

Sustainable Business Models

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A NEW REALITY ??



FS Mapping Tech Urban Scape Data Framework

Launched September '16

12 cities across GB

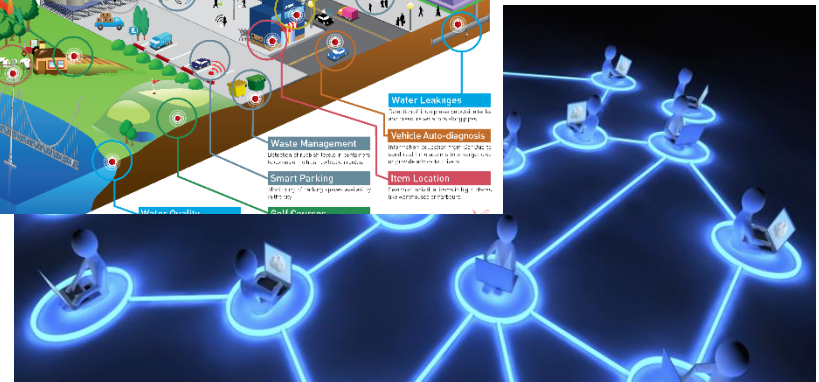
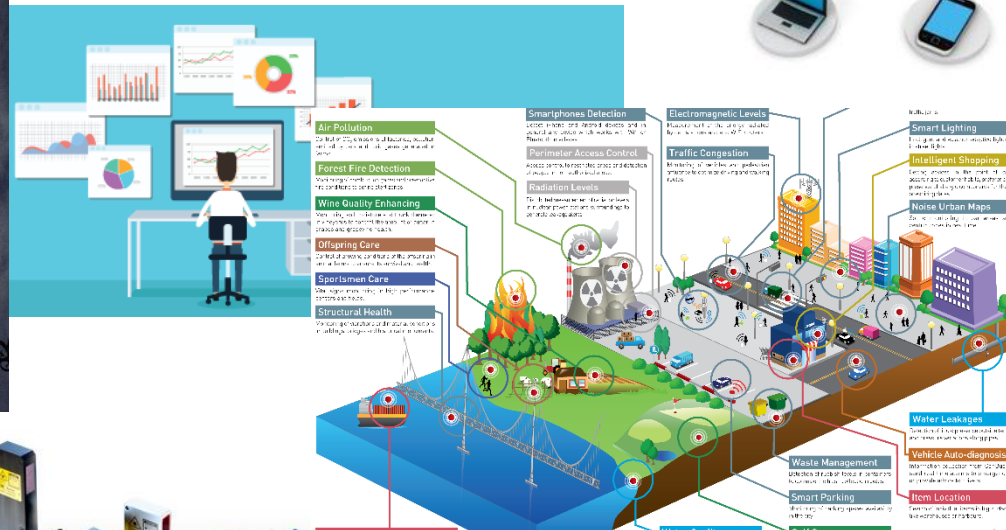
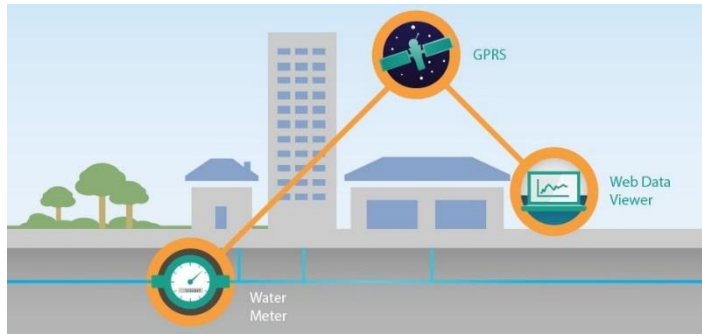
50 cities Europe wide by Jan '17

Comprehensive object model

Collaborative platform for data
sharing – target market of
national and local govts



HOW ??



OUR WORLD - WHAT'S HOT IN 2016



GLOBAL TRENDS

Success in the present will not guarantee success in future. To thrive in the future we need to be able to follow technology trends, learn new skills to leverage emerging technologies, quickly experiment with new ideas, fail and move on.

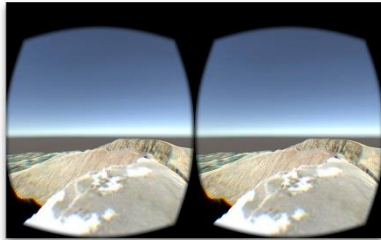
The world is facing massive global challenges from climate change to income inequality, failed states, geopolitical, social and religious tensions.

Nations need new forms of governance that go beyond political tenures to address global issues.

Increased power of access over ownership – emergence of the sharing economy.

Infrastructure is a key area of focus. Trillions of dollars' worth of infrastructure in the developed world needs replacing.

Some geospatial trends and predictions 2016



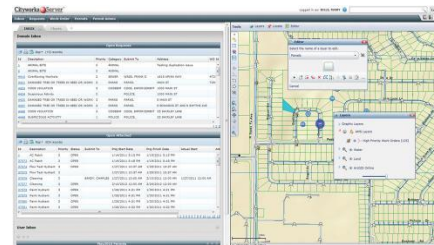
New market entrants will cause tangible disruption



More GIS integration with business intelligence and specialist platforms (CAD, BIM)



Demand will continue to increase for mobile



New solutions will include asset and work management software and will drop the GI tag



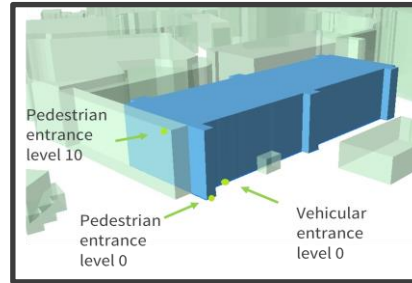
The mainstream corporate sector will drive market demand and talk in non-GI terms



Traditional geospatial landscape will be driven by world events, with data used to manage climate change, natural disasters, terrorism, and disease.

DEMAND FOR GEOSPATIAL CONTENT HAS CHANGED

- New opportunities and new use cases present a different demand:
 - Real time
 - Real world
 - Machine to machine
 - High volume
 - Predictive modelling
 - Cognitive thinking
 - Big data



Geospatial sector 2006

Threat of new entrants
Low

**Bargaining Power
of Suppliers**
Medium

Competitive Rivalry
Low

**Bargaining Power
of Customers**
Low

**Threat of substitute
Products**
Low

Geospatial sector 2016

**Threat of new entrants
High**

**Bargaining Power
of Suppliers
Low**

**Competitive Rivalry
High**

**Bargaining Power
of Customers
High**

**Threat of substitute
products
Medium**

WE LIVE IN A RAPIDLY CHANGING WORLD DRIVEN BY DIGITAL



Mobility



Social



Cloud



Big Data



Security

By **2016**,
smartphones and
tablets will put power in
the pockets of
one billion global
citizens

65%
of companies
are deploying
one or more
social
software
tool

70%
of organizations are
either using or
investigating **cloud**
computing
solutions

Digital content will
grow to **\$8B** by
2016,
up more than
300%
from 2011

In 2011 **Global Cyber**
Security market was
\$63.7B, expect to
increase **200%** to over
\$120B by 2017

DATA IS AT THE **HEART** OF 'SMART'

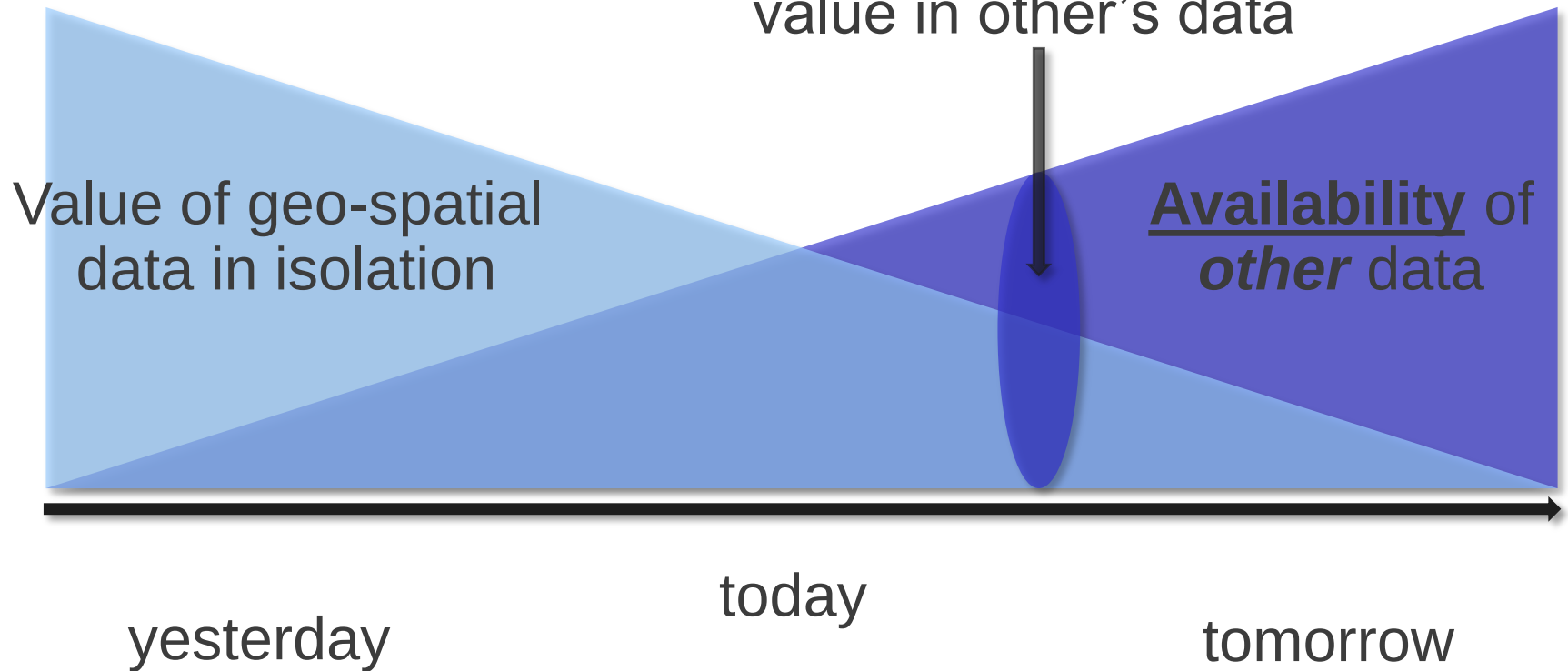


Smart meaning ... connected and integrated with confidence and precision.

It means that systems and infrastructure are efficient and effective at achieving higher quality outcomes – created in a way that can embrace those evolving environments, respond to them, and adapt to context or need.

VALUE FROM GEOSPATIAL DATA IS CHANGING

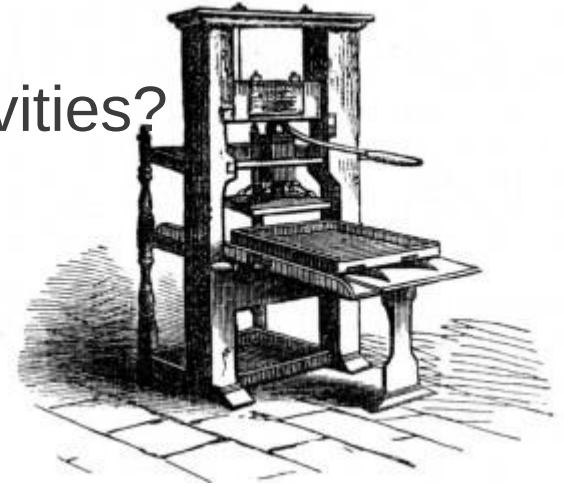
Location uniquely unlocks
value in other's data



IMPACTS

How is this impacting NMCAs and our activities?

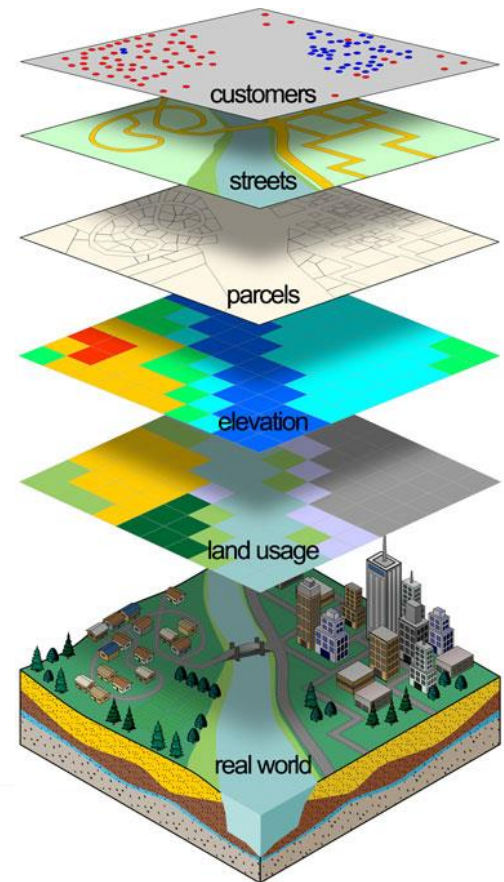
- Increased globalisation
- Reduced barriers to entry
- Data capture and publication
- User demands – *pull not push*



CHALLENGES

Are we responding to the challenges these now bring?

- Changing role and perception
- Consistency
- Existing product development
- Licensing models



WHERE WE STAND TODAY

So what does this mean for us right now?

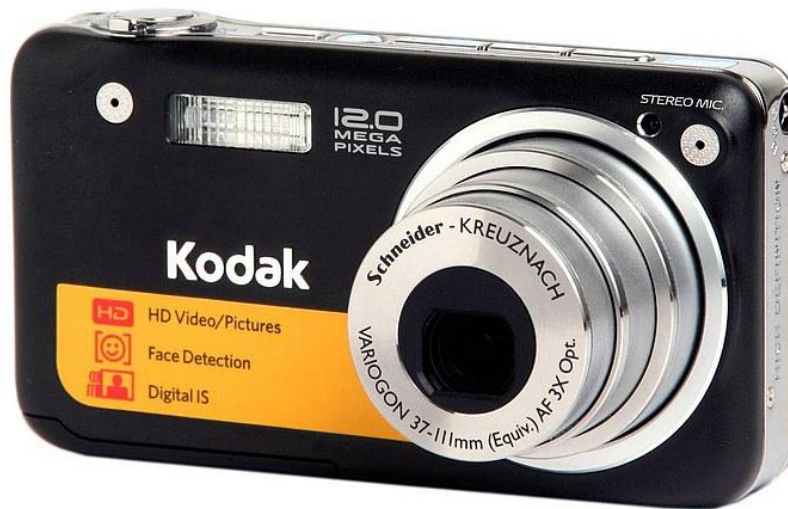
- A connected GI world
- A requirement to collaborate
- Frameworks and standards – not just data
- Access demands



CALL TO ACTION

- Kodak knew its market was changing
- The digital camera was invented by a Kodak engineer
- Kodak invested heavily in innovation
- But couldn't abandon its basic business model

Too little,
too late



'The [filmless] camera described in this report represents a first attempt demonstrating a photographic system which may, with improvements in technology, substantially impact the way pictures will be taken in the future.'

Kodak internal report, 1975

ORDNANCE SURVEY GREAT BRITAIN



Changing through technology and collaboration

- New ways of data capture
- New and evolving Data models/structures
- Collaborations with co-describers
- Service & API strategy
- Evolution of our licensing perspective



“ Ordnance Survey has a well-defined strategy in providing their customers with accurate and efficient services, and a strong track record of working collaboratively with partners.

— VINCE CABLE, FORMER BRITISH
SECRETARY OF STATE FOR
BUSINESS

SUSTAINABILITY ITSELF

How do these things impact our future sustainability?

- Technology just one factor

What makes us sustainable..?

- Knowing our users/market conditions
 - Service based
 - Collaborative platforms
 - Ecosystem position
 - Availability of metrics to inform business model
- 
- A decorative graphic in the bottom right corner consisting of various colorful geometric shapes and icons, including a blue cloud, a green tree, a yellow car, a red building, and several orange and yellow squares and circles.



OPPORTUNITIES - DISCUSS

- There are opportunities that we must seize. There is a race for relevance. Action is required and Eurogeographics is a place where we can do this together.
 - Technical innovation
 - Collaborations with one another
 - New Users
 - New business models



... THANK YOU ...

SUSTAINABLE BUSINESS MODELS

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