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MINISTERIO
DE INDUSTRIA, ENERGÍA
Y TURISMO

MINISTERIO
DE HACIENDA
Y ADMINISTRACIONES PÚBLICAS

SECRETARÍA DE ESTADO
DE TELECOMUNICACIONES
Y PARA LA SOCIEDAD
DE LA INFORMACIÓN

SECRETARÍA DE ESTADO
DE ADMINISTRACIONES PÚBLICAS
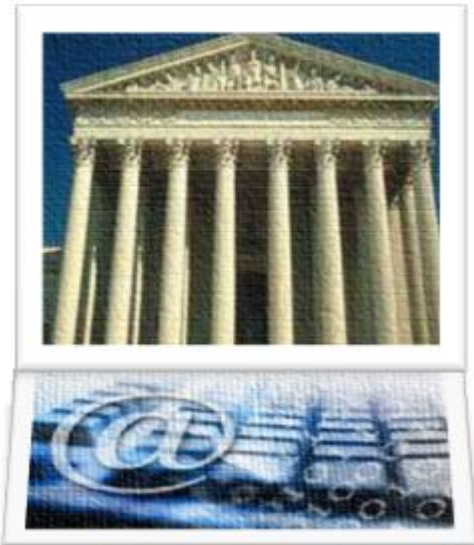
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CHARACTERIZATION OF THE SPANISH INFOMEDIARY SECTOR
Public Sector Information

2014

INFORMATION REUTILIZATION OF THE PUBLIC SECTOR:

- CHARACTERIZATION AND DEVELOPMENT OF THE INFOMEDIARY SECTOR

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For the purposes of this study we have defined the **Public Infomediary Sector as:**

> **Businesses that create value-added applications, products and/or services intended for third parties using information from the Public Sector.**

Given the **lack of an authoratative census** in this sector, we have used various sources and consulted information-producing organizations of the AGE in order to identify as precisely as possible **an initial group of infomediary businesses by examining the products and services they offer to present as realistic a characterization as possible of their activity.**

This status report includes businesses that reuse public sector information as well as private sector information. As a result, we have identified:

364
Infomediary-public information businesses in Spain
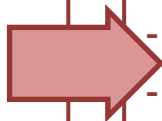
INITIAL CENSUS 494

CENSUS OF INFOMEDIARY RESEARCH BUSINESSES **413**
- 73% Reuse public + private information
- 15% Reuse public information

- **12% Reuse private information**

3

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ECONOMIC DATA

450 M€ – 500 M€

- Estimate of the **business volume generated by public infomediary activity.**
- *Estimate ⇧ 5-6%. 2012-13*

39%
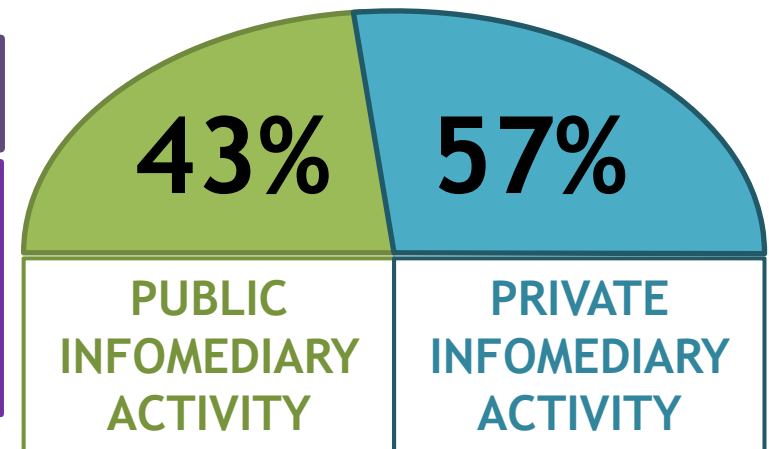Businesses indicate that demand has increased in the last year

1.000 – 1.200 M€

- Estimate of the **business volume generated by companies that carry out infomediary activities.**
  - *Estimate ⇧ 5-6%. 2012-13*

43%
PUBLIC INFOMEDIARY ACTIVITY

57%
PRIVATE INFOMEDIARY ACTIVITY

The sector has not been unaffected by the crisis, which, since 2012, has undergone a process of adaptation: price adjustments, development of new clients and markets.
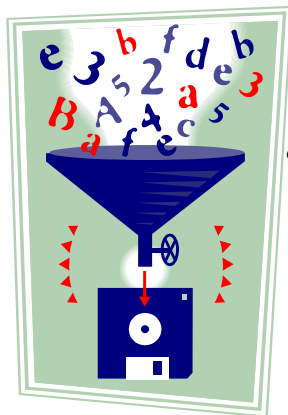
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EMPLOYMENT DATA

4.200 – 4.700 Jobs in the sector

- Creates **approximately 4.500** jobs directly related with infomediary activity.
  - *Estimate ⇧ 8-10%. 2012-13*

- **62%** of businesses have hired people in the last year

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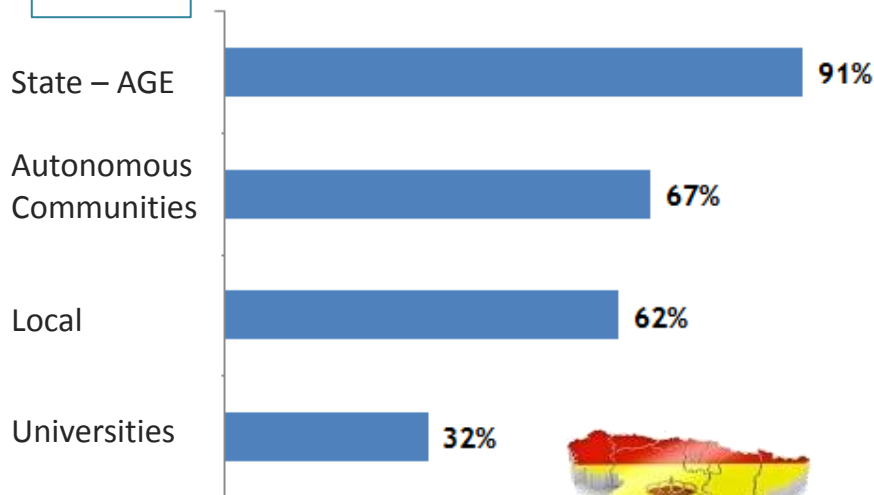
ECONOMIC DATA – SECTOR ACTIVITY

- The most important sectors / information areas of the businesses that participated in the survey are Geographic Information, publishing and market/opinion studies.

Geographic Information, including the reuse of land registry, urban and meteorological information	35 %
Publishing, including book editing, database commercialization, publications, etc.	32 %
Market studies, including opinion surveys, research and market studies	28 %
Directories, including address and telephone registries and guides for direct advertising	22 %
Economics and Finance, including information on commercial credit risk, solvency, credit bureaus.	22 %
Others	4 %

Origin of reused information

Information Areas

93%

State – AGE	91%
Autonomous Communities	67%
Local	62%
Universities	32%

48%

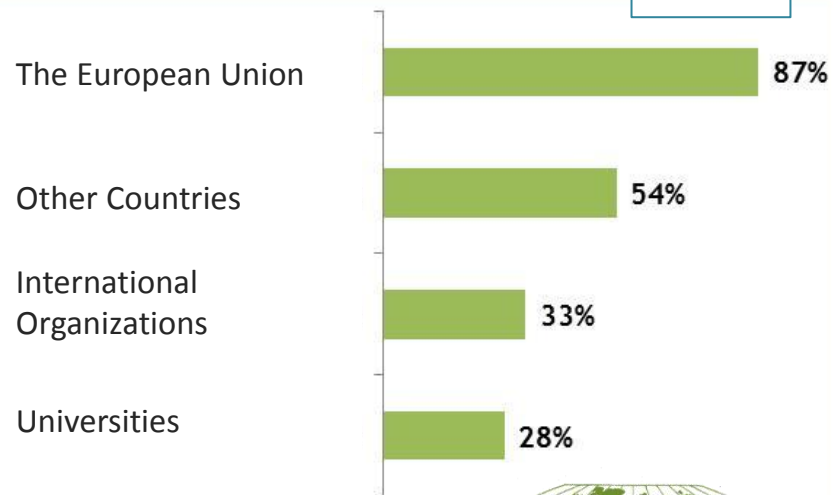|	
The European Union	87%
Other Countries	54%
International Organizations	33%
Universities	28%

Main sources:
- INE
- Land Registry
- Mercantile Reg.
- BOE
- IGN
- Property Registry

Main sources:
- European Commission
- World Bank
- IMF
- OECD
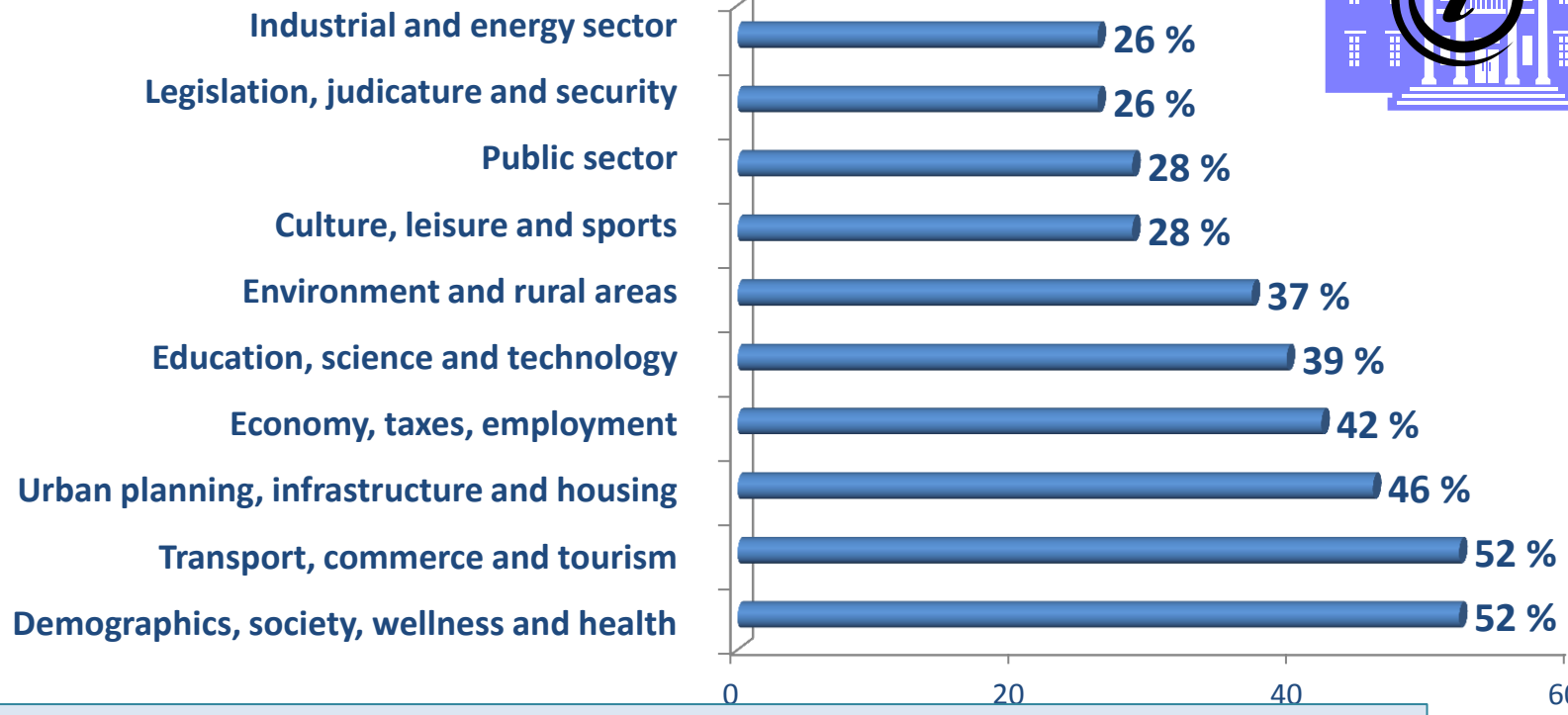- Countries: DE – FR – UK – PT
- USA – Latin America

28% Businesses use information from the 3 Public Admin areas

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ORIGEN AND TYPE OF REUSED INFORMATION
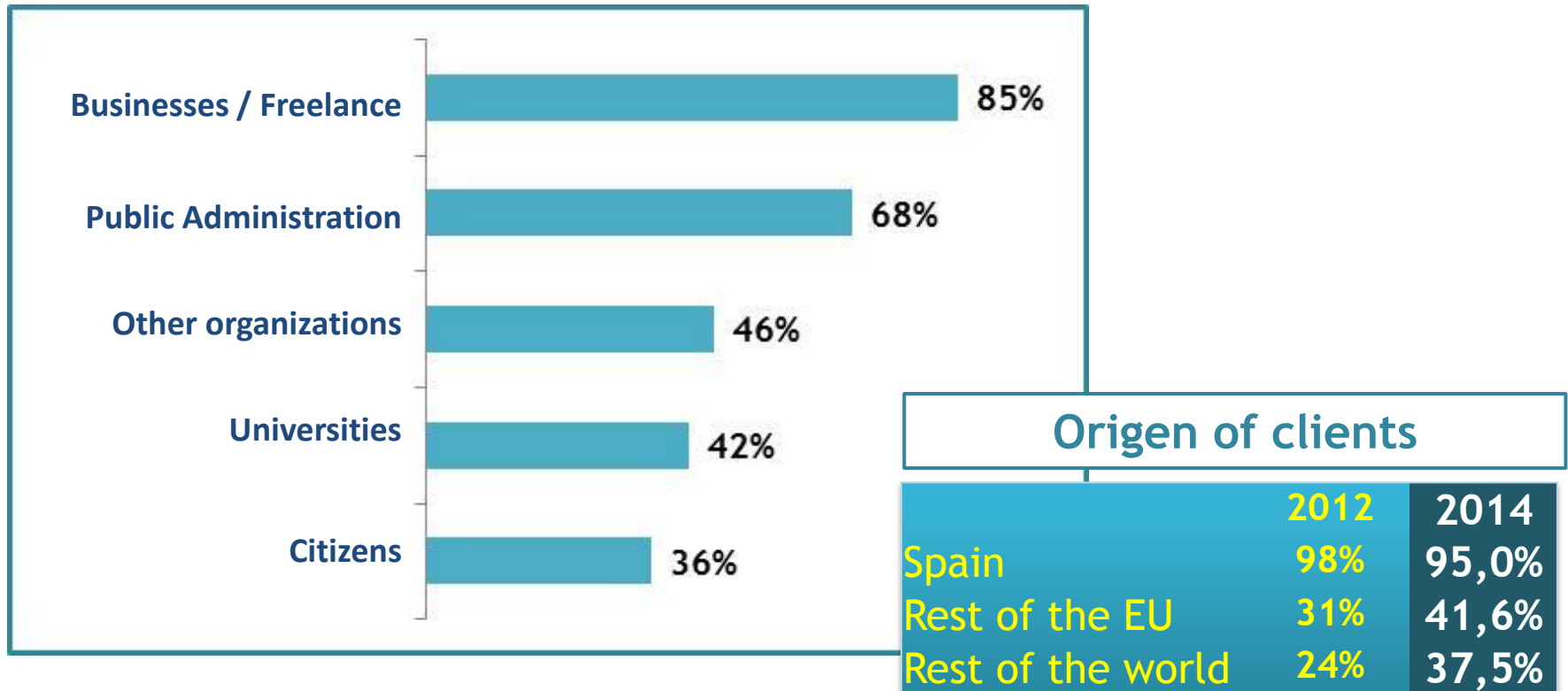
MODE OF ACCESS

- **92%** directly access the **Organization's RPSI Website/ Portal**
- **46% International portals**
- **36% Private organization** portals
- **44%** Obtained information from **other data reuse businesses**

TYPE

Type	Percentage
Industrial and energy sector	26 %
Legislation, judicature and security	26 %
Public sector	28 %
Culture, leisure and sports	28 %
Environment and rural areas	37 %
Education, science and technology	39 %
Economy, taxes, employment	42 %
Urban planning, infrastructure and housing	46 %
Transport, commerce and tourism	52 %
Demographics, society, wellness and health	52 %

0   20   40   60

Businesses reuse from 3-4 types of information to develop their products

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CLIENTS OF THE INFOMEDIARY SECTOR

Client	%
Businesses / Freelance	85%
Public Administration	68%
Other organizations	46%
Universities	42%
Citizens	36%

Origen of clients

	2012	2014
Spain	98%	95,0%
Rest of the EU	31%	41,6%
Rest of the world	24%	37,5%

- The **Public Administration has become an important client** for infomediary businesses, essentially at the local level.

Infomediary activity on an international scale has grown approximately **12%** between 2012 - 2014

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ACCESS AND MANAGEMENT OF PUBLIC ADMINISTRATION DATA

| Access data in an **OPEN FORMAT** | **50%** | **65%** | Continue accessing data in an **UNSTRUCTURED FORMAT** |

- **75 %** Access data structured in a proprietary format (xls,xml)

  Thus the appearance of the "**DATA BROKER**" who provides – for a fee - public / private data with a higher quality presentation / treatment

- **Management tools** like data analysis software, search tools and report generating software are **BASIC TOOLS** for the sector's development. They could even become **AN ENTRY BARRIER for new competitors**.

- **The COST of public information**
  - **84%** Reuse **FREE** information
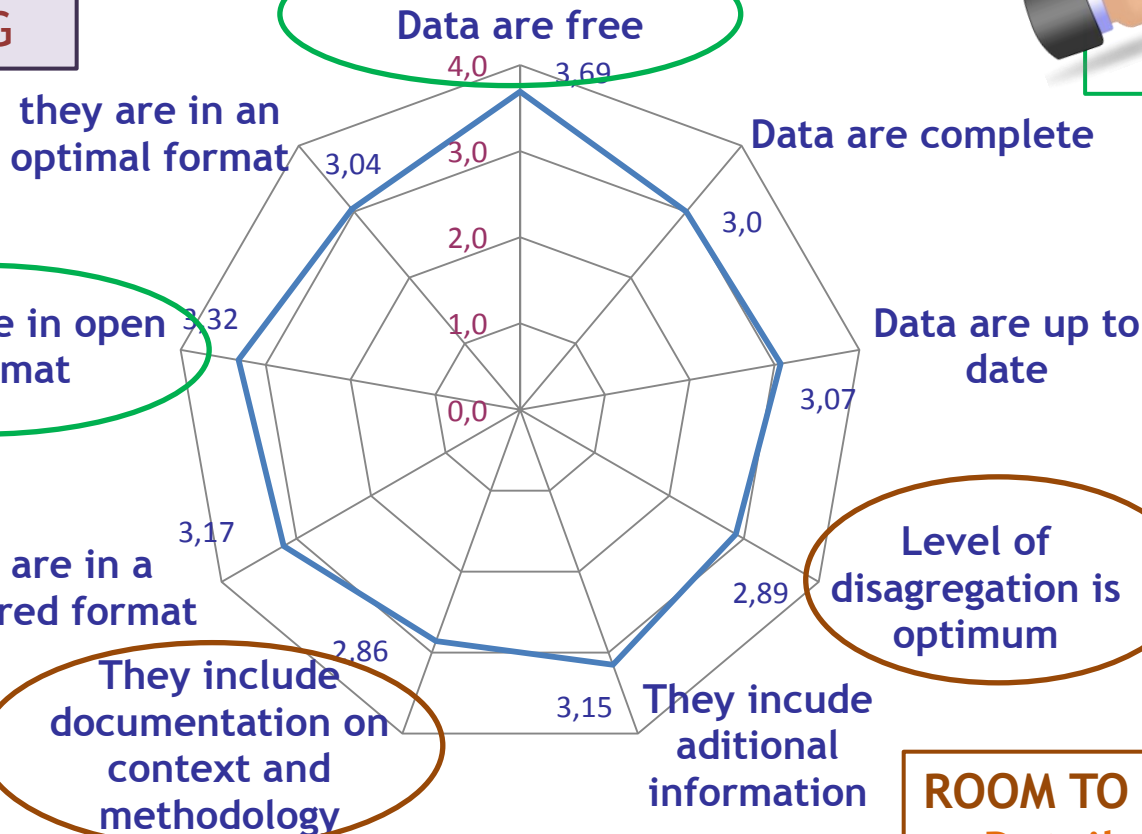   - The cost of the information is relevent for only 7%

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3,6/5
HIGH RATING

VALORACIÓN DE LA INFORMACIÓN PÚBLICA

POSITIVE QUALITIES
- **Free-of-charge**
- **Open format**

Data are free
4,0   3,69
3,0

they are in an optimal format
3,04

Data are complete

2,0
3,0

They are in open 3,32 format
1,0

Data are up to date
0,0
3,07

They are in a structured format
3,17

Level of disagregation is optimum
2,89

They include documentation on context and methodology
2,86

They incude aditional information
3,15

ROOM TO IMPROVE
- **Details and disaggregation**
- **Information on context**

The improvement of public information has allowed the sector to improve its **EFFICIENCY** and therefore **ITS RESULTS**

Valuation 1-5 (1 Strongly disagree / 5 Strongly agree

11

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ASSESSMENT OF PUBLIC ADMINISTRATION SERVICES TO ACCESS PUBLIC INFORMATION

✓ **SERVICES available and FUNCTIONAL** **46%** | **40%** **NOT all Pub Admin PROVIDE the necessary data** ⚠

provides MOST of the NECESSARY DATA

Services are ALWAYS AVAILABLE and functional

There are CHANNELS TO REQUEST the publication of data

Valuation 1-5 (1 Strongly disagree / 5 Strongly agree

Services are provided for MASS DOWNLOAD

Public Admin responds to requests and needs

Radar chart values:
- 2,78
- 2,84
- 3,2
- 2,99
- 2,93

Scale: 1,0 / 1,5 / 2,0 / 2,5 / 3,0 / 3,5

REVENUE MODELS

Free-of-charge service provision model

	2012	2014
Free without restrictions	23%	20%
Free with access key	10%	**14%**
Free with publicity	15%	10%

Paid service revenue model

	2012	2014
Pay-per access, use or task	56%	**62%**
Linear subscription payments	33%	**19%**
Paid subscription by type	27%	24%
Freemium services	16%	17%

82%
REVENUE through DIRECT SALE OF PRODUCTS OR SERVICES

13

PRODUCTS, SERVICES AND APPLICATIONS

PRODUCTS	**89%**

Treated data	**71%**
Maps	41%
Publications	28%
Raw data	19%

SERVICES	**80 %**

Personalized Reports	**55%**
Consultancy	44%
Comparisons	43%
Clipping	13%

APPLICATIONS	**50%**

Client software	**28%**
Mobile software	20%
GPS information	17%
SMS/mail alerts	16%

KEY FEATURES

- Tendencies:
  - **DIVERSIFICATION** of products and serv.
  - Products with **GREATER ADDED VALUE**
- **Growth of** (in relation to 2012):
  - TREATED DATA
  - CONSULTANCY (intelligence)
  - COMPARISONS
  - PUBLICATIONS/ Studies
- **Less businesses that sell BRUTE DATA and PERSONALIZED REPORTS** (2012)
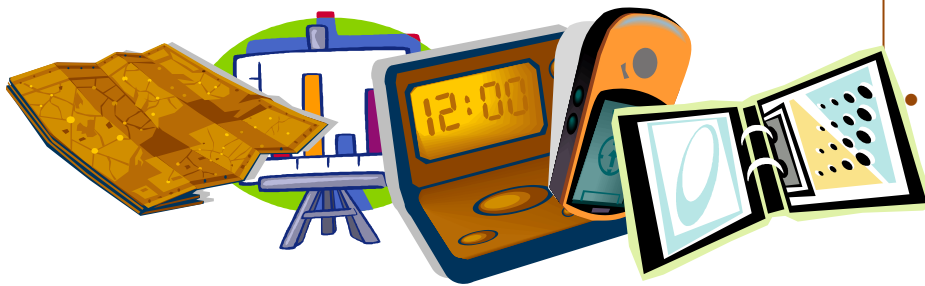
PRODUCTS, SERVICES AND APPLICATIONS
DEMAND FOR PRODUCTS BY TYPE AND CLIENT
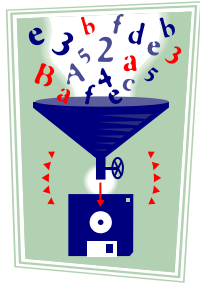
BUSINESSES
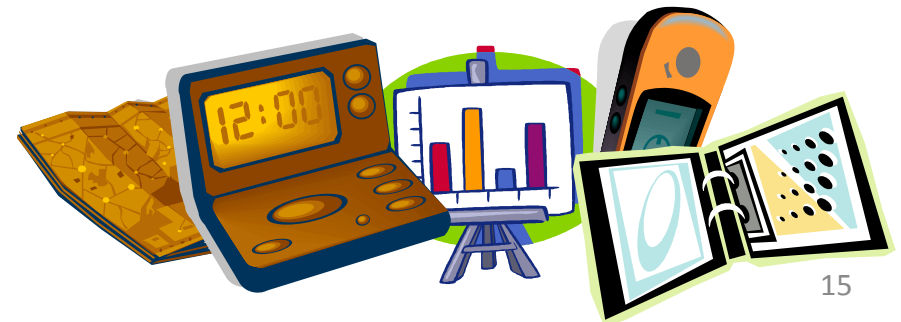**93%** request TREATED DATA, all kinds of SERVICE, and ALERTS

PUBLIC ADMIN
88% request geographic information –MAPS-, CLIPPING services, COMPARISONS, **82%** APPS and the development of client software

UNIVERSITIES
77% request BRUTE DATA, CLIPPING services and **65%** GPS applications and APPS

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The Internet is indispensible for business activity

THE WEB is the main communication channel businesses have with their clients.

- They have an active presence on the Internet
- 74% use blogs and social networks
- 51% use SEO/SEM web positioning
- 25% connect with clients through private communication systems

Spanish is the common lang (99%)
for available products or services

❑ **There is noticeable production in ENGLISH (49%)**

❑ **Catalan (26%), and Galician and Basque (16%) are also present**

16

FUTURE OF THE SECTOR

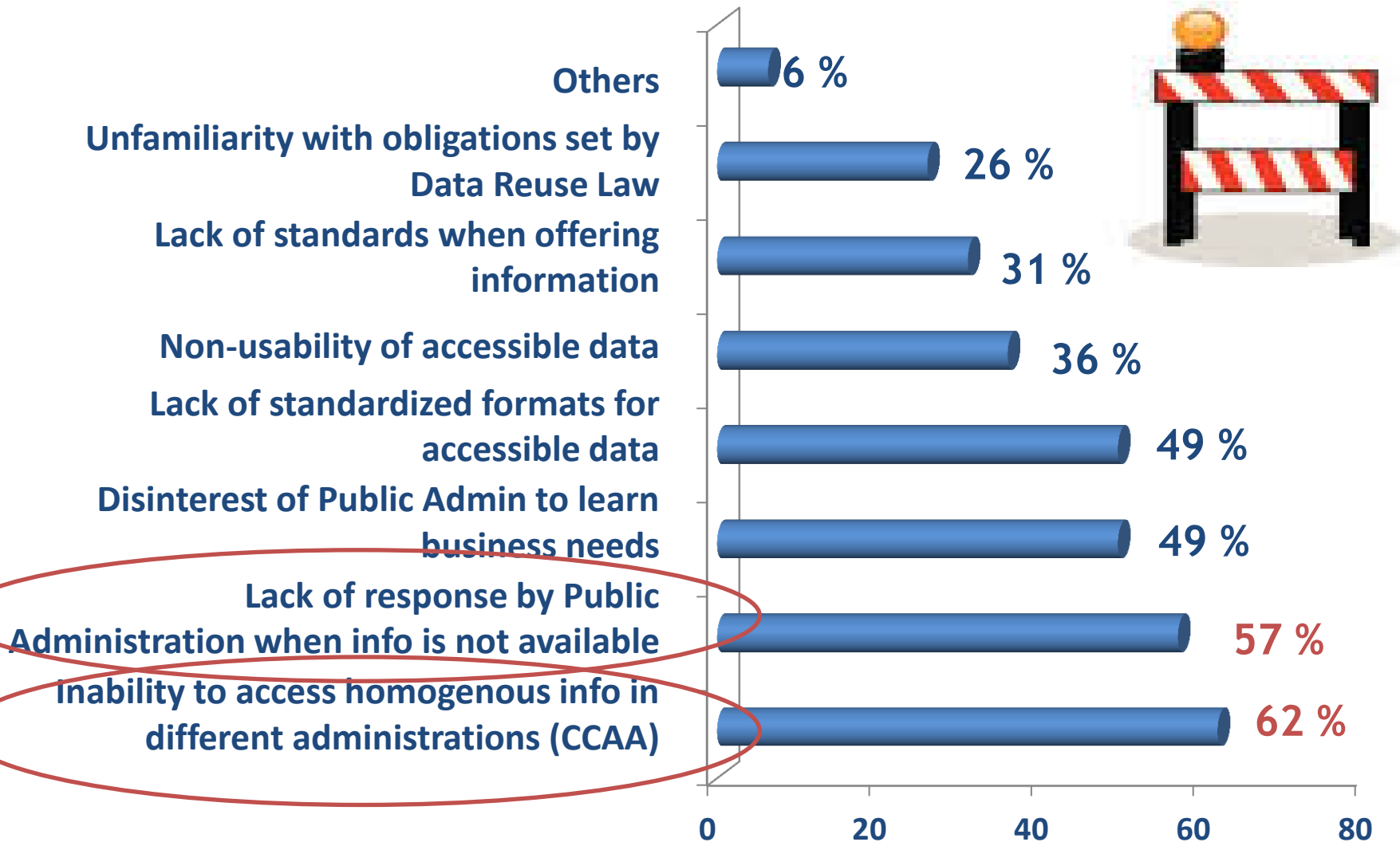## DEVELOPMENT OPPORTUNITIES

Development of
services for
SMART CITIES

FUTURE

BIG DATA

AVAILABILITY OF
REAL-TIME DATA

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BARRIERS AND OBSTACLES TO THE SECTOR'S DEVELOPMENT

Category	Value
Others	6 %
Unfamiliarity with obligations set by Data Reuse Law	26 %
Lack of standards when offering information	31 %
Non-usability of accessible data	36 %
Lack of standardized formats for accessible data	49 %
Disinterest of Public Admin to learn business needs	49 %
Lack of response by Public Administration when info is not available	57 %
Inability to access homogenous info in different administrations (CCAA)	62 %

0   20   40   60   80

PROPOSALS FOR THE FUTURE OF INFOMEDIARY BUSINESSES

The sector requests:

❑ **WITHIN THE SECTOR, to favor its development:**

  ❑ **Increase EDUCATIONAL EFFORTS about the ECONOMIC BENEFITS of data reuse (Public Admin, organizations, businesses)**

  ❑ **HUMAN RESOURCES ADAPTED to the needs of the sector**

❑ **IN PUBLIC ADMINISTRATION, to minimize possible inhibitors:**

  ❑ **IMPROVE PREDILECTION** of Public Admin and MODELS **for providing UNAVAILABLE INFORMATION**

  ❑ BETTER **COORDINATION** between Public Admins with clear leadership.

  ❑ **STRATEGIC PLAN: format and data standardization with mandatory publication and updates.**

  ❑ Minimize current differences between State – Auton Comm – Local levels to guarantee the development of a common market, products on a national level, economies of scale

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PROPOSALS FOR THE FUTURE OF INFOMEDIARY BUSINESSES

Future challenge: QUALITY INFORMATION with features such as:

❑ Development of *STANDARDS* for DATA configuration

❑ *SEMANTIC STANDARDIZATION* between Public Admin data and info

❑ Correct *UPDATES* in a periodic and formalized manner

❑ Strive for the *COMPLETENESS* of data

❑ Maintain *CONTEXT INFORMATION* about the data

❑ *Improved DISAGGREGATION*

❑ More *INFORMATION ON PUBLIC SERVICES* and in their use or consumption on the part of citizens

❑ *REAL-TIME INFORMATION* for value-added products.