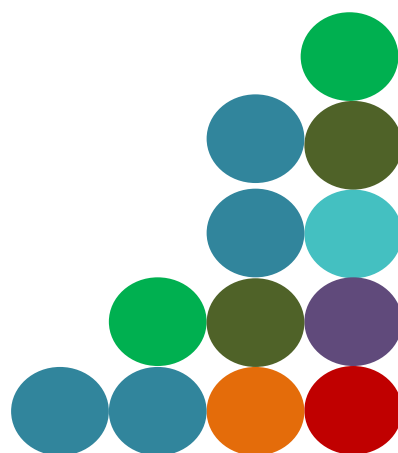


# Characterization Study of the Infomediary Sector

## *2012 Edition*

*Executive Summary*



## PRODUCED BY:

Team of Ministry of Finance and Public Administration of the State Secretary of Public Administration, of the Ministry of Industry, Energy and Tourism of the State Secretary of Telecommunications and the Information Society and the National Observatory of Telecommunications and Information Society, Red.es, with the advice and assistance of *Asesores y Consultores en Administraciones Públicas* (ACAP) in the development of the field work and analysis of results.

*The reuse of the study for commercial and non-commercial purposes is permitted. Approved reuse includes, activities such as copying, dissemination, modification, adaptation, extraction, arrangement and combination of information.*

*This authorization also implies the free and non-exclusive cession of rights intellectual property, licensing activities of reproduction, distribution, public communication or transformation, to develop the activity of authorised reuse in any form and under any format, for the whole world and for the maximum period permitted by law.*

*The conditions for the re-use of the document are as follows:*

- 1. It is forbidden to distort the meaning of the information.*
- 2. Must cite the source.*
- 3 Should mention the date of the original document.*
- 4 You can indicate, imply or suggest that the ONTSI, Minetur or Minhap participate, sponsor or support the reuse is carried out.*
- 5 Should be retained, not be altered or deleted metadata about the date of update and reuse conditions including, where appropriate, in the document made available for reuse*

*The use of the document will be made by users or agents of the reuse under your own account and risk, with them exclusively to them respond to third parties for damages that may arise from it.*

*The ONTSI, Minetur or Minhap shall not be responsible for the use of your information made for infomediary agents nor for damages or economic losses which directly or indirectly, cause or may cause damages economic, material, or data, caused by the use of reused information.*

*The ONTSI, Minetur or Minhap do not guarantee continuity in the availability of reusable documents, in content or form, nor assumes responsibility for any errors or omissions contained there.*

*The infomediary agent is subject to the rules on re-use of information in the public sector, including the sanctioning regime provided for in article 11 of the law 37/2007, of 16 November, on reuse of public sector information*

## Index

<b>1</b>	<b>Introduction.....</b>	<b>4</b>
1.1	Re-Use of Public Sector Information: A fomenting policy of the Information Society .....	4
1.2	Aporta Project .....	4
1.3	2012 Edition .....	5
1.3.1	Methodology.....	5
<b>2</b>	<b>Executive Summary.....</b>	<b>8</b>
<b>3</b>	<b>Characteristics of supply of the information that is generated by the Public Sector ...</b>	<b>Error! M</b>
3.1	Characteristics of the primary offering.....	Error! Ma
3.1.1	Sources and modes of access to information .....	Error! M
3.1.2	Formats in which the information is offered .....	Error! M
3.2	Assessment of the primary offering .....	Error! Ma
<b>4</b>	<b>Analysis of the Infomediary industry .....</b>	<b>Error! M</b>
4.1	Characterization of reuse companies .....	Error! Ma
4.1.1	General features of Reuse companies .....	Error! M
4.1.2	Related resources to the reuse activity .....	Error! M
4.1.3	Resources involved in the reuse infomediary sector .....	Error! M
4.1.4	Expenditure associated with the activity .....	Error! M
4.1.5	Typology of information on what to develop the activity of reuse. ....	Error! M
4.1.6	Other Business-related aspects.....	Error! M
4.2	Characterization of reuse services .....	Error! Ma
4.2.1	Channels through the products or/and services are distributed .....	Error! M
4.2.2	Types of products and services offered by reuse companies.....	Error! M
4.2.3	Media and formats on which the products and services are offered .....	Error! M
4.2.4	Languages in which the products and services are marketed.....	Error! M
4.3	Revenue model associated to the activity.....	Error! Ma
4.4	Added value by the company of its reuse activity to the primary information .....	Error! Ma
4.5	The perception of the effects of reuse activity in enterprises .....	Error! Ma
<b>5</b>	<b>Approximation to the identification of the demand for infomediary products and services .....</b>	<b>Error! M</b>
5.1	Volume of demand for reuse services or products .....	Error! Ma
5.2	Location of the demand of infomediary services .....	Error! Ma
5.3	Typology of clients .....	Error! Ma
5.4	Evolution of demand for infomediary services.....	Error! Ma
	<b>Anexo I Questionnaire .....</b>	<b>Error! M</b>
	<b>Anexo II Companies identified in the infomediary universe.....</b>	<b>Error! M</b>
	<b>Anexo III Tables related to the analysis of the primary supply.....</b>	<b>Error! M</b>
	<b>Anexo IV Tables related to the infomediary industry analysis.....</b>	<b>Error! M</b>
	<b>Anexo V Tables related to the analysis of infomediary sector demand. ....</b>	<b>Error! M</b>

# 1 Introduction

## 1.1 Re-Use of Public Sector Information: A fomenting policy of the Information Society

Along the first years of the current century the EC institutions have been researching about the potential use of the public sector information would be for the companies and citizens allowing them to create business with that information and help to grow up in economic terms throughout the European Union.

Due to this interest and after the creation of several specialized reports in 2003 the EC passed the Directive 2003/98/CE to the national legal code, specifying therein the basic principles regarding reuse matters. This Directive is within the Lisbon Agenda Framework and was developed according to get three basic aims:

- To provide the creation of products and services.
- To reinforce the use of overseas documents by private companies.
- To restrict the falseness of competition.

Therefore, this Directive establishes the beginning of actions that the different Member States have been developing in order to facilitate firstly the emergency and afterwards the consolidation of the European infomediary market.

To highlight the scope of the information that we are talking about by public sector information should be noted that that is, in this respect and according to the indicated in the 37/2007 law on re-use of information held by the public sector, in paragraph 2 of article 3:

**All documents, irrespective of the medium on which they are stored (physical or electronic) and its form of expression, graphic, sound or image, which has been prepared or kept by any organization or agencies of public administration.**

## 1.2 Aporta Project

The regulation and laws of re-use public sector information in Spain is under the Law 37/2007, of November 16th, regarding the Reuse of Public Sector Information as well as its regulation development by means of the Royal Order 1495/2011, of October 24th.

The Law decree by means of the first additional disposition the need of a Government which set up a set of action plans and programs managed to provide the reuse of Public Sector Information and promote the growth of the digital contents sector. As a result of this term of office the Aporta Project was released on 2007 and embedded currently into the Plan Avanza 2. The main duty of Plan Avanza 2 is to promote and manage a reuse public sector information culture able to make aware about the importance and value that the public sector information and after use by the reuse information holders could be for the Spain economy and a better Spanish Public Sector Administration transparency.

One of the most significant results of Aporta Project has been the implementation of the [www.datos.gob.es](http://www.datos.gob.es) site. The website has responsibility for the management of much of the Spain government's intellectual property and is the regulator of public sector information holders for their information trading activities.

## 1.3 2012 Edition

Within the Aporta Project framework during the last year was made the first analysis of the Spain's Reuse Public Sector Information. This analysis work was captured in the "Characterization Study of the Infomediary Sector" report.

That first and pioneering work continues with the next edition by means of this document. The research keeps the last year edition's basic matters however the current edition tries to characterize with a better accuracy a complicated sector like this inside of the country socio-economic reality owed to its innovation as well as its heterogeneity.

The aim of the study has been to continue with the analysis owed of the public sector information supply as well as the infomediary sector as a whole adding a rapprochement to the public sector information demand in Spain.

### 1.3.1 Methodology

#### Definition

With the aim to tune up the definition given in the last analysis It has been considered as a infomediary sector that one composed by:

*A set of companies that create products or services to market them to third parties based on public sector information. This definition includes the companies created for this duty and the other ones that were not created for that purpose but have an area or specific department devoted to create and market new products and services based on public sector information.*

#### Identifying the Public Sector Information holders

The questionnaire has been sent to 269 companies that have been identified as potentially reusers.

As the last year there is not a reference roll of infomediary companies It is not defined a economic sector which develop this activity either It has been delimited the research universe from several information secondary resources:

- Information from the identified companies on the first edition of this report.
- Information from public organizations of infomediary/user companies that have been identified because they would be considered as reuse information holders.
  - Information from previous studies made by public or private organizations.
  - Information from Internet resources by means of the identification of several activity areas associated with the reuse of public sector information.

---

### CENSUS OF INFOMEDIARY COMPANIES 2012

Finally were identified a total  
of **150** infomediary  
companies

130 Companies had been included within the first study. The 139 remaining companies have been identified after a research work with several companies involved into the sector (116) and internet (23).

At the beginning we have got 269 companies considered part of the infomediary sector but after several works, debugging errors, companies that currently do not make any sort of infomediary activity the study have been made on base of a real census of 150 infomediary sector companies.

There are 119 rejected companies due to several reasons:

- They are duplicated companies on the initial census or *they are companies*.
- The companies did not want to participate in the study.
- *They were identified themselves as not reusers.*
- *They permanently ceased their business activity.*
- *It was not possible to get in touch with them.*
- *The companies that have answered the questionnaire, despite they considered themselves as not infomediary companies*

In order to better understand the reality of this group of heterogeneous companies, they have been classified according to the typology of the field of reused information, as defined in the MEPSIR<sup>1</sup> (Measuring European Public Sector Information Resources) of the year 2006 of the European Commission.

These fields of information are:

- **Business/Financial:** financial, commercial and bidding information.
- **Geographic/Cartographic:** Geographic and urban development information, as well as graphic and cadastral alphanumeric data.
- **Legal:** information regarding legislation, rulings and judicial activity in general.
- **Meteorological:** information regarding climate and weather forecasting.
- **Social-demographic/Statistical:** information regarding the population, society, consumption and other activities or social-demographic areas.
- **Transport:** information regarding traffic, fuels, roads...

Moreover, it has been attached to this groups the **cultural files, libraries and museums information subsector** which it has been included into the European Union analysis also as a subsector associated to the reuse of public sector information.

## Quantitative techniques

*Direct questionnaires have been carried out with those holders responsible for applications, systems, products or business of the companies that perform infomediary activities. The topics dealt with in the questionnaire, reproduced herein as Annex I, and covered the following information areas:*

- *General characterization of the company.*
- *Activity of the infomediary company.*
- *Current situation of the company according to several matters of reuse of public sector information.*
- *Human Resources and Physical resources.*
- *Economic features of the company*
- *Identity features.*

---

<sup>1</sup> [http://ec.europa.eu/information\\_society/policy/psi/docs/pdfs/mepsir/executive\\_summary.pdf](http://ec.europa.eu/information_society/policy/psi/docs/pdfs/mepsir/executive_summary.pdf)

Direct questionnaire has been filled out by 72 companies where 54 do carry out infomediary activity and the key indicator model was applied for.

### Qualitative techniques

In order to understand in great detail the sector it has been made 10 interviews to let us know better the derivative perceptions and problems of reuse of public sector information for the infomediary companies.

These interviews have been carried out with those responsible for the infomediary companies during May and June 2012. The companies which took part in the interviews were:

- 2 public organizations. • 1 business association.
- 1 economic-information Company. • 2 Geographic- cartographic companies.
- 1 social-demographic/statistical. • 1 software developer company.
- 2 publishing companies.

### Technical Specifications

- **DEFINED UNIVERSE:** Initially 269 infomediary companies and after some verifications and check-ins this universe was reduced to 150 companies.
- **FINAL SAMPLE:** It was carried out in a census way by means of sending the questionnaire to the whole identified universe.
- **RESPONDENT PROFILE:** Responsible for applications, systems, products, services or business generated by the company by means of the reuse of public sector information.
- **GEOGRAPHICCONTEXT:** National
- **INFORMATION GATHERING TECHINQUE:** Questionnaire sent by email in several formats (Excel, Word, Open Office) and also followed up by telephone.
- **QUESTIONNAIRE DURATION:** Approximately 25 minutes are estimated to fill up the questionnaire.
- **EXECUTION PERIOD:** April 1<sup>st</sup>, 2012 to June 15<sup>th</sup>, 2012
- **STATISTICAL ANALYSIS TYPE**
  - Univariate analysis: distribution of frequencies of each and every one of the variable measures, as well as the average and standard deviation of the numeric variables.
  - Bivariate analysis: for determining the relationship between the variables

## 2 Executive Summary

This study of infomediary sector in Spain is the second one made after the first one on the 2011 year. The study tries to clarify the analysis in order to deepen the knowledge of the infomediary sector. For this analysis is the composite sector by:

*A set of companies that create products or services to market them to third parties based on public sector information. This definition includes the companies created for this duty and the other ones that were not created for that purpose but have an area or specific department devoted to create and market new products and services based on public sector information.*

Therefore the main aim is to know in a greater detail the reality of the sector and its evolution during the last year. This is a complicated sector within of the social – economic reality of the country due to its innovation – around 5 years old - and its heterogeneity.

Particularly, the work has been focused in three objectives:

- To know the **main features of the primary information supply**, in other words, the supply given by the Public Sector.
- To know the **main features of the infomediary companies** and their activities of performance within the sector.
- To carry out a **first attempt to the products and services generated** by the companies of the sector.

### *The Spain Infomediary Sector Identification*

---

**After the study and analysis carried out during the works it has been defined a sector compound at least by 150 companies.**

Inside of this sector the general profile of the infomediary companies would be as the small companies (maximum 20 highly qualified employers). These companies have been established by self-employed workers with a extensive experience about information reuse. This type of activity was combined with the infomediary activity with other market segments generating products or services associated to specific sector information that were subsequently put on the market.

After the analysis of the questionnaire it would specify that the main four information scope are:

- Geographic- Cartographic information.
- Business – Financial information.
- Social-demographic / Statistical information
- Legal information.

This does not means that they are isolated sectors. There are a lot of companies which share and use information from several contexts to generate services based on those combined informations to get a better added value to their reuse activity



## *Economic activity of the Infomediary Sector*

---

Regarding to its economic activity:

- Infomediary companies expends 430,000 euros on average to get basic information that after is reused. Nevertheless there is almost a 45 percentage of the companies is able to get the information for free of charge.
- Incomes associated to information reuse are about 600,000 euros per company. It is also true that there is an important variability of invoice with a range between 4,000 euros and 56 Million of euros.
- This information let us to know **how much is generating the infomediary sector:**
  - o **Estimated business volume between 330M and 550M of euros.**
  - o **Estimated number of employees related to the infomediary activity between 3,600 and 4,400 employees.**

## *Infomediary activity management*

---

- Access to public information

Over the 90% of companies get the information through the website or directly on the same public organization.

One of the most outstanding results is that about of the 45% of the companies have already accessed to the attached information by the public organization in specific websites.

In the assessment made of the provision of public information for reuse, the industry highlights especially two aspects, quality and accuracy of the information and accessibility to it. Thus, it is possible that the administration would improve the information reusable advertising and the development of support tools for the identification, representation, publication and express reuse of this information.

- Products, services and applications generated for its business

Infomediary companies have gathered public information to analyse it afterwards in order to get an added value to the use on their different typologies (products, maps, transformed data, raw data or published documents); services (by means of tailor made reports, assessment or comparative analysis); or applications (specific client applications development, software for mobile devices, information for GPS or SMS Alerts).

**Internet is the main source to carry out their activity.** These companies use websites, emails or FTP files to distribute their products. So much so that the 98% of the companies use an electronic format and mainly the PDF (63.8%) format for the products/services distribution.

- Infomediary Market

The main customers of the infomediary sector are essentially other companies (75.5%) with a couple of considerations. Firstly the Administration itself becomes an important customer in the industry (two out of three infomediary companies contracts with other administrations for the provision of services) and also third part of the sector has the universities as clients.

From a territorial context point of view of the business, the Spanish market is essentially the one where the activity is made on although there is over than a 30% of the companies with clients in the rest of EU or almost a 25% with clients from overseas (not in EU).

There are a lot of free incoming models co-living together in this market with other payment models. Free incoming models are used for more simple products/services or even the proper public information. Payment models are made for more specific products/services (pay per work or report) moreover some subscriptions methods.

### ***Assessment and Future Perspectives of the Infomediary Sector***

---

On the assessment of the **situation infomediary sector and its future prospects**, the companies consider that the infomediary activities allow main contribution to their business, not only to develop new products or services for their customers, but also generate loyalty tools for those same customers.

*Regarding the situation in the sector, companies feel that there has been a substantial improvement in recent years in regard to the volume of information available.*

Although it is a sector that is being affected also by the economic crisis, there are incremental improvements done by the Public Administration to promote the reuse and can help to support better this juncture.

***In fact, over two thirds of the companies that participated in the study considered that their level of activity has been maintained or has increased over the past year.***

The companies emphasize their needs in various aspects, summarized essentially of:

- Increased **coordination and clear leadership by the Public Administration** for reuse.
- There are **significant differences between the autonomous communities** that have to go by solving and ensure a common market.
- **Better regulation**, through modifying existing rules and new ones (eg Transparency Act).
- **Culture Change for reuse would not see as a confrontation**, but a mechanism of collaboration between the public and private sectors also encouraging competition and neutrality in access to information and reuse it.

Finally, regarding to future prospects of the sector, companies are seeing a potential niche in its international business, not only for doing a similar business in other countries, but even the larger ones, helping to make available this information (vg. Land Registry) in countries that lack such a structured information in a consistent way, such as in some Latin American countries and use the Spanish experience from the Administration and from the infomediary context to position themselves competitively in this new market.