Communities and Local Government

Policy options for geographic information from Ordnance Survey – *Consultation*

Government Response

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Government Response

March 2010
Department for Communities and Local Government

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Foreword

In the media age in which we now live, information drives innovation. Releasing data means individuals, communities and entrepreneurs can "mash-up" this information with other data to form brand new products and services, creating economic and social value.

Information and data are the keys to opening up Government. Allowing citizens to see and understand the basis on which services are provided increases scrutiny and public trust. I believe that providing communities with more information can truly be the foundation of democratic renewal, breaking down the walled garden of government and allowing everyone to see how decisions are made.

Thanks to the web, citizens are better informed, with higher aspirations and higher expectations of public services. They expect to be able to access the same quality of information at the touch of a button for public services as they can from the private sector. And making more data about public services available opens up new ways of driving reform and improvement, with greater openness and transparency. Greater transparency makes it much easier to look across all the services in an area and spot evidence of duplication or waste.

Everything must happen somewhere. Comprehensive, accurate and up-to-date information about location is a vital component of a modern economy. Digital and hard copy maps have become an underlying reference system for many types of business. Increasing access and usage will stimulate innovation within the UK's information economy – through generating new ideas, new uses and new businesses for the 21st century.

That's why the Government is committed to making public the non-personal data which is collected as part of public service delivery. Access to this data will empower citizens to help drive public service improvement.

On 21 January the Government launched www.data.gov.uk , its single, easy to use access point for government data. Over 3000 datasets are now available through this service and over 2700 people have joined the developer group to help us continue to improve the service. And I have encouraged local government to release its data too, and have appointed a Local Public Data Panel chaired by Professor Nigel Shadbolt to help them do that.

Ordnance Survey has a long and proud history. As Great Britain's national mapping agency, is recognised as a world leader in the collection, maintenance and distribution of geographic information and mapping.

The Government's consultation on policy options for geographic information from Ordnance Survey was published in December 2009, and I was pleased to learn that there were a large number of responses, highlighting the importance of the role Ordnance Survey plays. I am grateful for all the time and thought put into these.

Following this consultation, I am very pleased to confirm that we will be releasing a suite of Ordnance Survey products that, from 1 April this year, will be available to everyone free for use and re-use, including commercial re-use. And Government also wants to improve the way that the whole public sector uses Ordnance Survey data, moving towards just one agreement which simplifies and streamlines the way that all our public organisations can work together to deliver the best services for our citizens.

The release of Ordnance Survey data will give citizens and companies free access to some of Ordnance Survey's world renowned datasets, creating infinite opportunities for businesses and communities to innovate and succeed. Our vision is that this will provide the inspiration for more innovative public services, and for the information-based businesses of the future.

I firmly believe that the release of this Ordnance Survey data marks a new era in how we will all be able to understand and communicate location and place.

John Denham
Secretary of State for Communities and Local Government

Executive Summary

On 17 November 2009 the Prime Minister set out proposals to make certain Ordnance Survey datasets available for free and without restriction on re-use, and government issued a consultation on policy options for geographic information from Ordnance Survey on 23 December 2009. The purpose of the consultation was to seek views and comments on how government could best implement such a proposal, in the context of other strategic options for Ordnance Survey and the wider geographic information market.

Government has considered the many responses to its consultation. Responses were received from a varied range of stakeholders including businesses, trade bodies, industry experts, public sector bodies and individuals involved with, or with an interest in, the UK geographic information market.

A wide range of views were expressed in response to the consultation, although a clear majority (68%) of respondents agreed that at least some Ordnance Survey data should be made available for free.

The consultation set out three possible options for the future of Ordnance Survey. There was no clear consensus on which policy option of those set out is the favoured one. In light of consultation responses government has decided to pursue a modified approach. This is outlined below.

Release of data for free

In response to this support, government will release a range of Ordnance Survey data and products for free on 1 April 2010, known as OS OpenData™. The datasets to be released are those set out in the original consultation document as the Free package, with the following changes:

- replacement of 1:25 000 and 1:50 000 Scale Colour Raster products with OS VectorMap District
- addition of OS Locator™ and Land-Form PANORAMA to the product list
- replacement of Code-Point by Code-Point Open, which provides accurate locations for 1.7 million postcodes in England, Scotland and Wales.

Full details of the products to be released are set out in the main body of this consultation response.

The modifications to the data to be released have been made in order to:

- meet the most important needs identified by consultation respondents
- maximise the ability to make best use of other public data released under the Making Public Data Public initiative
- reduce the impact on existing market participants, in light of consultation feedback
- ensure that core reference information is freely available while protecting the ability of all market participants, including the Ordnance Survey, to add value
- ensure that Ordnance Survey continues to provide high-quality products and services to those customers, including government, who need them
- ensure the sustainability of Ordnance Survey paper maps
- meet affordability criteria; and
- ensure a sustainable business model for Ordnance Survey.

Public Sector Mapping Agreement

A significant number of consultation responses reinforced Ordnance Survey's role as the national mapping agency and provider of the definitive 'MasterMap' of Great Britain, referencing the organisation's unique history and high-quality data. Respondents also commented on the restrictions or complications involved in sharing data between different parts of the public sector, including between organisations involved in the different types of collective procurements.

Government's intention is therefore to move to a commercial relationship with Ordnance Survey to provide products and services to government, and, subject to discussions, the entire public sector, under a centrally funded Public Sector Mapping Agreement. Provision of a Public Sector Mapping Agreement would allow government to make geographic information provided by Ordnance Survey, including high specification OS MasterMap products, free at the point of use for public sector bodies, and subject to no limits on re-use when used internally within the public sector for public sector activities. This would cover all the definitive national datasets that the public sector needs in order to provide vital and valuable services to the public. Subject to discussions, this change will come into effect on 1 April 2011.

Ordnance Survey Licensing

Ordnance Survey will also be proposing changes to the derived data policy for the commercial sector, including 'Free To Use' data, as part of its work on revised pricing and licensing. Ordnance Survey, The National Archives and the Cabinet Office will also work together to ensure that derived data issues do not unnecessarily impede the release of public datasets by other public bodies, balancing the significance of the data taken, the impact of release of any dataset on Ordnance Survey's commercial business and that of its partners, and any legal or regulatory consequences for Ordnance Survey. This reflects concerns expressed in the consultation responses about licensing of Ordnance Survey products, and in particular derived data.

INSPIRE

Government has also asked Ordnance Survey to take on the technical delivery role of the services that are required to meet Britain's obligations under INSPIRE, which is an EU Framework Directive seeking to introduce greater harmonisation, interoperability and wider access to public sector electronic spatial information across Europe.

Section 1

Introduction

1.1 On 23 December 2009, the Government published a consultation paper on policy options for geographic information from Ordnance Survey. The purpose of this consultation was to seek views about how to best implement proposals made by the Prime Minister on 17 November 2009, to make certain Ordnance Survey datasets available for free with no restrictions on re-use. The consultation document, this government response and the final economic impact assessment are available at: www.communities.gov.uk/publications/corporate/ordnancesurveyconresponse

1.2 On 17 November 2009, the Prime Minister set out his vision for the role of public data and information in the delivery of Smarter Government. This was one of an accountable and transparent government, empowered citizens with better public services and a thriving private sector market based on the data that government produces.

1.3 Location information is a vital part of that vision, and is a key reference tool by which other data is understood. *Place Matters: the Location Strategy for the United Kingdom* set out the importance of location information to government and the wider economy on the principle of 'collect once, use many times'. It focuses on joining up, and integrating, information from many public sector sources within a consistent reference framework. The strategy also underpins the delivery of the UK's obligations under the European INSPIRE Directive, which sets out a general framework for a geographic information infrastructure, within the EU, for the purposes of environmental policies.

1.4 In light of this, government developed a number of strategic options for Ordnance Survey, as set out in the consultation document. These were based on government's aspiration to release certain datasets for free re-use while recognising that a solution needed to be identified which provided a sustainable operating model for Ordnance Survey and the broader UK geographic information (GI) market, in the context of rapid advances in technology.

1.5 This document is the Government's response to the consultation.

Section 2

The Consultation Process

2.1 The consultation was conducted between 23 December 2009 and 17 March 2010. The consultation asked 12 specific questions covering a range of issues. The consultation questions are attached at Annex A.

2.2 The consultation launch was supported by a press notice, and was reported in a number of online newspapers and other websites. Copies of the consultation document were sent to key stakeholders and placed onto the Department for Communities and Local Government (CLG) website at: www.communities.gov.uk/publications/corporate/ordnancesurveyconsultation

2.3 The consultation covers matters reserved to the United Kingdom Government concerning Ordnance Survey Great Britain. Scotland has separate arrangements with Ordnance Survey for provision of mapping data and GI information; however England, Scotland and Wales are covered by the remit of this consultation.

2.4 Over the period of the consultation a total of 441 formal responses to the consultation were received. Figure 1 shows a breakdown of responses by type of respondent (based on information provided in consultation response). These varied from a large number of interested individuals, to industry partners and competitors, to local authorities and other local user groups. A list of those respondents can be found at Annex B.

Figure 1 – Responses by sector

Type of Respondent	No. Respondents	%
Business Customer	30	7
Government Customer	27	6
Local Authority	46 + 1 (LGA)	11
Local and Interest Groups	53	12
Developer	8	2
Personal	218	49
Industry Partner	26	6
Industry Competitor	11	2
Industry Other	21	5

2.5 Consultation responses have been reviewed and analysed by government officials. Responses were analysed as they were received during the consultation process, and all those which were received by the consultation deadline have been taken into account in government's response. Some of the comments and observations made have also been quoted in this document as representative of the thoughts and views coming from respondents.

2.6 To supplement the consultation process, government officials held a series of meetings with a small number of interested organisations, detailed in Annex B. The points raised in these meetings have also been taken into account in this consultation response.

2.7 This consultation response seeks to reflect the views offered, although it is not possible to describe all the responses in detail in this paper. The Government is grateful for all the consultation responses received, and will continue to draw on them in formulating future strategy and policy for Ordnance Survey.

Section 3

Government Response

Introduction

3.1 In our consultation document we set out three possible options for the future operating model of Ordnance Survey. These are outlined below.

Option 1: Current business strategy

- Ordnance Survey continues to deliver its current business strategy as announced in April 2009.
- Ordnance Survey would continue to simplify its licensing framework, maintain and expand the OS OpenSpace service; deliver cost reductions; and would unwind in the medium-term some of the tariff imbalances between the public and private sectors.
- This model does not propose a dataset funded by government to be free at the point of use.

Option 2: Release of licensing constraints on large-scale data

- Customers would be able to use and re-use large and smaller scale data for free and without restriction.
- A substantially different model would be needed – a fully subsidised data collection and maintenance business is likely to result, requiring significant government funding; product development and distribution activities would be split out and operate in a fully competitive environment.

Option 3: Staged transition from current business strategy

- The current integrated structure would be maintained, with five additional changes: a set of products would be released for free and with no restrictions on re-use; tariffs for high specification data between the public and private sector would be rebalanced; organisational change would be accelerated; customer relationships and the ownership function would be strengthened.
- Long-term government funding would be put in place to enable these changes to occur.

3.2 The consultation document proposed the following datasets be included in 'Ordnance Survey Free', a package of products to be made available free at the point of use, without restrictions on re-use:

- OS Street View® (a 1:10 000 scale raster product)
- 1:25 000 Scale Colour Raster
- 1:50 000 Scale Colour Raster
- 1:50 000 Scale Gazetteer
- 1:250 000 Scale Colour Raster
- Miniscale® (a 1:1 000 000 scale raster product)
- Code-Point®
- Boundary-Line™
- Meridian™ 2
- Strategi®

3.3 The consultation set out the benefits, issues and implications for partners, distributors and competitors associated with each of the options.

Our response

3.4 In line with the Prime Minister's announcements on 17 November 2009, and the Making Public Data Public agenda, the Government's objectives with respect to proposals for changes in the way geographic information from Ordnance Survey will be provided and funded are to:

- increase the transparency of government
- empower citizens by giving them the accurate information they need to choose and personalise their public services; and
- create new social and economic value within the framework of Digital Britain.

3.5 Government has considered the wide range of views expressed in response to the consultation document. It is clear that different stakeholders have different, and sometimes conflicting, objectives. Moreover the views expressed cover a variety of wider issues about geospatial information in the UK, and these are sometimes themselves conflicting. The Government is grateful for all the consultation responses received, and will continue to draw on them in formulating future strategy and policy for Ordnance Survey.

3.6 The consultation set out three possible options for the future of Ordnance Survey. There was no clear consensus among respondents on which policy option of those set out is the favoured one. In light of consultation responses government has decided to pursue a modified approach. This is outlined below.

Release of data for free

3.7 There was strong support in the consultation responses for the opening up of at least some data, with 300 (68%) respondents indicating that they support the release of some or all Ordnance Survey data for free use and re-use by all. Taking account of the views expressed, government has decided that a modified package of the products set out in Section 7 of the consultation document will be made available for free. This modified set will:

- meet the most important needs identified by the respondents
- maximise the ability to make best use of other public data released under the Making Public Data Public initiative
- reduce the impact on existing market participants, in light of consultation feedback
- ensure that core reference information is freely available while protecting the ability of all market participants, including the Ordnance Survey, to add value
- ensure that Ordnance Survey continues to provide high-quality products and services to those customers, including government, who need them
- ensure the sustainability of Ordnance Survey paper maps
- meet affordability criteria; and
- ensure a sustainable business model for Ordnance Survey.

3.8 The modified package of datasets to be released has been named OS OpenData™. This will provide access to a set of Ordnance Survey products free of charge and without restrictions on use and re-use. We believe that OS OpenData will:

- make available a number of datasets including topographic mapping (at different scales including ground height information), geographic names, postcodes, streets, and administrative boundaries
- improve transparency, accountability and efficiency within government
- improve citizen empowerment by providing information which individuals and local communities can combine (or 'mash-up') with various other government data to produce results in a map form about their community and public services; and
- enable innovation in the private sector providing the potential for new products and services to be developed, and new firms to enter the value-added GI market.

3.9 The products that are released as part of OS OpenData will continue to be maintained by Ordnance Survey to a high and consistent standard. To ensure the product set remains relevant and continues to fulfil its objectives, it is envisaged that this product set will be reviewed periodically by an expert panel appointed by government and reporting to CLG Ministers.

3.10 Ordnance Survey will continue to commercially licence its products outside of the OS OpenData dataset, and will also have the right to supply the data underlying OS OpenData products under alternative licences.

3.11 The specification of OS OpenData is set out below:

- OS Street View®
- 1:50 000 Gazetteer
- 1:250 000 Scale Colour Raster
- OS Locator™
- Boundary-Line™
- Code-Point® Open
- Meridian™ 2
- Strategi®
- MiniScale®
- OS VectorMap™ District (available 1 May 2010)
- Land-Form PANORAMA®

3.12 This package has some differences to the 'Ordnance Survey Free' package outlined in Section 7 of the consultation document. The specific changes compared to the Ordnance Survey Free package set out in the consultation are:

- The replacement of 1:25 000 and 1:50 000 Scale Colour Raster products with OS VectorMap District. This dataset is a new product within the OS VectorMap family and is available in both raster and vector formats. It is designed to be a flexible and customisable product specifically designed for use on the web. It will enable developers to select, customise and modify maps to their specific requirements. This change addresses two concerns expressed by respondents about both the inclusion of 1:25 000 and 1:50 000 raster products. These were the potential damage to the national coverage of Ordnance Survey Landranger and Explorer paper maps and the absence of a mid-scale vector product to enable further innovation by developers. The changes will therefore increase the economic benefit of OS OpenData.

- OS Locator™ is an additional product which will be released. Used in conjunction with 1:50 000 Gazetteer it provides the complete range of named places, and when overlaid on OS StreetView enables simple search and display of all streets in Great Britain. The additional benefit of including this dataset is that it has been designed to allow users to refine searches of road names or numbers by providing additional reference to local, recognised geographies. OS Locator adds local information to discrete sections of road, allowing users to search by units such as localities, settlements, local authorities and both the 5km by 5km and 10km by 10km British National Grid tile references. As a reference dataset it enables developers to link across to other datasets and re-use it in conjunction with other mapping and government data.
- The inclusion of Code-Point Open in place of Code-Point. The Code-Point Open product provides accurate locations for 1.7 million postcodes with additional information including two health regions and four administrative division codes. It has been developed and included in OS OpenData in order to provide the data that developers need to be able to accurately locate postcode unit centres enabling applications where a location is required such as demographic analysis, crime statistics, end to end journey planning, 'find your nearest' and epidemiology. Codepoint Open will only cover England, Wales and Scotland, in line with the responsibilities of the Ordnance Survey and the other datasets in OS OpenData.
- Land-Form PANORAMA has also been added to the product list. A number of respondents thought this product would be a valuable addition to the free product set. Land-Form PANORAMA is a 1:50 000-derived digital height product. It can be used to produce 3-D visualisation and images and is used for some urban and rural planning and environmental impact assessments. It provides as data the relief information represented in the landscape at 1:50 000 scale.

3.13 Except where otherwise specified OS OpenData products will be available from 1 April 2010 in hard media and as an on-line service at www.ordnancesurvey.co.uk/opendata In addition OS OpenData will include an on-line viewing service of a selection of the OS OpenData topographic products.

3.14 A long-term funding arrangement is a pre-requisite for any changes to be viable. Central government has negotiated a commercial agreement with Ordnance Survey for the licence for OS OpenData and for its ongoing maintenance. As set out above, this licence will allow the data to be used and re-used for free by the public, including for commercial use.

3.15 In support of both the Making Public Data Public initiative and the growth of semantic web technologies, Ordnance Survey will develop a service to enable Ordnance Survey TOIDs (unique identifiers for geographical objects) to be

referenced and located. This service will be free, subject to limits on excessive use, and the TOIDs from it will be free to re-use. The details and timing of this service are being developed.

Public Sector Mapping Agreement

3.16 A significant number of consultation responses reinforced Ordnance Survey's role as the national mapping agency and provider of the 'MasterMap' of Great Britain, referencing the organisation's unique history and high-quality data and the resultant benefits for government and the economy from Ordnance Survey maintaining the definitive mapping services for the country. Some compared the position of Great Britain very favourably with the US, which does not have such a body. Government is keen to capture for all the benefits of this national infrastructure asset by changing the way it purchases and uses Ordnance Survey data.

3.17 From 1 April 2011, the Government's intention is to enter into a commercial relationship with Ordnance Survey to provide products and services to government, and potentially the whole public sector, under a centrally-funded Public Sector Mapping Agreement, subject to discussions with relevant stakeholders. Government's preference is to obtain all its underlying core, national geography data and mapping services in this arrangement, whilst leaving open the ability for organisations in the private sector to separately add further value to Ordnance Survey's core product sets. A more detailed transition plan will be published by government in June, and stakeholders will have the opportunity to provide feedback on those more detailed plans at that time.

3.18 This change reflects comments from a number of consultation responses, which set out the following related points around use of Ordnance Survey products by public sector bodies:

- There is concern about the restrictions or complications involved in sharing data between different parts of the public sector, including between organisations involved in the different types of collective procurements. For example full data sharing is only allowed between signatories of the Pan-Government Agreement (PGA), the Local Government's Mapping Services Agreement (MSA) and the Ambulance Trust's NHS collective agreement when the data is derived from a product that occurs in all three agreements. If central government, for example, wished to share 1:25 000 Scale Colour Raster with a local authority it would need to establish whether the local authority was bi-laterally licensed for that product, which does not form part of the MSA.
- Some respondents questioned the current process by which the whole public sector obtains data and mapping services from Ordnance Survey. A number of local authorities observed that the current situation was costly due to the

commercial and legal negotiations involved, largely as a result of procurement processes and licensing issues. They saw this increasing over time if no changes were made.

- Local authorities identified some benefit in terms of cost savings as a result of the removal of licensing fees from the free set of products. However, they also noted that by far the greatest cost was associated with the provision of high specification data.

3.19 Moving towards a Public Sector Mapping Agreement would bring significant operational and value for money benefits. It would:

- avoid the inefficient costs of running complex procurement processes for services provided by a Crown agency to other bodies within the public sector;
- facilitate the removal of existing restrictions on the use and re-use of government data between public sector bodies;
- align England and Wales with the approach in Scotland;
- align Ordnance Survey's business model with other data-rich Trading Fund models such as the Met Office; and
- continue to provide the necessary funding required to maintain the high quality, currency and accuracy of Ordnance Survey data.

3.20 Subject to discussions, these new arrangements will provide a basis for use of Ordnance Survey data and mapping services by all government services in England and Wales under a 'One England & Wales' agreement which is similar to the existing 'One Scotland' arrangement in Scotland. Under this approach, the removal of PGA, MSA and other collective agreements would lead to substantial cost savings across the public sector.

3.21 CLG will consult further with relevant stakeholders in the coming months. Government will work with all members of the current agreements to facilitate a move with minimal disruption.

3.22 In line with the model used by the Met Office, the specification of the service government purchases from Ordnance Survey will be overseen by a representative and expert customer body reporting to a government minister. The group will be responsible for ensuring that government receives data and mapping services of high quality, suitability and value for money. It will seek the views of all data users across government in order to develop specifications for the data that government requires both currently and in the future. The group will also be responsible for reviewing the specification of OS OpenData as product lifecycles evolve.

3.23 In order to ensure sustainable funding for Ordnance Survey, government would negotiate a commercial agreement with Ordnance Survey for the provision of this centrally funded Public Sector Mapping Service and for its ongoing maintenance. This licence would allow the data to be used and re-used freely by all within the public sector.

Ordnance Survey Licensing

3.24 Ordnance Survey will also be proposing changes to the derived data policy for the commercial sector, including 'Free To Use' data, as part of its work on revised pricing and licensing. Further details of when these changes will be implemented will be communicated later in the year. In addition, Ordnance Survey will work with Cabinet Office and the Office of Public Sector Information (OPSI) to agree guidelines and processes which would permit certain other datasets created by public bodies and containing licensed paid-for Ordnance Survey data to be made available for unrestricted, including commercial, re-use. In agreeing these guidelines, the parties will need to balance a number of issues, including the significance of the Ordnance Survey data taken, the impact of release of any dataset on Ordnance Survey's commercial business and any legal or regulatory consequences for Ordnance Survey. This reflects concerns expressed in the consultation responses about licensing of Ordnance Survey products, and in particular derived data restrictions.

Tariff Rebalancing

3.25 The consultation set out arguments for immediate tariff rebalancing of the price of Ordnance Survey high specification products between the public and private sectors. Due to a combination of comments received from consultation respondents and further economic analysis conducted internally and by LEK Consulting, the Government has decided not to pursue immediate upfront tariff rebalancing, as the broader welfare benefits are not likely to be as significant as previously assumed by the Cambridge study[1].

Public Task

3.26 As described above, many respondents thought that a key step in response to this consultation would be for government to clearly set out Ordnance Survey's public task, taking into account the requirements that government has for Ordnance Survey data. Since the launch of the consultation, the Prime Minister has announced that, to inform the continuing development of Making Public Data Public, the National Archives will produce a consultation paper on a definition of the 'public task' for public data, to be published later this year. The future public task of Ordnance Survey will therefore be considered in the light of both that wider consultation, and the responses to the consultation on geographic information from Ordnance Survey.

[1] Models of Public Sector Information Provision via Trading Funds. University of Cambridge. Newbery, Bently & Pollock, February 2008

INSPIRE

3.27 Government has also asked Ordnance Survey to take on the technical delivery role of services that are required to meet Britain's obligations under INSPIRE, which is an EU Framework Directive seeking to introduce greater harmonisation, interoperability and wider access to public sector electronic spatial information across Europe.

3.28 As a data management and delivery-focused organisation, Ordnance Survey is particularly well placed to provide a range of service capabilities on the UK Government's behalf, using Open Source software and the G-cloud where appropriate. Ordnance Survey will design, specify, create and acceptance test repeatable INSPIRE compliant hosted data services, together with an overarching portal to support the View and Metadata Services. These platforms will then be offered back to the community as Open Source software

3.29 Ordnance Survey will use the Open Source platform to establish an operational service environment, set up and hosted on the G-cloud, and will enable other public sector information providers to configure a local manifestation of the service environment for their own obligations and requirements. Ordnance Survey will also support other potential users through paid-for consultation, offered alongside other commercial service support providers.

3.30 This approach, including the use of cloud computing (the G-cloud), will address the historically high up-front costs of investment in the development of 'fixed infrastructure', which is clearly unattractive in the current economic climate, and in view of the uncertain level of user demand at this stage in the development of INSPIRE.

Section 4

Consultation Responses

Summary of responses

4.1 This consultation process has shown that there is widespread engagement on the availability of geographic information. Many people have expressed the importance of maintaining definitive, accurate location information. Many are keen to ensure that Ordnance Survey continues to provide high quality data.

4.2 The majority of respondents agreed that at least some Ordnance Survey data should be made available for free.

4.3 Some key themes raised in the consultation were:

- need to ensure the sustainability of Ordnance Survey
- support for free data
- concerns about restrictions caused by derived data and licensing issues
- need for a public task for Ordnance Survey
- importance of maintaining the high quality of Ordnance Survey information.

4.4 As expected, certain themes were particularly important for certain groups of respondents:

- competitors tended to favour only releasing 'governmental data' such as boundaries, addressing, postcodes
- some market participants (including some competitors) would favour release of all large scale vector data
- local government tended to favour an approach based on release of core reference geographies but had some concerns about the current method by which they received Ordnance Survey data
- individuals and interest groups had mixed views, but tended to agree with more data being released
- partners were nervous about proposals, but would also support 'government' datasets being released
- customers care about quality of data, but also its cost.

4.5 The consultation set out three possible options for the future of Ordnance Survey. There was no clear consensus on which policy option of those set out is the favoured one. Of the 441 responses 3% indicated that they preferred Option 1 (current business strategy), 13% Option 2 (release of licensing constraints on large scale data), 8% Option 3 (staged transition), and 17% suggested or preferred an alternative option. 59% did not express a clear view on which option they preferred, instead expressing interesting and valuable views about the Ordnance Survey and the GI sector in general rather than selecting a single option from the three presented.

4.6 A detailed analysis of the responses to each consultation question is set out below.

Question 1
What are your views or comments on the policy drivers for this consultation?

4.7 205 respondents (46%) commented on this question. Of these, many thought that the policy drivers outlined in the consultation document were the right ones for government to be considering.

Making Public Data Public

4.8 Most respondents were, either explicitly or implicitly, supportive of the Making Public Data Public initiative and its rationale. Many noted that there would be significant economic and social benefits from releasing Ordnance Survey data more widely and for free. These included the development of innovative services and products by the private sector, and the delivery of more efficient and effective public services. A number of respondents mentioned the 'collect once, use many times' principle and thought that the release of Ordnance Survey data from re-use restrictions could significantly contribute to this principle.

4.9 Some noted that while they supported the release of government data, there was a difference between that and Ordnance Survey products, and the release of refined products, as opposed to data, could affect competition. Some thought that the provision of mapping data was a public service that should be treated as such by ensuring government funding for it.

Market

4.10 Some respondents had concerns about competition issues, specifically the impact on existing market participants, and a few expressed concern that the release of free data would maintain or expand Ordnance Survey's monopoly in the GI market.

4.11 Some felt that an evaluation of Ordnance Survey's business model was overdue, and that changes needed to be made in order for it to compete in current and emerging markets. In particular some highlighted that the current licensing restrictions would hinder Ordnance Survey in future. Others felt that although Ordnance Survey's business model was outdated, making its mapping available for free would undermine the business model of others who operated in the same market.

4.12 A number of respondents commented on the high quality of Ordnance Survey's data, and the importance of ensuring its ongoing role as Great Britain's 'national mapping agency'.

Location

4.13 Many respondents underlined the importance of definitive location data, and were supportive of an approach which delivered definitive national datasets. In particular some respondents felt that location data was key to the delivery of vital public services. A number of respondents thought that the future policy for geographic information should be based around delivery of the Location Strategy.

Innovation

4.14 Many felt releasing some or all of Ordnance Survey's data for free would help increase personal and commercial innovation and could be of great benefit to communities through enabling others to make Ordnance Survey data more useful in the social context. Some respondents commented on access to data by the third sector, and set out how provision of services could be improved if the third and not-for-profit sector had wider access to Ordnance Survey data for free.

4.15 Many respondents thought that the release of Ordnance Survey data would stimulate innovation in the economy and was essential to support the growth of the digital economy in the UK. Respondents identified benefits which could occur as a result of increased innovation in both the public and private sectors thanks to wider use of geographic information. A number thought that increased economic activity would lead to an increase in tax receipts to the Government, which could then be used to offset the cost of releasing data for free. However, a few respondents were unsure as to whether the release of data would stimulate innovation and some even felt it could stifle it as there might be little or no incentive to add value.

4.16 Greater flexibility and fewer restrictions on Ordnance Survey data in terms of licences seemed by many to be a way to enable greater innovation. Ordnance Survey licensing was seen to be a burden to developers and licensing terms and regulations more generally were seen to be overly complex.

4.17 Making boundary and postcode information freely available was seen as particularly relevant to increasing innovation.

Question 2
What are your views on how the market for geographic information has evolved recently and is likely to develop over the next 5-10 years?

4.18 191 (43%) respondents provided comments on this section. Comments covered a wide range of issues.

Drivers of growth

4.19 Many respondents thought that the market for geographic data was likely to expand as a result of advances in technology, in particular for mobile phones and personal navigation devices (PNDs). Some felt that the importance of location as an attribute would drive rapid development of the market over the next 5-10 years.

4.20 Some respondents thought greater access to Ordnance Survey datasets, or equivalents, could have a significant impact as the vehicle for linking data and information. Respondents observed that both existing market participants and new entrants could capitalise on the release of Ordnance Survey data and products. Some public sector bodies commented that having less restrictions on Ordnance Survey data would allow them to use and share it more freely, increasing the use of geographic information within their organisations.

Current market and its future evolution

4.21 Many respondents recognised the analysis of the market provided in the consultation document. Some provided further comments which supported elements of that analysis, such as the growth of consumer use of geographic information, for example through PNDs and also through existing 'free' mapping services such as Google Maps and StreetMap. A number of respondents stressed the significance of 'crowdsourcing' and Opensource projects such as OpenStreetMap in the context of recent changes in the market, which was not included in the analysis in the consultation document. Some felt that these projects challenged the conventional commercial model of licensing maps.

4.22 Some thought that the OS OpenSpace service had been positive in terms of opening up access to mapping for consumers without affecting the existing market place.

4.23 Some felt atlases, street guides and topographic maps would continue to sell as niche items to a minority, whereas the demand for 3-D data (especially city models) would grow rapidly. The fusion of topographic, hydrographical, aeronautical, meteorological and imagery data to populate 4-D 'real worlds' would become realised more widely – emphasising the move to digital technology. However, others felt that paper maps would always have their place with a considerable number of respondents specifically mentioning Ordnance Survey's paper maps and the need for their continuation.

Competitive landscape and trends affecting competition

4.24 Some respondents thought that there would be more commercial competition for Ordnance Survey in all areas, including large-scale mapping, with customers becoming more demanding and sophisticated in their geographic information requirements. A small number of public sector bodies commented that the growth in competition could prompt reconsideration of the use of Ordnance Survey data within their organisations.

4.25 However others mentioned free geographical data already existent in the market place eg. Google Maps, Streetmap. They commented that consumers were happy to use this data, as it was available for free, despite it being comparatively lower quality to Ordnance Survey data. Some thought this had already significantly expanded the use of geographic information both for commercial and non-commercial uses. While some recognised that the trend towards more free data was likely to continue, a number thought that there would still be a need for a consistent, high-quality, definitive source of geographic information.

4.26 Some thought that GPS, Aerial LiDAR and ground-based laser scanning were likely to transform large-scale mapping, making collecting information considerably easier and cheaper than land-based systems, and therefore potentially increasing competition in that segment of the market. A few thought that it would be difficult to get the same level of information from aerial data capture as that possible by land-based systems.

4.27 Some thought that the growth of the GI market, had and would continue to, provide considerable commercial opportunities for companies who were able to exploit it. A number thought that release of Ordnance Survey data would accelerate and expand this potential.

4.28 A number of respondents cited Ordnance Survey licensing restrictions as a barrier to innovation and growth of competition in the market, in particular those around derived data.

Question 3
What are your views on the appropriate pricing model for Ordnance Survey products and services?

4.29 (55%) of respondents commented on this question. While views were wide-ranging, and as one would expect depended on the interest of the respondent, a number of respondents thought that it was important to ensure that the pricing structure was more transparent.

Pricing models

4.30 Responses received were supportive of a range of pricing models, including those set out in the consultation document: marginal cost; 'cost plus'; 'retail minus'; and Ramsey pricing. Some thought demand-based or 'retail-minus' pricing models would not work for businesses with high fixed cost bases (such as Ordnance Survey), given the variability in demand. Some thought that the existing 'retail-minus' model used for distributors and Value-Added Resellers (VARs) worked well, although it depended on what constituted a 'viable margin'.A number thought that a 'cost plus' or marginal cost pricing structure could remove competitive pressures and could lead to a cut off of the customer relationship which can drive innovation and efficiency. However other respondents thought that the current collective purchasing agreements already did this to some extent.

4.31 Conversely a number of respondents felt that Ordnance Survey should continue to operate with its current business model. These respondents thought that Ordnance Survey should be able to charge for data to ensure its quality and to ensure that customers value the high-quality, accurate products provided by Ordnance Survey. A few supported the existing specific use contracts, on the basis that that structure would provide the most sustainable basis for maintaining the current high quality of data. However, several commercial users were in favour of a simpler licensing structure if data was not available for free.

Pricing of Ordnance Survey data and products

4.32 A number of respondents provided comments in this section in support of 'free data'. A clear majority, 300 responses (68%), felt that either some or all of Ordnance Survey data should be released for free. Views were wide-ranging – in some cases respondents thought raw or unrefined data should be free, others thought all basic mapping, others that small and medium scale raster products should be free to all and value added data should be charged for. Some, mainly competitors, thought no data should be made available for free.

4.33 Several respondents, mostly individuals or representatives of community groups, commented that since taxpayers had funded the collection of Ordnance Survey data access to that data should be free.

4.34 A few respondents felt that data should be free for all non-commercial use. Some respondents thought that the pricing of data should be a function of the size of the company (based on turnover), while others thought pricing should be based on the use made of the data, or its outputs. This approach, to some extent, reflects Ramsey pricing theory where prices to customers are set differentially according to their elasticity of demand.

4.35 Others thought that given there were already free mapping alternatives available on the internet, even if they were of poorer quality, Ordnance Survey would need to follow and make available some mapping data for free.

Funding of Ordnance Survey

4.36 Some respondents were concerned that Ordnance Survey's sustainability would suffer as a result of products currently licensed being made available for free. In particular, a significant number wanted to ensure the quality of all Ordnance Survey data was maintained following the release of some products for free. Concern was expressed about how government would maintain funding to Ordnance Survey in the long term. One suggestion that had some support was for central government to provide ring-fenced funding to Ordnance Survey on a long-term basis.

4.37 Some respondents thought there was not sufficient information in the consultation document on Ordnance Survey costs to comment in any detail.

Question 4
What are your views and comments on public sector information regulation and policy, and the concepts of public task and good governance as they apply to Ordnance Survey?

4.38 155 (35%) of respondents commented on this question. A significant number of respondents commented specifically on the 'restrictive and complex' nature of the Ordnance Survey licensing regime, many of these were particularly with respect to the derived data restrictions. Some were supportive of the process to simplify Ordnance Survey's licensing framework which begin in May 2009 and were keen for that to continue and be implemented.

Public Sector Information Regulation

4.39 Some respondents thought that regulation of Ordnance Survey was one of the key issues to be considered. A few thought current regulation of Ordnance Survey to be insufficient, feeling that OPSI did not have strict enough enforcement powers, which led to incompliance. Others felt that there was no need for economic regulation of Ordnance Survey, with some going as far as to say that the current Public Sector Information (PSI) Regulations should be removed.

4.40 A few respondents thought the regulation landscape with respect to Ordnance Survey was complex and diffuse. It was suggested that an approach in which data was free could simplify procurement and re-use across organisations, public and private.

4.41 A number of respondents noted that there was a fundamental inconsistency between the PSI Regulations which encouraged the maximisation of re-use of information once it had been collected and paid for by government on a marginal cost basis, with the current requirement placed on Ordnance Survey to recover its costs through licensing that data, due to its Trading Fund status.

4.42 Some thought that the current PSI Regulations as applied to Ordnance Survey data and, in particular, data derived from Ordnance Survey data, were not appropriate, and many were concerned that they acted as a barrier to the dissemination of public sector information or made it difficult for users to contemplate moving to other suppliers. In addition some respondents felt that Ordnance Survey had an unfair advantage in being able to licence for a fee data that was definitive 'government' data. Respondents who commented on this thought these datasets should be available for free use and re-use. Relaxation and simplification of licensing would be a welcome step for many respondents who thought it could lead to greater innovation.

Public task

4.43 Many respondents thought that a key step in response to this consultation would be for government to clearly set out Ordnance Survey's public purpose, taking into account the requirements that government has for Ordnance Survey data. Several commented that the public task should include an element related to data being available to the public for free re-use, and an element related to the 'public good' from Ordnance Survey providing definitive high-specification mapping data to enable core government functions such as land registration and planning. Others thought that the task should specifically refer to the Location Strategy and should include free provision of data such as boundary, addressing and postcode information, but should not include mapping which could be provided by the competitive market.

4.44 Other suggestions put forward for Ordnance Survey's public task included:

- Ordnance Survey should be designated the 'national mapping agency' and its public task should be defined as the provision of high-quality large-scale geographical information to government
- the public task should not be defined too narrowly to prevent flexibility in the future, in particular in light of the rapidly changing GI market
- to produce products specified by government for the purpose of government and to make those products, which are PSI available for all for re-use (some thought only 'unrefined' products should fall into this category)
- the public task should include the requirements that government currently has under the various collective purchasing agreements;
- the public task should include those areas where there is not a viable competitive market
- it should include links to INSPIRE and the Location Strategy;
- Ordnance Survey could be integrated with other organisations such as Land Registry and the Valuation Office Agency to create a 'national land and property agency'.

Governance

4.45 Several respondents thought that there were a number of governance issues which could be improved. This included a feeling from a number that there was an insufficient customer focus in product development, and that Ordnance Survey should work more closely with its customers to define requirements. An example supported by a few respondents was that Ordnance Survey MasterMap was over-specified for their needs. There was some support for a model similar to the Public Weather Service Customer Group (and its relationship with the Met Office), which would provide stronger governance and could potentially advise on issues such as Ordnance Survey's public task.

4.46 There was support for an independent body to have a larger role in driving policy around Ordnance Survey, for example to represent the views of users of Ordnance Survey data, or to set its public task. Some suggested that the Location Council would be well placed to deliver this role, in its advisory capacity on medium- to long-term geographic information.

4.47 A few respondents expressed concern at what they saw as a conflict of interest with Ordnance Survey both supplying government with data, and being government's advisor on surveying, mapping and geographic information for short- and medium-term policy.

Question 5
What are your views on and comments on the products under consideration for release for free re-use and the rationale for their inclusion?

4.48 237 (54%) respondents commented on the proposed set of products for release, and the rationale for their inclusion. Many respondents were supportive of the proposed product set. A number stated that the product set did not go far enough and all Ordnance Survey data should be available for free, including OS MasterMap, in order to stimulate the greatest levels of innovation. Conversely others were supportive of an approach which ensured this product's sustainability by maintaining the current licensing and charging structure. A few respondents thought that no Ordnance Survey products or data should be available for free, in order to retain copyright and IP rights. Some mentioned here, in line with comments on other sections of the consultation document, that derived data was a more pressing issue than the availability of free mapping.

4.49 Of those that commented on this question, many were supportive of releasing what could be considered 'definitive government datasets' including 1:50 000 Gazetteer, CodePoint, and Boundary-Line. Existing market participants including partners and some competitors of Ordnance Survey were supportive of releasing these datasets. Many respondents thought that it was particularly important to have widespread access to postcode data. Few respondents were opposed to the release of these products.

4.50 The rationale for inclusion of vector products was generally accepted. However, some respondents thought that the lack of a mid-scale vector product would limit the level of realisable innovation and economic benefit.

4.51 Some respondents were supportive of the release of 1:25 000 and 1:50 000 colour raster products to provide backdrop mapping. However, others were concerned about the potential release of these products. A variety of reasons were articulated as to why release of these particular products would not be helpful:

- the release of these products for free would have a detrimental impact on existing market participants who produce competing products or value-added products derived from these
- raster products are unsuitable for data 'mash-ups' as they are static pictures rather than being data-based products
- the availability of raster products is not a barrier to innovation (and they could be provided by a service such as OS OpenSpace)
- similar free alternatives already exist such as Google Map, Microsoft Bing

- the release of these products could result in an increased risk to the viability of Ordnance Survey paper maps, as competitors could 'cherry-pick' the most valuable areas of the country to produce paper maps using the freely available 1:25 000 and 1:50 000 Scale Colour Raster products.

4.52 A few respondents thought that releasing 1:10 000 raster mapping (OS StreetView) could lead to the substitution of larger scale products such as OS MasterMap, and potentially competing products.

4.53 In addition to the comments received on the products set out in the consultation document, a number of respondents were specifically keen to see the release of LandForm PANORAMA. Others wanted to see the release of CodePoint with polygons, arguing that CodePoint alone did not provide a sufficient level of accuracy, and others thought that Address Layer 2 would be a helpful addition. There were also comments supporting the release of ONS Census boundaries, MasterMap Integrated Transport Network (ITN) layer and data on building outlines and elevations.

4.54 Broadly, existing market participants were supportive of the release of datasets they believe were 'governmental data' such as boundaries, addressing and postcodes. Their view was that mapping products should be delivered by the market. However, others thought that all 'unrefined' data should be freely released and the market should be left to deliver suitable mapping formats, depending on demand from customers.

Question 6
How much do you think government should commit to funding the free product set? How might this be achieved?

4.55 About 46% of respondents included comments on funding of a free product set. Of those, most thought that government should fully fund the free product set, at whatever level that required. Most of these were supportive of central government funding to support the release of data. A few were concerned that a centrally allocated subsidy would be subject to budgetary pressures and therefore would not be sustainable in the long-term. Many were concerned that without a government commitment to providing funding, the quality and standard of Ordnance Survey data would fall.

4.56 A number of responses were opposed to an increase in prices to the public sector for large-scale data, with many public bodies concerned about their budgets in the current funding environment. Some local authorities and other public sector bodies were in favour of central government providing funding to cover any shortfall in funding to Ordnance Survey. A number thought that if Option 2 were implemented then savings made by removing the costs of procuring and licensing issues (e.g. for the PGA and MSA) could in some part be used to fund the collection and release of large-scale data.

4.57 A few existing market participants thought there was no need for government to provide additional funding to Ordnance Survey for the release of a free product set. These respondents generally thought that Ordnance Survey would be able to fund the free product set itself, if necessary through further cost savings. Other market participants thought that there should be no government funding for products which were not explicitly part of Ordnance Survey's public task – which should be clearly defined – or specifically the incremental costs of providing Ordnance Survey Free. Where a government subsidy was provided these respondents thought that it should be clearly accounted for to ensure that no cross-subsidisation of products in the competitive market occurred.

4.58 We received a variety of suggestions of how funding to support the release of free data should be provided, including:

- placing an additional charge on those who require changes to be made to the mapping database, such as through the planning or land registration processes
- increased tax receipts as a result of data being free could be partly used to offset any funding gap
- funding from the PGA, MSA and other government collective procurements could be centralised and used to fund the release of data
- a 'general licence fee' should be set at a relatively low level for all customers who use Ordnance Survey data.

4.59 A few respondents thought that users of the data should pay for it and therefore government should not provide any additional funding to release products for free, while others thought that the current model provided a successful model without requiring further central government funding and therefore should continue to be used if possible.

Question 7
What are your views on how free data from Ordnance Survey should be delivered?

4.60 207 (47%) respondents provided comments on this question. Many of those were either individuals with an interest in using the data, developers, or existing data users.

4.61 There was support for all of the delivery mechanisms mentioned in the consultation. The most favoured were an online public viewing service, to enable non-specialists to view the data, and an online download centre, to enable developers and users of GI to have full access to the data. Some specifically supported an API service. Others thought that the data should also be available on hard media (DVD) and generally accepted it was reasonable that a moderate charge be made for this. In addition respondents expressed a range of views on the most suitable format for provision of data.

4.62 A few respondents thought that there was no need to make the data available under a Creative Commons licence, on the basis that this licence only addresses copyright and not database rights. These respondents supported the release of the data directly into the public domain, or potentially under the Open Data Commons project: http://www.opendatacommons.org

Question 8
What are your views on the impact Ordnance Survey Free will have on the market?

4.63 200 (45%) respondents provided comments about what effect they thought Ordnance Survey Free would have on the market. A number noted that the scale and extent of the impact would depend on the products and timetable for release. Some respondents commented that the release of large scale vector mapping for free would have a significantly larger benefit than the release of the 'largely raster' products in Ordnance Survey Free. Some concerns were voiced about risks of 'inaction' and the effect that would have on the market, and therefore that certainty was important for market participants.

4.64 A wide range of respondents thought that the overall impact of Ordnance Survey Free on the market would be positive. Many of these observed that in the short term there were likely to be adverse impacts on the market, as existing users of the data begin to receive the same products for free, while others migrated from their current paid-for products to the free product set. Respondents thought this would mean Ordnance Survey partners and other participants in the market would suffer

a short term drop in revenue, but wider access to data would drive long-term growth in the sector as a whole allowing those detrimentally affected to re-evaluate and modify their business models to take advantage of new opportunities, along with new entrants to the market. Some commented that while Ordnance Survey licensed partners would be adversely affected by increased competition in that area, they would receive a reduction in their production costs.

4.65 Some thought that there would be rapid growth in both new users and new uses for geographical information as a result of making some data available for free. Several respondents saw particular benefit from the provision of postcode, addressing and boundary data. Specific examples provided included business models based on growth of fast, affordable and legal 'lookup' services using addressing and postcode data, and opportunities to innovate using boundary data in particular in the land and property, and finance markets.

4.66 Respondents observed that there were many 'free' mapping alternatives already on the market (e.g. Google, Microsoft Bing). They thought the effect of this had been that there was already an expectation of 'free' data, and therefore some businesses in the supply chain were already beginning to take advantage of the opportunities presented by this change. Related to this issue, some thought economic gains would be predominantly enjoyed by large multinationals such as Google.

4.67 Some respondents thought the release of free data would have a negative effect on some sectors of the market, with some commenting that the release of small- and mid-scale mapping data for free would have damaging effects on competition in that section of the market. Comments also suggested that distributors of Ordnance Survey data would be adversely affected by the removal of revenue streams, as a result of the data being made available for free. A number of market participants thought there would be particularly adverse impacts as a result of releasing 1:10 000, 1:25 000 and 1:50 000 raster products. Some thought that this would also have a particularly detrimental effect on the Ordance Survey paper map market, as demand would drop as a result of both digital supply and competition in popular areas (such as National Parks). A number of respondents were also concerned about the effect this would have on the quality of the paper maps available.

4.68 A number, while recognising that there would be an effect on the market particularly in the short term, thought that a more important consideration was the effect on the quality of data as a result of any changes. Many respondents were particularly concerned to ensure that the standard of any free data was maintained, and that the impact of releasing data for free would not affect the quality of Ordnance Survey's large-scale mapping. Comments also suggested that the free release of data could risk de-valuing mapping and posed a risk to the professional cartographic industry. Some thought that release of free products would create additional competitive

pressure on OS MasterMap as customers sought to reduce their costs by using a free product as a substitution.

4.69 Some respondents felt that Ordnance Survey's current position on derived data had an adverse impact on the market, and would continue to do so if it was not revised. Their concerns lay around the restrictions that it placed on people, preventing them from innovating and creating new products and services. A number of respondents thought that relaxing or removing these restrictions would have a significant beneficial effect on the market.

Question 9
What are your comments on the proposal for a single National Address Register and suggestions for mechanisms to deliver it?

4.70 189 (43%) respondents provided comments on this question. Of those the large majority were supportive of the proposal to create a definitive National Address Register. Responses identified a number of benefits of having a definitive register including efficiency gains, and enabling more accurate and improved delivery of services. Some respondents were critical of the current arrangements, in particular due to the collective costs of multiple systems, and also due to the lack of a definitive national dataset for addresses which was identified in the Location Strategy as one of the 'Core Reference Geographies'. A small number of respondents thought that this was not a significant issue, or thought it was unlikely in practice to happen.

4.71 Most respondents thought that ultimately any national address register should be available for free to all, but some recognise that there may be a need to licence such a product in the short to medium term, for a fee.

4.72 Those who had more direct experience with this issue recognised that there were barriers to overcome, in particular the complex interactions of different intellectual property rights of Royal Mail, local government, and Ordnance Survey. One respondent thought that if licensing barriers were removed and the parties contributions were funded on some other basis then a single dataset would naturally result.

Question 10
What are your views on the options outlined in this consultation?

4.73 Of the total 441 consultation responses 3% indicated that they preferred Option 1 (current business strategy), 13% Option 2 (release of licensing constraints on large scale data), 8% Option 3 (staged transition), and 17% suggested or preferred an

alternative option. 59% did not express a clear view on which option they preferred, instead noting interesting and valuable views about Ordnance Survey and the GI sector in general rather than selecting a single option from the three presented.

4.74 Of the 237 respondents who indicated a view on the options, 6% were in favour of Option 1 (current business strategy), 25% preferred Option 2 (release of licensing constraints on large scale data), and 15% supported Option 3 (staged transition). Some respondents preferred Option 2 but saw Option 3 as a viable alternative, and 31% did not support any of the options and would prefer a modified approach. Some could identify advantages and disadvantages of all of the options.

Option 1

4.75 Those who were in favour of Option 1, the current business strategy, generally thought that it was:

- affordable and based on a proven business model
- able to maintain the integrity and quality of Ordnance Survey data.

4.76 Those who were opposed to Option 1 articulated a variety of reasons, although many stated that it was unsustainable in the rapidly changing marketplace and in light of recent policy initiatives:

- many felt that it would not provide adequate support to the Making Public Data Public project – some thought that given that geographic information was so critical to unlocking public data Option 1 was not an option
- in general local authorities felt that Option 1 would retain or increase existing high costs associated with procuring data, and resolving legal issues
- some thought that in the current rapidly changing market pursuing Option 1 would only lead to reductions in Ordnance Survey's revenues.

Option 2

4.77 With respect to Option 2, those who supported this option, or those who could see merits in some elements of it, were particularly in favour of the release of data for free and without restrictions on re-use, citing the economic and social welfare benefits that could be expected from such a release. Benefits identified included:

- widening the use of Ordnance Survey significantly beyond where it currently is, for example into the areas of charity, heritage, community and environment projects
- an uplift in innovation and enterprise as a result of new business ventures based on the data

- a significant benefit to local authorities, many of whom felt that Ordnance Survey licensing constraints (including derived data) were the greatest issue they faced.

4.78 Of those who were specifically opposed to Option 2 reasons cited included:

- the impact on Ordnance Survey, and the potential for the quality and accuracy of its data to deteriorate
- the impact on the value of the data provided by Ordnance Survey
- the impact on the market of creating a fully subsidised 'DataCo' which could entrench Ordnance Survey's position as monopolistic large-scale map producer
- the costs to government
- the potential for distortion in the market if 'ProductCo' were not adequately regulated
- opposition to privatisation of ProductCo or any part of Ordnance Survey.

4.79 Others supported the principle behind Option 2 but were concerned about the long-term viability of this option, in particular whether government funding streams would be sustainable in light of current economic conditions. Some saw it as a huge irreversible step and therefore preferred a more cautious approach. Others thought that the costs involved were too high to support moving to this option at this time.

Option 3

4.80 Most of those who supported Option 3 thought that it seemed like a practical compromise, although some saw it as a pragmatic alternative to Option 2 which would otherwise have been their preferred option. In particular respondents who favoured this approach thought it would enable some products to be released for free while securing a large part of Ordnance Survey's revenues and therefore ensuring its sustainability and the quality of its data in the future.

4.81 Some respondents who opposed Option 3 thought that the hybrid model including both charged and free elements would be complex and, ultimately, unsustainable. Some thought the benefits would be limited as, in their view, the option did not go far enough.

4.82 Comments from some existing market participants indicated that they would suffer as a result of the Ordnance Survey Free package being made available for free. One respondent commented that the option would move away from OFT recommendations on unrefined and refined data and PSI Re-Use Regulations therefore strengthening Ordnance Survey's position against competitors.

Some thought that Ordnance Survey Free should be limited to unrefined data, particularly those which could be considered definitive 'government' datasets, as opposed to mapping products and services.

4.83 While some were opposed to tariff rebalancing others were supportive of this element of Option 3. As one would expect this tended to be split in accordance with the expected gain or cost to the respondent under tariff rebalancing, with public sector customers and some competitors generally opposed and some private sector customers in favour.

4.84 A few existing market participants did not think additional funding was required to implement Option 3. They felt that Ordnance Survey could sustain this approach itself through current revenues and more aggressive cost reductions. Others thought that if funding were provided this should be on the basis of clear and transparent accounting.

4.85 Some commented that it was not clear what Option 3 was a transition to, and that if it was implemented a clear timetable for that transition should be communicated. Some thought that while Option 3 offered a balance, in the longer term it would encourage demands to release all Ordnance Survey data for free so therefore would provide a transition step to a larger scale change.

Alternative approaches

4.86 Some respondents suggested alternative approaches. While it is not possible to outline all of those in detail here, some key themes are outlined below:

- A number of respondents, including the Local Government Association (LGA), and a number of market commentators, thought that the options as set out did not adequately contribute to the delivery of the Location Strategy, and in particular the 'Core Reference Geographies'. They thought this was the most important element of any option and should be reconsidered.
- Some thought that a 'National Mapping Agency' or some equivalent, should be tasked with procuring these core reference geographies.
- A further suggestion was that the current procurements between Ordnance Survey and the whole public sector be funded by the taxpayer rather than by individual contracts.
- Several respondents, largely existing market participants, were in favour of an approach which would provide core definitive 'government' datasets such as addressing, boundaries and postcodes for free and would make the provision of all other mapping open to the competitive market to provide.

- Another alternative model would be to create a monopoly public data collector which could charge for the provision of 'raw' data to the market, including 'ProductCo', on a fair and equal basis;
- Some respondents specifically called for the removal of Ordnance Survey's trading fund status, and supporting a fully government-funded 'National Mapping Agency'.
- A small number of respondents suggested an alternative model could be either for Ordnance Survey and Land Registry to be merged, so that land registration fees could cover the cost of 'national mapping', or that the Land Registry should assume surveying activities.

4.87 Local authorities generally supported Option 2, on the basis that it would generate the greatest benefits and would remove licensing restrictions from large-scale Ordnance Survey data, as well as making it free. The main concerns expressed about that option were around the lack of detail on mechanisms for funding the large scale data, and ensuring the continued high quality of that data. Several authorities were particularly opposed to tariff rebalancing.

4.88 A few developers stated that Option 2 would be their preferred approach, on the basis that it allowed the greatest access to data and would therefore generate the highest levels of innovation.

Question 11
For Local Authorities: What will be the balance of impact of these proposals on your costs and revenues?

4.89 While the LGA provided a response on behalf of local authorities, 46 authorities also provided individual responses, responding mainly to support the LGA's response, with 24 authorities wishing to add further comments. It is worth noting that a few individual authorities were not in agreement with all elements of the LGA response, although most supported it.

4.90 The LGA response identified Option 2 as the option which minimised costs of data use across services, in particular by removing the complex licensing regime and costs associated with the management of commercial and legal processes. It saw Option 1 as unacceptable, in part due to the 'substantial financial burdens in procurement, and legal obstacles, and is a serious constraint on innovation and effective delivery of public services'. LGA felt that Option 3 would impose additional costs on the public sector, as a result of tariff rebalancing. Their response stated that 'passing the costs of Ordnance Survey pricing adjustments onto local government is unacceptable at

a time when the emphasis is on councils protecting frontline services and making reductions in support expenditure'. It was LGA's view that an increase in prices was likely to result in reduced procurement of those products.

4.91 A number of individual authorities observed that the current situation was costly due to the commercial and legal negotiations involved, largely as a result of procurement processes and licensing issues. They saw this increasing over time if no changes were made, and therefore felt that Option 1 would increase costs to local government overall.

4.92 Most thought that Option 2 would be the least costly option overall. In some cases this was based on the assumption that funding for high specification Ordnance Survey data would be provided by central government. However some assumed that the option would be funded by a transfer of the current MSA funding back to central government to fund large-scale geographic data from Ordnance Survey. Under this assumption savings were still identified, as a result of the removal of the MSA running costs, which local authorities currently pay to Local Government Information House. This would be a 'real' cost saving to local government, in addition to the removal of costs associated with procurement and legal issues.

4.93 A number of local authorities identified some benefit in terms of cost savings under Option 3, as a result of the removal of licensing fees from the free set of products. However, they also noted that by far the greatest cost was associated with the provision of high specification data, so under Option 3 that cost would be retained. Many were strongly opposed to the rebalancing of public and private sector prices. Some felt that if tariff rebalancing were pursued then central government should provide additional funding for local government to enable it to cover the increase in cost. A number of authorities referred to the possibility of seeking alternative suppliers of geographic information if their costs increased significantly as a result of the proposals outlined.

4.94 The LGA response commented that the consultation document was incorrect to state that the private sector subsidised the public sector. LGA's view was that the discounts provided to the public sector were secured on the basis of it operating bulk procurements. Other respondents felt that it was inappropriate to consider the public and private sectors in the same way, given the public sector's purpose to deliver public services, many of which are reliant on geographic data.

4.95 The LGA, and a number of individual local authorities, thought that the consultation document lacked of detail on the costs of the options and how these related to Ordnance Survey's financial model. In particular LGA highlighted that that consultation document failed to mention that often core public sector geographic

datasets are generated by other public sector bodies such as local authorities (address and street data), DEFRA (e.g. national park boundaries), and ONS (census geographies).

Question 12
Will these proposals have any impact on race, gender or disability equalities?

4.96 The majority of respondents did not provide comments on this question. Of the 127 (29%) comments received, the majority thought that there would be no impact on race, gender or disability equalities.

4.97 However around a third of respondents to this question thought that releasing some Ordnance Survey data could have beneficial impacts on race, gender and disability equality. In particular a number of local authorities recognised potential benefits that may be realised in terms of equality, as a result of proposals around releasing data. Positive impacts identified included:

- policy benefits as a result of improved geographical analysis of relevant statistics in a variety of different contexts
- the importance of geographic information in decision-making which can help to avoid social exclusion and minimise race, gender or disability inequalities
- increased accessibility benefits for those with disabilities, not only through greater access to information but also as a result of innovative services which might result e.g. the creation of maps focusing on route suitability and accessibility of services.

Annex A

List of Consultation Questions

Question 1: What are your views or comments on the policy drivers for this consultation?

Question 2: What are your views on how the market for geographic information has involved recently and is likely to develop over the next 5-10 years?

Question 3: What are your views on the appropriate pricing model for Ordnance Survey products and services?

Question 4: What are your views and comments on public sector information regulation and policy, and the concepts of public task and good governance as they apply to Ordnance Survey?

Question 5: What are your views and comments on the products under consideration for release for free-use and the rationale for their inclusion?

Question 6: How much do you think government should commit to funding the free product set? How might this be achieved?

Question 7: What are you views on how free data from Ordnance Survey should be delivered?

Question 8: What are your views on the impact Ordnance Survey Free will have on the market?

Question 9: What are your comments on the proposal for a single National Address Register and suggestions for mechanisms to deliver it?

Question 10: What are your views on the options outlined in this consultation?

Question 11: For local authorities: What will be the balance of impact of these proposals on your costs and revenues?

Question 12: Will these proposals have any impact on race, gender or disability equalities?

Annex B

List of Respondents

A total of 441 formal responses to the public consultation were received by the closing date. The names of organisations that responded are listed below, with the exception of 2 organisation respondents who wished to remain anonymous. The remaining 225 responses were from those who responded as individuals.

1Spatial
ACPO Cymru
Advisory Panel on Public Sector Information
AGI
APCO
Archaeology Scotland
Ashfield District Council
Association of Census Distributors
Aster Group
Aviva Insurance
Barnsley MBC
BCS, the Chartered Institute for IT
BECTA
Birmingham City Council
BIS Geographical Statistics and Data Matching Unit
Blackwell
Borough of Camden
Brent Council
Bristol City Council
Bristol Council
British Cartographic Society
British Horse Society
Broads Authority
Buckinghamshire County Council
CACI
Calnea Analytics Limited
Cambridgeshire County Council
Cambridgeshire Local Access Forum
CCRP
Census and Geodemographics Group
Central Association of Agricultural Valuers
Cheltenham Council
Colchester Borough Council
Collins Bartholomew
Commission for Rural Communities
Cook, Hammond and Kell
Cotswold District Council
CPRE National Office
CycleStreets Ltd
Dartmoor National Park Authority
David Denison Associates Limited
DCSF
Defra Network
Demographic Users Group
Devon County Council
Devon Local Authority
Distributed Generation Ltd
Dorrigo
Dotted Eyes Ltd
DPP
East Cheshire Hospice Christmas Tree Collection
East Renfrewshire Council

East Sussex Council
EDINA
emapsite
English Heritage
English National Park Authorities Association and Welsh Association of National Park Authorities
Environment Systems
ESRI (UK)
Exmoor Local Access Forum
Experian
Federation Against Software Theft Limited
Fenland District Council
Find Maps
FirstGroup plc, UK Bus Division
Gàidhlig
Geoplan
George S Wilson Associates
Getmapping
Glasgow University Library's map collection
Gloucestershire County Council
Google
Greater London Authority
Greater Manchester Passenger Transport Executive (GMPTE)
Green Amps Limited
Greenpower International
Greenspace Information for Greater London
Guardian News and Media
Hackney Council
Hambleton District Council
Harrogate Borough Council
Harvey Maps
Have a Map Shop
Hertfordshire County Council
Hounslow PTC
Hull City Council
i-CD Publishing
Infotech
Infoterra
Intelligent Addressing Ltd
Intergraph
JISC Executive
Joint Chairs Group
Joint Local Access Forum
Junkk.com
Kirklees Council
Know Edge
Land Registry
Landmark Information Group
Laser Surveys
Latitude Mapping
Leeds City Council
Leica Geosystems Limited
Levelwood Mapping
Lewes District Council
LGA
Local Public Data Panel
Loch Lomond & The Trossachs National Park Authority
Locus Association
London Fire Brigade
Long Distance Walkers Association
Lovell Johns
Lucas Books
MapMechanics
Meridian Maps
Microsoft
Middlesbrough Council
MOD
Mouchel
National Association of Credit Union Workers

National Library of Wales
National Trust
NATS
NAVTEQ
Network Rail
NFS Maps
NHS Digital Mapping Agreement
Nicholson Maps
North Dorset District Council
Northumberland National Park Authority
ONS
Open Source Geospatial Foundation
Pear Technology Services Ltd
PGA
Places for People
Placr
Plymouth City Council
PostcodeAnywhere
Powys County Council
Prospect Union
Public and Commercial Services Union
Public Sector – Central Procurement
Ramblers
RBS Insurance
RCAHMS Royal Commission on the Ancient and Historical Monuments of Scotland
Realtime Worlds
Redcar & Cleveland Borough Council
Registers of Scotland
Research Councils UK
RIBA Royal Institute of British Architects
RICS Royal Institution of Chartered Surveyors
Royal Commission on the Ancient and Historical Monuments of Wales
Royal Geographical Society
Royal Society for the Protection of Birds
RSA Royal Society for the encouragement of Arts, Manufactures and Commerce
Runnymede Borough Council
Saturday Walkers Club
Sciemus
Scotland Ramblers
Scottish Enterprise
Scottish Government
Scottish Water
Severn Trent
Sheffield City Council
Sigma Seven
Society for Professionals in Information, Technology and Management
Society of Cartographers
Somerset Local Access Forum
South Derbyshire District Council
South Staffordshire Water
South Wales Fire and Rescue Service
Stanfords Business Mapping
STAR-APIC
Stevenage Council
Stockton Council
Stutchbury
Surrey Police
Sustrans
The AA
The Advisory Unit: Computers in Education
The CIC Association
The Coal Authority
The GeoInformation Group
The Guardian
The Map Shop
The Survey Association (TSA)
Thurrock Council
TM Group
Torbay Council

Transition Network
Traveline
UK Broadband Ltd
UK Location Council
UK Map Centre
United Kingdom Hydrographic Office
Vexed Digital
Viewranger
Virgin Media
Wales Assembly Government
Wales Centre for Health
Walking World
Wandsworth Borough Council (GIS Team)
Waterstones
Welsh Local Government and the Local Government Data Unit
Wessex Water
West Midlands Cancer Intelligence Unit
Westminster City Council
Wigan Council
XYZ Digital Map Company
Yorkshire & Humberside GOR
Yorkshire Dales National Park Authority
Zurich

In addition, Government officials met with the following bodies in person.

- Advisory Panel on Public Sector Information (APPSI)
- Getmapping
- Improvement and Development Agency (IDeA)
- Infoterra
- Local Government Association (LGA)
- Westminster City Council.

Annex C

Summary of Ordnance Survey's main products

OS MasterMap® (Large-scale data)	A database and online service featuring the most detailed and flexible digital mapping of Great Britain (England, Scotland and Wales). Specifically designed to be used as fully integrated corporate resource. All of the half a billion features carry unique references so data can be linked to them quickly and easily for instant analysis. Data is held in separate layers so that users can pick and mix the exact type and extent of the information they need. The layers are called Topography, Imagery, Integrated Transport Network(ITN)™ , Address and Prebuild Address. OS MasterMap® is widely used in both central and local government for citizen services, social, political, economic and environmental monitoring, planning and assessment, as well as within the utilities sector for asset management, infrastructure planning, customer services and meeting regulatory requirements.
Post code data	Code-Point® provides a precise geographical point location for each postcode unit in the United Kingdom. Code-Point® with polygons provides a precise geographical location for each postcode unit in Great Britain with a polygon that encloses every fully matched postcode in the correct boundary. The products are used across the entire range of market sectors for applications such as market analysis and profiling, statistical analysis, sales targeting and route planning and location based services.

1:10 000 Scale data	1:10 000 Scale Raster map data is the most detailed raster product, providing large-scale background mapping upon which you can add or overlay information. It provides detail including, roads and road names buildings, topographic features such as water and field boundaries, and urban extents. OS VectorMap Local provides a detailed view of the landscape in a flexible, vector format that enables users to interact directly with the data by customising the look and feel of their map and incorporating their own information, to better suit their own requirements. It provides details including roads and road names, buildings, urban extents and topographic features such as areas of woodland, water and field boundaries. Both datasets are used widely across the entire sector base of Ordnance Survey to provide geographic context for customers' own data.
OS Sitemap® and OS Landplan® Data	OS Sitemap and OS Landplan Data are available through the Mapping and Data Centres retail network. OS Sitemap provides a detailed and seamless view of topography of Great Britain, surveyed at one of three basis scales: 1:1250, 1:2500 and 1:10 000. It is site-centred and printed out on paper, or as data on floppy disk, CD-ROM, via email or online. It is extensively used for planning and design purposes, especially by architects, engineers and construction companies. OS Landplan Data is a 1:10 000 scale site-centred map paper plot or digital desktop data product for property professionals such as architects, civil engineers, construction companies and estate managers. It is the largest scale of Ordnance Survey raster data to show contours, providing an excellent overview of the lie of the land; fences, field boundaries, road names and buildings are also included. Landplan Data is delivered by email from a seamless database so users can choose precisely where they want their extract centred.
Mid scale raster data	The raster data products provide a complete range of contextual, geographic mapping data, for use within computer systems, at a variety of scales – right down to street level – which can be viewed on-screen and over which customers typically display their own geographical information. The range comprises of 1:25 000 Scale Colour Raster, 1:50 000 Scale Colour Raster, 1:250 000 Colour Raster and MiniScale® (at 1:1 million scale) . There are also 1:50,000 and 1:250 000 Scale Gazetteers, which pinpoint and reference more than 250,000 places and features shown on the maps. Both datasets are used widely across the entire sector base of Ordnance Survey to provide geographic context for customers' own data.

Mid and small scale vector data	Meridian™ 2, Strategi® and MiniScale® provide a range of digital mapping at smaller scales (approximately 1: 10 000 scale to 1: 1 000 000 scale, which, with their different levels of detail, are ideal for planning purposes, project work and analytical tasks. These data sets include communication networks, settlements, areas of woodland or open space, boundaries, coastlines, leisure and water features, areas of higher relief and relevant text. They are used across government, principally, to provide citizen services as well as customisable geographic context for customers' own data.
Points of Interest data	A location-based database developed for use in both civic and commercial applications made up of over 3.5 million features, that record via a grid co-ordinate, the location of a wide range of both commercial and non commercial activities, including Retail, Manufacturing, Leisure and Tourism, Education, Transport, Public Infrastructure and Sport throughout Great Britain. There are nine groups of information subdivided into 56 categories and a further 750 classes of information which provide a very detailed way of pinpointing specific types of activity. The product is used across a range of market sectors for financial, leisure and location based applications and services. This product is produced by PointX, a joint venture between Ordnance Survey and Landmark Information Group Limited.
Height data	Land-Form PANORAMA® is a 1:50 000-derived digital height product and Land-Form PROFILE® a 1:10 000 scale digital height product. They are both available as contours or a Digital Terrain Model (DTM) covering the whole of Great Britain. Land-From PROFILE® PLUS is a high-specification digital terrain model (DTM) for the whole of Great Britain – a continuous bare earth model of the ground surface, with all surface features such as trees, buildings and bridges removed. In England and Wales, high-accuracy LIDAR data is targeted at floodplains, the coastal zone, urban areas and key communication routes and is sufficiently detailed to represent key terrain features such as cuttings and embankments. The products can be used to produce 3-D images on computer screens, and are widely used especially within the governmental and environmental planning and management market sectors, particularly for urban and rural planning, environmental impact assessments and flood modelling.

Boundary Line™	The product is produced at a nominal scale of 1:10 000 and contains a complete range of administrative and electoral boundary data in Britain from civil parishes and communities through to parliamentary and European constituencies. It is widely used across many market sectors, but particularly within central and local government for the administration, monitoring and provision of services to the citizen.
Historical map data	Scanned, detailed historical mapping from the nineteenth century onwards which can be overlaid with modern map data to track changes to the landscape, identifying former land uses. This service is the result of a joint venture with Landmark Information Group Ltd. It covers a range of scales and is mainly used for historical context and also the consumer market sector.
Printed maps	Ordnance Survey produces 650 different recreational and leisure maps including the OS Landranger map series at 1:50 000 scale and the OS Explorer map series at 1:25 000 scale. These are the definitive outdoor leisure map products for Great Britain. Also available is a series of OS Travel Maps for motorists comprising eight regional Road Maps and one national Routeplanner. Printed maps can be bought directly from Ordnance Survey, online, or through retailers. They are typically used for walking, navigation, tourism and leisure activities.

Annex D

Glossary

API	Application Programming Interface. An interface that allows different computer software to interact with one another.
APPSI	Advisory Panel on Public Sector Information. A non-departmental public body of the Ministry of Justice. It advises Ministers, the Director of OPSI and Controller of HMSO on the information industry. It also reviews and considers complaints under the Re-use of Public Sector Information Regulations.
BIS	Department for Business, Innovation and Skills.
Cambridge Study	Cambridge University study ("Models of Public Sector Information Provision via Trading Funds") authored by Newbery, Bently and Pollock. Published in February 2008, it analysed the impact of different pricing models at the six largest trading funds, by data provision.
CLG	Communities and Local Government.
Cost plus	A price of a product is determined from the actual cost of production plus an agreed fee, mark-up or rate of return.
DCSF	Department for Children, Schools and Families.
DEFRA	Department for Environment, Food and Rural Affairs.
Fixed costs	Periodic costs that remain unchanged irrespective of the volume of output.
GI	Geographic Information, data which is linked to location.
GPS	Global Positioning System, a US satellite based navigation system.
High Spec	High Specification. This relates to products and services that Ordnance Survey produces at the most detailed level, typically used for professional purposes by business and government customers.
HMSO	Her Majesty's Stationery Office. Core activities include responsibility for the publication of legislation and the management of Crown copyright operating from within OPSI.
INSPIRE	The EU INSPIRE Directive. It lays down the general framework for a geographic information infrastructure, within the EU, for the purposes of environmental policies and policies, or activities, which may have an environmental impact.

ITN	Integrated Transport Network. One of the four layers in Ordnance Survey's main product, OS MasterMap®. It provides data on Great Britain's roads, including location and access restrictions.
Land Registry	The Land Registry is a Trading Fund. Its main statutory function is to keep a register of title to freehold and leasehold land throughout England and Wales. On behalf of the Crown, it guarantees title to registered estates and interests in land.
Location Council	The Location Council is chaired by DEFRA and provides leadership and strategic direction for the implementation of the UK Location Strategy and the INSPIRE Directive. It comprises board level and other senior representatives of the departments and agencies in local, devolved and central government that are significantly involved as either users and/or suppliers of location information across the UK
Location Strategy	Published in November 2008, the Location Strategy aims to maximise the value to the public, government, UK business and industry of geographic information. It provides a consistent framework to assist national, regional and local initiatives and service delivery.
Low Spec	Low Specification. This relates to products and services that Ordnance Survey produces at a lower order of detail. It includes mid and smaller scale topography, gazetteers and paper maps.
LR	see Land Registry.
Met Office	The Met Office is the UK's national weather service. It is a Trading Fund within the Ministry of Defence.
MPDP	Making Public Data Public, a government initiative to make public data more accessible to the public.
MSA	Mapping Services Agreement, the contractual framework through which local government collectively procures its geographic information requirements.
NLPG	National Land and Property Gazetteer, a definitive, national address list that provides unique identification of properties across England and Wales. It allows local government to link their information systems to this source of addresses and accurate geographic location. It is complied and owned by the Local Government Information House.
OFT	The Office of Fair Trading, an independent competition and consumer protection authority established as a statutory corporation.
ONS	The Office for National Statistics, the executive office of the UK Statistics Authority, a non-ministerial department which reports directly to Parliament.

OPSI	The Office of Public Sector Information is the regulator of public sector information holders for their information trading activities. It also investigates complaints against public sector information holders made under the Re-use of Public Sector Information Regulations.
OS MasterMap®	Ordnance Survey's main product. A flexible digital mapping database of the whole of Great Britain. Data is held in four layers, Address Layer, Imagery Layer, ITN and TOPO.
OS MasterMap® Address Layer	One of the four layers in Ordnance Survey's main product, OS MasterMap®. It pinpoints the location of more than 26 million individual postal addresses.
OS MasterMap® Imagery Layer	One of the four layers in Ordnance Survey's main product, OS MasterMap®. It provides a seamless digital dataset of high quality aerial photography.
OS MasterMap® TOPO	Topography. One of the four layers in Ordnance Survey's main product, OS MasterMap®. A data set which contains almost half a billion features from the built and natural landscape in Great Britain.
OS MasterMap® VectorMap™ Local	A flexible Ordnance Survey product that helps users to visualise information on a map. It can be customised, through user-defined styling, and can incorporate users own information, to create a bespoke product.
OS OpenSpace®	OS OpenSpace® is a free to access Ordnance Survey product that allows web applications and online projects to use Ordnance Survey maps.
PND	Personal Navigation Device, combines location and navigation capabilities and typically used in vehicles
Price discrimination	The practice of charging separate customer groups different prices for similar transactions which do not reflect differences in the costs incurred by the producer.
PSI	Public Sector Information, information collected or created by a public organisation.
Ramsey pricing	A pricing regime which maximises social welfare by pricing according to the elasticity of demand of different customer groups through price discrimination.
Regulatory models	Alternative structures for the regulation of a business, usually applied by law.
Retail minus	A pricing scheme in which an access seeker is charged a price based on the access provider's end-customer price, less the costs avoided by providing access

Re-use Regulations	The Re-use of Public Sector Information Regulations 2005 (Statutory Instrument 2005 No. 1515), which aim to encourage the re-use of public sector information.
Trading Fund	A part of government that has been established by a Trading Fund Order, in order to improve the efficiency and effectiveness of the management of those operations. There are currently 19 trading funds, they have responsible for their own finances, are able to re-invest profits.
VAR	Value added re-seller, a business customer who purchases Ordnance Survey data/product and sells it on, after having incorporated its own product.

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