

The background of the slide is a high-angle aerial photograph of a city street. The street is lined with multi-story buildings that have prominent red-tiled roofs. A central section of the street is paved in a bright green color, possibly indicating a pedestrian zone or a specific urban planning feature. The street is flanked by sidewalks and some greenery, including trees and small patches of grass. The overall scene depicts a typical urban environment.

# Key developments and Strategic Issues

**EuroGeographics  
Extraordinary General Assembly**

**Leuven 14 May 2019**





Bundesamt  
für Kartographie  
und Geodäsie



Kartverket



Ordnance  
Survey



NLS  
NATIONAL  
LAND SURVEY  
OF FINLAND



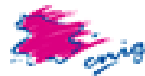
A  
BIG  
THANK YOU



GOBIERNO  
DE ESPAÑA

MINISTERIO  
DE FOMENTO

INSTITUTO  
GEOGRÁFICO  
NACIONAL



kadaster



GOBIERNO  
DE ESPAÑA

MINISTERIO  
DE HACIENDA  
Y FUNCIÓN PÚBLICA

SECRETARÍA DE ESTADO  
DE HACIENDA

DIRECCIÓN GENERAL  
DEL CATASTRO

A  
BIG  
THANK YOU



Helen Kaestner



ELS Programme Team Jari Reini



Abigail Page



Saulius Urbanas

## Issues affecting our business

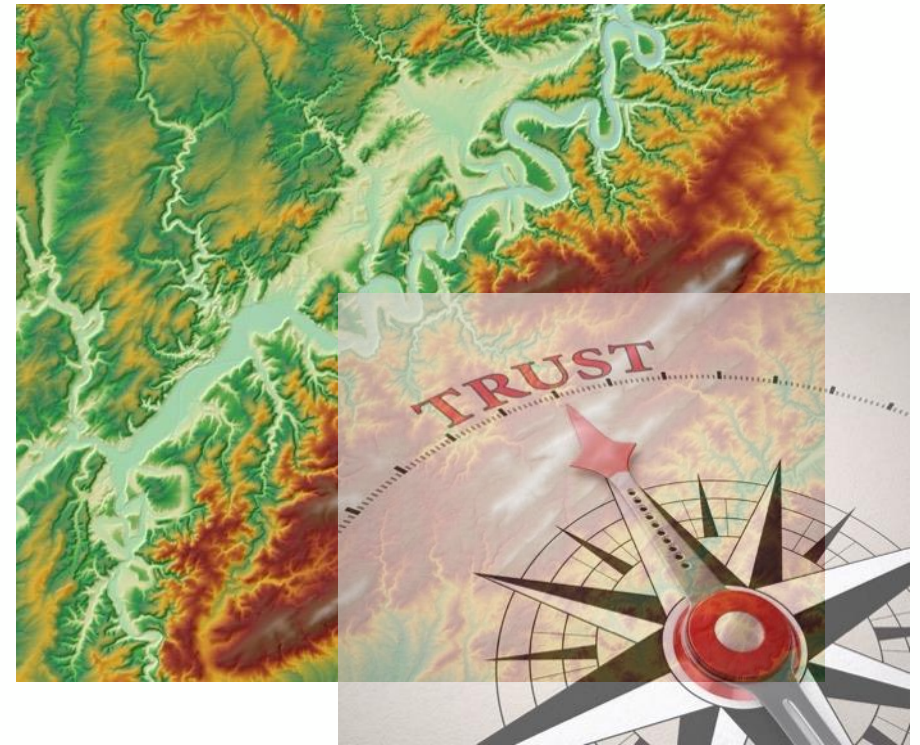
Things have changed:

- ELS has concluded its work
- There have been a number of recent developments in our operational environment
- Our financial situation has changed, and
- The “big picture” is changing too.

These changes have occurred since our strategy was agreed in October 2017

They are a challenge and an opportunity

How are we responding?



**These changes have occurred since our strategy was agreed in October 2017**

**A short reminder - Our current Strategy**



## Society empowered by our members' authoritative geospatial services

*We support the public good by representing our members' interests, maintaining networks that help our members improve their capabilities and role, and by facilitating access to and use of our members' geospatial services*



## EuroGeographics is:

- A not-for-profit International Association of members
- Voluntary membership, no legal mandate, no power to compel
- Our success is based on our ability to deliver value to our members, and on the willingness of our members to collaborate for their wider benefit

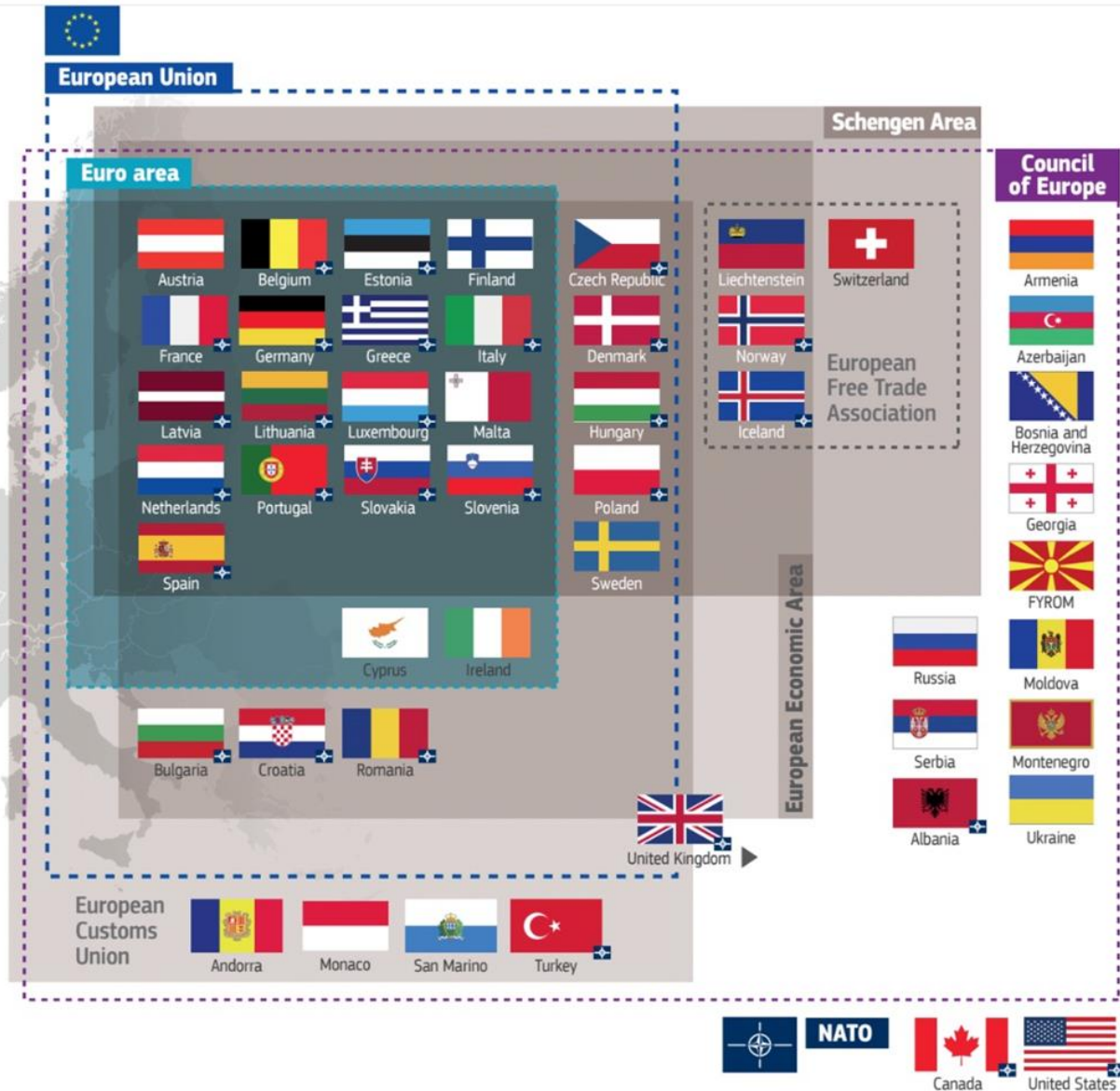
### EuroGeographics has

- limited resources (financial and people), and is
- Reliant on members active participation (representation, KENs)
- Only able to deliver if our members contribute – data, time, resources, skills and knowledge

## EuroGeographics is NOT:

- A data producer, or supplier of data (limited production only, based on members contributions)
- An operational business
- A commercial entity, returning profits to shareholders





## Europe – a multi-layered complex continent

- Not just EU 28 (27?)
- EU
- Euro
- EFTA / EEA
- Customs Union
- Council of Europe
- Schengen
- NATO



## EU influences beyond the 28 (27)

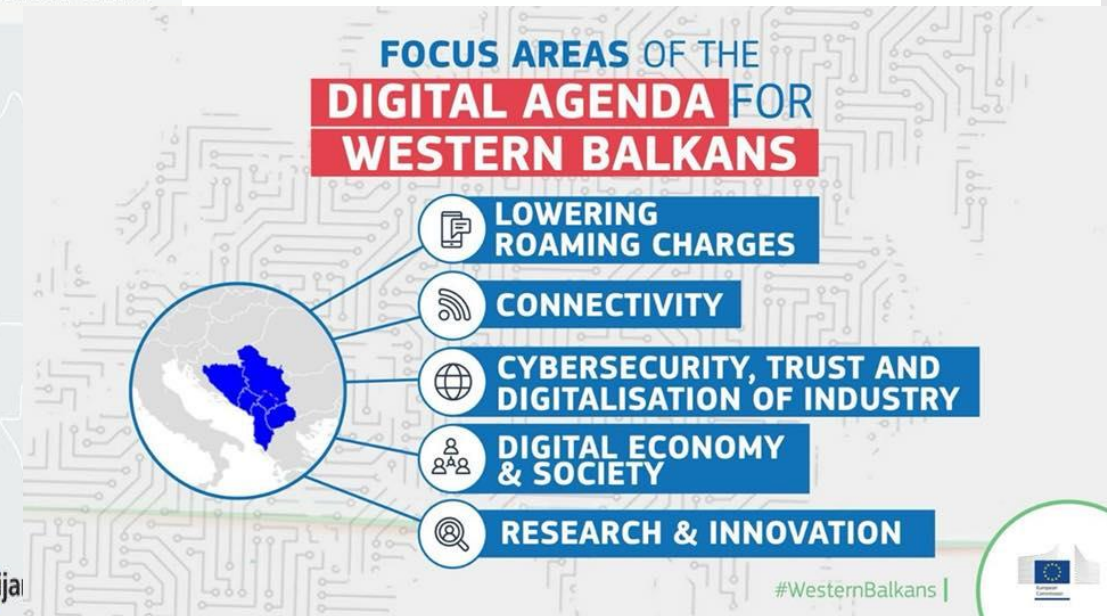
Example - 28<sup>th</sup> February Eastern Partnership declaration on Digital economy:



- promoting stronger digital economies for the EU's six Eastern Partners: Armenia, Azerbaijan, Belarus, Georgia, the Republic of Moldova and Ukraine

- to help deepen cooperation in the digital area across the region, Harmonisation of Digital Markets
- four priority areas (stronger economy, stronger governance, stronger connectivity, stronger society).

- EU4Digital will contribute to eliminate existing obstacles and barriers for pan-European online services for citizens, public administrations and businesses, including through the harmonisation of the digital environments, such as broadband infrastructure



## Review of ELS, look to the future

### Background

- GA2018 Prague: Members support for the vision for ELS, but need for revision
- EuroGeographics is not as an operational business
- Management Board agreed to redeploy Gartner to:
  - Review the ELS programme,
  - Update the vision and strategy, and
  - Help identify a role for EuroGeographics.

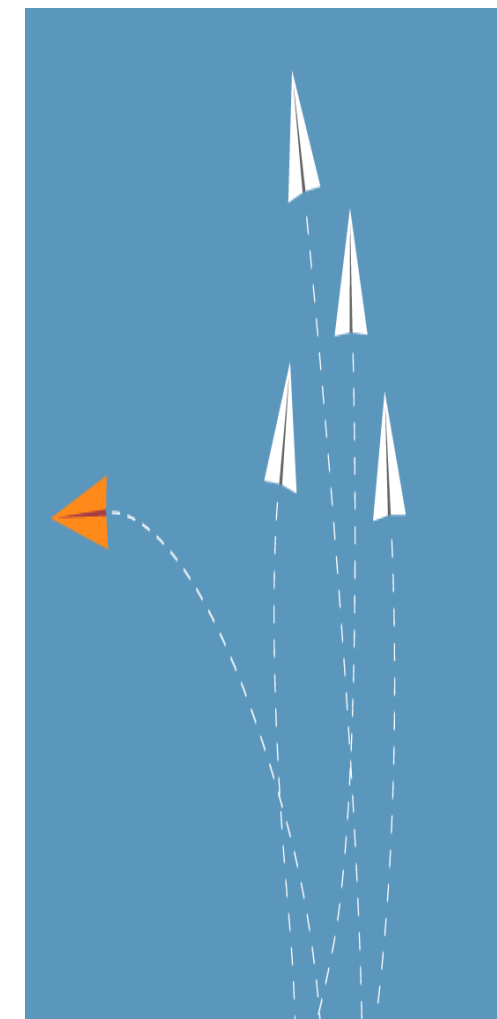
### Work undertaken:

- First task - analysis of the current ELS Programme,
- Understand what has gone well and what could have gone better.
- What were the lessons learned for future development of ELS
- Then – look to future of ELS, and EuroGeographics role in it.

Gartner®

## Recent developments in our operational environment

- Nov 2017 – EEA plans to issue tender for CLC+, to include ‘CLC-Backbone’.
- December 2018 – DG ENV and EEA letters: Should INSPIRE data not meet the EC operational requirements ... then free to consider alternative, eventually intermediate solutions, to timely meet needs.  
The “implementation of the Inspire Directive ... not ... sufficient ... in order to be used in the Copernicus core land monitoring service at European level”
- May 2018 EULIS concludes; LRI project underway.
- June 2018 – ESA plans to issue tender for pan-European and global DEM / DSM, despite past experiences!





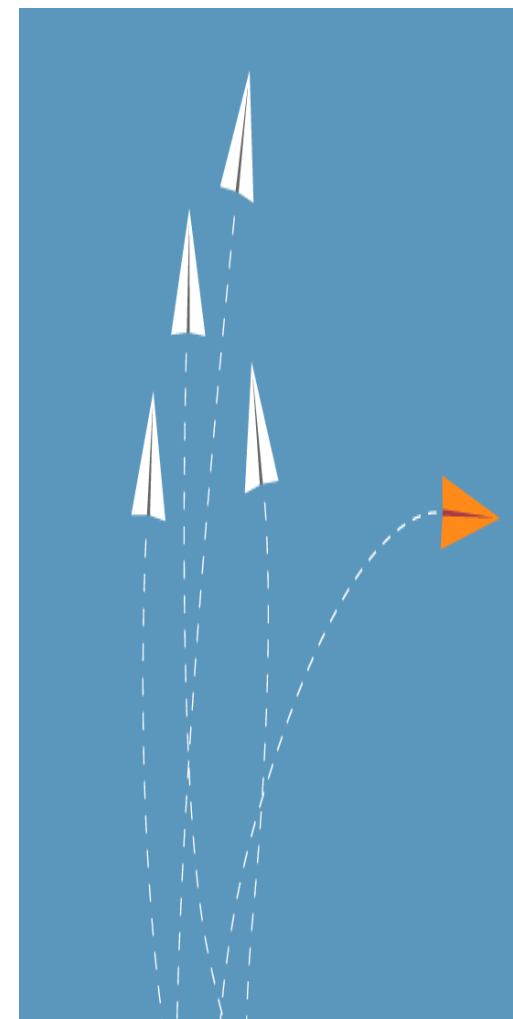
## Recent developments in our operational environment (2)

December 2018 – Eurostat tender result - contract award only for administrative and statistical regions (EuroBoundaryMap).

Not required: EuroRegionalMap  
Core Reference Data (CRD)  
ELS evaluation

EGHO budget cut of € 345k (21.1 %)

Jan – Mar 2019 – JRC / Eurostat announce plans to develop an EU Gazetteer;  
Eurostat will not sign evaluation license for CRD; Obtaining CRD data direct from member`s instead.  
A strengthened role for Eurostat in relation to obtaining geospatial data is under consideration.



## Example - Road infrastructure safety management Directive - amendments

### Text proposed by the Commission

- 2 b. 'primary road' means a road that is not a motorway but connects major cities or regions, or both, and is defined as a primary road in the EuroRegionalMap produced by the National Mapping and Cadastral Agencies of Europe;

### Amendments

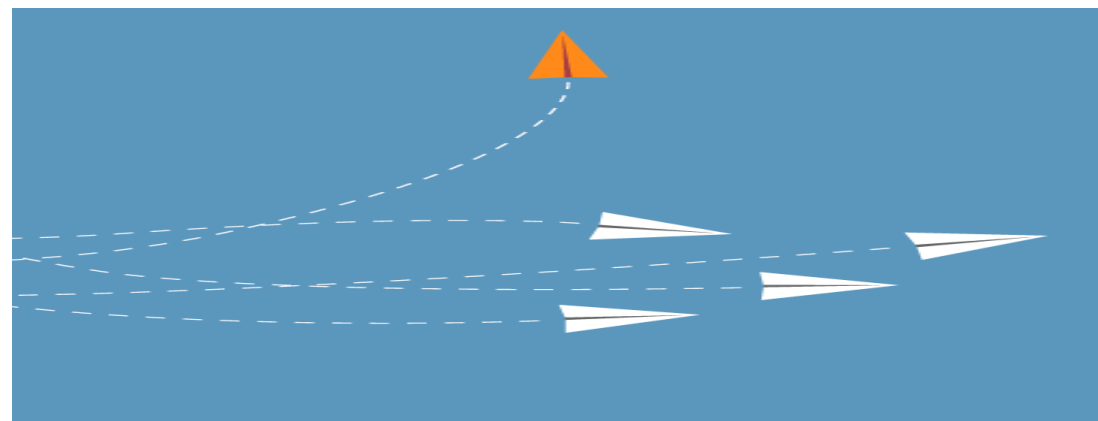
- 2 b. 'primary road' means a road that connects major cities or regions, or both, belonging to the highest category of road below the category 'motorway' in the national road classification;

Reason - apparently some Member states are criticizing the fact that legislation would take as a benchmark a product that requires payment.

Local and regional authorities can, if they need, access the same data that is provided by their own national mapping and cadaster authorities, since that's the source for ERM. The concrete terms of such access depend on national policies. (subsidiarity principle – it is for MS to inform of road classifications).

## Recent developments in our operational environment (3)

- June 2018 – Gartner interviews with potential ELS partners - commercial market need is being met by easily accessible proxy data provided for free in some cases by Google, OSM and Tom Tom, Limited interest in a full partnership on ELS.
- October 2018 - GA 2018, members continued to support the vision for European Location Services, but recognised the need to revise the vision and strategy, that the role of EuroGeographics was not as an operational business, and the Association should not intend to become one.
- April 2019 - CRD status, EEA evaluation
- May 2019 - Open Data PSI Directive
- Further CEF bid rejected for Open ELS II





## Our financial situation has changed

Following Eurostat tender decision:

- A reduction in income of €345,000 for 2019, 21.1% to the 2019 budget, has a significant impact on the Association, requiring immediate budget reductions.
- Reviewed 2019 budget
- Our reserves will cushion the impact of this decision, but further actions are required to ensure that we are able to sustain our activities into the future
- NOT just a budget saving exercise. Recognise the need for a broader strategic response to the changing environment around us.
- The critical objective is to remove approximately €250,000 per year deficit from membership activities (Against €1.8 million costs)
- And ensure that membership subscriptions cover the costs of Association activities.
- Recognising that there is the potential requirement to increase subscriptions for 2020 to enable us to maintain membership activities

## Our 'market' has changed

### New entrants

Over the last 10 years there has been an explosion of new entrants into the global geospatial 'market'

### Bargaining power of users

European users are free to obtain data from any source;  
No legal / and limited policy requirement to use national data at European level (although there is a weak political one).

### Substitute Products

New entrants have successfully introduced substitute products that are proxies for authoritative data,

Pan-European competitive landscape

### Data supply side issues

Constrained to provide members only data  
INSPIRE issues  
Data coverage  
Diverse policy, legal, financial landscape – multiple agreements required

## Technological change continues ....

- Last year disruptive technologies workshop. Influences policy decisions, new considerations.
- The pace of technological change continues, and disruptive technology continues to disrupt, technical processes and business models.
- PSI directive review brought the legislative framework up to date with digital technologies, and further stimulate digital innovation, especially in Artificial Intelligence
- Space Programme: bring together all of the Union's (EGNOS; GALILEO, Copernicus, SSA, GOVSATCOM).
- Need for data is clear. This will lower barriers to entry into our traditional business. Can we fill the gap?
- Deployment of technology will disrupt even more (Drones, VGI, “involuntary” GI)
- BUT! Do not focus just on this as we don't operate in isolation of wider political, social and economic change



## Political Environment

- Elections; New EU institutional leadership, new policies and new priorities ahead!
- Five dimensions: Protective Europe; Competitive Europe; Fair Europe; Sustainable Europe; Influential Europe.
- Conclusions of the wide debate on “White paper on the Future of Europe” are:
- Fighting climate change, protecting the environment, addressing migration.
- Changes beyond the anticipated scenarios. Brexit, rise of populism and nationalism
- The Sibiu Declaration unanimously agreed on 10 commitments

## Social & Environment

- Migration pressure; security and defence cooperation;
- Strengthening external relations in the neighbourhood and beyond;
- Aging population and regional disparities;
- Climate changes and Environment. Need for data, to measure and monitor impact, and response to the consequences. It will affect all the above, and all of us.
- Refocussing of INSPIRE on environmental priorities? What does this mean for us?

## Economic environment

- Significant global competition, rise of China, USA and India;
- Digital Single Market building competitive European business;
- Focus on Research & Innovation.

- Need for data remains.
- Drive to Open data continues:
- “Open Data and Public Sector Information (PSI) Directive”.

## A word about the SDGs and Europe

- Commission reflection paper – “Towards an ever more sustainable Union by 2030”; European Committee of the Regions (CoR) support
- Sustainable Development at the core of EU principles
- UN sustainable development goals will be a “compass” for EU
- Calls on the EU to become a global “trailblazer” – in partnership with the UN
- SDGs endorsed at the highest political level
- Overriding strategy will guide actions by the EU and MS.
- EU Institutions to work closer together and with MS, including with regional and local authorities
- SDGs to be ‘mainstreamed’ in all relevant EU internal and external policies
- More focus on external action
- Conclusion – SDG will form a core component of EU policies over next five years



# Conclusions & Next Steps

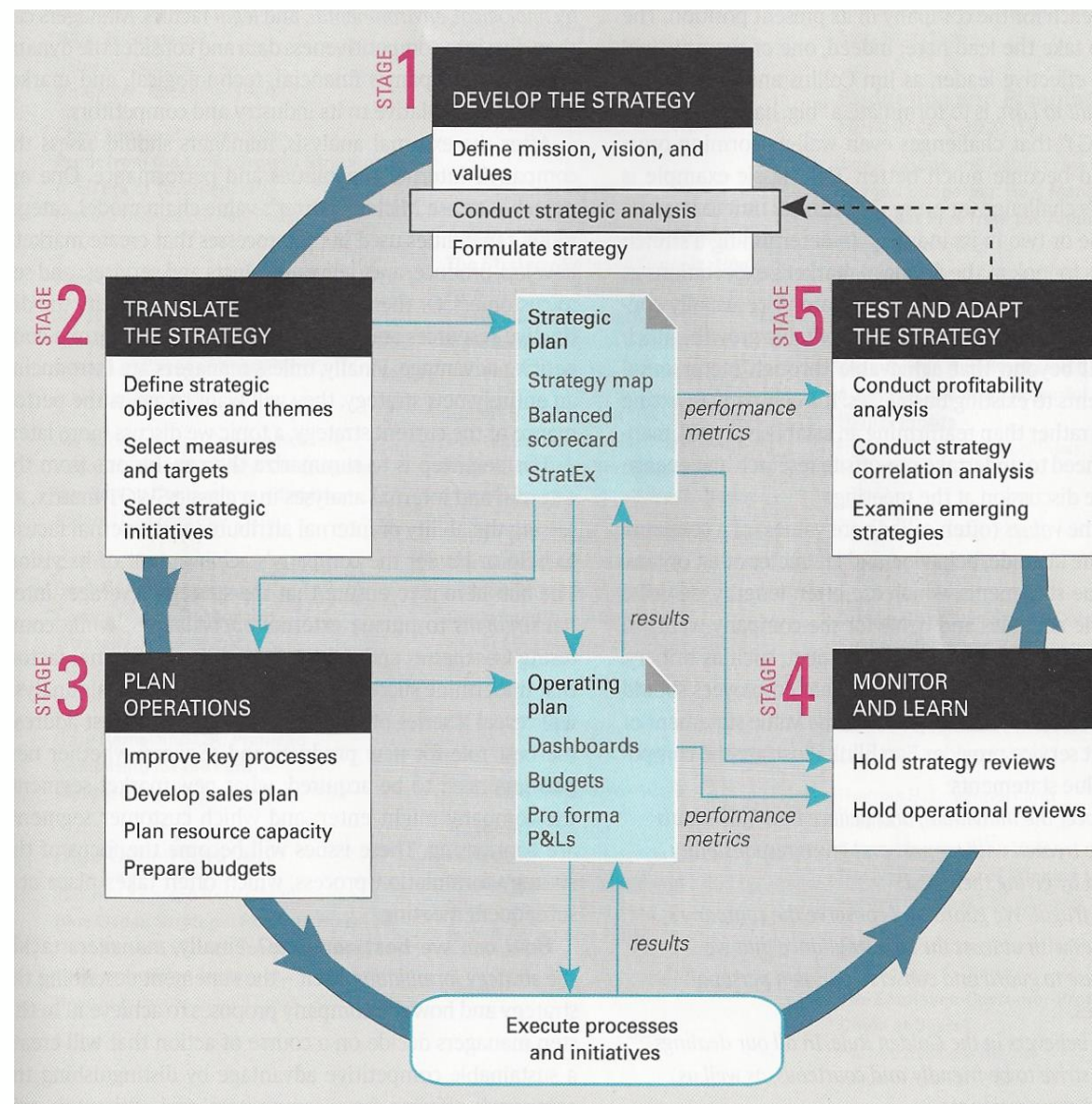




## A strategic response

Strategic conversation about our future - Rethink how we achieve our vision

- Focus on being a membership association;
- Present a balanced budget this year, and for future years!
- Consider 'how' we carry out our core purpose;
- In particular review our approach to the three strategic pillars of activity;
- Sustain our commitment to the importance of authoritative data from our members and SDGs;
- Build our dialogue and relationships with key European institutions
- Clarify our value proposition to EC and other International stakeholders.



## Conclusions – An opportunity!

Things have changed: These changes have occurred since our strategy was agreed in October 2017

- ELS has concluded its work - We have gone as far as we reasonably and sensibly can with ELF/ELS based projects We are very proud of what the projects, through our Members, have achieved
- There have been a number of recent developments in our operational environment ; Our financial situation has changed, and the “big picture” is changing too.
- EC accessing more NMCA data directly from national sources
- Opportunities, especially around Open Data PSI Directive, for High Value Datasets
- These developments are a challenge and an opportunity – For EuroGeographics and its members
- It is now time to move on within our changing landscape and with a strategy that works within that landscape
- We will build on our existing strategy over the coming weeks and months to determine how we will respond to this change, and
- Present our plans to the GA in Manchester this October.