

# By Europe, for Europe

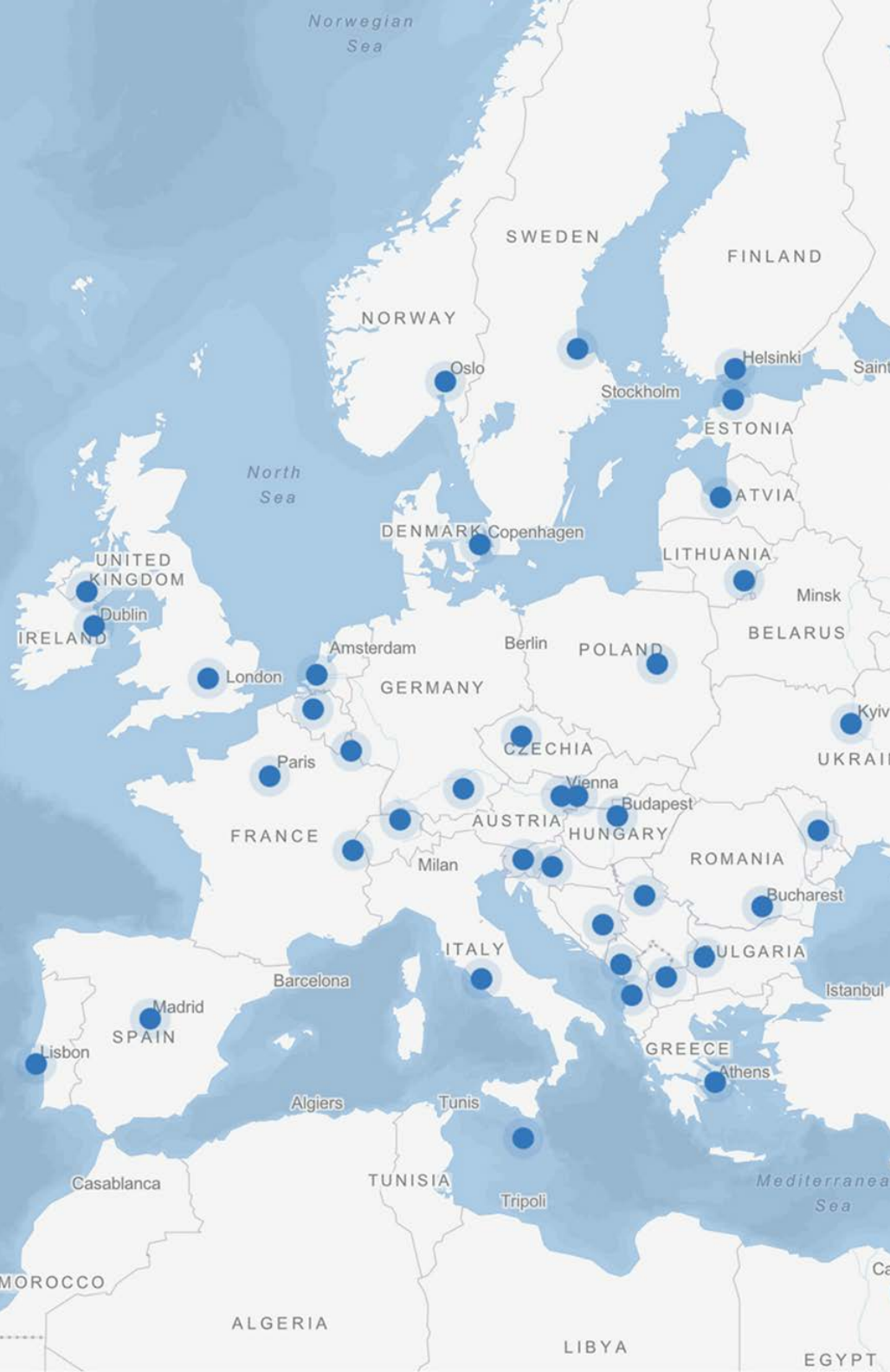
How Esri's Local Approach Powers  
Digital Sovereignty



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● Esri Distributors in Europe

## Executive Overview

The question facing European organizations today isn't whether to embrace digital innovation—it's how to do so while maintaining sovereignty over security, critical infrastructure, and data. As Europe implements new regulations like the Digital Markets Act and advances ambitious initiatives such as Gaia-X, the Continent is defining what technological independence looks like in practice without sacrificing performance.

This shift toward digital sovereignty comes at a pivotal moment. Military and cyber conflicts require robust defense and security capabilities. Climate emergencies demand a rapid and enduring response. Urban planning requires sophisticated reality mapping. And in Europe, a region of integrated nations, cross-border collaboration thrives on seamless data sharing that respects national data governance and security frameworks.

For more than four decades, geographic information system (GIS) software provider Esri has approached the European market differently than most foreign technology companies. Rather than imposing a one-size-fits-all model, the company built its presence through a network of locally owned companies who understand that European sovereignty isn't just about compliance—it's about empowering local innovation while enabling continental collaboration. ■



# Local Ownership and Commitment, Global Innovation

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When most American technology companies enter European markets, they establish subsidiaries and regional offices. Esri chose a fundamentally different path—locally owned organizations that operate as independent businesses under European laws, serving European customers with European teams.

This approach represents more than just a business strategy. The model has established a network of sovereign national entities where each business influences the technology road map while operating independently, creating solutions tailored to their local customers' needs.

The result is a significant European investment. Today, about 2,700 tech professionals work directly for the Esri ecosystem of companies across the continent, representing significant local employment, tax contributions, and community engagement. A support center in Bucharest, Romania,

troubleshoots European customer issues in Europe. In addition, over 700 partners—ranging from global systems integrators to startups—employ thousands of Europeans focused on GIS solutions.

Esri's global model of locally led customer engagement creates a unique feedback loop for innovation. European countries have been instrumental in guiding Esri's approach to data governance and architecture, helping the company understand not just regulatory requirements but the underlying principles that drive European sovereignty concerns. Working directly with government officials and businesspeople who represent these markets provides insights that would never be discovered from a distant corporate headquarters. ■



# Sovereignty Through Flexibility

Bitkom, Germany's digital industry association, characterizes sovereignty as the ability and freedom to use one's own technologies and those of one's partners—in contrast to self-sufficiency, which prioritizes independence even at the expense of efficiency.

The flexibility of Esri's ArcGIS® platform enables sovereignty solutions that go beyond compliance checkboxes with a commitment to FAIR principles: findable, accessible, interoperable, and reusable. Esri's network of locally owned EU businesses is woven into the mission of the European community at every level, emphasizing the broad span of government and private sector organizations that have securely deployed the software for decades in enterprise environments.

This flexibility and tight security manifests in multiple ways. First, Esri maintains a European node of our hosted ArcGIS Online software as a service (SaaS) and the accompanying geospatial data catalog, ArcGIS Living Atlas of the World. Second, customers have the flexibility to host Esri® software and their data wherever they prefer—in their own data centers with full control and no reliance on a public cloud, or in European regions of major cloud providers. Many choose a hybrid option, using our SaaS-based system integrated seamlessly with an on-premises system of record that provides full control over data. This includes unified user management across both environments that gives administrators full control over the data and tools each user can access. ►





## Sovereignty Through Flexibility

(continued)

Esri is involved in the efforts of partners Amazon Web Services (AWS) and Microsoft to build cloud capabilities in Europe with European staff. These efforts provide customers with configurable options for ArcGIS hosting that enhance sovereignty.

The platform's openness proves equally important. The system is open and interoperable, with all functionality and content accessible via fully documented APIs and world-leading open standards support. This means organizations aren't locked into vendor-specific ecosystems. Instead, they can integrate with existing infrastructure while maintaining full control of their data and processes to fulfill key missions important to the region.

Importantly, emerging technologies like AI thrive within this sovereignty framework. Organizations can bring in any large language model, including Mistral AI, the French equivalent to ChatGPT, incorporating algorithms and LLMs from sovereign AI companies without sharing queries or data. This isn't a road map item—it's the fabric of who the company is today.

In short, organizations achieve control and security without compromising performance. ■





# Innovation Rooted in European Excellence

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Esri's commitment to European innovation extends beyond business models to substantial research and development investments. The company operates seven European R&D centers employing more than 200 specialized professionals, each focused on technologies that matter most to their region and the world.

In our Zurich office, teams develop Esri's global 3D modeling capabilities, exemplified by a digital twin that integrates detailed 3D visualizations and indoor maps of Zurich's buildings. Vienna's R&D center focuses on indoor positioning and navigation systems. Stuttgart leads reality mapping innovations that transform how we understand and navigate physical spaces. Paris drives core aspects of GIS development, while Edinburgh advances developer technologies that extend ArcGIS capabilities.

This isn't just about adapting American technology for European markets—it's about European innovation driving global capabilities. The work happening in these centers influences the broader ArcGIS platform, ensuring that European needs and perspectives shape the technology's evolution.

The Esri approach in Europe amplifies this innovation through long-term customer engagements supported by effective alliances. Esri partner SAP extends enterprise-wide capabilities, while VertiGIS specializes in utilities mapping, and con terra delivers GIS integration. Companies like Atos ►





## Innovation Rooted in European Excellence (continued)

provide systems integration, Ramboll contributes architectural and engineering expertise, ICEYE delivers satellite imagery, and Telespazio is a trusted source of defense and aerospace intelligence.

Sovereignty isn't one-size-fits-all in Europe. Nordic requirements differ from Mediterranean needs. German federal standards may not address French regional concerns. Esri's approach enables flexible infrastructure while maintaining the interoperability that makes ArcGIS valuable for cross-jurisdictional collaboration.

And despite local differences, shared experiences guide continuous improvements for organizations and governments. Annual European community events on a wide range of topics—such as infrastructure management, national security, technology integration and development, energy, and sustainability—bring together local customers to learn from one another and advance together. Each year, around 5,000 people from the public sector and private industry gather at these community events to connect with peers and exchange knowledge. ■



76%





# Serving Critical Institutions Through Data-Driven Governance

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Where complex decisions are made, geospatial technology is increasingly woven into the fabric of European governance. From the European Commission and the European Environment Agency to NATO and Frontex, the continent's most critical institutions rely on GIS to transform policy and values into measurable action.

When crisis strikes, this partnership model proves its worth. During the 2020 Zagreb earthquake, local Esri distributor GDİ immediately mobilized to help assess damage. When floods hit Valencia in 2024, Esri Spain flew drones in coordination with the Madrid police, creating reality maps that revealed where emergency services could and couldn't reach. And in Greece, Esri distributor Marathon Data Systems responds almost annually to wildfires, providing valuable geospatial support. These local responses benefit from Esri's 24/7

Disaster Response Program, which offers free data, added licenses, and first responder expertise as crews scale to address each emergency.

The partnership extends to Ukraine, where Esri has worked with organizations like Kadaster—the Netherlands' Cadastre, Land Registry, and Mapping Agency—to build detailed maps through automation and imagery. The Onova platform captures reports of damaged infrastructure, creating a system of record for rebuilding when the conflict ends, in coordination with national ministries.

These responses aren't managed from Esri headquarters in California—they emerge from European companies that understand local needs and respond immediately with ready access to Esri software. These are the same ►





## Serving Critical Institutions Through Data-Driven Governance (continued)

organizations that support institutions embodying pan-European collaboration: the European Commission, NATO, national governments, and ministries of defense and environment.

The Esri community of local firms delivers transformative projects for virtually every national government in Europe. It also supports more than 15 cadastre organizations—the agencies that manage the land records and property rights underpinning our economies. Local Esri professionals also work hands-on with the region's state and local governments, improving the quality of life across the region.

The presence of GIS across government jurisdictions isn't accidental—it reflects how governments have become truly data-driven. When the European Commission sets climate targets, geospatial analysis measures

progress across member states. When migration patterns shift, border agencies use spatial intelligence to allocate resources effectively. And when new regulations emerge, governments use GIS to research policy approaches and monitor implementation across diverse geographic and demographic contexts.

Together, Esri and its network of European enterprises are also fostering the next generation through primary and secondary education programs and in partnership with hundreds of universities. Research and development efforts at European universities have enhanced Esri products. In fact, several of Esri's European R&D centers started as university spin-off companies, including Procedural, a spin-off of ETH Zurich, nFrames from the University of Stuttgart, Germany, and Maplex from Cardiff University in the UK. ■





## A Legacy of Partnership in Action

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Europe has been a geospatial leader from the very beginning—a continent that invented modern cartography and has always understood the power of maps to shape understanding and enable collaboration. Esri's local business model honors this legacy while addressing contemporary challenges.

This approach—local ownership, flexible technology, European innovation, crisis support, and education—creates something unique in the technology landscape: a global company that operates as a truly European ecosystem, honoring sovereignty while enabling the cross-border collaboration that strengthens Europe's values and economic competitiveness.

In an era when digital sovereignty often means choosing between capability and self-sufficiency, Esri's European model suggests a different path: one where local ownership and global innovation create the flexible foundation Europe needs for its digital future. ■





## About Esri (Europe)

Esri, the global market leader in geographic information system (GIS) software, location intelligence, and mapping has built a robust decades-long European presence in the form of locally owned companies across the continent. This network of businesses operates independently under European laws, serving European customers with European teams. This model ensures that Esri's technology is not only compliant with Europe's regulations, but also deeply aligned with the continent's values of digital sovereignty while still enabling collaboration. This commitment to sovereignty is reflected in Esri's flexible deployment options, including on-premises, cloud-based, and hybrid solutions all hosted in European regions.

Esri's ArcGIS platform supports critical institutions—from the European Commission and NATO to national ministries and local governments—by enabling data-driven governance and spatial intelligence. With over 2,700 professionals and 700 partners across Europe, Esri fosters local employment, community engagement, and technological excellence. Its seven European R&D centers, located in cities such as Zurich, Vienna, Stuttgart, Paris, and Edinburgh, drive global innovation rooted in regional expertise. The openness and interoperability of ArcGIS allows organizations to maintain full control over their data and integrate seamlessly with existing infrastructure while maintaining full control of their data and processes. Esri's sovereignty framework also enables important emerging technologies like AI to thrive, empowering local innovation.

For more information, visit the  
**Esri in Europe web page.**





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