A QUARTERLY PUBLICATION OF THE
WGIC POLICY DEVELOPMENT & ADVOCACY COMMITTEE

POLICY SCAN

Q2 2026 | April – June · Volume 1, Issue 1

27
POLICIES REVIEWED

5
REGIONS COVERED

12
HIGH-IMPACT ITEMS

IN THIS ISSUE

- US and EU race to define AI governance frameworks for geospatial applications
- Planned INSPIRE Geoportal phase-out (mid-2026) reshapes European geospatial data access
- White House releases National AI Policy Framework with federal preemption signals
- UN Statistical Commission endorses Global Statistical Geospatial Framework, 2nd edition
- Deep Dive: The convergence of AI, Earth observation, and public policy infrastructure

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An at-a-glance summary of geospatial policy developments across five regions, organised into eight chapters covering enforcement, infrastructure, governance, and the road ahead.

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CHAPTER 01

Chair's Foreword

Geospatial intelligence is becoming foundational to how governments govern, economies operate, and societies respond to global challenges.

As Chair of WGIC's Policy Development and Advocacy Committee, I am pleased to present the Q2 2026 Geospatial Policy Scan at a moment when geospatial intelligence is becoming foundational to how governments govern, economies operate, and societies respond to global challenges. This quarter reflects a clear shift: geospatial data, Earth observation, and AI-enabled spatial analytics are no longer peripheral policy considerations, but essential national and international assets.

The developments captured in this scan illustrate both the opportunities and responsibilities facing our industry as regulatory ambition accelerates alongside public-sector reliance on geospatial capabilities. WGIC remains committed to helping its members navigate this evolving policy environment, advocate for balanced and innovation-enabling frameworks, and reinforce the geospatial sector's role as trusted infrastructure for decision-making worldwide.

I would also like to commend the WGIC Secretariat, Aaron Addison, Executive Director, for his support, and offer special acknowledgement to Dr (Ms) Kuhelee Chandel for her excellent compilation work. I also wish to thank all the contributors and the Policy Development and Advocacy Committee for their insights and input to the Geospatial Policy Scan.

Best wishes,

Prof Dr Zaffar Sadiq Mohamed-Ghouse

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Chair, Policy Development and Advocacy Committee, World Geospatial Industry Council

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CHAPTER 02

Executive Summary

The second quarter of 2026 is shaping up to be an important period for geospatial policy worldwide. Two parallel forces are reshaping the landscape: the acceleration of AI governance frameworks on both sides of the Atlantic, and the deepening integration of geospatial and Earth observation data into public-policy infrastructure. These developments create both compliance obligations and significant commercial opportunities for the geospatial community.

In the EU, the AI Act[1] reaches full enforcement in August 2026 while the Commission simultaneously steers Copernicus and Destination Earth toward operational AI-enabled services. In the United States, the White House has released a National AI Policy Framework[6] with legislative recommendations that signal federal preemption of state rules, and a proposed AI legislative framework (the TRUMP AMERICA Act)[2] would introduce an expansive new treatment of location data that could directly impact the geospatial sector. At the global level, the UN Statistical Commission's endorsement of the Global Statistical Geospatial Framework second edition[4] marks a milestone for integrating geospatial data into government evidence systems.

CHAPTER 03

Key Takeaways

1
The **EU AI Act** becomes fully applicable August 2, 2026, requiring conformity assessments for high-risk geospatial AI applications in remote sensing, automated change detection, and spatial decision support, though the Commission has proposed postponing the high-risk compliance deadlines and MEPs have signalled support for the delay.[1]

2
The **White House National AI Policy Framework** (March 2026) seeks federal preemption of state AI rules, if enacted, this would simplify the compliance landscape significantly for geospatial AI providers operating across US states.[6]

3
A proposed AI legislative framework (widely referred to as the **TRUMP AMERICA Act**) introduces a 5-mile threshold for "precise geolocation," dramatically expanding the regulatory perimeter for location data beyond existing CCPA standards, with major implications for historical location data and geospatial analytics.[2]

4
The **INSPIRE Geoportal** is expected to be phased out by mid-2026 as part of a broader INSPIRE Directive simplification, with *data.europa.eu* positioned to become the single European entry point for geospatial data delivered as machine-readable high-value datasets via APIs.[3]

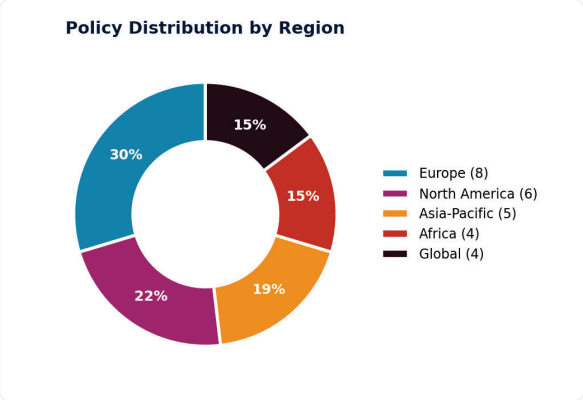
5
The **UN GSGF second edition** endorsement and €91M Horizon Europe Space Research Call signal that geospatial and Earth observation are being positioned as core public-policy infrastructure, not peripheral research tools.[4][18]

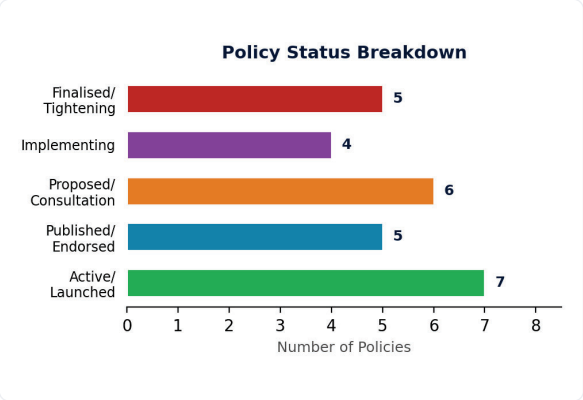
CHAPTER 04

Policy Radar: At a Glance

The most consequential geospatial policy developments this quarter, ranked by impact level.

POLICY / LAW / REGULATION	DESCRIPTION	REGION	STATUS
EU AI Act Full Enforcement	Conformity assessments for high-risk geospatial AI begin Aug 2026	Europe	▲ Aug 2026
White House AI Framework	National AI Policy Framework with federal preemption of state rules	North America	■ Published
TRUMP AMERICA Act	5-mile geolocation threshold; historical location data restrictions	North America	○ Proposed
INSPIRE → HVD Transition	Geoportal phase-out expected mid-2026; API-based high-value datasets mandatory	Europe	▲ Mid-2026
EU Space Act	Authorization framework for space activities and data services	Europe	○ Consultation
UN GSGF 2nd Edition	Global framework for geospatially-enabled official statistics	Global	■ Endorsed
Horizon EU Space Call	€91M for EO digital enablers and AI building blocks	Europe	○ Open
ASEAN DEFA / ACCDF	Emerging cross-border data flow mechanisms; DEFA negotiations ongoing	Asia-Pacific	In Development
Map Africa Initiative	5-year programme to map all 54 African countries	Africa	■ Launched
FAA BVLOS Proposed Rule	NPRM for Part 108 BVLOS operations; final rule pending (comment period reopened Jan 2026)	North America	NPRM Stage
China Geospatial Classification	FTZ data export rules evolving; national cybersecurity enforcement tightening	Asia-Pacific	⚠ Mixed signals
Destination Earth Pilots	Large-scale EO+AI pilots as public-policy infrastructure	Europe	■ Active





CHAPTER 05

Regional Policy Updates

EUROPE

AI Governance: From Lawmaking to Implementation

The EU's AI agenda has shifted decisively from lawmaking to practical implementation. The AI Act[1] becomes fully applicable on August 2, 2026, when all member states must have AI regulatory sandboxes operational and high-risk AI systems must undergo conformity assessments. However, the Commission's "Digital Omnibus" package and subsequent proposals to amend the AI Act would postpone the high-risk obligations, and the European Parliament has signalled support for a delay, meaning the August 2026 date for high-risk conformity assessments is now likely to slip. The EDPB/EDPS Joint Opinion 1/2026 (January) clarified how data protection authorities will oversee AI systems processing personal data,[7] while the Commission's April statement confirmed the AI Continent Action Plan has delivered major milestones in scaling compute, data, and talent.

WHAT THIS MEANS FOR THE GEOSPATIAL INDUSTRY

Companies deploying geospatial AI for remote sensing analytics, automated change detection, or spatial decision support must have compliance documentation ready by August. The convergence of AI Act enforcement with GDPR oversight through EDPB means geospatial data processing that involves personal data (e.g., location analytics) faces dual regulatory scrutiny.

INSPIRE Closure & The High-Value Datasets Era

The INSPIRE Geoportal is expected to be phased out by mid-2026 as part of the Commission's INSPIRE Directive simplification proposal, with *data.europa.eu* taking over as the single European entry point for geospatial data. Council legislative documents and the discontinuation of the INSPIRE Reference Validator (April 2026) confirm the transition is underway, though a formal public closure notice has not yet been identified. Member states must ensure their geospatial datasets are published as machine-readable, free-of-charge high-value datasets with API access and bulk downloads. Simultaneously, the EU Space Act (COM/2025/335) is advancing through parliamentary review, with the rapporteur report published in March.[5]

WHAT THIS MEANS FOR THE GEOSPATIAL INDUSTRY

This is a major infrastructure transition. Data discovery workflows that relied on INSPIRE must migrate. Commercial providers serving European clients need to adapt to API-based delivery models. The €90.97M Horizon Europe Space Research Call opened in March provides direct funding opportunities for companies building the next generation of EO digital enablers.

NORTH AMERICA

US AI Policy: A Multi-Track Landscape

US AI governance is unfolding along several parallel tracks rather than a single federal pathway. At the federal level, the White House released its National AI Policy Framework on March 20, 2026[6], with legislative recommendations that support innovation, address rights and safety, and critically seek to preempt the emerging patchwork of state AI rules. On proposed federal legislation, a proposed AI legislative framework widely referred to as the TRUMP AMERICA Act[2] has been circulated as a 291-page draft bill. It outlines a comprehensive regulatory framework including risk-based AI evaluation, developer and deployer liability, and foreign AI system registration requirements. As of April 2026, the bill has not been formally introduced with an assigned number in Congress. Alongside these federal efforts, a rapidly expanding body of state AI laws, including Colorado's AI Act, California's transparency and training-data disclosure statutes, and Texas's TRAIGA, is already setting enforceable obligations for developers and deployers, including for geospatial and location-based AI. Federal agencies are steering a separate track through procurement and acquisition policy: OMB memoranda M-24-10 and M-24-18 (as revised), together with GSA and DoD guidance, impose risk-management, inventory, and impact-assessment requirements on AI systems used or purchased by the federal government. A fourth track runs through sectoral and agency rulemaking from NIST's AI Risk Management Framework and generative-AI profile, to FTC enforcement on algorithmic claims, to NOAA, USGS, and DoI guidance on AI in Earth observation and geospatial analysis, each shaping compliance expectations in the absence of a single federal AI statute.

KEY DEVELOPMENT: LOCATION DATA REDEFINED

The proposed TRUMP AMERICA Act would define "precise geolocation" at a 5-mile threshold, dramatically broader than the CCPA's 1,850-foot standard. It would create a two-tier distinction between precise and approximate geolocation, each with different regulatory consequences. Most consequentially, it would treat historical location data as triggering "opaque algorithm" requirements, meaning any platform using algorithmic ranking based on historical geolocation would face extensive disclosure and opt-out obligations.

SDI Modernization & NGAC Refresh

The FGDC's 2026-2027 SDI Modernization Initiative is advancing next-generation architecture using OGC APIs and federated cataloging.[19] In March, the Department of the Interior appointed new NGAC members and leadership, refreshing the advisory body that shapes national geospatial policy and NSDI priorities.[11] The FAA's proposed Part 108 rule for BVLOS drone operations, published as an NPRM in August 2025 with a comment period reopened in January 2026, remains pending finalization. If adopted, it would establish the framework for expanded drone operations in surveying, agriculture, and aerial mapping without individual waivers.[14]

ASIA-PACIFIC

Cross-Border Data Flows: Opening and Closing

The Asia-Pacific region presents evolving trajectories. ASEAN continues to develop cross-border data flow mechanisms under the Digital Economy Framework Agreement (DEFA), which remains under negotiation. The ASEAN Model Contractual Clauses (adopted 2021) provide a voluntary foundation, and a Cross-Border Data Flow Certification (ACCDF) concept is emerging, though uniform rollout across member states has not yet been confirmed. A Malaysia-led Regional Framework on Cross-Border Cloud Computing was endorsed in 2026, signaling incremental progress.[8] China's data governance landscape presents a more complex picture. FTZ-level data export rules in Shanghai, Hainan, Zhejiang, Guangxi, and Jiangsu are evolving, with several zones actually raising thresholds to ease data export compliance burdens. However, national-level enforcement is tightening: amendments to the Cybersecurity Law took effect January 1, 2026, raising penalties and introducing new certification requirements for cross-border personal information transfers. The net effect for geospatial data transfers remains jurisdiction-specific.[9]

Australia's Geoscience Australia Strategy 2026-2036, released this year, sets an ambitious agenda with the Digital Atlas of Australia and a national positioning infrastructure plan targeting centimetre-level real-time outdoor positioning via the SouthPAN augmentation network.[10]

AFRICA

Mapping a Continent: Infrastructure at Scale

The Map Africa Initiative, launched in July 2025 by UAE-based Space42 in partnership with Microsoft and Esri, is the quarter's most ambitious geospatial infrastructure program. This five-year effort to comprehensively map all 54 African countries represents a generational investment in continental geospatial data.[12] Kenya continues to lead in open geospatial data through its Open Government Partnership commitment (KE0020), integrating GIS into urban planning and county development plans.[13] Rwanda's completion of 8+ million land parcel digitization and its progress on IGIF implementation provide a model for the region.[15]

GLOBAL

Geospatial Enters the Statistical Mainstream

The UN Statistical Commission's endorsement of the Global Statistical Geospatial Framework (GSGF) second edition in March 2026 is a landmark for the integration of geospatial data into official government statistics. This framework, combined with the UN-GGIM Vienna meetings in February[16] and preparations for the Third United Nations World Geospatial Information Congress in Jeddah, signals that geospatial data is being treated as foundational public infrastructure rather than a specialist capability.

CHAPTER 06

Deep Dive: AI, Earth Observation & the Rise of Policy Infrastructure

Each quarter, we examine one policy theme with outsized implications for the geospatial community.

The strongest cross-cutting trend in Q2 2026 is the growing treatment of geospatial, Earth observation, and AI as **public decision infrastructure**. This represents a fundamental shift from how these technologies have traditionally been positioned in policy: as research tools, commercial capabilities, or specialist data sources.

Three converging developments illustrate this shift:

1. The EU's programmatic alignment

The March 2026 DG DEFIS/HaDEA workshop on AI and Earth Observation explicitly framed Copernicus and Destination Earth as operational, AI-enabled public services, not research programmes.[17] The Horizon Europe 2026-2027 work programme reinforces this with calls for large-scale pilots using Destination Earth capabilities in critical public-policy sectors. When combined with the €91M Space Research Call funding digital enablers for EO, the signal is clear: the EU is building an integrated EO-AI digital twin stack designed for government decision-making.

2. The statistical integration pathway

The GSGF second edition endorsement and the upcoming StatEO26 conference (May 2026)[20] are embedding Earth observation data into official statistics for natural capital accounting, agriculture monitoring, emissions tracking, and policy reporting. This creates a new institutional demand channel: national statistics offices becoming routine consumers of geospatial and EO services.

3. The governance infrastructure

The UN-GGIM framework, NGAC appointments in the US, and national geospatial strategies in Australia, Canada, and Kenya all point toward geospatial capabilities being woven into permanent government infrastructure. These are not project-based initiatives, they are institutional commitments with multi-year horizons.

WGIC PERSPECTIVE

For the geospatial industry, the policy-infrastructure shift creates a dual opportunity. On the demand side, government programmes are creating stable, long-term procurement channels for geospatial and EO services integrated with AI capabilities. On the standards side, the convergence of the AI Act, GSGF, UN-IGIF, and OGC API modernization is creating an interoperable policy environment where companies that align early gain structural advantage. The risk is for companies that treat these developments as separate regulatory burdens rather than as components of a single infrastructure transformation.

CHAPTER 07

Looking Ahead: Q3 2026

Key dates and developments to watch in the coming quarter:

DATE	DEVELOPMENT
May 5-7	StatEO26: ESA-ESRIN conference on Earth observation for official statistics and policy indicators
Jul 1	INSPIRE Geoportal expected phase-out, transition to *data.europa.eu* as sole European geospatial entry point
Aug 2	EU AI Act: Full compliance deadline. High-risk AI system conformity assessments begin
Aug 2026	UNSDUN-GGIM 16th Session (August 5-7); Third United Nations World Geospatial Information Congress (Jeddah, November 16-19)
Q3 2026	US Congress: Watch for formal introduction of the TRUMP AMERICA Act; potential committee markup
Q3 2026	ASEAN DEFA: Watch for progress on cross-border data flow provisions and ACCDF framework development

CHAPTER 08

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The following sources underpin the analysis in this edition of the Geospatial Policy Scan. Footnote numbers throughout the document correspond to the entries below.

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