

Current Trends in the European Surveying Market

- The Surveying Profession in Europe
- Trends in the immediate future



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Current Trends in the European Surveying Market

"You were, as you say, taken on as a surveyor, but we don't need a surveyor. There wouldn't be the least bit of work for a person like that. The boundaries of our smallholdings have been marked out, everything has been duly registered, the properties themselves rarely change hands and whatever small boundary disputes arise, we settle ourselves. So why should we have any need for a surveyor?"
Kafka, Franz (1926) "The Castle"



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Current Trends in the European Surveying Market

- What is a surveyor?
- Changing markets
- Perceptions
- Changing technology/legislation
- Free market / regulated market



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The Surveying Profession in Europe

One example of activities embraced by the surveying profession

- Land & Hydrographic Surveying
- Mapping and Positioning
- Geographic Information Science
- Land Law, Administration & Reform
- Dispute Resolution & Expert Witness
- Cartography
- Project Management
- Ocean Bed & Resource Surveys
- Geodesy
- Global & Local Navigation Systems
- Engineering Survey
- Cadastre & Land Registration
- Photogrammetry & Remote Sensing
- Research & Consultancy
- Monitoring of Structures
- Land, Coastal & Marine Information Management
- Private, Regional & International Boundaries Determination



Source RICS UK

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The surveying profession in Europe

Factors that influence trends

- Expectations of society leading to:
 - EU expansion
 - Mutual recognition of qualifications
 - Cross border activities / global markets / global companies
 - New business opportunities
 - New legislation / National and EU
 - Societal and client expectations
 - Litigation potential
 - Simplification of technology
 - Emergence of National Spatial Data Infrastructures (NSDI)
 - Pervasive nature of Geographic Information per se



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The surveying profession in Europe

Key Questions to participants:

- Do you practice in a "Free Market" Profession ?
- Do you practice in a "Regulated" Profession ?
- Do you practice in both ?
 - If so are you comfortable with this situation?



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The Surveying Profession in Europe

Two major markets exist

- Free market – where no license is required to practice
 - Characteristics: Broadly unregulated
 - Trend: Increased need for competent and qualified practitioners
 - Informal regulation by Indemnity Insurance and potential litigation
 - Can be local, regional or global
- Regulated market – where a license is required to practice
 - Characteristics: Jurisdiction or State specific
 - Trend: Higher level of precision and accuracy
 - Acknowledgement of Role in Society
 - Tends to be state specific



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Free Market

Example 1

European Union Market for GIS is valued at 1,276 million euros.

This industry is expecting a compound annual growth rate of 10.7% per annum between now and 2010 – Frost and Sullivan

<http://www.frost.com/prod/servlet/frost-home.pag>

Example 2

RICS 2010 report – surveying demographics and economic Analysis. Environment sector to grow by 200% pa.

www.rics.org



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The Surveying Profession in Europe

Example 3

In the UK, Ordnance Survey (OS) data adds value (gross value added – GVA) of up to £150 billion – 220 billion euro to the economy according to (OXERA)

<http://www.ordnancesurvey.co.uk/oswebsite/aboutus/reports/>

Example 4

The Survey Association in the UK estimates that their 80 commercial member bodies have a combined turnover of £85 million (110 million euro)



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Trends in the immediate future

Are the free market and the regulated market mutually exclusive ?



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Trends in the immediate future

Free Market

- Growth of cross boarder alliances
- Increase in international mergers – need for mutual recognition
- Emergence of multi skilled professional firms providing cradle to grave services
- Emergence of multi faceted contracts in the market place
- Increased growth of added value services in new market areas



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Trends in the immediate future

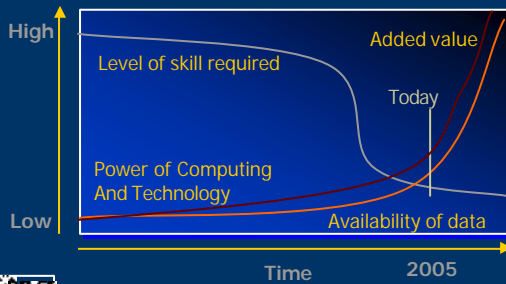
Regulated market

- State / Jurisdiction specific
- Ever greater protection of society
- More accountability
- EU Permanent Commission on Cadastre
<http://www.eurocadastre.org>
- UNECE report on EU land systems
http://www.uncece.org/env/hs/wpla/welcome_wpla.html
- EULIS
http://www.uncece.org/env/hs/wpla/welcome_wpla.html
- UK land registry online
<http://www.landregistry.gov.uk/direct/Default.asp>



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Trends in the immediate future



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Trends in the immediate future

Continued change:

- Drivers outside of the profession
- Firms will be multi disciplinary offering "cradle to grave" services
- Skills will need to be continually updated and refined
- Definition of a surveyor be redefined



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Trends in the immediate future

Free and Regulated Markets will require:

- Add value through use of professional knowledge
- Deeper level of professionalism
- Less need to understand the technology
- Acknowledgement of globalisation
- Increased engagement at the political level



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Trends in the immediate future

Key point summary

- Two markets exists both subject to external pressures/influence
- Technology becoming easier to use by non professionals
- Value added services will become the main focus of the professional
- We will see more cross border service provision and cross border qualifications
- Practices offering total service across wider disciplines, global labour marketplace
- Increasing influence of policy



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