The evolving R.*spatial package ecosystem, changes in OSGeo FOSS libraries, and retiring rgdal, rgeos and maptools

Roger Bivand 17 January 2023, 10:00-11:15 CT

Summary

- Packages rgdal, rgeos and maptools will retire (be archived on CRAN) during 2023, planned during October 2023
- One reason is to reduce exposure to maintenance failure (the maintainer is not getting younger); another that available developer effort is best devoted to available, more modern packages such as sf, terra, stars and others
- Work is under way to replace some of the use of rgdal and rgeos in sp by calls to sf, so sp workflows should continue to function after adaptation
- The maintainer of raster, Rober Hijmans, has already replaced calls to rgdal and rgeos in raster to calls to terra

Background

- The R.*spatial package ecosystem is evolving: what are the main drivers? R.*spatial includes R-spatial and Rspatial, and their Github organisations R-spatial and Rspatial
- One driver has been the widespread adoption of the Rcpp package for interfacing C++ libraries in R packages (Eddelbuettel 2013)
- Another has been the rapid pace of change in OSGeo FOSS libraries over the last few years
- Finally, since at least 2016, Edzer Pebesma and I have been aware that the user base should be protected from maintenance failure for key infrastructure packages, those we intend to retire and archive during 2023: rgdal, rgeos and maptools

The evolving R.*spatial package

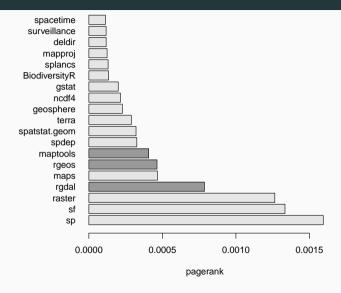
ecosystem

The evolving R.*spatial package ecosystem

- In the first edition of Bivand, Pebesma, and Gomez-Rubio (2008), 12 R packages depended directly (strongly) on **sp**, a package providing classes and methods for spatial objects
- By the second edition five years later, the "strong" dependency count was 78, but the count of recursive "most" dependencies (Depends, Imports, LinkingTo, Suggests) was 507
- Today, recursive reverse "most" dependencies total 16692 of 18947 CRAN packages; it is more important to tally non-recursive reverse dependencies, "most": 610 and "strong": 486
- The new sf package shows non-recursive reverse dependency counts: "most": 539 and "strong": 395

R.*spatial package cluster pagerank scores





Starting sf - Simple Features

- At useR! in 2016, list columns were declared "tidy," using examples including the difficulty
 of encoding polygon interior rings in non-list columns (https://www.r-consortium.org/all-projects/awarded-projects/2016-group-1#simple+features+for+r)
- The decision to accommodate "tidy" workflows as well as base-R workflows had already been made, as at least some users only know how to use "tidy" workflows
- Pebesma (2018) shows the status of the sf towards the end of 2017, with a geometry list column containing R wrappers around objects adhering to Simple Features specification definitions
- The feature geometries are stored in numeric vectors, matrices, or lists of matrices, and may also be subject to arithmetic operations

Why Simple Features?

- The "ESRI Shapefile" format was created before the OGC standard ISO 19125-1:2004 (Herring 2011), so polygon geometries are not stored as Simple Features exterior and interior rings, with exterior-interior only marked by ring direction without assignment of interior to exterior rings; sp initially followed this representation
- GDAL and GEOS use Simple Features internally, so the "ESRI Shapefile" model of
 polygons used in sp ceased to be a good fit to libraries used for reading, writing, and
 manipulating geometries; interior ring membership of external rings was encoded in an
 string comment added to geometries, not a robust representation

sf a moving target

- Pebesma, Mailund, and Hiebert (2016) discussed the need to add proper handling of metric units for data and position before sf appeared (https://cran.r-project.org/package=units); the same applies to the desirability of meaningful aggregation attributes to data (Stasch et al. (2014), Scheider et al. (2016))
- So sf (https://cran.r-project.org/package=sf) is also a platform for community development of a range of ideas
- One such idea is to distinguish between planar and spherical (ellipsoidal) representations, so using GEOS for topological predicates and operations on planar geometries, and s2 for spherical geometries, see (https://github.com/geopandas/community/issues/10, https://r-spatial.org/book/04-Spherical.html, https://www.r-consortium.org/all-projects/awarded-projects/2019-group-1#r-global:+analysing+spatial+data+globally)

sf a moving target

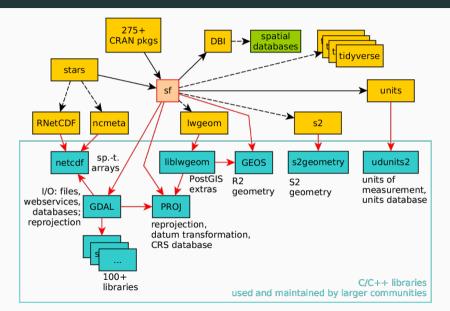
- Another is to explore not treating points as features
 (https://github.com/r-spatial/sf/pull/2059) as iterating over features can be costly
- sf also provides stars with functionality in external libraries
 (https://cran.r-project.org/package=stars,
 https://www.r-consortium.org/all-projects/awarded-projects/2017-group-1#stars:
 +scalable,+spatiotemporal+tidy+arrays+for+r)
- sfnetworks (https://cran.r-project.org/package=sfnetworks, https://www.rconsortium.org/all-projects/awarded-projects/2019-group-2#tidy+spatial+networks+in+r)

sf a moving target

- **sftime** (https://cran.r-project.org/package=sftime, https://www.r-consortium.org/all-projects/awarded-projects/2020-group-1#spatiotemporal+data+and+analytics)
- sftrack (https://cran.r-project.org/package=sftrack, https://www.r-consortium.org/all-projects/awarded-projects/2019-group-1#sftraj: +a+central+class+for+tracking+and+movement+data, https://www.r-consortium.org/all-projects/awarded-projects/2020-group-1#sftrack+v1.0:+stable+api+for+a+broad+adoption)
- cubble (https://cran.r-project.org/package=cubble)

- While initially only GDAL used a C++ API, and GEOS and PR ϕ J C APIs, now only GEOS prefers a C API (it is modern C++ internally, but presents a C API)
- ullet During the barn-raising, PR ϕ J was more tightly integrated with GDAL, and both adopted more modern C++ interfaces
- This means that Rcpp is a much better fit to these libraries, and that code in rgdal and rgeos interfacing them will become increasingly hard to maintain
- terra has also been written to interface these libraries using Rcpp; of course rgeoda uses
 Rcpp

OSGeo FOSS libraries and sf



CRAN binaries are statically linked

- CRAN packages are provided as source packages, and in addition as pre-installed binary packages for 64-bit Windows, and 64-bit macOS for Intel and ARM architectures
- These binary packages are statically linked, as dynamic linking to upstream libraries built using other tool sets is a prime potential source of inexplicable software failures
- This means that external libraries (and libraries they may depend on) must also be built and updated (and they have all shifted to cmake)
- Changing to UCRT on Windows with Rtools42 has permitted more driver variants to be added (https://svn.r-project.org/R-devweb/trunk/WindowsBuilds/winutf8/ucrt3/toolchain_libs/mxe/src/gdal.mk); macOS (https://github.com/R-macos/recipes/blob/master/recipes/gdal) is a bit behind
- No CONDA here!

When upstream OSGeo FOSS

libraries change

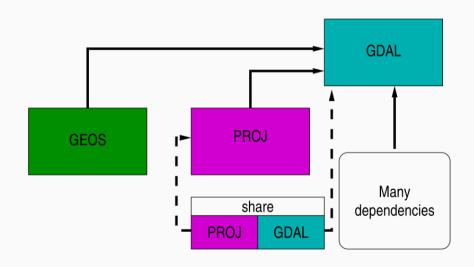
Upstream OSGeo libraries

- PR ϕ J is really important, and has been used to define coordinate reference systems and carry out coordinate operations (projection since the 1970s, transformation for about twenty years)
- GEOS was first interfaced to R package in a package by Colin Rundell in a GSoC project in 2010, and its use has increased since then
- GDAL bindings were first created as an R package twenty years ago, initially just for raster data, but quickly extended to vector data
- ullet R packages for spatial data have been updated as PR ϕ J, GEOS and GDAL have evolved, quite fast since the GDAL barn-raising occurred
- Following the development email lists: proj, geos-devel, gdal-dev has been crucial

OSGeo FOSS foundations

- R is FOSS itself through contributed packages that the user may choose to install in R libraries
- ullet The shared FOSS foundations are PR ϕ J, GEOS and GDAL
- PR ϕ J (then often called Proj4) provides coordinate reference systems (CRS) definitions, and projection and datum transformation operations
- GEOS provides planar topological predicates and operations
- GDAL provides abstractions for reading, writing, manipulating and transforming GIS data using drivers for raster and vector data

OSGeo FOSS foundations



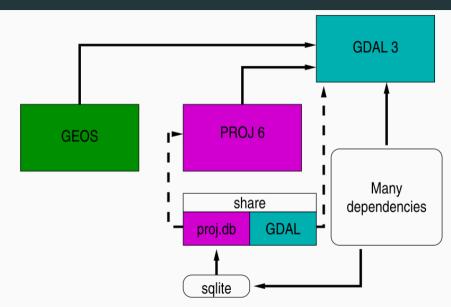
Pre barn-raising status

- PR ϕ J < 6 and GDAL < 3 used to ship with shared flat text files providing metadata about coordinate reference systems. Pre-PR ϕ J 6, PR ϕ J 5 introduced pipelines for projection and datum transformation operations Evers and Knudsen (2017)
- PROJ 4 had been stuck with an outdated WGS84 (World Geodetic System 1984 and
 +towgs84= key-value pairs) datum transformation hub introducing errors of up to 2m
- All datum transformations were forced through WGS84 as an intermediate product.

Barn-raising

- Following the Barn Raising project (https://gdalbarn.com/), PR ϕ J 6 and GDAL 3 were released together, with GDAL 3 requiring PR ϕ J >= 6
- The most obvious changes were that $PR\phi$ J now stored CRS, projection and transformation metadata in an SQLite database, also used by GDAL, and that most of the legacy flat text files were replaced by database tables
- The database file made it much easier to adopt OGC WKT2 (2019) for specifying CRS
- This provided the information needed to drop the WGS84 transformation hub in most cases, and to construct direct transformation pipelines from database lookup

Barn-raising



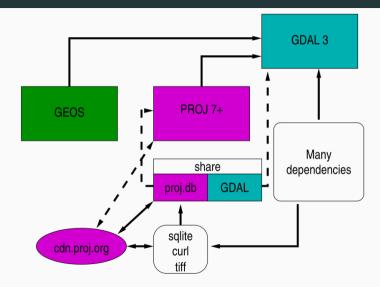
CDN or bundle grid files?

- The most accurate direct transformation pipelines may need transformation grids rather than 3 or 7 parameter transformation models applied equally over the area of interest
- While the legacy proj-datumgrid zipfile never exceeded 6.3 MiB, the current proj-data zipfile is 562.5 MiB (https://download.osgeo.org/proj/)
- Since it is unlikely that users need transformation grids for all continents, one can download by continent (Oceania, North America, Europe), or for global transformations, but these are still all large
- The volume of transformation grids released under permissive licenses and hosted by the CDN will continue to increase rapidly.

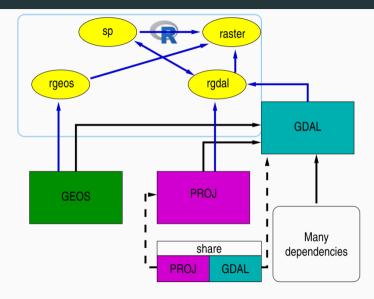
CDN or bundle grid files?

- Instead of installing lots of unneeded grids, which may become stale, use can be made of an on-demand content download network https://cdn.proj.org from within $PR\phi J$, using CURL for download and TIFF as the unified grid format (Cloud Optimized GeoTiff)
- On-demand use creates a user-writeable cache.db SQLite database of grid chunks, which
 may be used across applications looking at the same PROJ_LIB directory

CDN or bundle grid files?



Pre barn-raising R packages



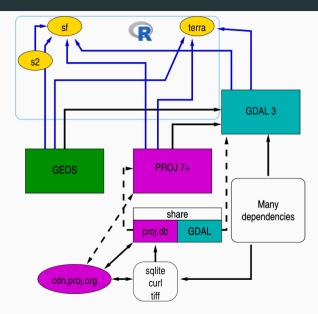
Addressing barn-raising in R packages

- Bivand (2021) describes the steps taken to modernize rgdal as a useful place to prototype adaptations - see also Bivand (2022)
- For vector data, the sf simple features package is strongly recommended for new work, while for vector and raster spatial and spatio-temporal arrays, stars may be used
- Both of these are part of the informal r-spatial GitHub organization (https://r-spatial.org, https://github.com/r-spatial)
- rgdal perhaps uses PR ϕ J directly rather than PR ϕ J through GDAL, but most of what was learned about changes in PR ϕ J and GDAL is shared.

Addressing barn-raising in R packages

- In addition, rgdal had been used extensively by the raster package, which itself did not link to external software libraries
- raster is largely re-implemented in the terra package, which is now almost complete
- terra, like sf, links to PR ϕ J, GDAL and GEOS, so provides the same file handling functionality as rgdal with regard to the R-GRASS interface, but for both vector and raster objects
- rgdal, sf and terra can use the WKT2 (2019) CRS representation.

Addressing barn-raising in R packages

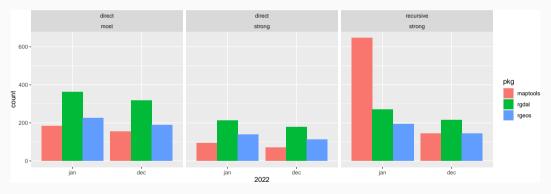


- The project is also supported by the R Consortium, and by the CRAN team
- The project repo is hosted on Github: https://github.com/r-spatial/evolution
- Two blogs have been published, https://r-spatial.org/r/2022/04/12/evolution.html
 https://r-spatial.org/r/2022/12/14/evolution2.html
- The blogs summarise some of the steps taken to date, and form the main content of this
 presentation, in addition to https://r-spatial.org/book/sp-raster.html (Pebesma and
 Bivand (2023), https://r-spatial.org/book)

- The plan is to retire maptools, rgdal and rgeos during 2023 while changing sp to use sf under the hood, so that the package remains active; this has already been doone for raster with use of retiring packages now replaced by calls to terra
- Retirement means that maintenance will halt, and that as a consequence the packages will be archived on CRAN
- The source code repositories on R-Forge will remain as long as R-Forge does itself
- One reason for retirement is that their maintainer has retired, a more important reason that their role has been superseded by the newer packages
- We hold it most unlikely that a new maintainer will take over the R-Forge repositories, in part because much of the code of these packages has gradually evolved along with developments in the GEOS, GDAL and $PR\phi J$ libraries, and now contains numerous constructs that are outdated and make it forbidding to read

- "Spatial" classes defined in sp, and their methods will remain but not under active development
- Before rgeos and rgdal retire, existing ties that package sp has to rgdal and rgeos will be replaced by ties to package sf
- This involves for example validation of coordinate reference system identifiers, and checking whether rings are holes or exterior rings
- Chosen maptools functions may also be moved to sp
- Note that the retiring packages have been kept in R-Forge SVN repositories, signalling an early decision to discourage development contributions

There has been some progress in reducing package reverse dependency counts between January and December 2022:



58 of the **maptools** recursive strong reduction are by archiving, others as other popular packages like **car** have dropped **maptools** as a strong dependency (see below)

Converting ASDAR

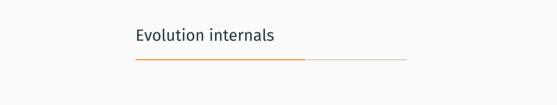
- The code of the earlier book *Applied Spatial Data Analysis with R* (Bivand, Pebesma, and Gomez-Rubio (2013)) has been converted to run entirely without **rgdal**, **rgeos** and **maptools** and where possible without **sp**
- The scripts are found at https://github.com/rsbivand/sf_asdar2ed
- In most cases, coercion is used, and sometimes round-tripped, to permit functions and methods from sf to be used in the place of those from rgdal or rgeos

sp evolution status

- When loaded, sp looks for an option "sp_evolution_status" or an environment variable "_SP_EVOLUTION_STATUS_", which can take values 0-2
- 0: business as usual, 1: stop if rgdal or rgeos are needed and absent, 2: use sf instead of rgdal and rgeos
- Until June 2023, the default value will be 0, and will then be changed to 2
- Relatively many packages with strong dependencies on sp also add weak dependencies on rgdal and/or rgeos because sp has weak dependencies on them

Detection of spurious reverse dependencies

- Once sp drops its weak dependencies on retiring packages (after June 2023), we will be
 able to check which packages actually use functions or methods in the retiring packages,
 and which only added them as dependencies because sp had done the same (for
 evolution status 2)
- We will model this process on work-in-progress following the release of raster 3.6-3
- This release of raster retains a strong dependency on sp, which provides the class definitions underlying those provided by raster
- However, this release drops any residual direct dependency on rgdal and rgeos, using terra instead



Evolution internals

- For a number of years, reverse dependency checks (rev-deps) using the "most" criterion have been run when new GDAL, GEOS or $PR\phi J$ release candidates became available
- These checks were run on rgdal, sf and other packages linking to the external libraries directly
- Initially, they served as a useful support for adaptations in packages as barn-raising progressed
- However, the same approaches apply as packages depending on retiring packages need to be warned about impending changes

Which functions and methods are used?

- We have so far run two sets of pkgapi analyses to attempt to untangle which functions or methods in retiring packages are used in code by reverse dependencies
- pkgapi can be found at https://github.com/r-lib/pkgapi
- As in rev-deps, we depend on tools::available.packages() to downlload the current CRAN package database, and tools::package_dependencies() to list the reverse dependencies
- But instead of running R CMD check on downloaded reverse dependency source packages for rev-deps, here we unpack the source package archives and run pkgapi::map_package() for each package

pkgapi output

- Output from runs of pkgapi::map_package() for each of the retiring packages are then
 processed and collated
- The results (here for the second run 2022-12-06) sorted by retiring package function https://github.com/r-spatial/evolution/blob/main/pkgapi_221206.csv and by using package https://github.com/r-spatial/evolution/blob/main/pkgapi_by_pkg_221206.csv summarise status
- Special steps have been taken for packages using GDAL internals through rgdal by
 manually raising github issues https://github.com/nplatonov/ursa/issues/1 and
 https://github.com/USDAForestService/FIESTAutils/issues/3 and email; perhaps vapour
 may be a possible alternative

Deprecation steps

Deprecation steps

- Functions and methods showing more usage from the **pkgapi** analysis in the retiring packages are being deprecated
- Deprecation uses the .Deprecated() function in base R, which prints a message pointing to alternatives and issuing a warning of class "deprecatedWarning"
- rgdal >= 1.6-2, rgeos >= 0.6-1 and maptools >= 1.1-6 now have larger numbers of such deprecation warnings
- Deprecation warnings do not lead to CRAN package check result warnings, so do not trigger archiving notices from CRAN, but can and do trip up testthat::expect_silent() and similar unit tests

Deprecation is intended to irritate i

x <- rgdal::readOGR(system.file("shapes/sids.shp", package="spData")[1]) ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others ## Warning: OGR support is provided by the sf and terra packages among others

Deprecation is intended to irritate ii

```
## OGR data source with driver: ESRI Shapefile
## Source: "/home/rsb/lib/r_libs/spData/shapes/sids.shp", layer: "sids"
## with 100 features
## It has 22 fields
```

We hope that maintainers and users will realise that the best way of reducing the irritation is to upgrade workflows rather than muting the warning (please, don't do this!):

```
suppressWarnings(x <- rgdal::readOGR(system.file("shapes/sids.shp",
    package="spData")[1]))</pre>
```

Deprecation is intended to irritate iii

```
## OGR data source with driver: ESRI Shapefile
## Source: "/home/rsb/lib/r_libs/spData/shapes/sids.shp", layer: "sids"
## with 100 features
## It has 22 fields
```

- In connection with a release of spdep, maintainers of packages depending on spdep and strongly depending on one or more retiring package were contacted by email in early October to advise action
- Note that spdep has not even Suggests: retiring packages since August 2022
- sf has been available for constructing weights objects since early 2019, and s2 early in 2021, with implementations advancing as s2 itself advances
- Both sf and s2 use efficient spatial indexing; dbscan supplements these in the planar case where suitable
- So spdep can be used without reference to retiring packages already; use of sp objects remains possible

 The packages were detected by running reverse dependency checks without retiring packages present in the R library path. In early October 2022, the 27 affected packages were:

adespatial*, AGPRIS, BayesX, bfsMaps, expp, FRK, gamlss.spatial, GeNetIt, geocmeans*, Guerry*, gwer, GWmodel, LabourMarketAreas, latticeDensity, leastcostpath, meteoland, micromapST, OasisR, PReMiuM*, ref.ICAR, rflexscan, SegEnvIneq, spatialEco*, SpatialEpi, spmoran, stampr, tipsae

- These are being monitored to gauge how rapidly upgrades occur as a response to a bulk email; there were a fair number of replies to the email
- The email concluded: Of course, your use of the retiring packages that I've maintained for many years has been a source of great satisfaction, but now it is time to move on.
- In a linked exchange (the Guerry package), maptools::pointLabel() is deprecated
 and is now car::pointLabel() (and https://github.com/sdray/adegraphics/issues/13),
 and adapted functions based on these were deprecated as in
 https://github.com/oscarperpinan/rastervis/issues/93

- As of mid-December 2022, 98 CRAN packages depended (of type "most") on spdep when running reverse dependency checks on spdep 1.2-8
- None failed _SP_EVOLUTION_STATUS_=0 R CMD check when the retiring packages were on the R library path; five packages marked with stars * no longer failed _SP_EVOLUTION_STATUS_=0 R CMD check without retiring packages on the R library path in mid-December 2022
- Three new reverse dependencies had appeared at that point, of which SpatialRegimes
 and SUNGEO failed irrespective of evolution status (indirect dependencies via automap
 and GWmodel respectively), and geomerge passed for _SP_EVOLUTION_STATUS_=2

- gamlss.spatial, latticedensity, spmoran and tipsae could be fixed easily by conditioning on package availability in examples or vignettes.
- Of these packages, only BayesX, bfsMaps, expp, FRK, leastcostpath, micromapST,
 OasisR, ref.ICAR, SegEnvIneq, SpatialEpi and stampr actually use functions or methods from retiring packages in code rather than examples or vignettes.
- Among the most used are maptools::unionSpatialPolygons(), rgeos::readWKT() and rgdal::readOGR.

Using raster as a larger-scale testbed

Using raster as a larger-scale testbed

- Following the experience gathered using **spdep** as a testbed, **"most" raster** reverse dependencies (482) were tallied with **rgdal** (323) and **rgeos** (189) reverse dependencies (2022-12-13)
- At that date, 248 packages that "most" depended on raster also depended on either rgdal or rgeos
- Of these 248, only 102 were found to use functions or methods from retiring packages in their own code; others may use them in examples or vignettes, of course

Contacting maintainers

- While in the spdep case, contact with maintainers was by two emails sent to multiple recipients, of whom some responded, in the raster case the package count is an order of magnitude greater
- Using templated texts, github issues were raised for the 167 packages listing a github repository, and individual emails sent to the remainder
- Within four weeks and over the holiday period, activity was observed for 33% of the packages (32% of those using retiring packages in code)
- 43% of the github issues showed activity, but only 12% of the emails elicited any response (only one bounced, but false positive spam detection is not unlikely)

Next steps

Next steps

- At the end of 2022, 452 CRAN packages "most" depend on the three retiring packages
- Of these, 258 also "most" depend on raster (here also including maptools, on which raster has never depended)
- Of the remaining 134 packages, 60 do not "most" depend on sp, while 74 depend on sp
- The remaining groups after the exercise described above for raster, rgdal and rgeos are the 134 not depending on raster and the few depending on maptools and raster
- Of the remaining 194, 134 "most" depend on sp, while 60 do not explicitly do so

Next steps

- A new blog drawing on the conversion of ASDAR code to run without the retiring packages will be prepared
- The blog will link to the sf migration Wiki: https://github.com/r-spatial/sf/wiki/Migrating
- The next round of github issues and emails to maintainers will point to these resources
- The target is full archiving by the end of October 2023, and switching sp to evolution status
 2 (reliance on Suggests: sf, but leaving retiring packages Suggests: for a further four months) during June 2023

What you have to do now

- Since you are reading/seeing this, you've started preparing for changes affecting your workflows and packages you may use or maintain
- If you have workflows or packages you maintain using the retiring packages directly, you should take steps to replace them, for example replacing rgdal::readOGR() with as(st_read(), "Spatial") as in https://github.com/rsbivand/sf_asdar2ed
- If your work does not involve the retiring packages directly, but packages you use do so, consider keeping the installed retiring packages in a separate library, and testing that your work is unaffected if that library is not on the library path
- Do use the "_SP_EVOLUTION_STATUS_" environment variable if your work involves sp to check whether you can continue working without the retiring packages
- Consider migrating sp workflows to sf and raster workflows to terra

Aftermatter

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