



Ubisense The next generation

17 July 2013



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|----|---|----------------------------|
| 1. | Welcome and Introduction | Richard Green, Ubisense |
| 2. | Google Maps for Business | Ed Parsons, Google |
| 3. | Next Generation Products | Peter Batty, Ubisense |
| 4. | Next Generation Demos | Gillian Kendrick, Ubisense |
| 5. | A Customer Perspective | Todd Kutty, Cablevision |
| 6. | Customer Acquisition and Business Model | Paul Holroyd, Ubisense |
| 7. | Summary and closing remarks | Richard Green |
| 8. | Q&A | All |
| | Afternoon tea, coffee, drinks | |

| | Indoor | Outdoor |
|---------|--------------------------------|------------|
| Dynamic | RTLS | GPS |
| Static | Building Information Modelling | Geospatial |

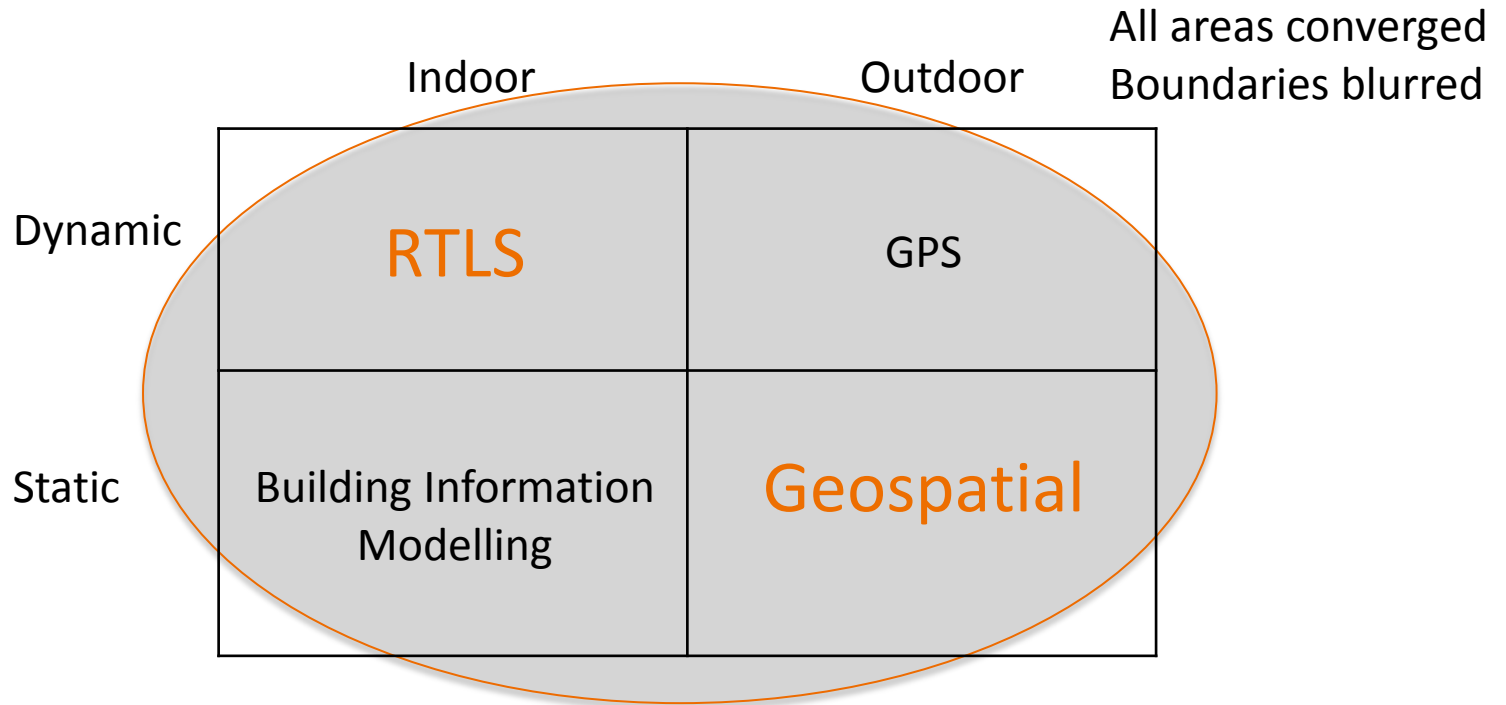
A number of drivers:

Technology

- ❑ Rise of the cloud – availability of data online
- ❑ Everyday use of Google Maps and Street View
- ❑ Proliferation of smart mobile devices – tablets and smartphones
- ❑ Pervasive use of location technology - Indoor and Outdoor

Business

- ❑ Regulatory and Audit obligations
- ❑ Recognition of business value arising from data-driven location analytics
- ❑ Increasing use of geospatial information to interpret operational data
- ❑ Continuing drive to reduce costs and increase quality



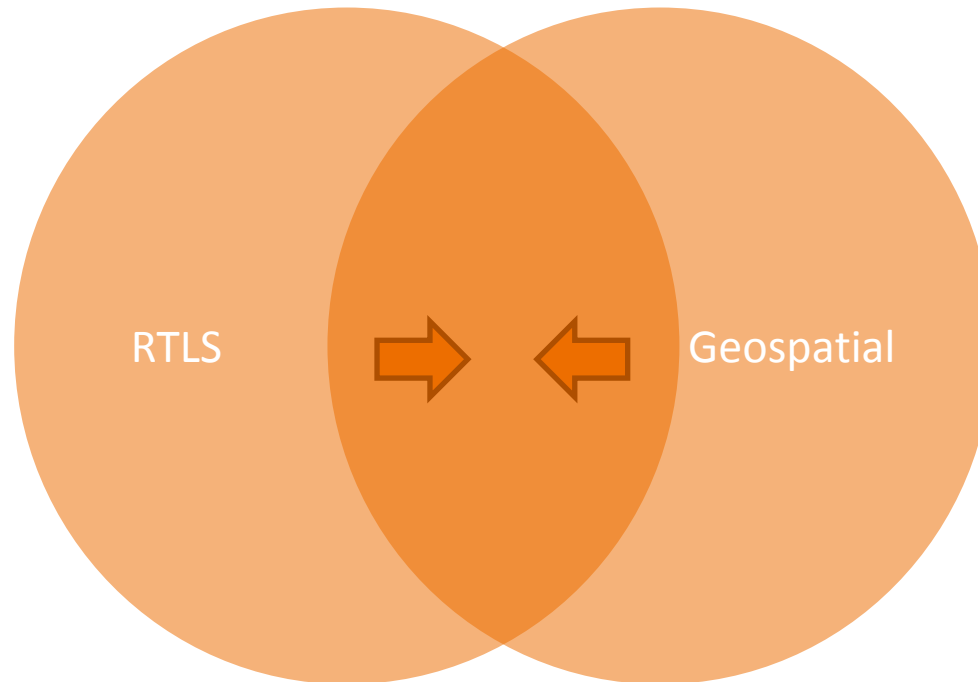
- Our customers are thinking bigger and more dynamically now
- Indoor and outdoor location support in one solution
- Dynamic and static data in one solution
- They want new ways to make the most of their data to maximise business efficiency

Manufacturing

Automotive manufacturer wants to understand where assets reside within their site on a real time basis

Geospatial

Utility wants its operatives to be able to locate assets while they are mobile in the field, to respond to customer faults in real time.



Convergence of Internet data (traditionally the preserve of our Geospatial business) and Companies' own enterprise data (traditionally RTLS) represents a game-changing opportunity for us

Real Time Location Intelligence

We at Ubisense improve the efficiency of our customers by applying real-time location intelligence to their mission-critical processes



Google Maps for Business

Ed Parsons, Google





Google Maps for Business

Making maps mainstream..

Ed Parsons, Geospatial Technologist
Google Research, London



+ed parsons



@edparsons

Google[®]

Google_{UK}

Google Search

I'm Feeling Lucky

1 in 3 about places

**10 years of finding
the nearest pizza ?**



Google

+You Search Images **Maps** Play YouTube News Gmail More - Sign In

Help & Feedback

Ramona's Pizza, Birch Street, Palo Alto, CA

Ramona's Pizza
2313 Birch St
Palo Alto, CA 94306
Permanently closed
Directions
ramonas-pizza.com
(650) 322-2181

See inside Street View 3 Photos

3.7 ★★★★★ 11 reviews · Menu · \$
European Restaurant · chicken with mushrooms · garden fresh salad

Get driving directions to this location

Start Location
palo alto
Get Directions

Web pages related to this location

San Francisco Restaurant
http://www.chowbaby.com/sf/ramonas-pizza

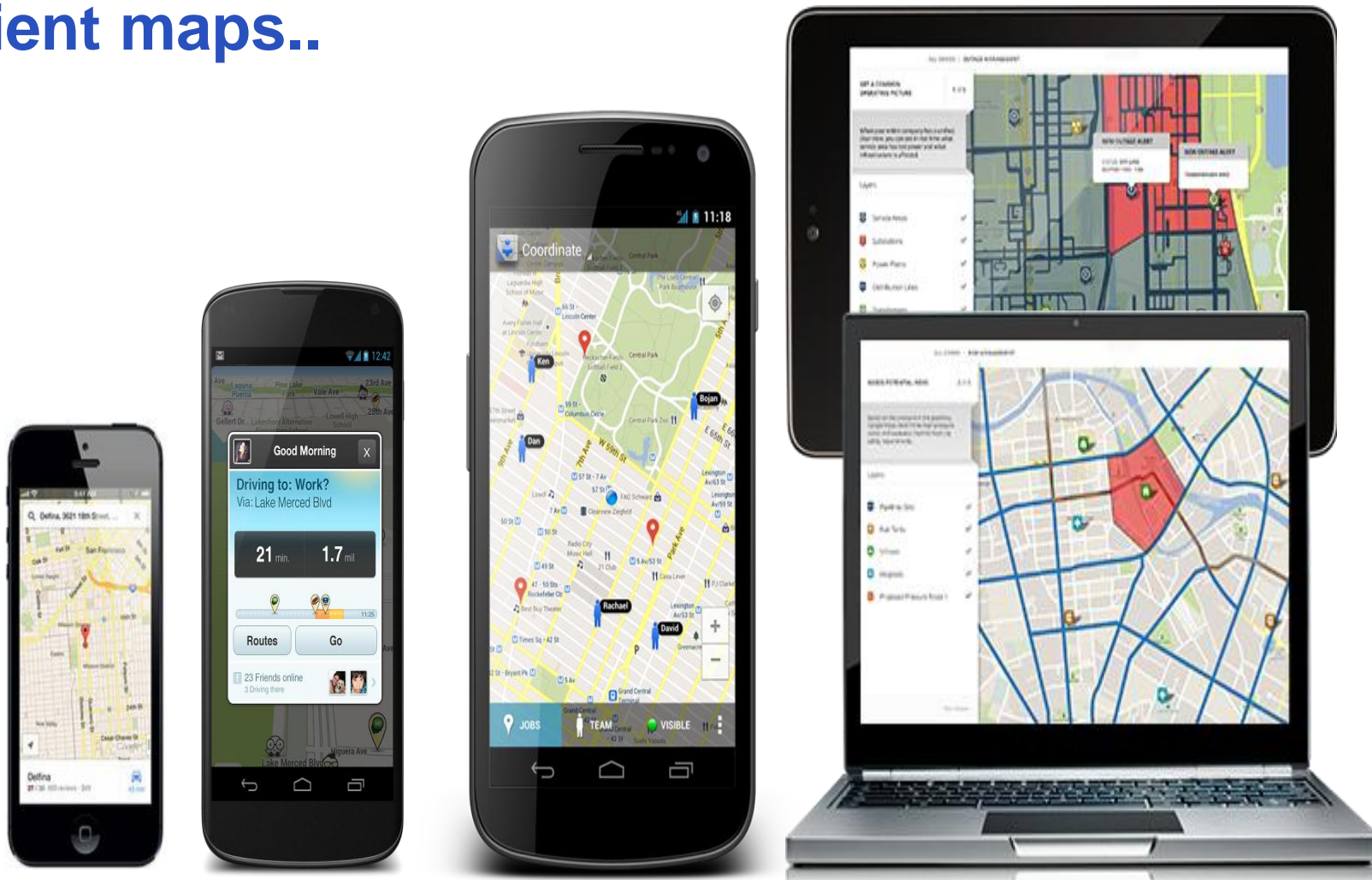
Unofficial Guide
... Ramona's Pizza \$ Post n
Mon-Sat 11am-10pm, Sun 4
http://unofficial.stanford.edu/

Map data ©2013 Google Terms Privacy Report a problem 200 m

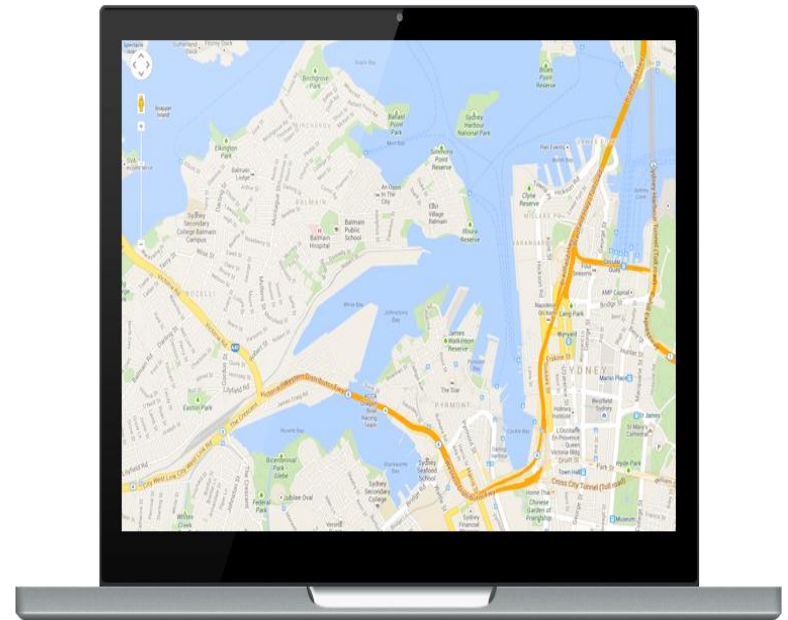
2004

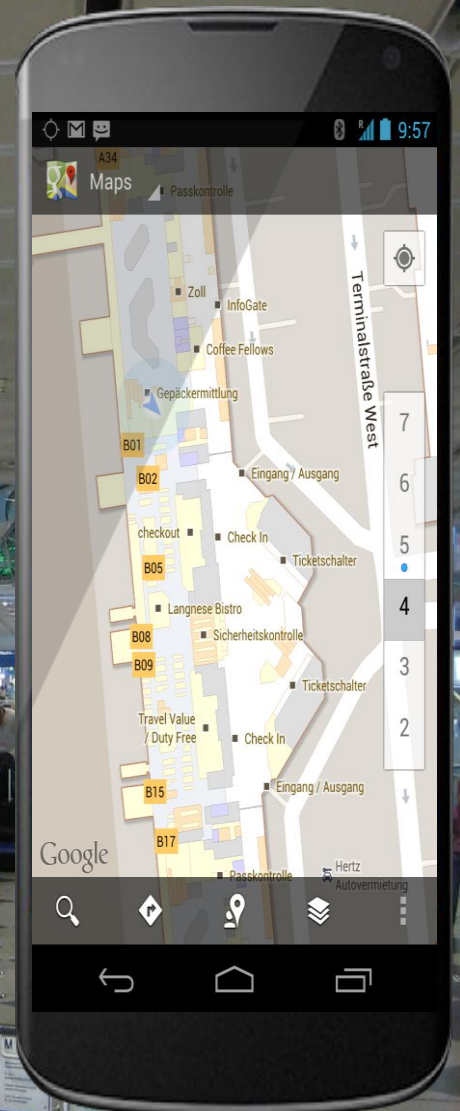
2013

Ambient maps..



Google™







One Billion!
Monthly active users

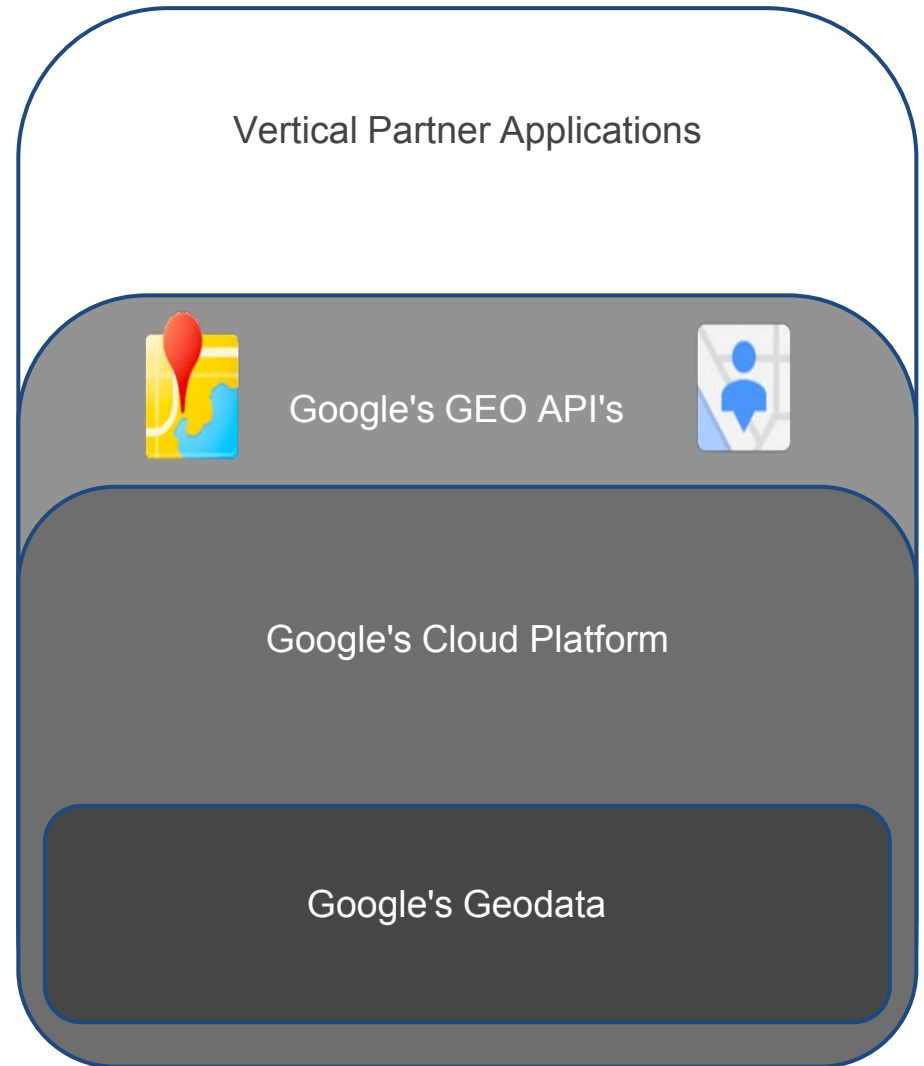
The collage features a variety of mapping interfaces. At the top left, there's a site with a world map and a sidebar. Next to it is a detailed street view of a city. To the right is a topographic map. Below these are several Google Maps instances showing different locations and data overlays. One map shows a large area with many red pins. Another shows a detailed street view of a city. There's also a map with a large red circle and a smaller red circle. At the bottom, there's a map with a large red circle and a smaller red circle. The text 'One Million! Maps API Sites' is overlaid on the collage.



By allowing employees to
work the way they live,
businesses can move
fast and innovate



Maps for business





425

Million

GMail Users

72+

Hours

Video uploaded per second

100

Billion

search queries per month

20

Billion

pages served per day

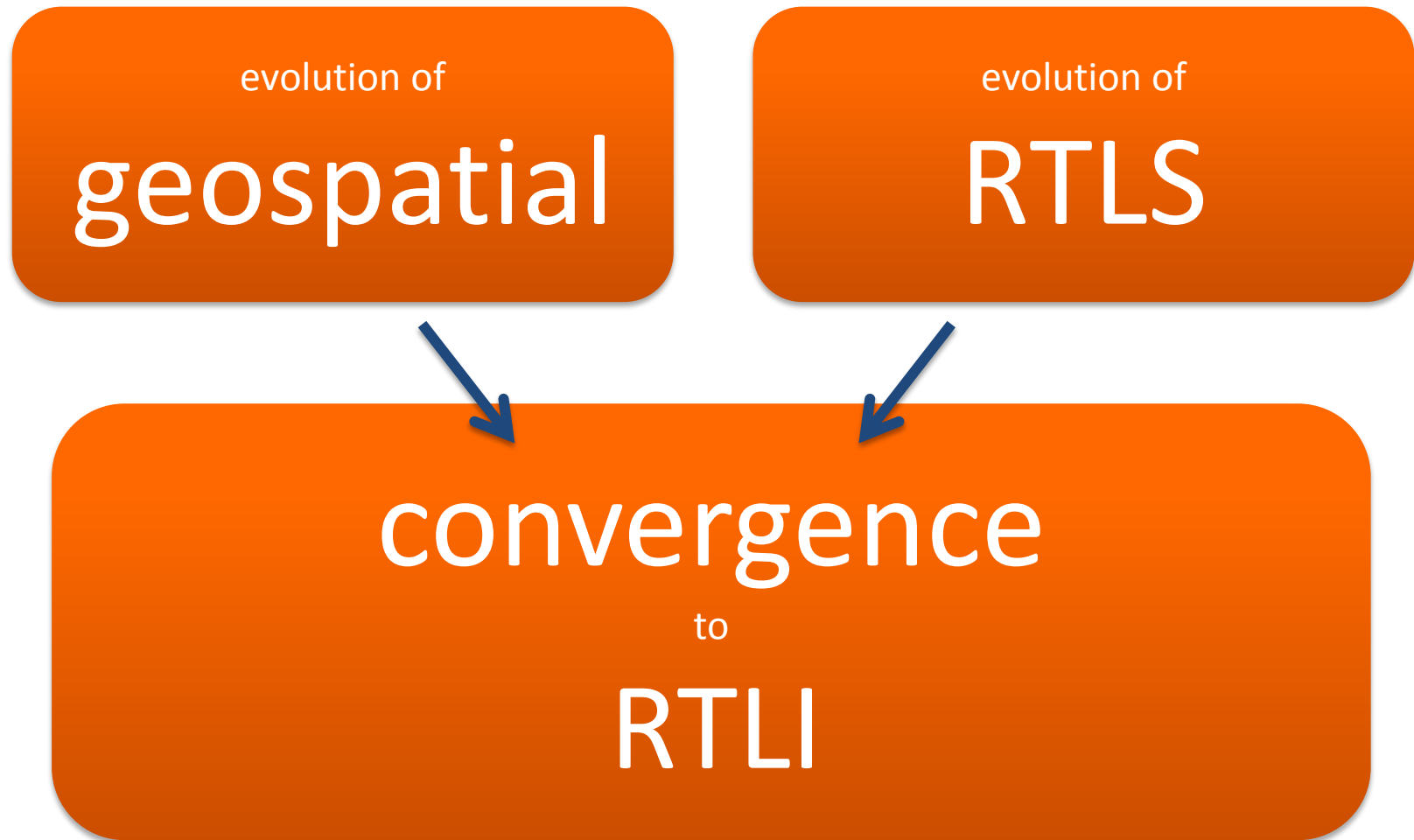
Liberate your GIS assets !

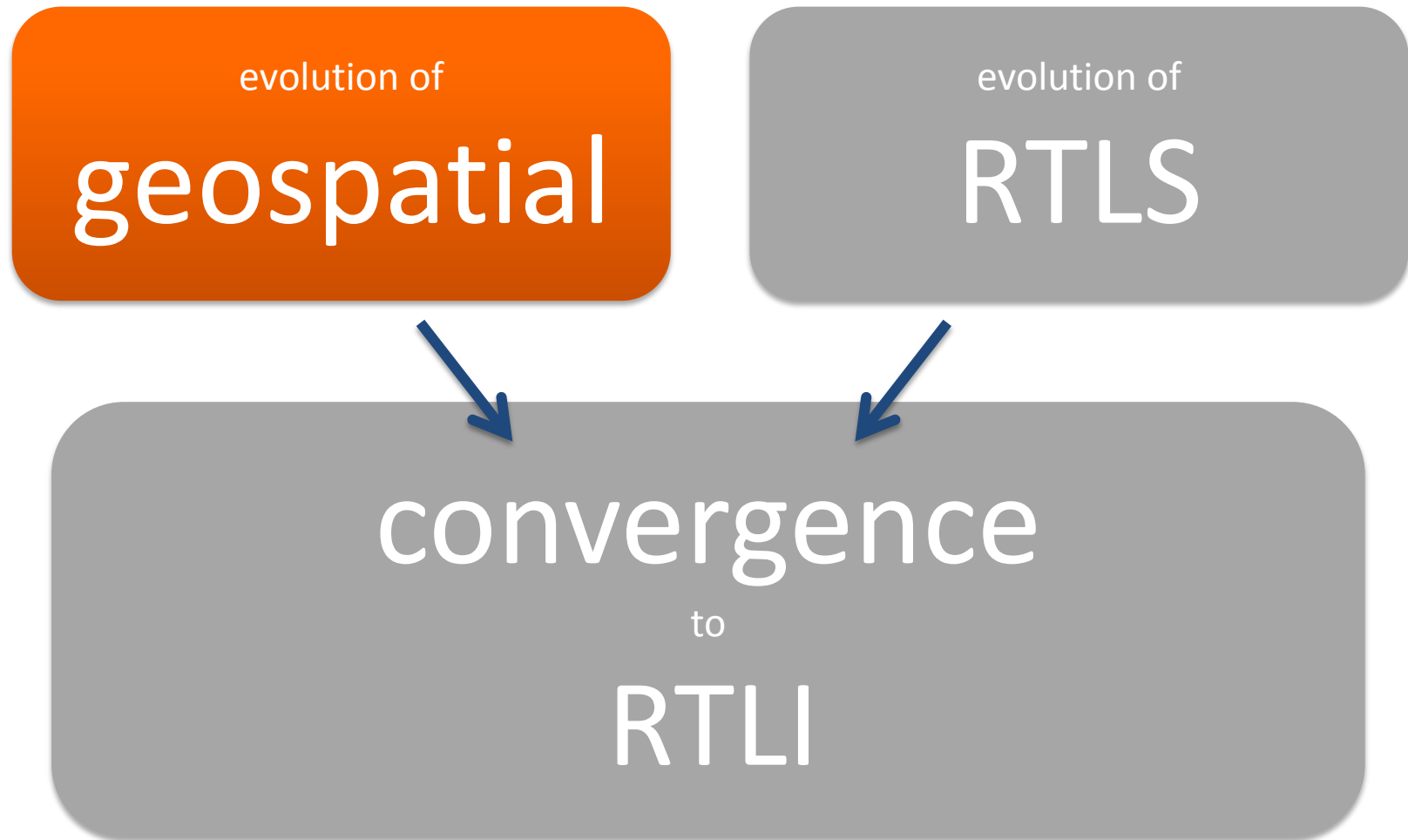


Ubisense product update

Peter Batty









Solutions Provider
GE Energy



Rich but complex and expensive systems
Existing core technologies all date from 1990s



Google Maps
Smart phone and tablets
Pervasive location tracking



Consumer-led IT

Electric



Smart Grid
Renewable
Energy

Gas



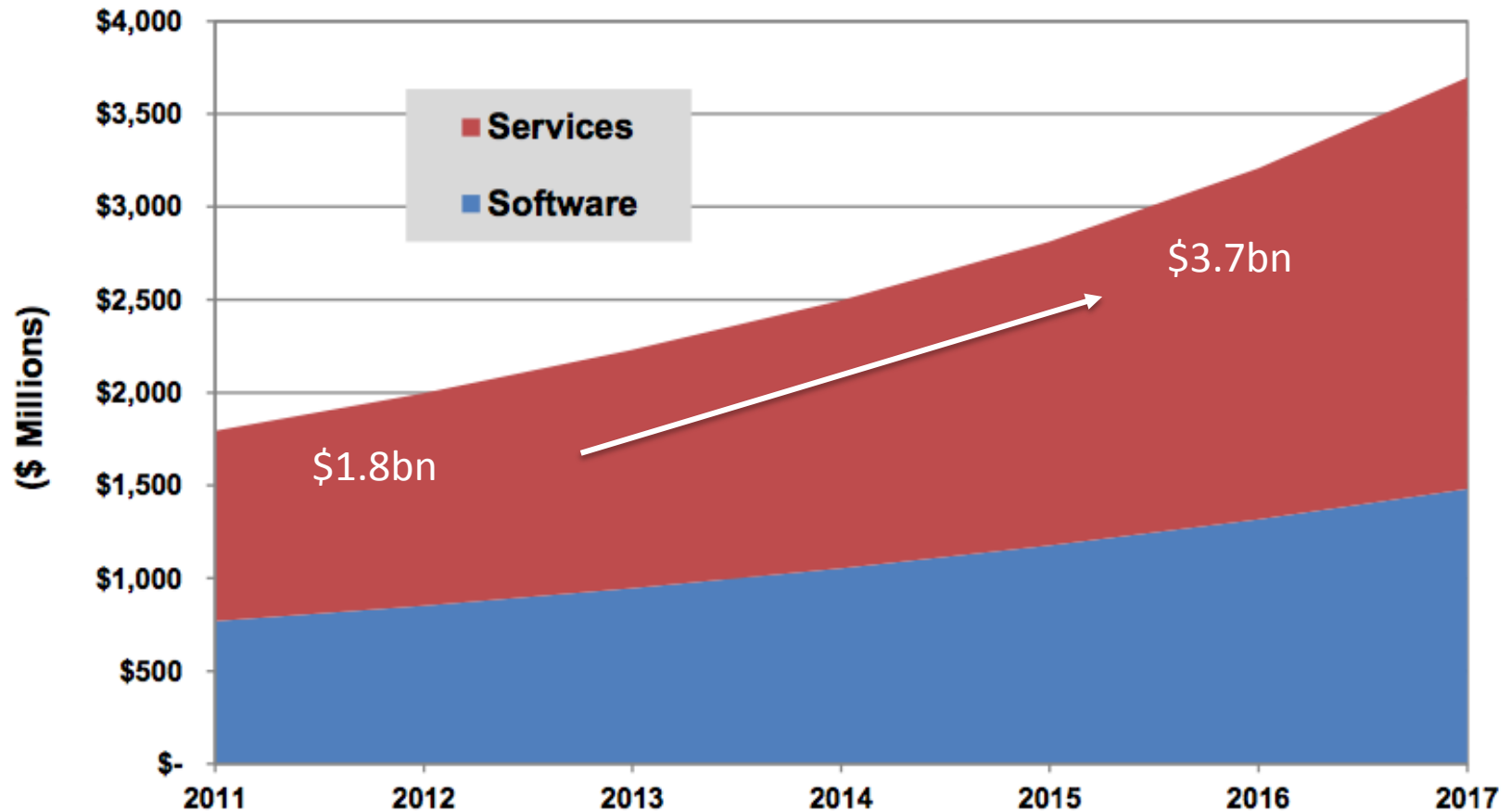
Regulatory
requirements

Telecom

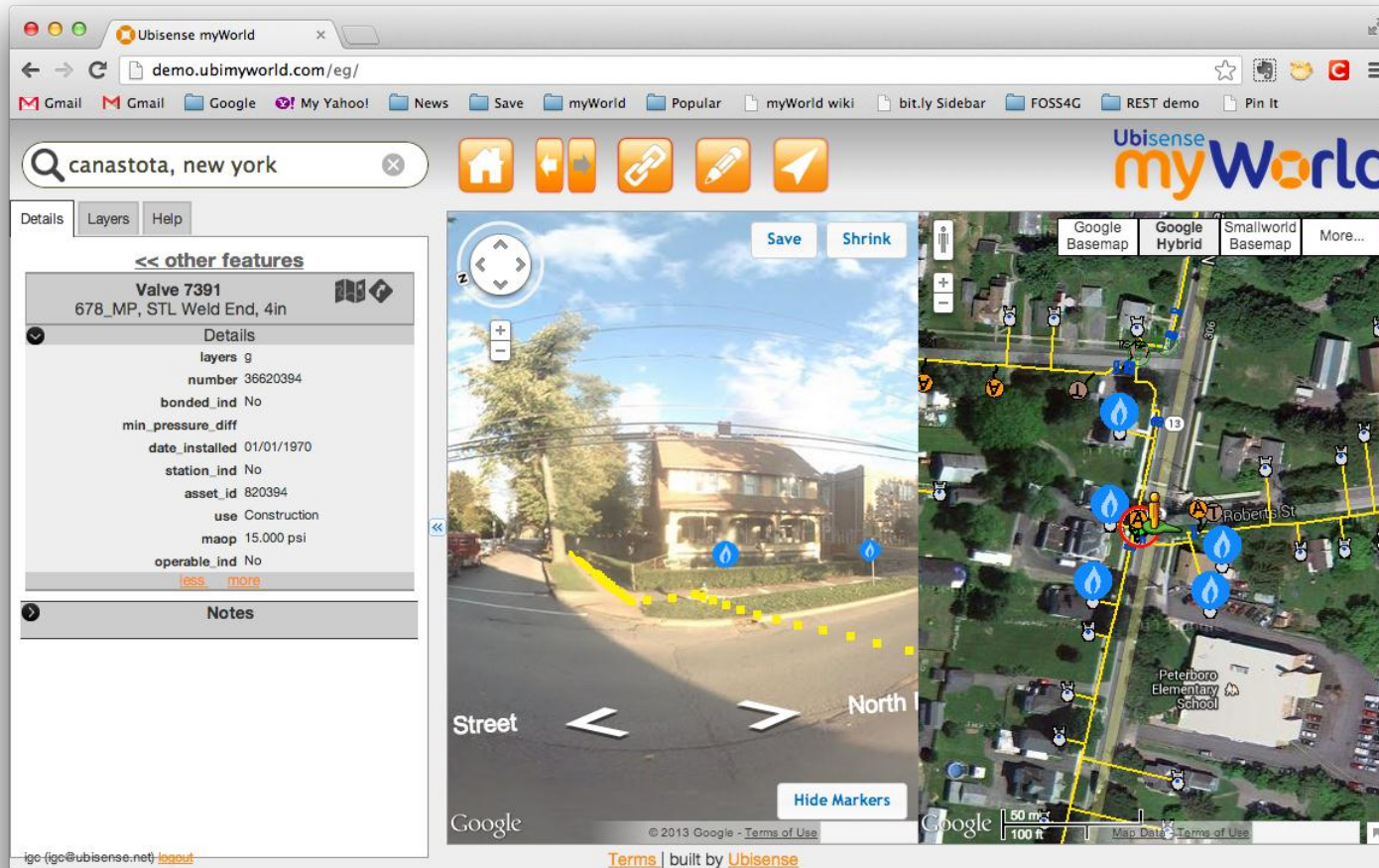


Fiber &
wireless
growth

Total Electric Utility Industry GIS-Related Software and Services Spending, World Markets: 2011-2017



(Source: Pike Research)



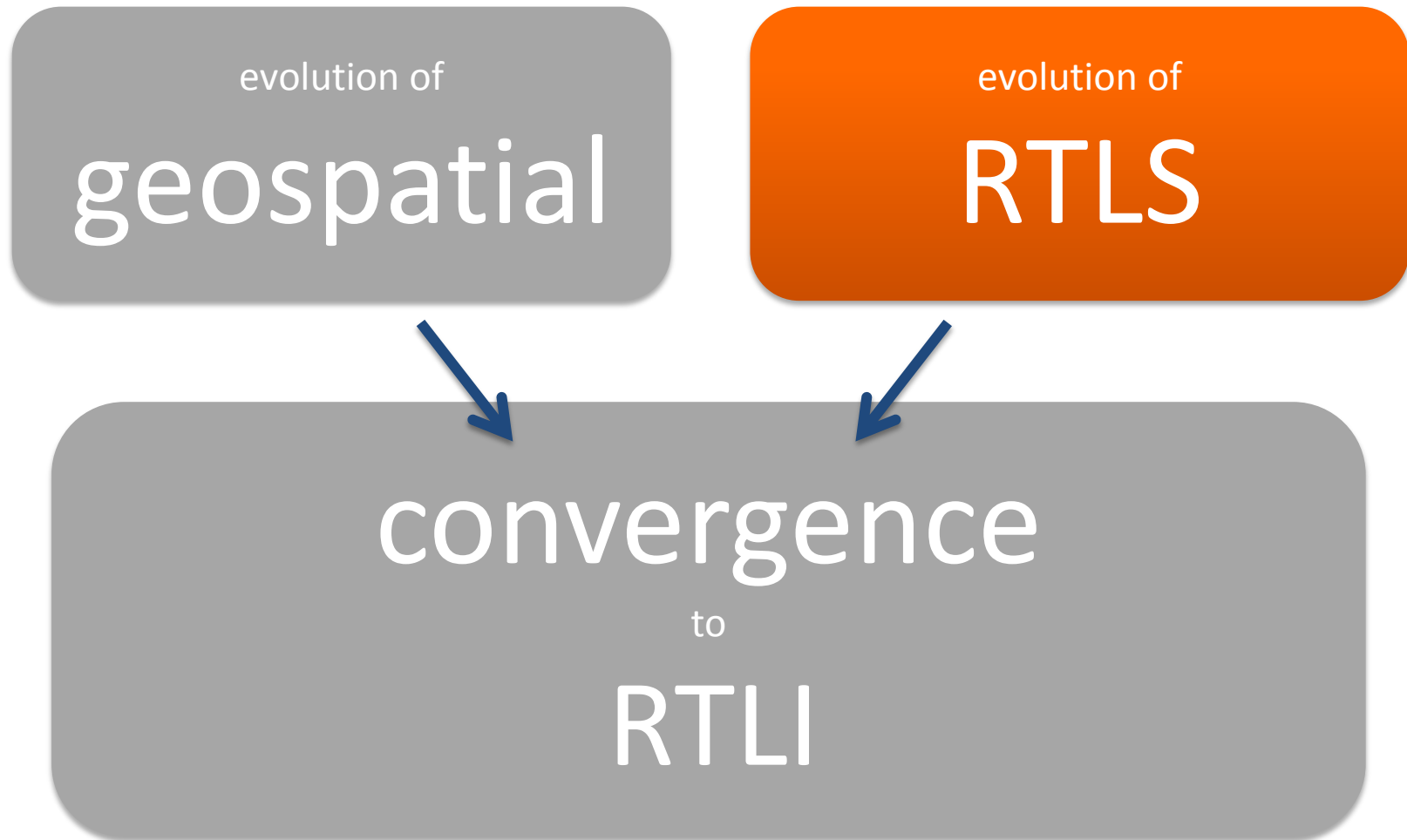
We now have a strong portfolio of geospatial products
Growing overlap / synergy with RTLS

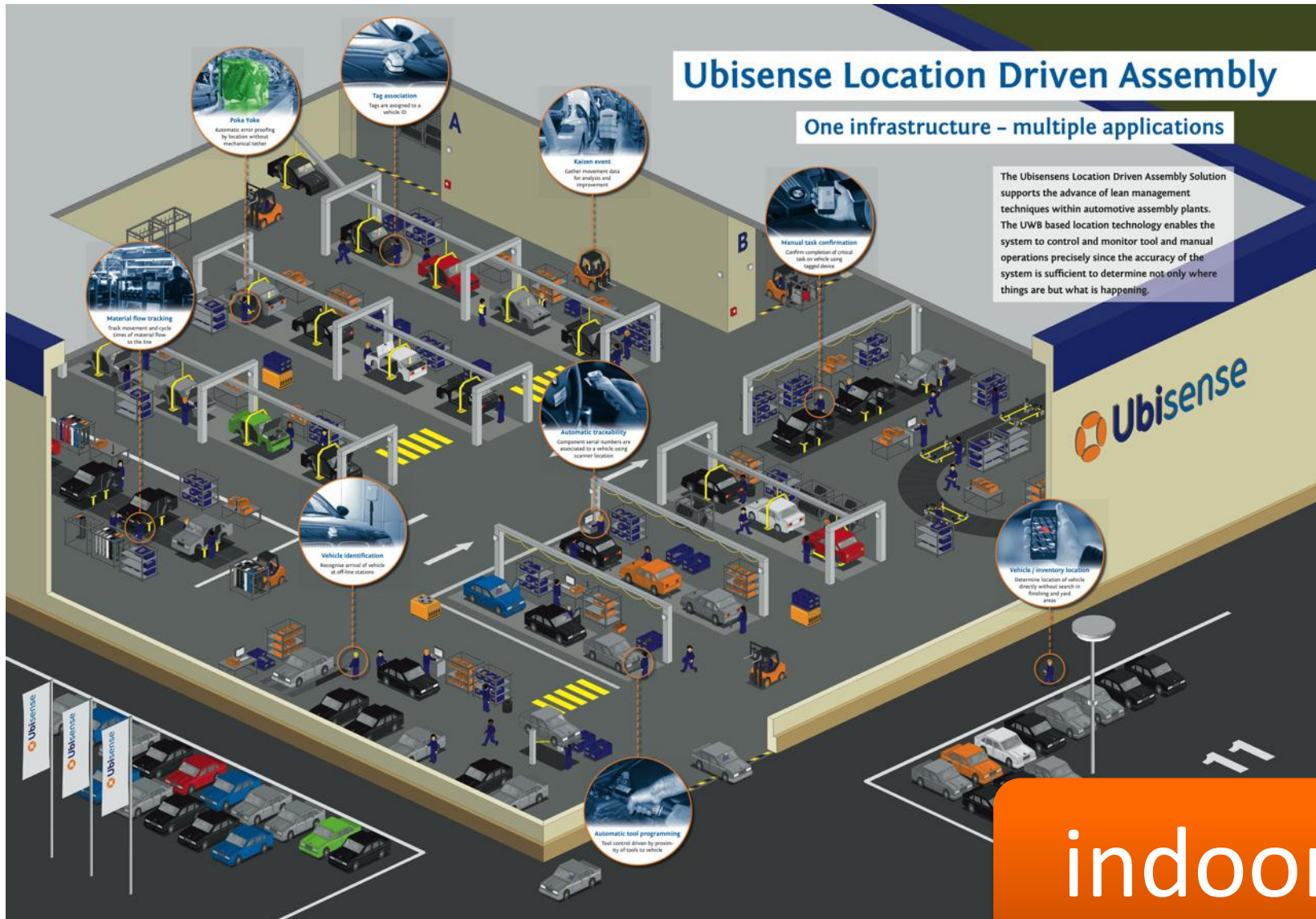
“Ubisense is one of the nimble startups that are quickly leveraging new GIS platform capabilities.”

“Consumerization of geospatial technologies will boost business-side expectations and inspire new utility applications,”

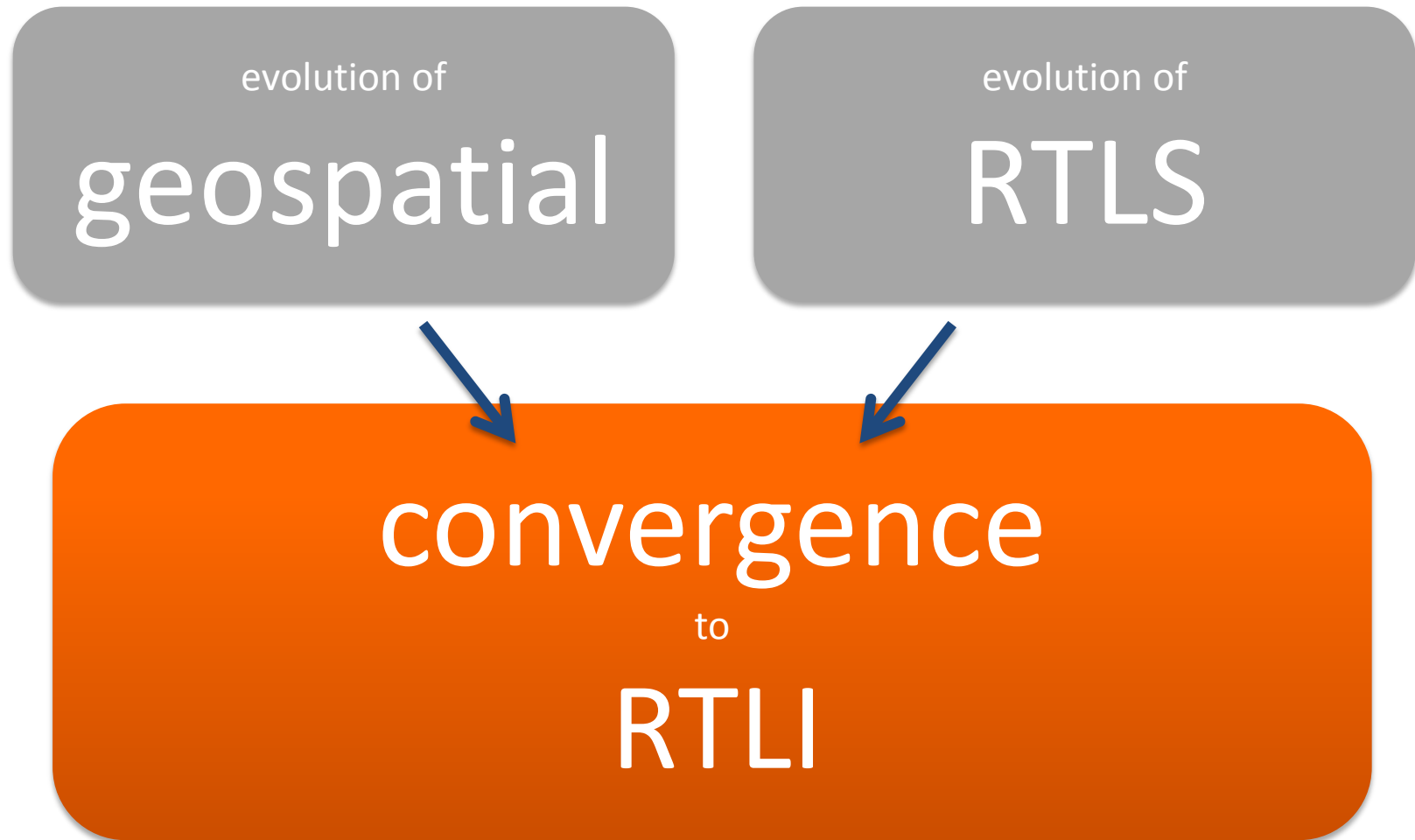
“Shifting market dynamics will challenge incumbent utility GIS vendors' ability to satisfy business expectations, prompting utility CIOs to evaluate new GIS capabilities.”

<http://www.gartner.com/id=2260419>









Application Solutions

Tool
Control

Asset
Management

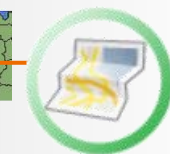
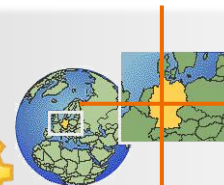
Process
Tracking

Yard
Management

Network
Planning

Storm
Recovery

Location Intelligence Platform



Ubisense components

Third party components

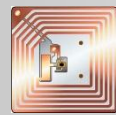
Data sources



Ubisense
RTLS



GPS



RFID



SCADA



ERP
MES
QMS



GIS
OMS

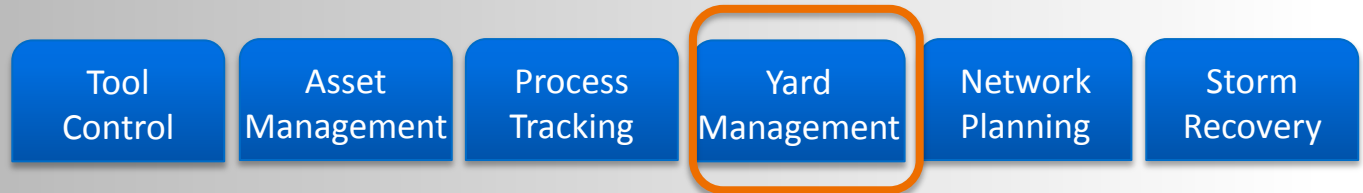


Sensors

Enterprise systems

Cloud

Application Solutions



Location Intelligence Platform



Data sources



Sensors

Enterprise systems

Cloud

Application Solutions

Tool
Control

Asset
Management

Process
Tracking

Yard
Management

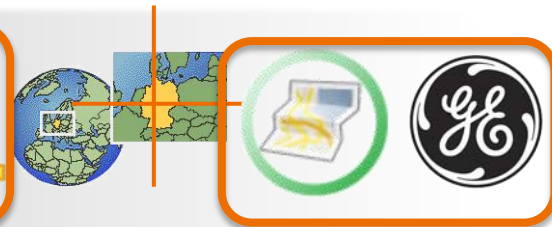
Network
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Ubisense components

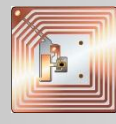


Third party components

Data sources



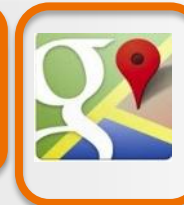
GPS



RFID



SCADA



Sensors

Enterprise systems

Cloud



Next Generation Demos

Gillian Kendrick





A Customer Perspective

Todd Kutty, Cablevision



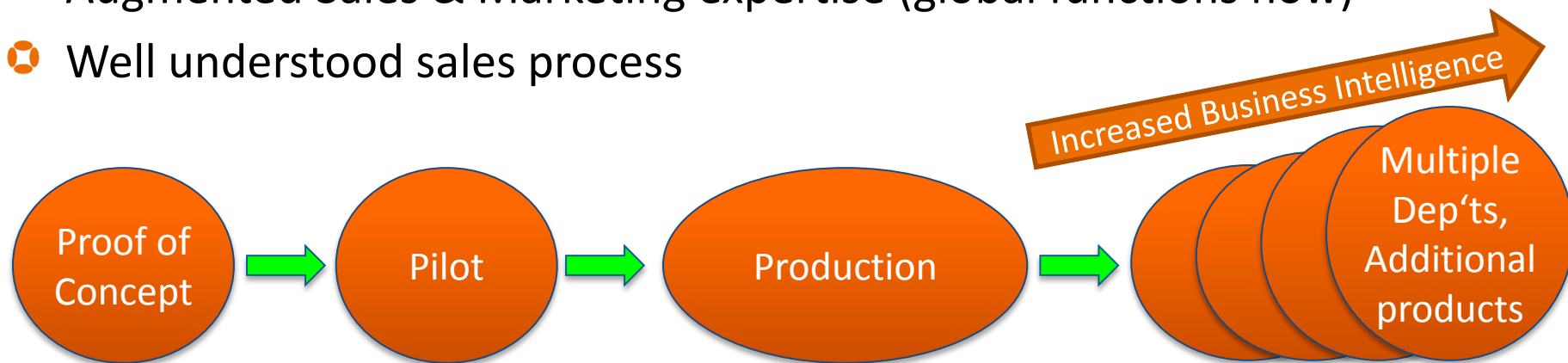


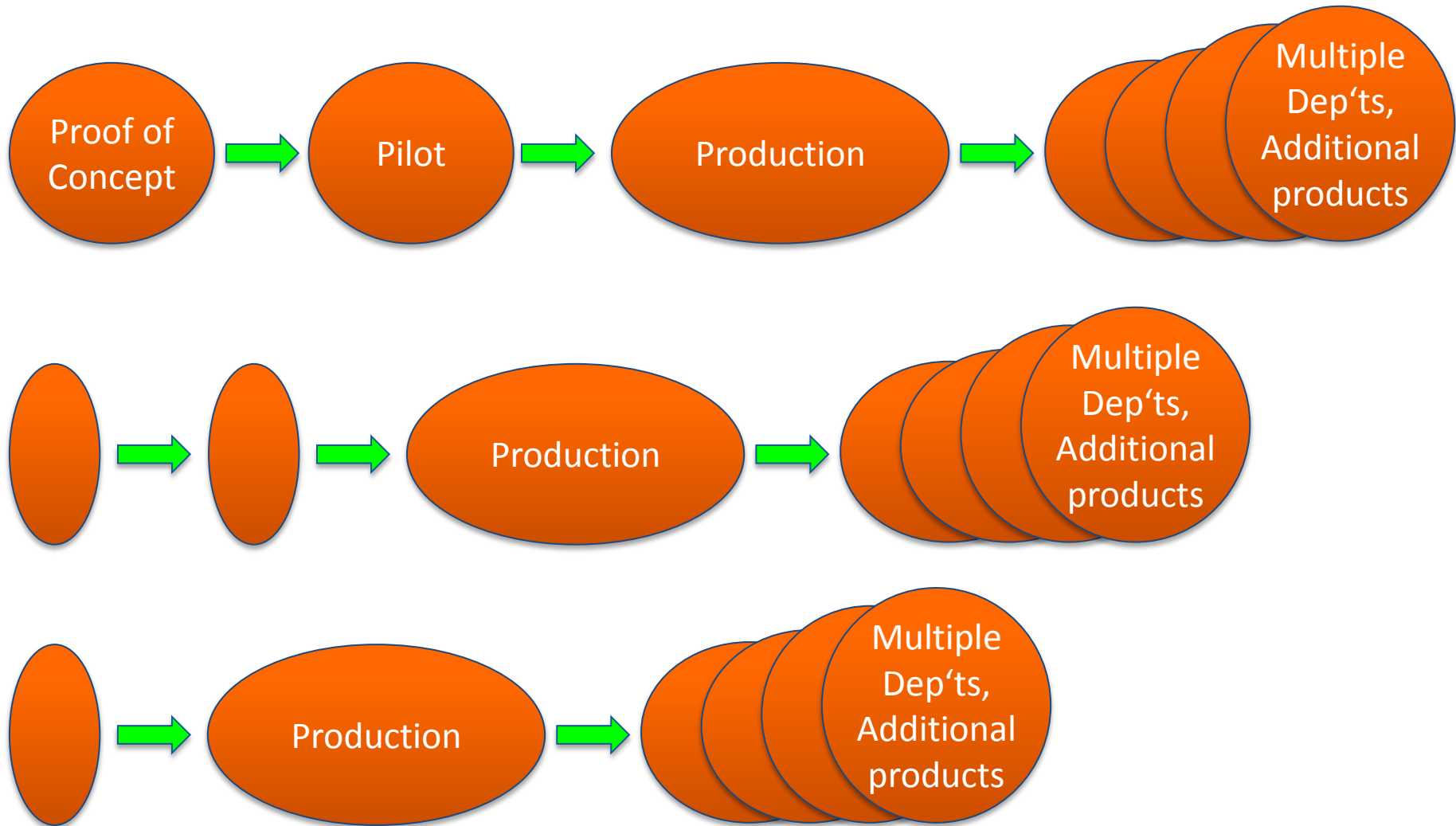
Customer Acquisition and Business Model

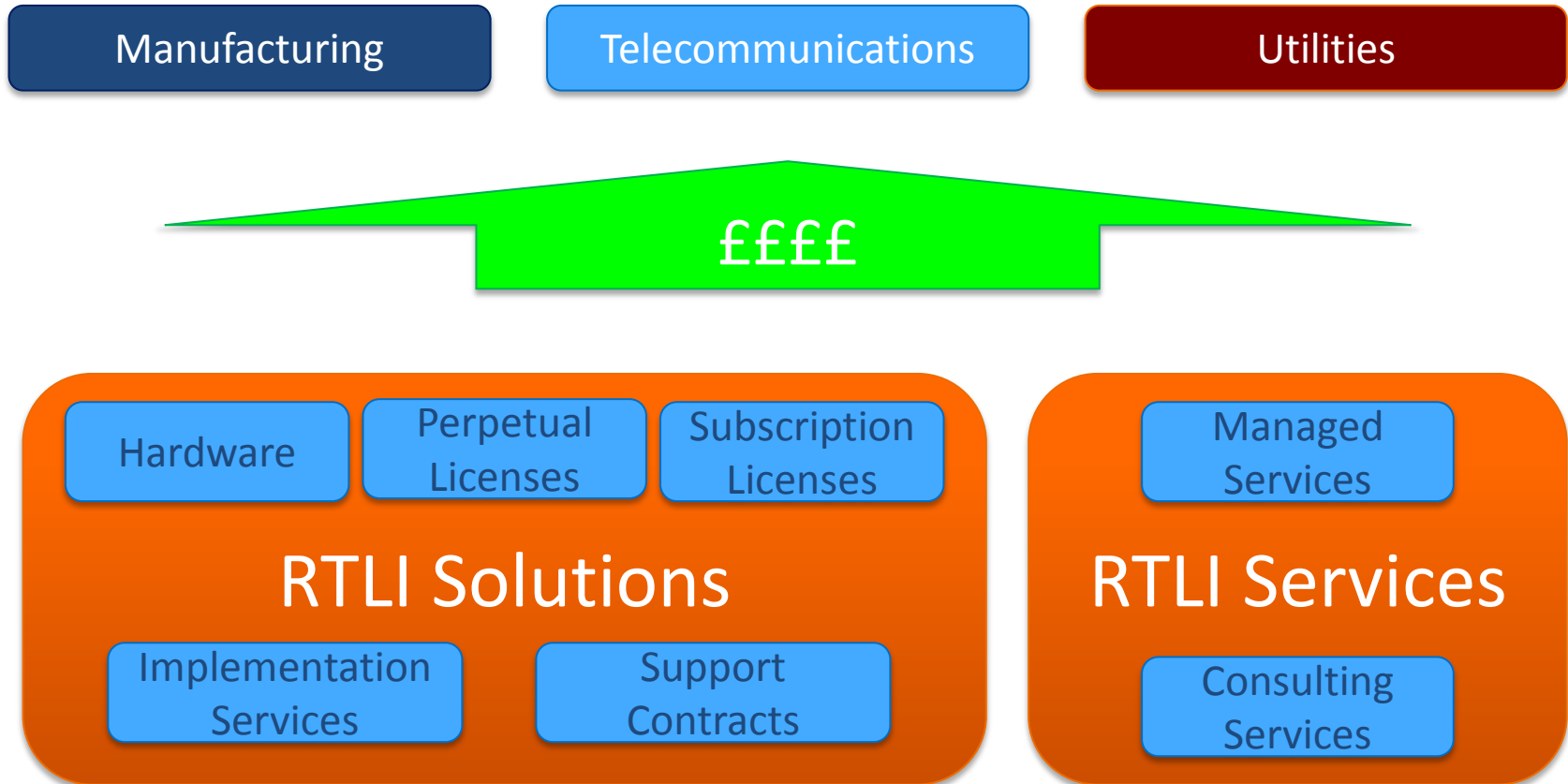
Paul Holroyd



- ❑ Readily identifiable customer base to farm and develop in telecoms and utilities
 - initially within GE/Smallworld platform clients; first ESRI client, others later
 - subject matter experts provide key support to the sales process / clients
- ❑ Readily identifiable customer base to farm and develop in high value manufacturing
 - pre-sales technical team and solution sales pros
- ❑ Trusted and experienced delivery teams
- ❑ Augmented Sales & Marketing expertise (global functions now)
- ❑ Well understood sales process

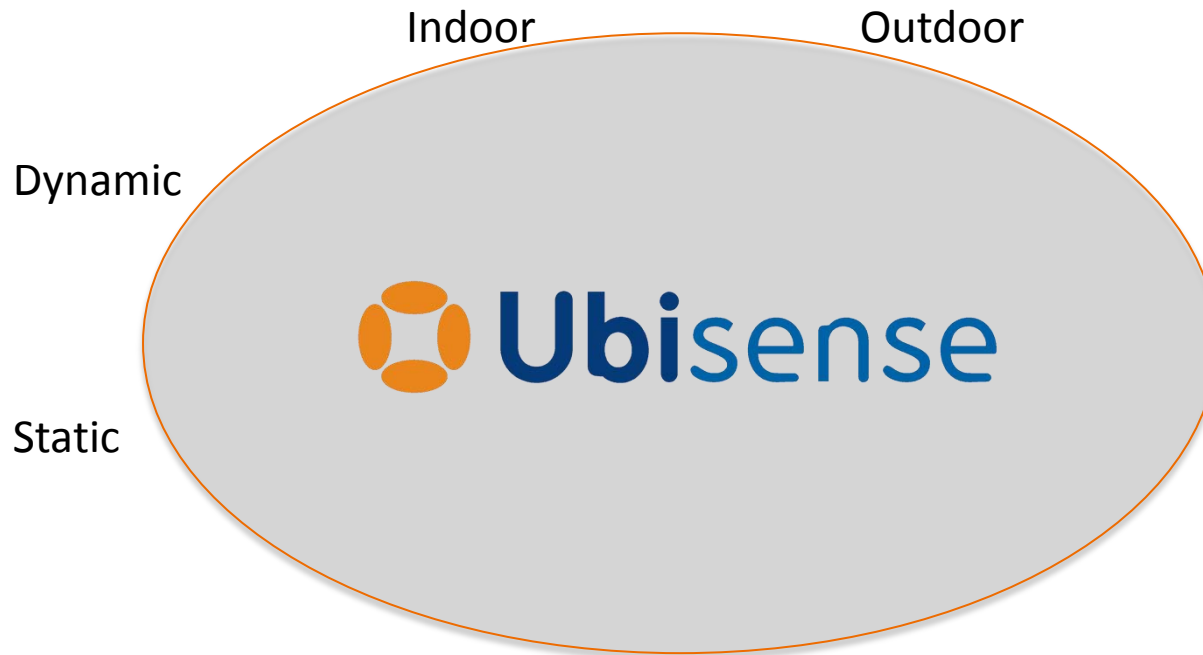






- ❖ RTLI Solutions deals characterised by proportionally more software and related services leveraging the increased IP portfolio
- ❖ Opportunity to grow high quality recurring revenue
 - increased M&S revenue from higher proportion of software sales
 - higher potential for subscription software model
 - increasingly mission critical = increasingly sticky
- ❖ RTLI Services business remains strong and stable
- ❖ Global go to market approach to maximise global opportunities

Summary



- Market convergence
- Ubisense organised on functional lines
- Product-based business with Services capability
- Focus on Telecoms, Manufacturing and Utility enterprises