



Kadaster in times of Financial Crisis



Mr. Godfried Barnasconi
Executive Board
Hanoi FIG, October 19-22, 2009

kadaster
feitelijk verrassend

Content

- Economic crisis in The Netherlands
- Effects on Kadaster
- How to handle them

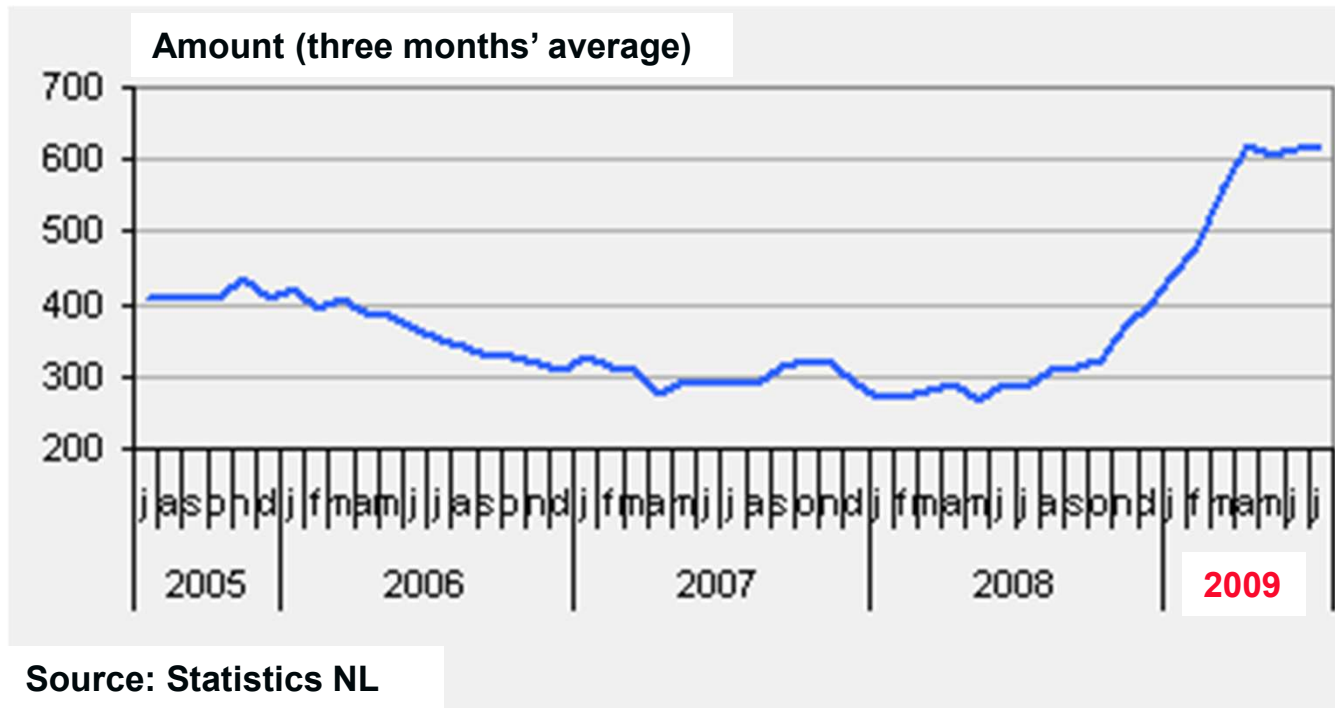


Economic crisis in The Netherlands

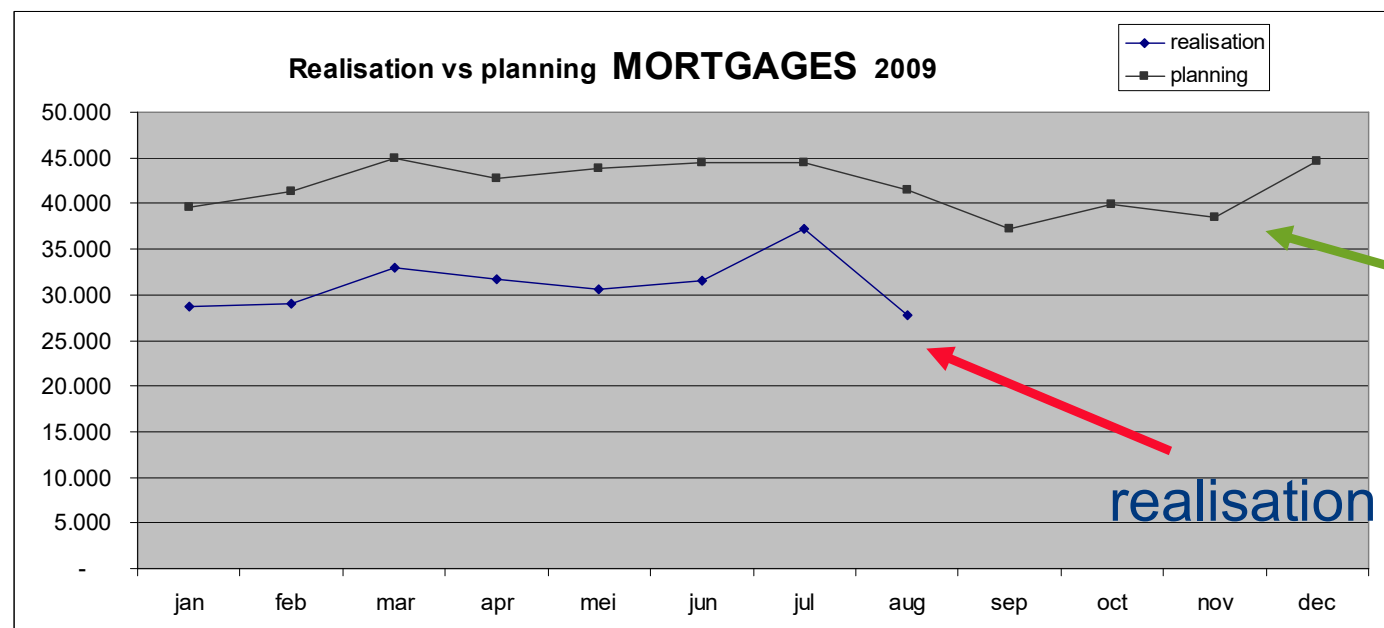
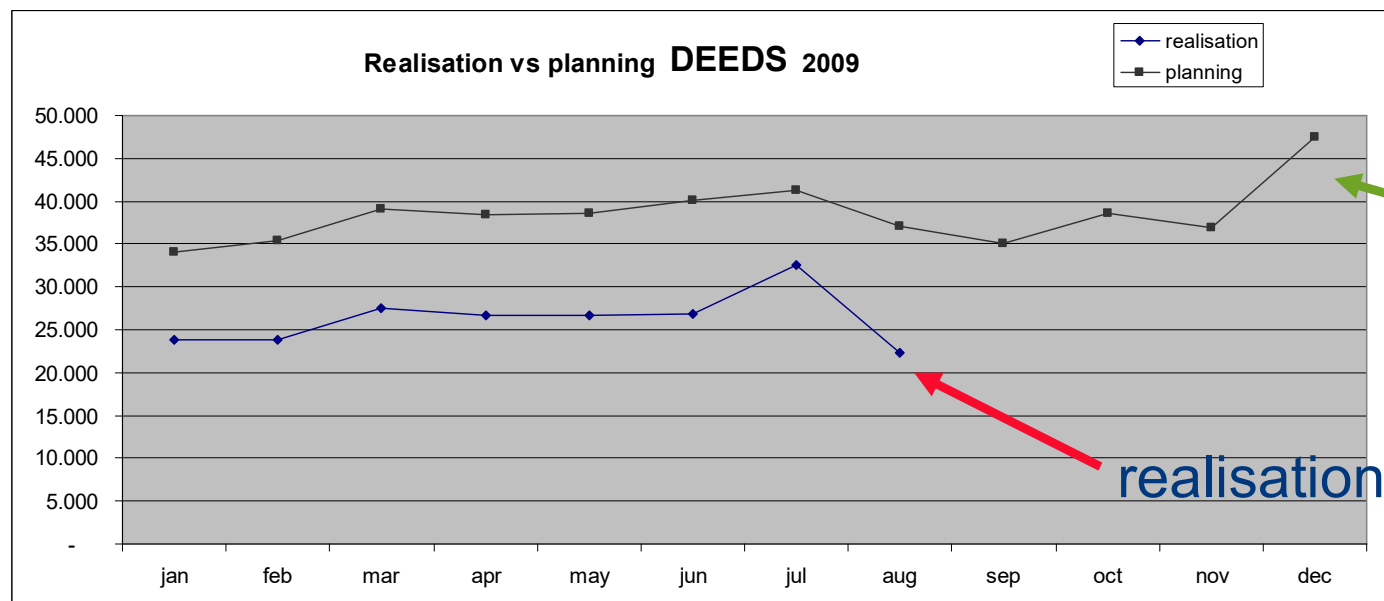
- August 2009: 4,9% of total labour force is unemployed (in 2008: 4,3%)
- Real estate market: only 6 months of work in entire country = the lowest construction stock since November 1994
Coming 2 years a loss of 50.000 jobs in construction industry is expected
- Dun & Bradstreet's forecast: increasing bankruptcy:
 - 2008 : 4200 companies
 - 1st half 2009 : 4150 ,, (finance, real estate, construction)
- Real estate market: # of private house sales in 2009 = 30-35% less



Bankruptcies as an economy's indicator



Effects Input: trend # of deeds / mortgage documents



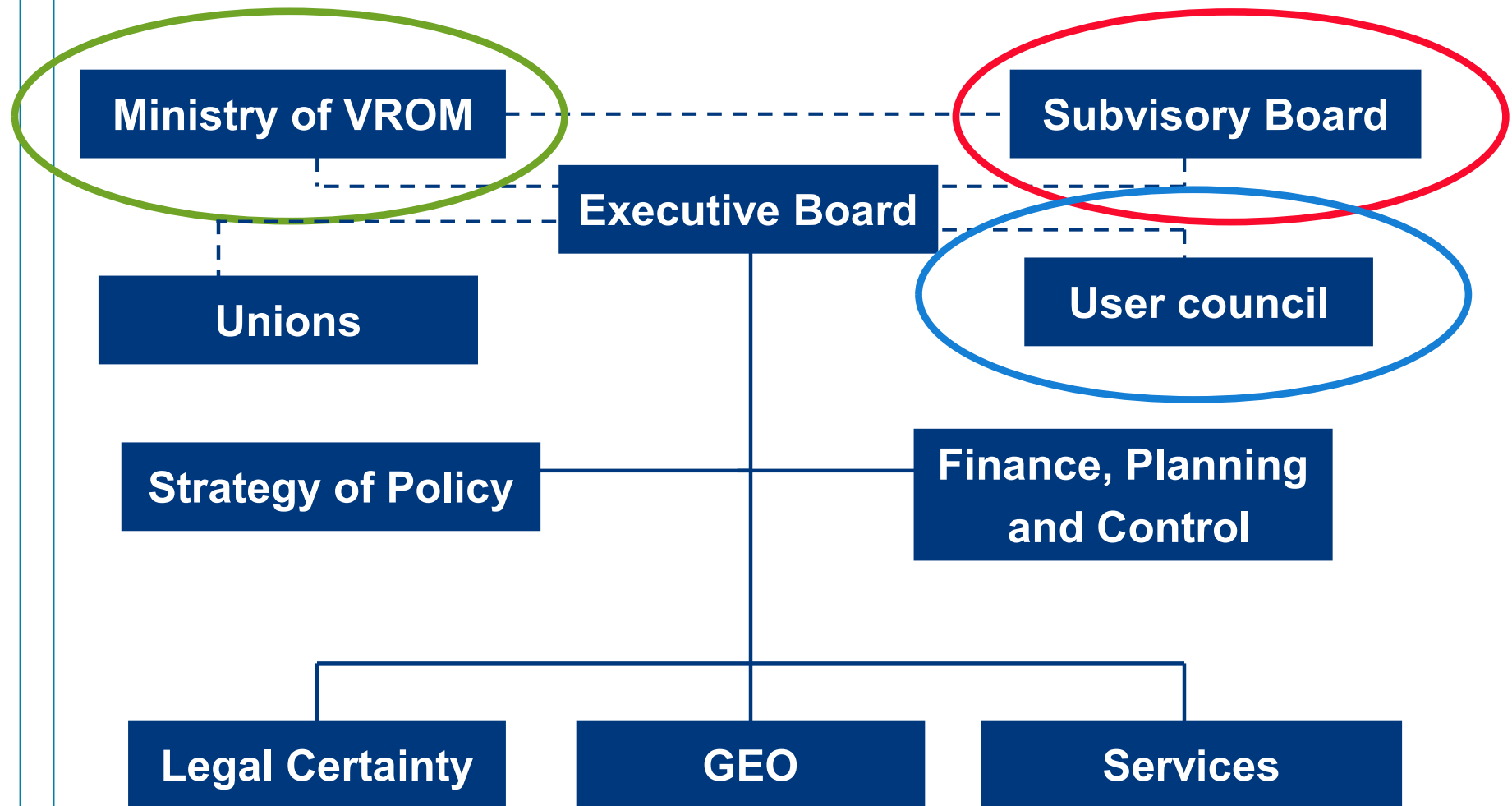
Profit and Loss Account ytd August 2009

	<u>Realisation</u> ytd Aug	<u>Planning</u> ytd Aug
■ Total operating income	: € 144,3 million	€ 179,8 million
■ Total operating expenditure:	<u>€ 158,1 million</u>	<u>€ 167,1 million</u>
■ Operating result	: € -/- 13,8 million	€ 12,7 million
■ Interest expenses	: <u>€ -/- 1,0 million</u>	<u>€ -/- 0,7 million</u>
■ Result	: € -/- 14,8 million	€ 12,0 million

Financial policy and internal management

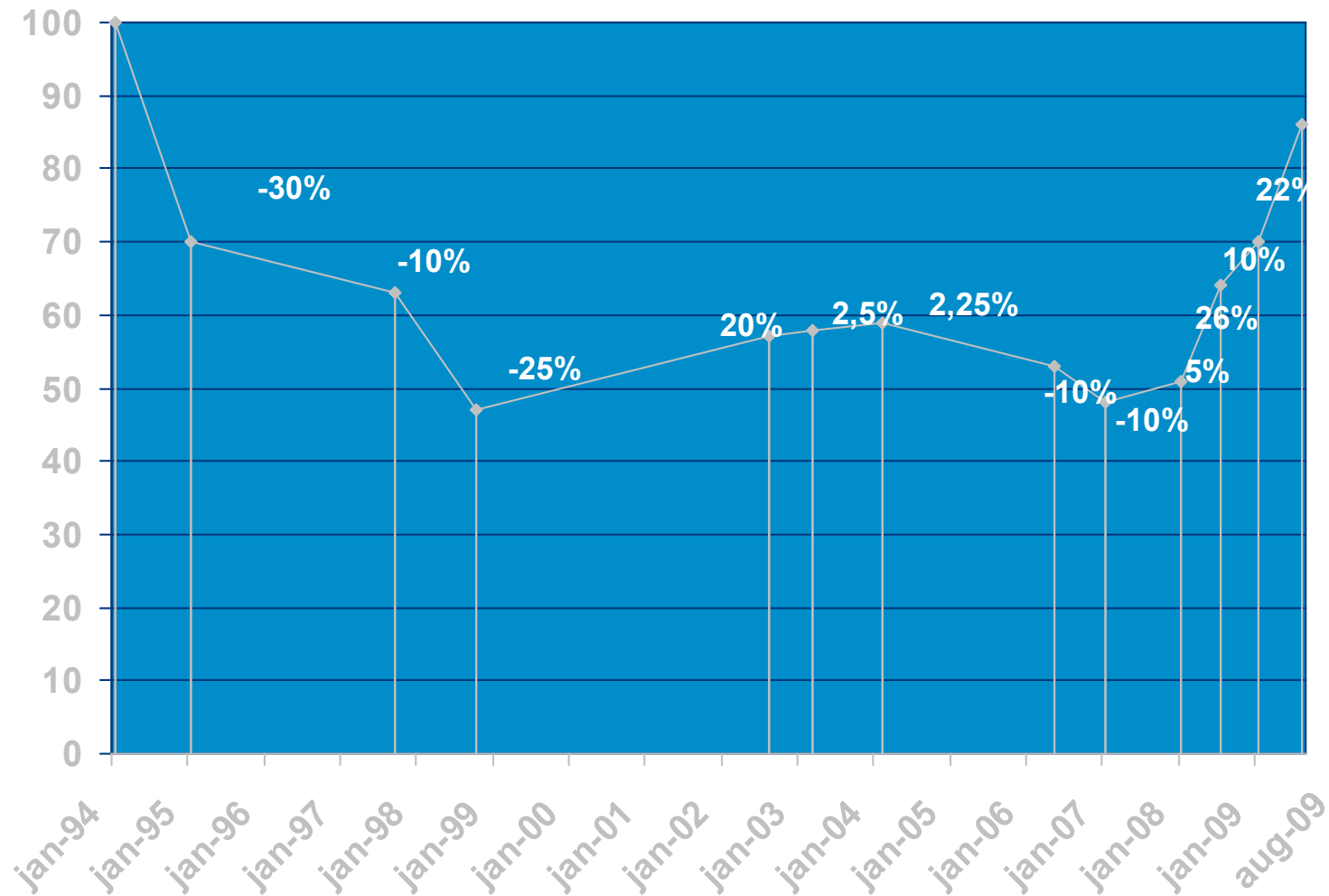
- Highly structured internal management cycle
- Driven by budgets, performance indicators and cost price
- Financial & business management information per month
- Turnover: not easy to influence (= external factors)
- Cost control-driven approach
- Cost flexibility is important, but difficult to realise
- ***Review of strategy***
- ***Discussion about higher tariffs with stakeholders***

Kadaster organisation / stakeholders

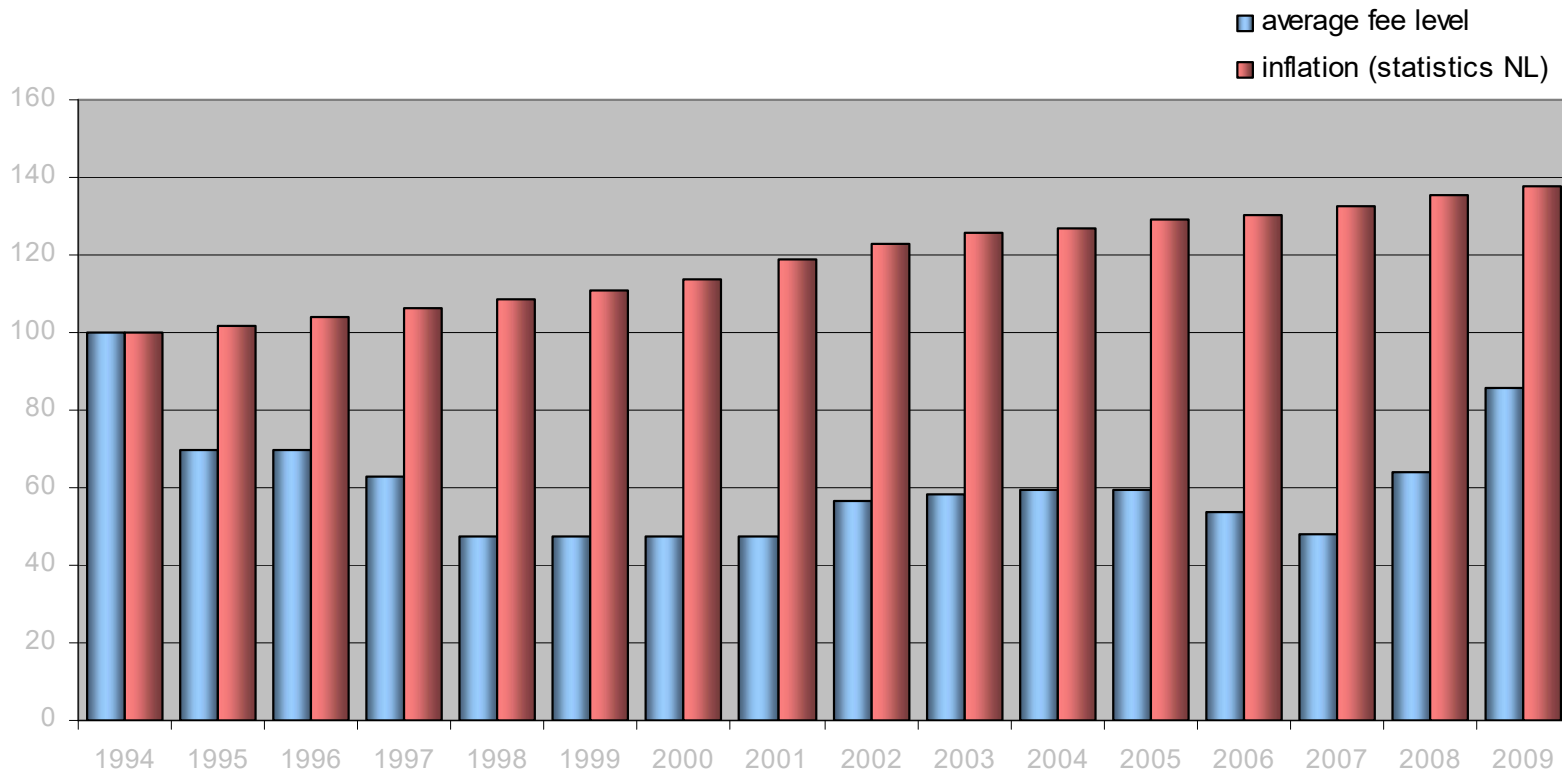


Development users' fees

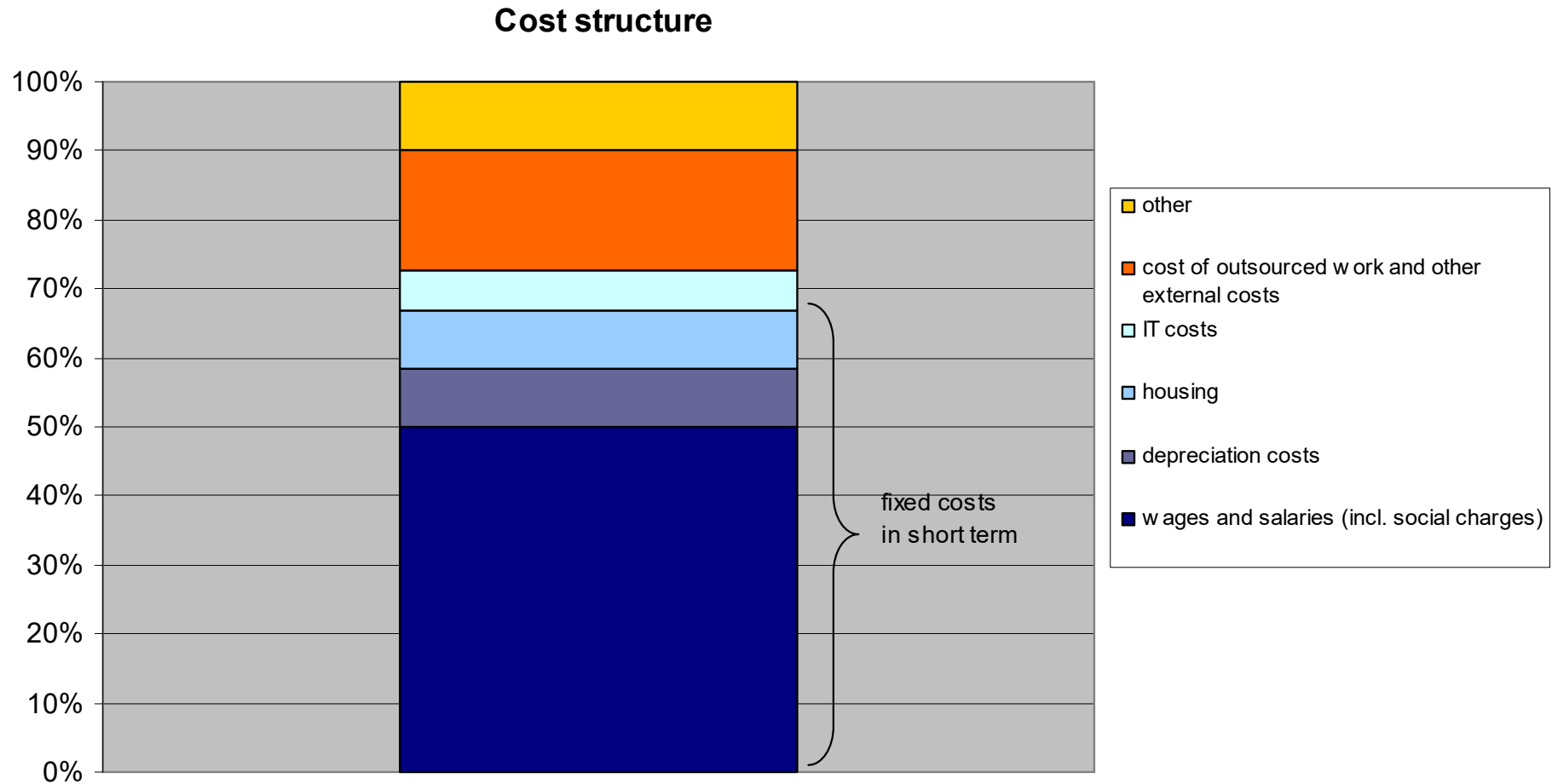
tariff based finance system



Development users' fees, inflation included



Cost structure



Cost flexibility

Less than 30% of Kadaster costs is flexible:

Reducing cost of outsourced work and other external costs has consequences:

- less quality
- objectives will not be achieved
- quality appointments to market / stakeholders under pressure

Only a few percent is flexible without consequences for business, image and promises

Conclusion: flexibility in current cost structure is very limited

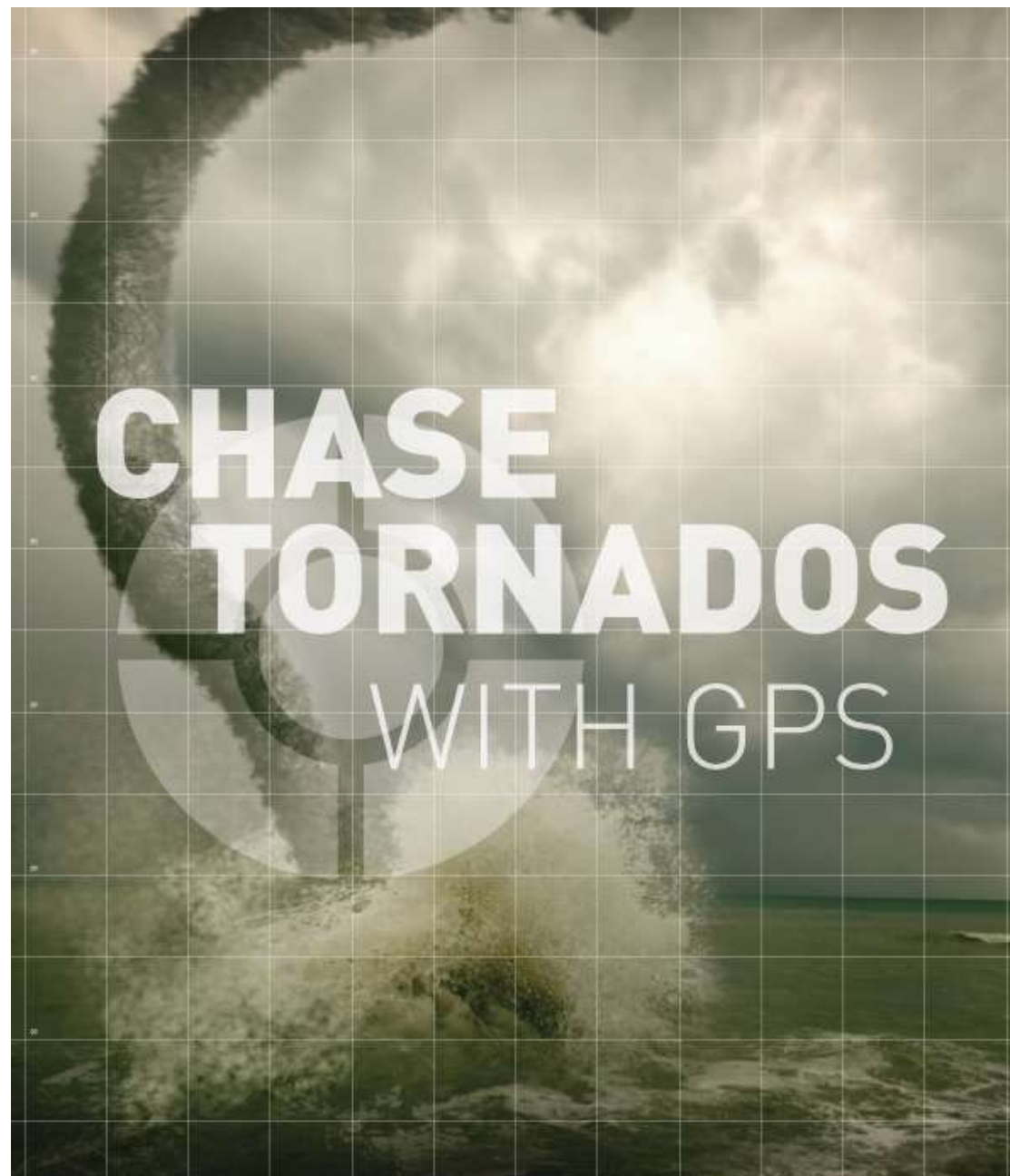
To use or support new technologies

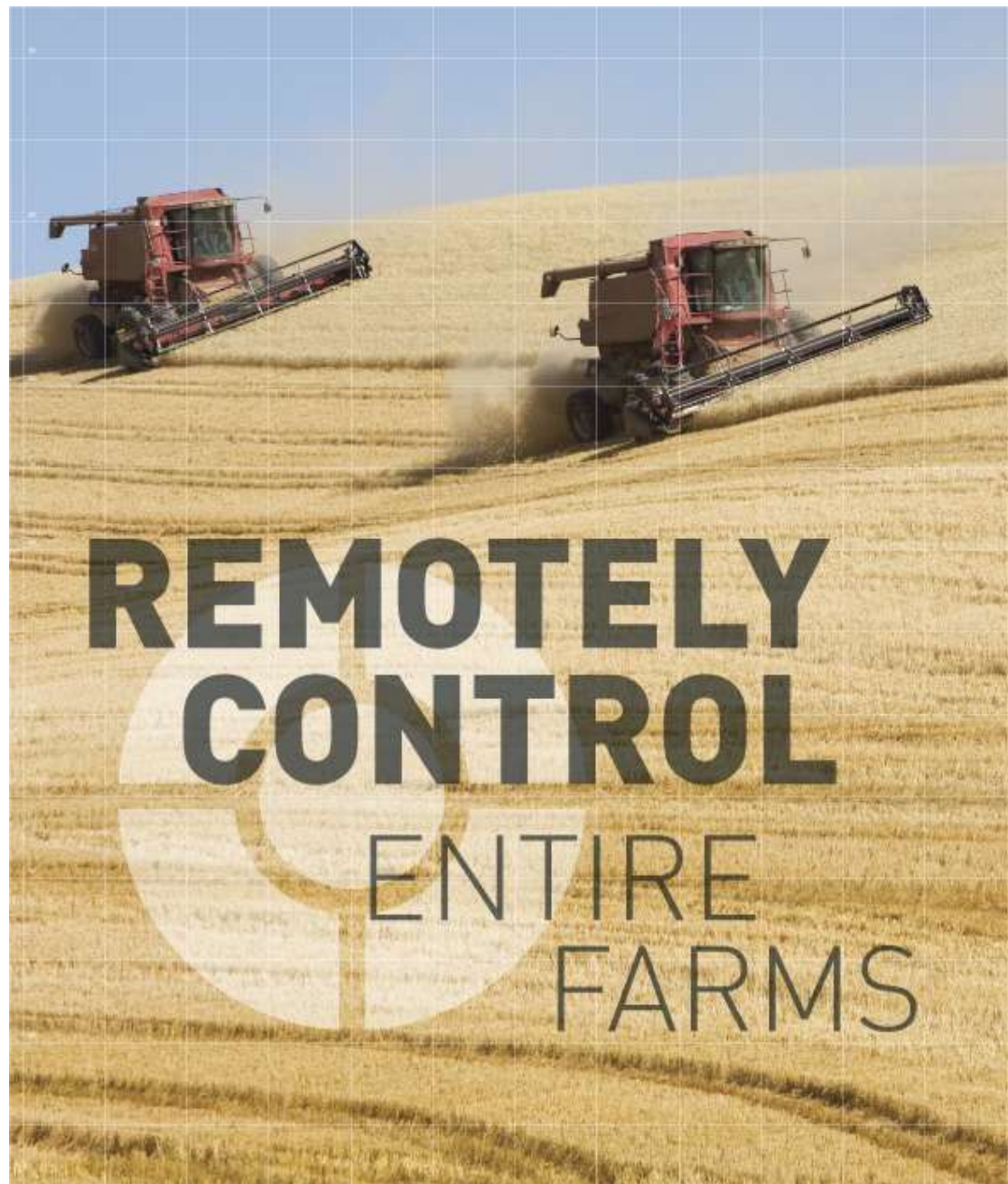
- Contribute to location awareness: support location based services by promoting mapping
- Location awareness *will* grow (despite) of crisis
- Mapping (use) is not affected by crisis anyway
- Examples of the industry:
 - Nokia: in all new mobiles geo referencing will be available
 - transport: heavy use of navigation systems and mapping
 - infrastructure (geo referencing)

Cooperation private industry

- Innovation new products
- Cooperation with market
- Labour market: capacity building







Cooperation: Education-Public sector-Industry



Start of special foundation 'Labour market & geodesy'

Building capacity!

Conclusions

- Mapping is an useful assisting tool for:
 - visualising economic turbulence
 - analysing its details
 - supporting policy and operational decisions on it
- Mapping is already a booming market / navigation
- I dare to say: this economic crisis:
 - emphasizes the importance of mapping in solving it
 - stimulates a wider-spread mapping demand and sale

In the end: cooperation with market is really essential !

