

# SURVIVAL OF THE FITTEST

DANIEL PAEZ ANALYSES THE THREATS SURVEYORS FACE FROM COVID-19 AND HOW YOU CAN ADAPT TO MEET THEM



SORRY  
WE ARE  
CLOSED

COVID-19

The COVID-19 pandemic is changing everything – quickly. The oil industry is reducing its prices as never before while airlines are experiencing the worst impact since The Second World War. This article will not try to predict the future. Rather, it offers an analysis of the general trends in the industry using Porter’s Five Forces and proposes general ideas about the role of surveyors in the new world that is emerging.

In 1979, Michael Porter, a Harvard Business School professor, published a strategic methodology for business planning. It identifies five forces likely to affect any business. By analysing competition, suppliers, clients, possible substitutes and newcomers, strategies for the future can be developed.

Independently of whether you work for a university, in private practice or as a public servant, Porter’s Five Forces (see Figure 1) offers a way to digest the enormous amount of change we are suffering today in the geospatial industry.

## Competition

In both regulated and unregulated markets, competition among surveyors appears to remain stable. Our role is complex and requires training or experience. In some sectors, there are significant government regulations that limit competition. Software for geospatial analysis is complex and spatial analysis normally requires formal training at a university.

So it seems unlikely that the number of surveyors in most disciplines will change significantly. Competitive conditions are likely to remain the same during the response and recovery phases of the pandemic. Deregulation is perhaps the only risk to competitive forces among surveyors.

The poor prospects for the post-pandemic world economy might result in a “deregulation ghost”, where governments decide to remove entry conditions for regulated areas of surveying, such as cadastral and building



Figure 1. Porter's Five Forces for surveyors

surveying. Deregulation could mean reduced barriers to entering the profession or even their complete removal, so that other professionals could perform tasks that today are assigned only to surveyors.

But the chances of significant deregulation of the surveying industry are low. Therefore, our resilience to competition is strong or at least in most cases will be the same as before the pandemic.

**Suppliers**

The market is in our favour. We are blessed by healthy competition in the software and hardware markets. It is unlikely this will change any time soon.

Indeed, the arrival of new suppliers of high-end software and hardware from India, China and other countries are likely to result in decreased prices and increased options. This is already happening in the GIS market with the fast growth of SuperMap, for example. There is also increased competition between satellite imagery providers, thanks to start-ups such as Planet and Capella Space.

Our market resilience is unlikely to be affected by disruptions to supply chains. Some sectors might even experience benefits, as suppliers are willing to reduce prices to access new markets.

**Clients**

The future here might be greyer. Nobody yet knows what the future will look like, but post-pandemic, the property market, the main source of work for many of us, is likely to suffer, affecting our incomes. This will significantly impact those directly related to the sector, such as construction surveyors and those doing spatial analysis for spatial planning.

Even government surveyors might be affected as government revenues from fees and land taxes are affected when property prices drop. Universities are also likely to suffer from reduced research funding and fewer students.

Unless your work is directly related to service provision for the pandemic response, your potential clients are likely to have fewer resources. To improve your resilience, you should review the value chain within which you operate. If you identify vulnerabilities, taking early action could go a long way, particularly when it comes to cash flow and investment management.

**Possible substitutions and newcomers**

Technology is changing the way we do things. Surveyors deal with the important relationship between people and land,

and our profession is not immune to the new technological possibilities, as well as the expectations they bring to society. Cloud-based systems, mobile technologies, automation, 3D and blockchain are some of the examples of changes occurring today.

New technologies mean younger generations can do everything on their phones. They want tools and processes that have fewer rules and, most importantly, are empowering.

For those willing to change, new opportunities will emerge, accelerated by the pandemic. For example, there is a strong trend now for geospatial technologies to support social distancing and contact tracing. Surveyors who are willing to be part of the change are likely to have strong resilience to new entrants and substitution forces.

However, surveyors are not always those leading these efforts. Other industries, particularly the IT sector, are becoming important newcomers to watch.

Their impact could be beneficial or detrimental to surveyors. It is up to us to be the newcomer and provide services based on the expectations of younger generations and the latest technologies.

**Where we stand today will define our position in the future**

Porter's Five Forces for surveyors suggests our main vulnerabilities stem from the reality that our clients and citizens will have fewer resources. Only those who can adapt to quick technological transformation will stay active in the market. Competition and supply forces are likely to remain stable. Other professions might replace us if we ignore these vulnerabilities.

We cannot be static and just hope the pandemic is simply a temporal blink of nature. We are witnessing an extraordinary transformation of our society. Humanity is not just fighting a virus, it is getting an urgent call from nature to change, to adjust, to improve and more importantly to unite. Not being active in shaping the way forward is not an option, particularly as COVID-19 is likely to accelerate the desire of governments to reform.

FIG encourages surveyors all over the world to support solidarity among surveyors, to collaborate with national and state governments, and to develop ideas to shape the systems, technologies and solutions that will ensure a prosperous and sustainable development path for all nations of the world.

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