

Proyecto

aporta
Reutilización de la Información
del Sector Público

Characterization Study of the infomediary Sector

EXECUTIVE SUMMARY

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Executive Summary

The Aporta project and Characterization Study of the infomediary Sector

With the aim of encouraging Public Sector Information (PSI) re-use in Spain, the Spanish Government launched in 2009 the Aporta project (www.aporta.es), promoted by the Ministry of Territorial Policy and Public Administration and the Ministry of Industry, Tourism and Trade. This sector presents considerable potential for economic growth, employment generation and development of new services and products with high added value, thereby improving the competitiveness of our economy.

Within the framework of the Aporta project, a pioneering "Characterization Study of the infomediary Sector" has been carried out. This study covers the present lack of studies examining the infomediary business sector in Spain.

Methodology and sampling universe

For the purposes of this study, the infomediary business sector has been defined as: “the set of companies that **create applications, products and/or added-value services for third parties, using public sector information**”. For a more detailed analysis, these companies have been classified into several subsectors according to the information they re-use: Business/Economic, Legal, Geographic/Cartographic, Meteorological, Social Data / Statistics and Transport.

Due to the lack of a reference census for this sector, and in order to identify the sampling universe of the study, a group of 230 infomediary companies were identified in Spain through various sources and consultations with other agencies of the Public Administration that generate re-usable information.

Different research activities, based on quantitative (surveys) and qualitative (interviews and focus group) methods, were carried out between March and May 2011 on this set of companies.

Economic and employment data of the sampling universe

The most important quantitative data that arise out of the study are the following:

- The business volume directly associated with the infomediary activity of the studied companies reaches between **€550 and €650 million**.
- This turnover estimation would place the **infomediary sector at the same level as other digital content sectors**. According to ONTSI data, in its "Annual Report on Digital Content in Spain 2010", within the € 8,000 million generated by this sector in 2009, the video game industry (SW development) and online

advertising generated a turnover similar to the infomediary sector, around € 650 million¹.

- The infomediary activity of the analyzed companies represents between 35% and 40% of their total activity, which in its turn represents a total turnover of more than € 1,600 million.
- In general, the subsectors of the infomediary companies are of differing importance within the framework of developing re-use activity, confirming that these companies often operate in several subsectors simultaneously.

Estimated total activity of infomediary companies
Estimated business volume - € 1,600 to 1,700 M
Estimate activity associated with Public Sector Information re-use
Estimated Infomediary business volume - €550 to 650 M. (Approx. 35-40% of the activity)
Estimated activity regarding the field of re-use
Business / Economic 37.6%
Geographic / Cartographic 30.5%
Legal 17.0%
Transport 5.2%
Social Data / Statistical 1.9%
Meteorological 1.1%
Other: ICT, etc. 6.7%

- Between 5,000 and 5,500 employees are directly assigned to activities related to re-using information, in the companies analyzed on this research.

Profile and characteristics of infomediary companies

- The re-used information comes mostly from national agencies. Moreover, half of the companies also reuse international information.
- Infomediary companies are mainly concentrated in Madrid, Catalonia and the Basque Country.
- Companies use electronic means as major distribution channels for their products and services.
- The main clients from the infomediary activity are companies, the self-employed and some activities of the Public Administration. For example, some administrations benefit from the re-use of public information offered originally by other administrations with a wider territorial scope.
- In the last year the number of clients directly resulting from this activity has increased, especially in those companies with foreign customers. 45.7% of the

¹ Source: "Annual Report on Digital Contents in Spain 2010." ONTSI. Figures for Digital Content in Spain 2009: €8,004 M. Video Games (SW) 8% (€640 M) Online advertising 8.2% (€656 M). www.ontsi.red.es

companies have customers in the EU and even 20% of them have clients from outside the EU.

- Free-access and password-access models coexist with other business models, such as models that generate revenues from advertising incorporated in their product portals/websites, and payment models. In the latter case, pay-per access/use/work and pay per subscription are the most frequent systems, both linear and variable according to the type of access.
- With an annual average investment in ICT of € 915,000, a significant portion of this investment is directed towards the improvement and innovation in the management, processing and analysis of data re-use.
- Infomediary companies generally have a high technological level, and innovation in the field of analysis is one of the main issues intrinsically linked to their business, to processing and to presenting the re-used information.

A sector approach by the infomediary business

- Infomediary companies value the effort made by the Administration in developing policies for the re-use of information.
- In particular, aspects such as quality and accuracy of the information, the dissemination activities about the legal framework (like the Aporta Project), and the significant growth of the amount / scope of information generated in recent years are the most highly valued.
- Infomediary companies value the infomediary activity within their own business as a major business line, especially for the development of new products, services and applications; the increase in new customers and their increasing loyalty are also highly valued as these new services incorporate additional quality and a clear improvement for them.

Proposals for the future of infomediary companies

- Infomediary companies valued the progress in the re-use of public information reached by the Spanish authorities.
- A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis indicates the following:
 - **Sector opportunities** arise from the increasing volume of information available and the potential for the development of new services that arises from new open information to be re-used. This could even allow internationalization of markets integrating national and international public information.
 - These companies are considered an industry with a high technological level, with consolidation and clear positioning within their areas, allowing them to have a moderate degree of competition that **strengthens their current activity and future sustainability**.



- The companies have identified **some areas for improvement**, such as the standardization of information formats published by the Administration and the standardization and improvement in the regulation of licenses for re-use, but also regarding the pricing of the information. They deem this necessary to reduce possible dysfunctions that arise in the management, production and marketing of their services.
- Within the sector, most companies **have pointed out that strengthening the levels of business association amongst infomediary companies would be a useful tool to facilitate communication and dialogue with public administrations.**