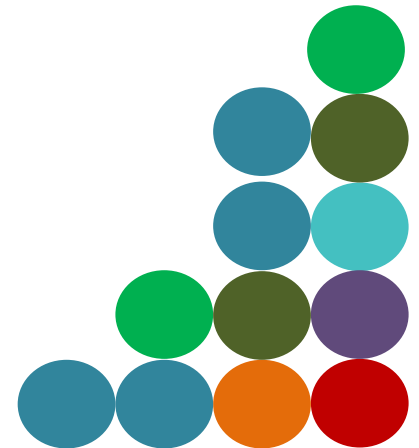


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Characterization Study of the Infomediary Sector

2012 Edition



For the purpose of this study was defined **as Infomediary Sector:**



Set of companies that generate applications, products and / or added value services for third parties, from public sector information.

In the **absence of a census of reference** in this sector, we have proceeded through various sources and consultations with other agencies of the State General Administration that are providers of reusable information. This has allowed to identify an **initial universe of infomediary companies** and more precisely we have analyzed the products and services offered to characterize this activity in a more realistic manner.

At the end of this process has identified a universe of:

150

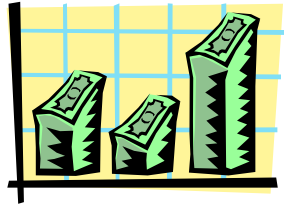
Infomediary companies in Spain

It has been cataloged these companies into subsectors according to **the area of reusable information:**

- Business/Economy
- Geographical/ Cartographical
- Social-demographic/ Statistical
- Information about museums, libraries and cultural files (new in the 2012 edition)
- Legal
- Meteorological
- Transport

This effort of accuracy on the characterization and its activity has influenced in the **reduction of the identified universe the previous year:**

- Companies that their activity have not considered as infomediary activity finally.
- Companies which no longer sell products or services based on the reuse of public sector information
- Companies which have ceased their activity.



Economic data

330 M€ - 550 M€

- Estimated **turnover directly associated with the infomediary activity.**

825 M€ - 1,200 M€

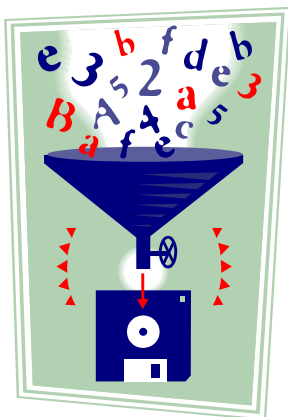
- Estimated **turnover generated by companies with infomediary activities.**

3,600 – 4,400
sector employments



- Infomediary sector **generates approximately 4,000 jobs directly related to the infomediary activity.**

70% of companies state that infomediary activity has grown or at least has been remained in the same figures as the previous year.

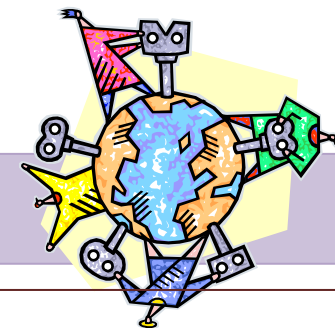


Economic data

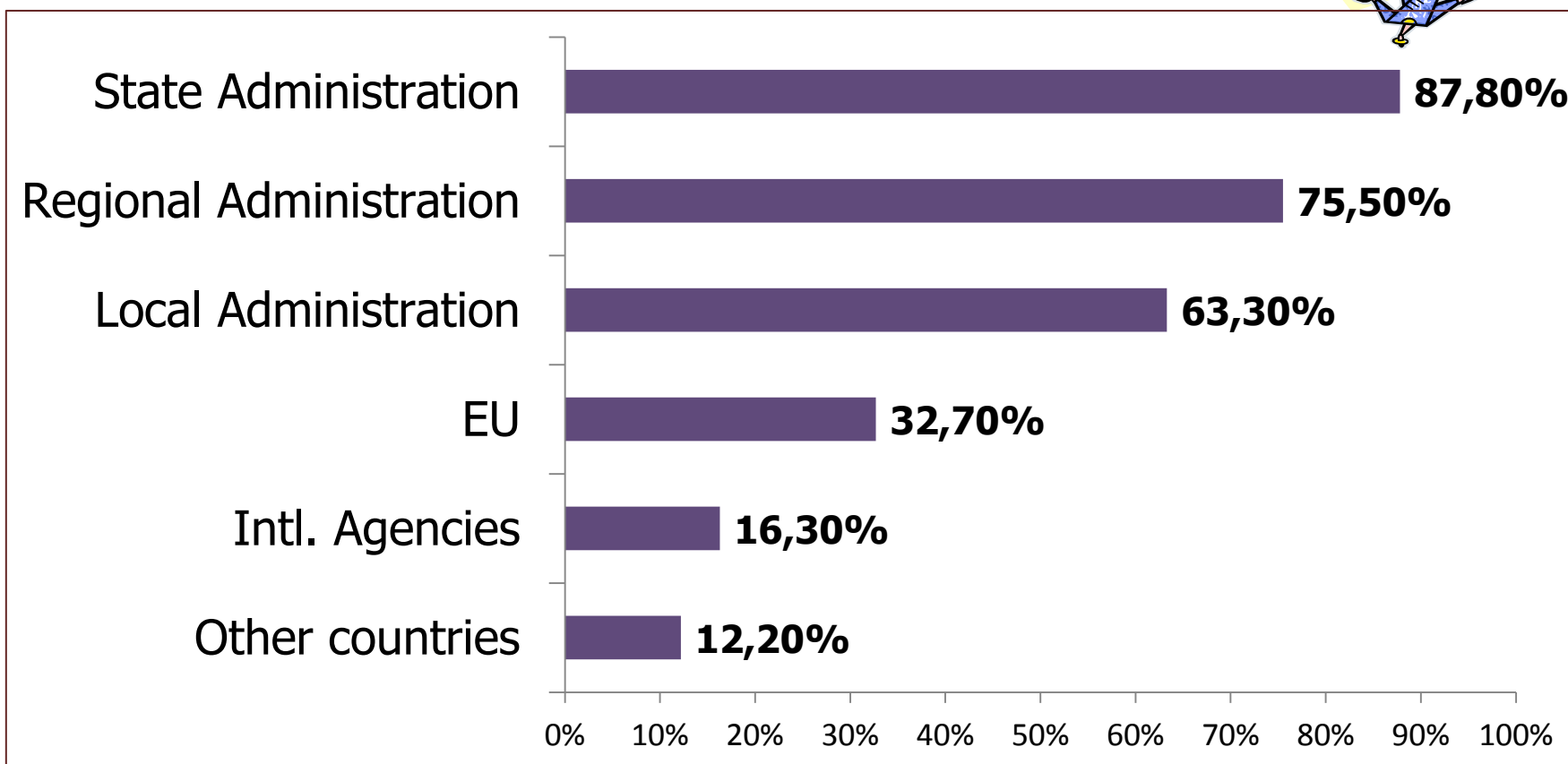
- Within the different types of activity, would be the most prolific **Cartographic/Geographic Information** and **Business/Economic Information**.
- This year's report includes information of cultural sources background information that would be used by just over 10% of companies.

Geographic/Cartographic Information	51.1%
Business/Economic Information	46.8%
Social-demographic/Statistical Information	29.8%
Legal Information	27.7%
Meteorological Information	12.8%
Transport Information	12.8%
Others (IT Consulting,...)	12.8%
Information from museums, libraries and cultural files.	10.6%

Sources of reused information



Area of the information



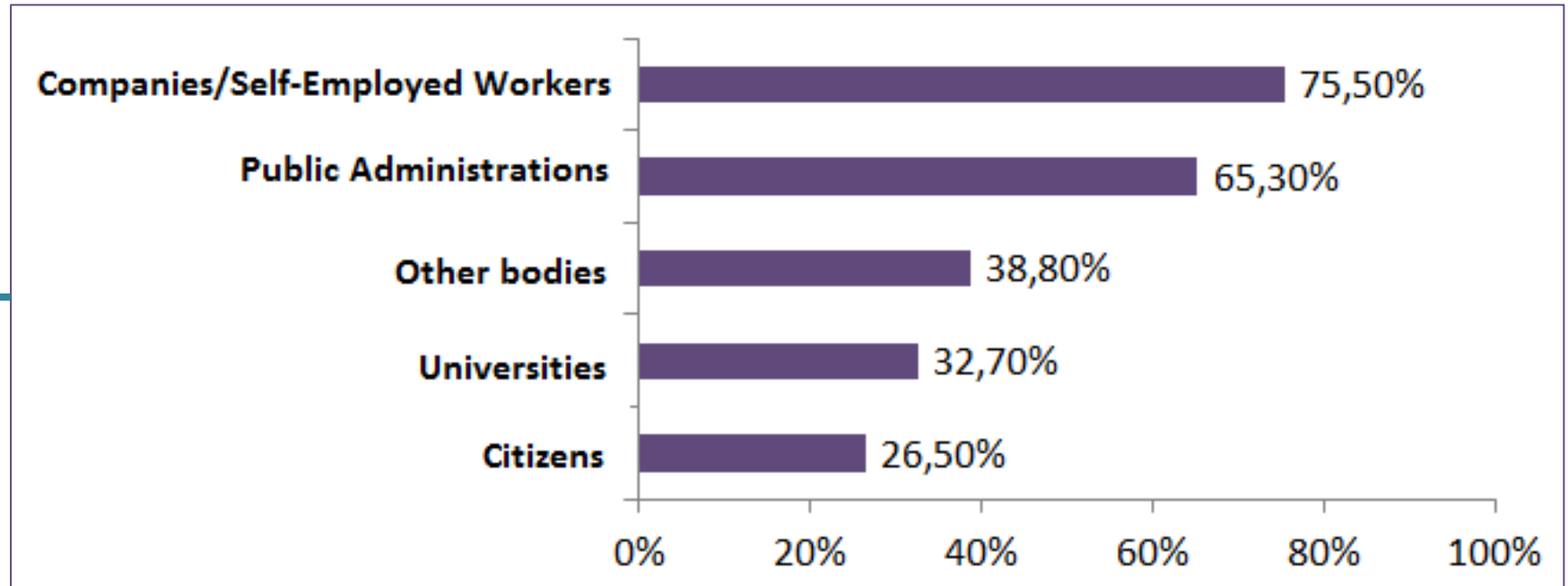
Sources of reused information



Form of access

- Over 90% of companies have accessed via web or directly to the information of each agency.
- Over **45%** have accessed to re-use specific portals created by public administrations.
- There is a **15%** that have obtained public information from reusing companies – they would become reusers of reusing activity.

Clients of infomediary sector



Origin of clients

Spain	98.0%
Other UE countries	30.6%
Rest of the world	24.5%

- The administration itself becomes a client of infomediary companies.
- A third of companies have overseas customers.

Revenue models



Provision model of free services

Free unrestricted	22.9%
Free by key	10.4%
Free with advertisement	14.6%

Revenue models

Revenue models for payment of services

Pay per access/use/workd done	56.3%
Pay per lineal subscription	33.3%
Pay per subscription with modalities	27.1%
<i>Freemium Services</i>	16.7%

Products, services and applications offered from the sector

GENERIC PRODUCTS

Data processed	82.9%
Maps	36.6%
Raw data	26.8%
Publications	26.8%

GENERIC SERVICES

Custom reports	78.8%
Advice	27.3%
Comparatives	18.2%
Clipping	3.0%

APPLICATIONS

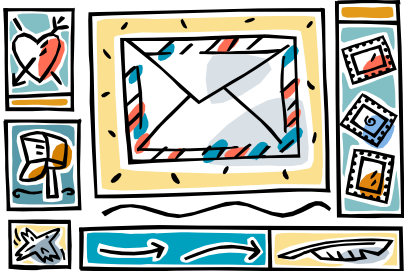
Client Software	70.8%
Mobile Software	29.2%
GPS Information	25.0%
SMS/mail alerts	16.7%

HIGHLIGHTED ELEMENTS

- Over 25% **sell raw data** directly from the Administration-
- **Custom reports at the request of clients** is the main service of sector.
- Nearly 30% of companies generate **applications for mobile devices**



Internet is the basis for the exercise of their activity



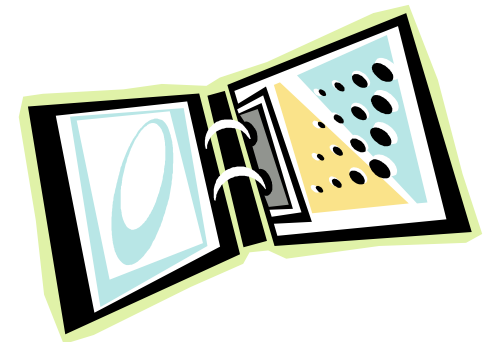
Internet (web y FTP) and e-mail are the key distribution channels

98%

Companies use **electronic format** for distribution of their products or services

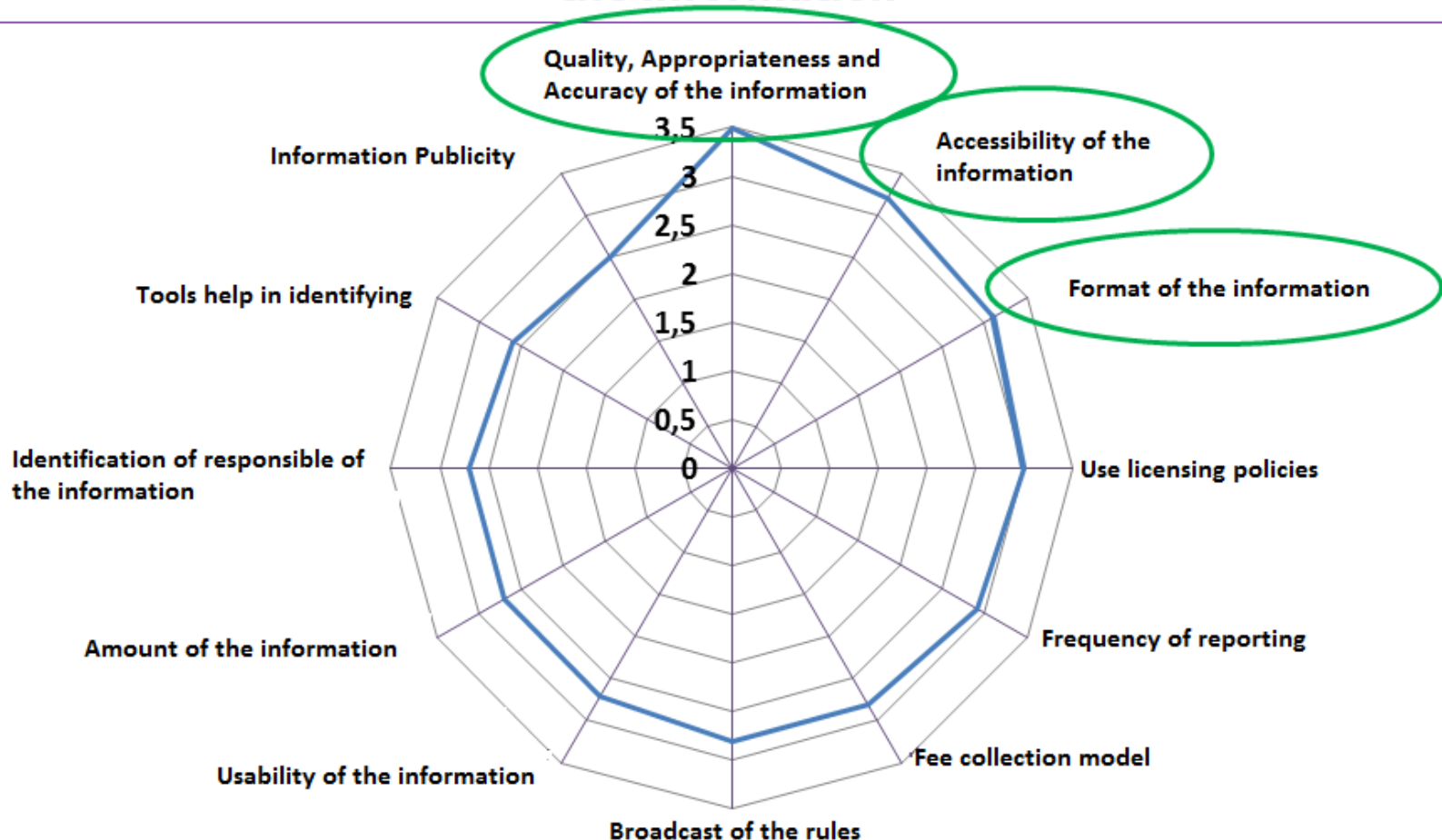
Spanish is the common language for the products or services offered but it also highlights the production in English, Catalan and Galician.

PDF format is the most used for the distribution of products or services (**63.8%**)



Assessment of infomediary sector

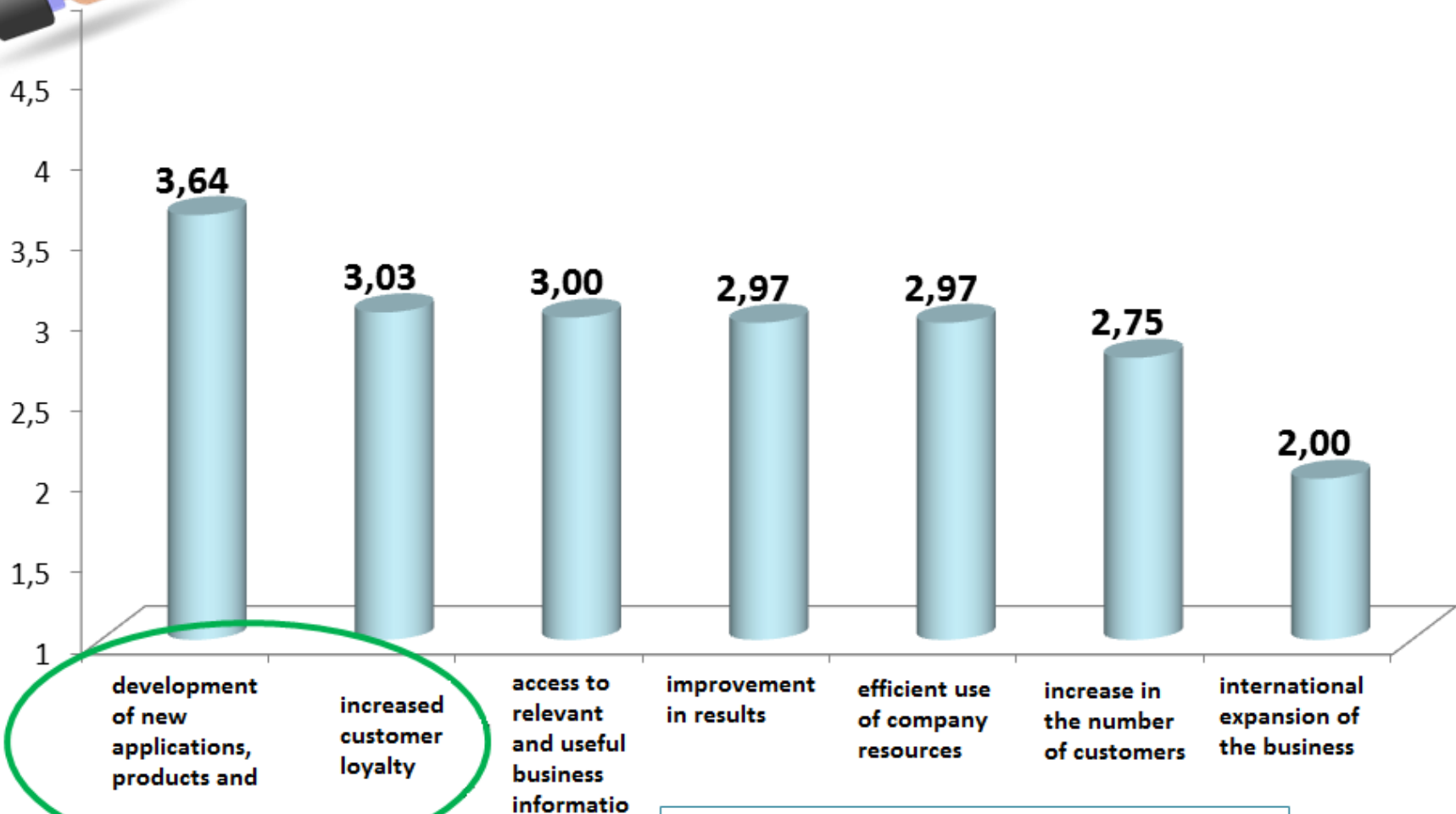
Activity carried out by the Administration for the development of reuse the information



Assessment 1-5 (1 Disagree / 5 Totally agree)

Assessment of infomediary sector

Assessment of potential effects of the infomediary activity



Assessment 1-5 (1 Disagree / 5 Totally agree)



Proposals for the future of companies infomediary

It should **increase the reuse culture** that currently exists in both the Administration and in the group of reusing companies or potentially reusers.

Sector demands:

- Increased **coordination and clear leadership by the Public Administration** for reuse.
- There are **important differences between the Autonomous Communities** that have to be resolved to ensure a common market.
- Better regulation**, both by modifying existing rules and new rules.
- Culture change for reuse is not seen as a confrontation**, but a mechanism of collaboration between the public and private sectors.