



SIBA New Zealand’s Future Direction - Information Paper for the Annual General Meeting 26 September 2019

Purpose and Introduction

This document captures the context, rationale and analysis in the executive Committee workshop on 27 June 2019 in regard to the future direction of the Spatial Industries Business Association (SIBA).

The intention is to disseminate this document as part of an Information Paper to the wider SIBA member community at the Annual General Meeting (AGM) in September 2019 for discussion and further inputs.

The other two papers of the information pack contain membership analysis spreadsheet and the refocussed SIBA Strategy.

The workshop began with a stocktake of the changing landscape of the spatial industry within the wider ICT industries, recapped SIBA’s journey so far and analysed its strengths, challenges, opportunities and threats. With that understanding the group proceeded to validate SIBA’s current Mission and Focus Areas and explore feasible options for the future that best realise SIBA’s and its members’ vision.



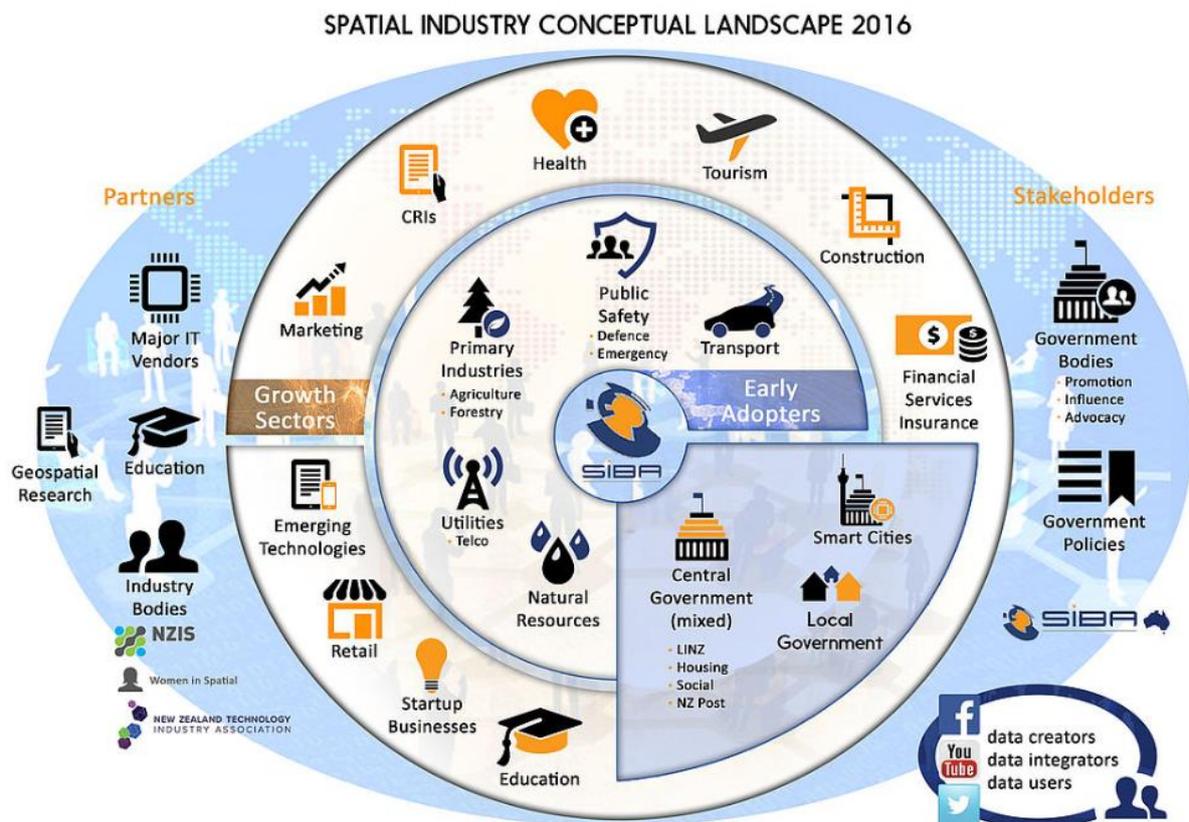
Spatial Industry Landscape

In the earlier years spatial technology was seen as a specialist area within the wider ICT industry. It was differentiated from the “mainstream”. Spatial vendors have specialist expertise that is not generally found in the key ICT players.

For years the industry’s focus has been on technology, it has then shifted to providing integrated solutions, to data intelligence, to adding value, and now the focus is on user experience.

“Mainstream” ICT providers are increasing partnering with spatial experts (and vice versa) as spatial is invariably a part of the overall solution or can enhance user experience (this is a strength). Spatial professionals and companies are also developing wider ICT skillset themselves, e.g. data scientists.

The differentiation is disappearing and the industries, including Spatial, are converging towards integrated solutions that give the consumers a positive and productive experience.



This infographic depicted a conceptual landscape of the spatial industry as at 2016. Whilst the established adopters of utilities, primary industries, local government and public safety agencies etc have remained constant; the growth sectors are now different. The relationships with the government stakeholders and SIBA Australia have evolved. SIBA NZ has grown independently of SIBA GITA into its own strong NZ identity. The partnerships with the wider

SIBA New Zealand was established in 2009. SIBA NZ has membership with SIBA GITA and licensed our branding from them when established.

In the first years SIBA has focussed on the relationship with LINZ, has worked collaboratively with them through industry feedback, sharing of work programmes and developed some influences on policies. LINZ became a foundation partner of the NZ Spatial Excellence Awards (NZSEA) in 2013, alongside SIBA and NZIS at the time. NZSEA celebrates the success of the spatial industry and the contribution it makes to NZ. At the same time, it also highlighted and promoted SIBA. It continues to be the flagship event of SIBA as well as the spatial industry.

Under the leadership of a new Chair the focus of SIBA started to widen from 2014 onwards. An experienced CIO was also co-opted at the time. The mission statement was updated, 6 focus areas¹ were developed and supported by a new programme of work.

The focus was further widened under the current Chair and there have been increased industry events that not only focussed on Spatial but highlighting Spatial as part of the wider ICT industry, e.g. the Tech Week events. While LINZ evolved its strategies and leadership SIBA's relationship with them has also shifted from previously taking directions to charting its own direction more confidently.

There has not been tangible leadership or support from SIBA Australia throughout the years. SIBA NZ did not seem to be their priority or focus. They are on a different journey.

In 2016/2017 SIBA has started discussion with both the then NZIS and NZTech to explore opportunities of alliances or partnerships for mutual benefits.

NZIS has since evolved into S + S NZ in 2017. It is an organisation for individuals whereas SIBA is a business association. This key differentiation means that there were different focus and directions. NZIS's key groups of surveyors and spatial professions have undergone disruptions and has since evolved into S+S.

NZTech joined SIBA as a corporate affiliate and SIBA became a community member of NZTech in 2017. This recognises and consolidates the integrated directions of the wider industries.

There has been a number of core and long standing SIBA members. A few company members have left in the recent years and smaller spatial companies and startups have joined, plus NZTech. Currently there are 23 members – full, affiliates and startups. It is fair to say that the membership has been steady and strong, while having the challenge to grow further.

Membership growth remains a challenge. SIBA finds it hard to increase its value proposition to its members. Currently it is resourced to offer a community, a collective voice, NZSEA and a few tech events.

¹ Advice, Sustain, Advance, Support and Inform

Its current business model centred on an executive committee of about 9 people from member organisations. While there is commitment and willingness to make time for SIBA work the reality of a demanding full-time job often takes priority. Marketing, membership recruitment, additional network events etc all require resources. Consequently, it is a constant challenge for SIBA to make the significant advancement that it is capable of.

SCOT Analysis

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|--|---|
| <p>Strengths</p> <p>Strong identity and clear vision. Collective wisdom and network. A collective voice for the Spatial industry. Power to influence as a group. A steady membership base. Committed Chair and Executive Committee.</p> <p>Converging ICT industries; Spatial is a core enabler.</p> <p>NZSEA is a respected and prestigious event, it has the business owner level of attendees rather than a user conference so there is opportunity there for NZ business to grow.</p> <p>A solid reserve fund.</p> <p>SIBA GITA support the APSEA awards and Locate conference, these two events have benefit for NZ. The NZSEA winners go on to the APSEA awards and Locate is held in a different city every year.</p> | <p>Challenges</p> <p>Broader awareness of SIBA.</p> <p>SIBA executives are elected and meeting time is supported by the member companies. Commitment and time to work on SIBA activities is dependent on the committee members' availability ad priorities. The turnover and commitment of exec members determines how much can be done.</p> <p>A lot of time and effort is required to just run the organisation let alone work to deliver or achieve outcomes sought.</p> <p>We need channels to a wide audience to grow spatial and meet our objectives.</p> <p>We need further established channels to decision makers and central government to influence and feedback on policy and RFP's.</p> <p>Lack of resources, including for the following, weakens value proposition to members:</p> <ul style="list-style-type: none"> • Marketing & Promotion is needed. • Recruit new members. • Hold more events, more than just NZSEA. <p>SIBA GITA - haven't had much out of this relationship, high turnover from CEO's and Deanna Hutchenson has just left.</p> |
| <p>Opportunities</p> <p>Potential to gain more members in spatial as well as the wider ICT sectors.</p> <p>Opportunity to expand business through partnering and part of "disruptive" solutions.</p> <p>Wider technology landscape "rocketing", spatial will stay relevant and take a leadership role.</p> <p>Work closer with the tertiary education sector to develop skills and gain exposure.</p> <p>Exploit partnership with other established technology bodies such as NZTech, to leverage</p> | <p>Threats</p> <p>Relying on individual persons to maintain membership.</p> <p>LINZ have said they will no longer be NZSEA foundation partners in 2020.</p> <p>Skill shortage.</p> <p>It was apparent that most issues were either Challenges or Opportunities. They will only be Threats if SIBA lets them or not do anything about them.</p> |

| Opportunities cont. | Threats cont. |
|--|---------------|
| <p>their established model and resources, and to further promote Spatial.</p> <p>Leverage the resources and knowhow of NZTech to recruit members and share costs of events.</p> <p>LINZ have a new CEO as of 14/05/2019 after acting CEO for about 1 year.</p> | |

Validate SIBA Vision and Focus Areas

Mission

Growing a successful spatial industry for the benefits of members and NZ.

Through the Focus Areas of:

Advise, Sustain and Advance SIBA, and Inform and Support the members.

The next five year vision is:

- For our organisation to be well recognised as an authority of spatial information and location intelligence and technology. For our industry to be well recognised, understood and celebrated.
- For our membership to be a diverse mix of Startups, SME's, Large Corporations, Government departments, academia, social enterprise and charities.
- To have established channels of communications to a wide and targeted audience with information that is useful for them.
- To have a well recognised and engaged community
- For maximum efficiency and return on investment to the membership.

Future Directions

With the convergence of the wider ICT industries and the expanded potential areas for spatial technology to tap into, SIBA is in a strong position to capitalise on the evolving industry landscape.

SIBA is in its tenth year with a steady membership base. It is obvious that the industry sees the needs of a business association to strengthen and promote the benefits and wants to keep a distinctive identity. This identity must be retained whatever the new future direction is.

The membership challenge has to be tackled head on for SIBA to grow and consequently the members and the spatial industry. SIBA needs efficient and effective resources and the current operating model has to change.

This is the time to review SIBA's future direction, operating model and examines the feasible options to realise the above mission and vision. The following options have been explored:

| Option | Pros | Cons |
|--|--|---|
| Status Quo Not Recommended | Easy to implement. | See the Challenges listed above |
| S + S NZ Not Recommended | Spatial technology is a common enabler for both organisations. | <p>An individual based organisation. It is moving toward a spatial as the number of surveyors has halved in recent years. Their industry is being disrupted by technology. It is also desirable to have more diversity in their members.</p> <p>It is an organisation with a different focus and direction and there will be limited benefits for SIBA.</p> |
| SSSI Not Recommended | Australia based, foundation partner with SIBA GITA for Locate and APSEA. CEO Peter Olah was collaborative but has recently resigned. | <p>Not NZ based and focussed; issues and challenges will be different. There will be limited gain in collective influencing power.</p> <p>There will be no easy mechanism to leverage their administration resource pool for memberships growth and events.</p> <p>The relationship is valuable, but it should be maintained as collaborators rather than a merger.</p> |
| Dissolve SIBA Not Recommended | Distribute the remaining funds to the members and have a big party. | The spatial industry needs a collective voice and strong identity. SIBA is ten years old and going strong. See all the points mentioned in Strengths above. |

| Option | Pros | Cons |
|---|--|---|
| <p>NZTech Recommended</p> <p>This option has been explored with NZTech and the associated cost and benefits identified.</p> <p>The benefits will include both meeting the current challenges mentioned above as well as the immediate and future opportunities for new members for both SIBA and NZTech.</p> | <p>In 2017 NZTech adjusted its constitution to allow “Communities” to be formed within the NZTech association which effectively operate as independent associations. Each Community has its own Board or Executive Council, membership, budget, purpose, brand, website, projects, etc. SIBA’s identity can be retained.</p> <p>Organisations such SIBA that are incorporated societies in their own right could join the Tech Alliance to increase the exposure of their group.</p> <p>SIBA also has the option to leverage NZTech’s infrastructure, resources, member recruitment, events and other established processes.</p> <p>The wider benefits lie in the immediate potential of new members for SIBA and term mutual benefits of potential new members for both organisations in the longer term. It also facilitates the convergence of the industries and create a bigger market for both.</p> <p>There are two viable options: Affiliate or Group. The factual costs and benefits for each of the options will be clearly worked out.</p> <p>Overall this option aligns with SIBA strategic directions to grow SIBA, its members and the industry.</p> | <p>The perceived risk of losing the SIBA identity.</p> <p>That spatial technologies might lose its edge amid the big corporate players.</p> |
| Any other options? | | |