real world case studies and "life" for RFID beyond the Apparel sector.
1.45pm	**Coffee**
2.00pm	**Debrief EECC** Group will share their new learnings, their own learning on RFID and their views on the future opportunities, enablers and barriers to adoption.
2.30pm	**Store Briefings** *Colin Peacock, Group Program Manager, ECR Community Shrink & OSA Group* Each group will visit one store, looking to explore in that store visit, how they are responding to the current group research priorities. - Omni-channel, click & collect and the new risks to retail losses - Inventory accuracy (RFID) - Self-scan - Risk Amplification - Food Waste
2:45pm	**Transit to and Store Visits**
4:30pm	**Transit to Meeting Room at Swissotel, Dusseldorf, Rheinallee 1, Neuss, 41460, DE for Coffee then review**
4.45pm	**Store Visits Review** – *Facilitated by Colin Peacock* Groups to swap notes and prepare feedback to the stores, what inspired them? What ideas could they reapply to their organisation and what loss prevention ideas could they give to the store they visited?
6:00pm	**Close and Transit to Hotel**
7:30pm	**Cocktails and Network Dinner at Swissotel, Dusseldorf Neuss**

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THURSDAY, JUNE 1ST	
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8:00am	**Coffee and Light Breakfast**
8:30am	**Day 1 (Store Visits) Recap and Day 2 Agenda Overview -** *John Fonteijn*
9.00am	**Emerging Technologies in Retail Loss – A Benchmark Study:** *Professor Adrian Beck* New benchmark data from USA on the extent to which retailers are adopting nine emerging technologies to help prevent retail loss: The nine are: 1) Feature Recognition: The ability to identify unique individuals within a store environment. 2) Smart Shelves: The ability to detect the removal of product from specific shelves or displays based on defined criteria, 3) Biometrics: The use of unique physical characteristics such as fingerprints or retinal scans to identify employees and grant access against defined roles/rules.4) POS Product Activation: The ability to require an activation protocol at POS in order that a product will function properly. 5) Body-mounted Cameras: Cameras warn by store and security staff, with or without audio. 6) Non-scan POS Detection: The ability to identify transactions where merchandise passes through the checkout process without being properly scanned/identified. 7) GPS Product Tracking: The ability to track the movement and location of specific products. 8) Exception-based Video Alerts: Automatic video-based alerts generated by agreed rules/events such as the opening of a door or the removal of a product and 9) RFID
9.30am	**Coffee**
9.45am	**Round Table 1 – Emerging Loss Prevention Technology.** *Facilitated by Adrian Beck*
10.15am	**Availability – Promise in Omni Channel Retail.** *Daniel Corsten (IE Business School), Thomas Gruen (University of New Hampshire)* Dan and Tom will report the results of a groundbreaking new research study on Availability-to-Purchase (ATP) at pure online and omni-channel retailers in six major countries and for six non-food categories. Using a consumer-based definition, they find that ATP is around 80 per cent. Items that are Out-of-Stock, i.e. physically unavailable, account for 8 per cent. They analyse the extent of Voids. i.e. specific product pages that have been suppressed and cannot be accessed by the shopper. The extent of Void items is 12 per cent. They also examine consumer reactions to missing products. Globally 29 per cent of shoppers switch brands, 27 per cent switch within brands, 22 per cent switch online stores. 5 per cent purchase the desired at a physical store of the same retailer and 5 per cent at a different retail store. 8 per cent delay and 4 per cent cancel their purchase. More differences exist across countries than categories. Implications for brands and retailers are discussed
11.15am	**Coffee break**
11:30am	**Round Table 2 – Availability - Promise – relevance to your organisation?** *Facilitated by Daniel Corsten*
12:00pm	**Light Lunch**

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12:45pm	**Working Together – What does it take?** – *Rainer Muench, Partner, Oliver Wyman* Collaboration is easy to say but hard to do. The sceptic's guide to collaboration (see appendix) identifies some of the inhibitors however, real-world case studies shared by ECR members (Ahold, Tesco, Diageo, Danone, Wrigley's, etc) clearly demonstrate that when the conditions are right that the business case can be compelling. To help "shine a very bright light" on what is meant by great collaboration, academics, experts, retailers, wholesalers and manufacturers have set about the task of developing a maturity model on shrink / waste. This framework will articulate the differences between a level of collaboration that could be labelled as "under developed" to another that could be labelled "fully developed". This maturity models can serve two main purposes, first it can act as a practical tool that can help collaborative partners align on the current state of their collaborative relationship on shrink / food waste across several dimensions and how they could advance their collaboration to the next level and what that different stage looks like. Secondly, they can be a tool for individual organisation's to self- assess their current relationships with their partners on shrink / waste collaboration.
1.30pm	**Round Table 3 – Shrink / Waste Maturity Model – how relevant for you?** *Facilitated by Colin Peacock*
2:15pm	**Coffee**
2.30pm	**Research Round Up – Academics to provide updates on the current research projects** • Omni-channel – the true cost of a return • Inventory Accuracy – what is the impact on sales? • Self-Scan – how much extra shrink should be budgeted? • RFID – what is the ROI?
3.15pm	**Wrap Up, next steps and next meeting details (Milan, 26-27 September)**
3.30pm	**Close**

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Getting there [to the EECC]

The EECC is approximately 30-40 minutes by Taxi from Dusseldorf Airport. There is also a train connection to a station circa 10 minutes from the EECC.

https://www.google.com/maps/place/European+EPC+Competence+Center+GmbH/@51.1563233,6.1797263,9z/data=!4m5!3m4!1s0x47b8caab87d467e7:0x1a84c5366d428cc9!8m2!3d51.15632!4d6.740029?hl=en-GB
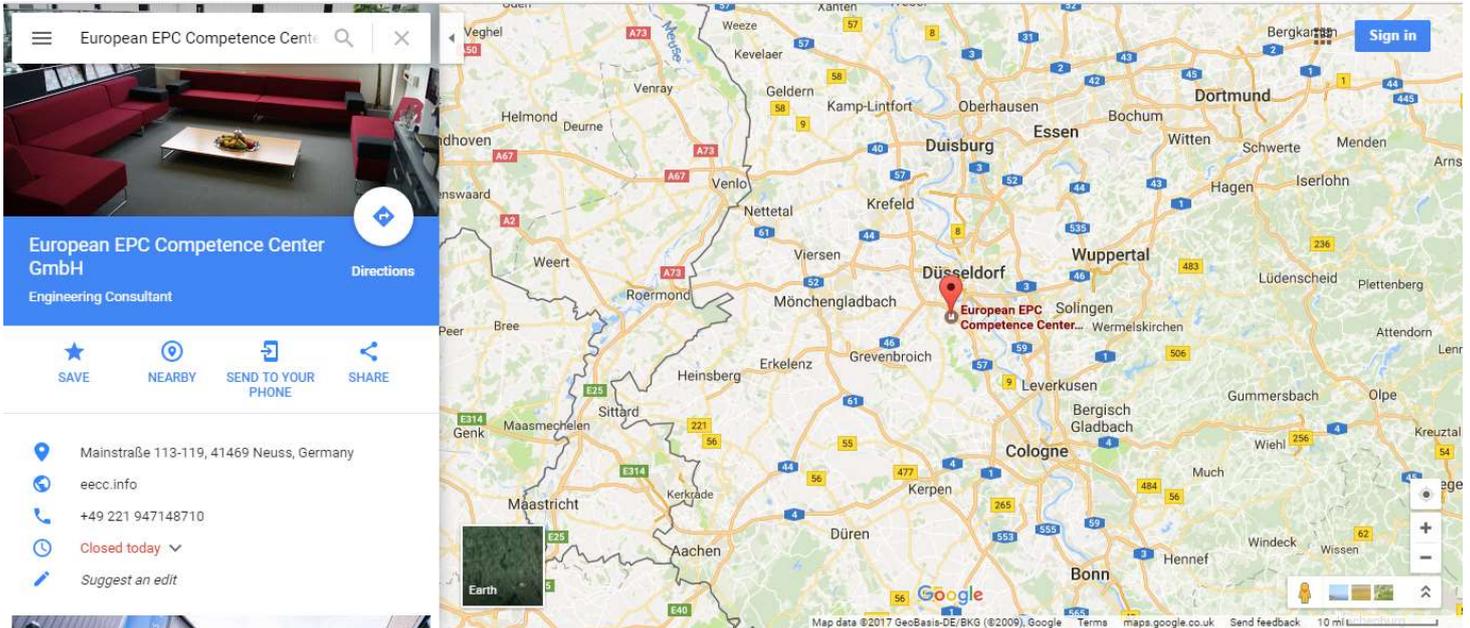
Hotel and Logistics

The group has reserved rooms at the Swissotel Dusseldorf, Rheinallee 1, Neuss, 41460, DE. This is 3km from the EECC. Separate instructions will be sent on how to book at the special ECR rate.

APPENDIX 1: Sceptics Guide to Collaboration

1. We need to stay focused on what is best for our business and avoid being diverted by others
2. Collaboration reduces the number of ways we can compete and win
3. Collaboration means losing control and compromising
4. Collaboration would slow us down. It takes long enough to get agreement within our business without having to agree with others
5. Collaboration is time consuming and we don't have people to spare for this
6. When companies offer to collaborate, they are really doing this as a way to push their own agenda
7. If I share information with our suppliers/customers it could get passed on to our competitors
8. However much we try to collaborate with our suppliers/customers we can't avoid haggling over price and that's what dominates the relationship
9. Collaboration with their suppliers is what big, established retailers do. If it works, why are they losing share to companies like the discounters and Amazon?
10. Collaboration runs the risk of infringing competition law
11. Collaboration means opening up our business to others who may use the information they receive against us
12. Collaboration with buyers to meet their needs, means that I cannot also collaborate with the supply chain who want to do something different
13. Collaborating with others other than the buyer means there are no rewards or recognition for collaboration if the buyer is not motivated or measured by that business improvement idea
14. Collaborating eventually leads to an argument about how to split any benefits, lets avoid that argument and not collaborate, it's easier that way.
15. Collaboration is about long term thinking but buyers are being asked to think only about the short term where disrupting, wrecking and holding collaboration as a hostage to better terms could be seen as a good negotiation strategy.
16. Collaboration needs consistency and trust, with buyers and sellers rotating roles every 18-24 months, collaboration is constantly disrupted
17. Collaboration cannot happen without data sharing, however retailers want to sell and generate revenue from their data and not give it away for free, so collaboration will cost manufacturers money to enter the game.
18. Collaboration may be alright for my top 1-2 vendors but not worth it for the retailers other [say] 35 smaller vendors

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