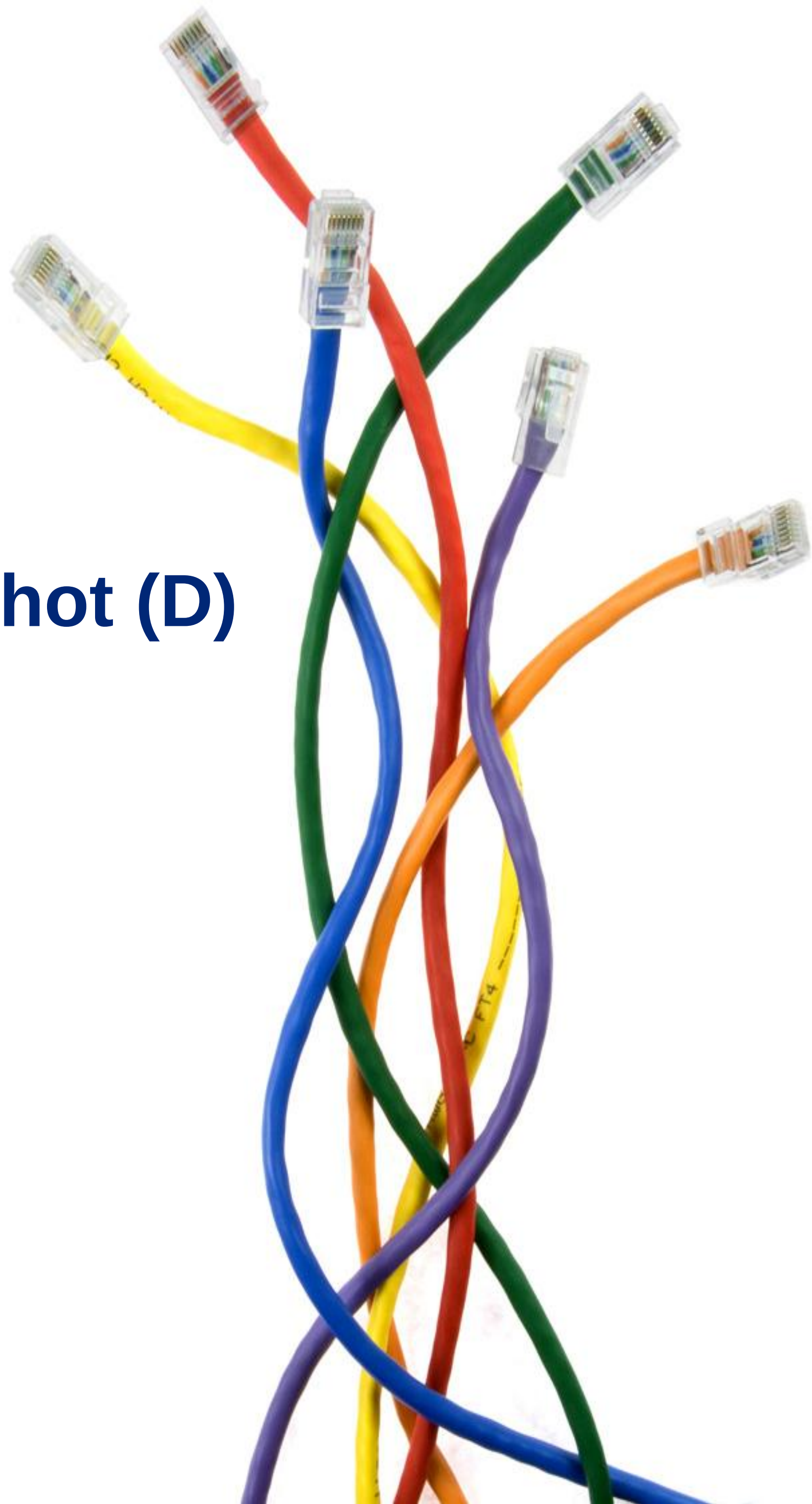
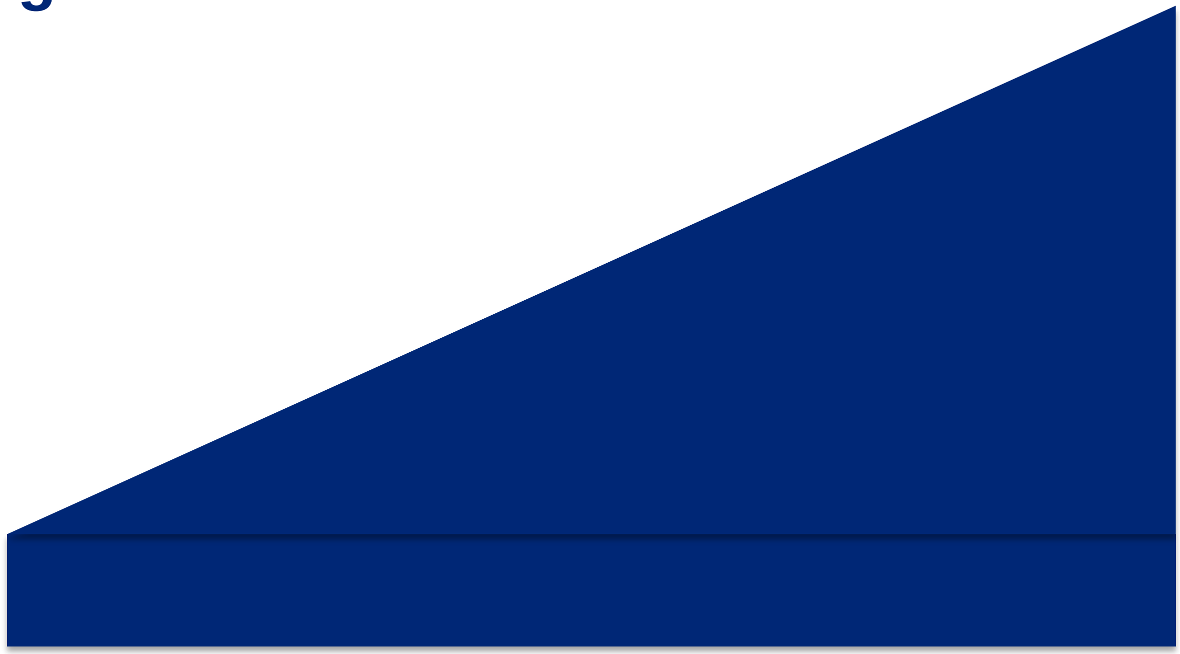
Apps market snapshot (D)



Main message



Direct impact is emerging

-Large predicted market growth up to 35 billion in 2015

-Average apps developer makes 3000 Euros per year from direct app sale

- 60% apps in EU markets are EU-made

-individual success stories but low employment impact: Angry Birds company employs 50 people

-50% of time devoted to scraping data

Indirect impact is far greater

The enablers of next Google will be:

-Big data: “Statistics is the next sexy job”, “More data beat better algorythm”

-business model experimentation and time-to-market

Open data is the **gym** and **showcase** of future Google founders

+ consumer surplus 10 times revenues

Methodology – objective D – Apps snapshot

Objective D

1. Summary of literature review and publicly available market data

2. Survey of applications in the main apps marketplaces based on random sampling of 500 apps in travel, finance and weather category on *App Store, Android Market and Ovi Store*

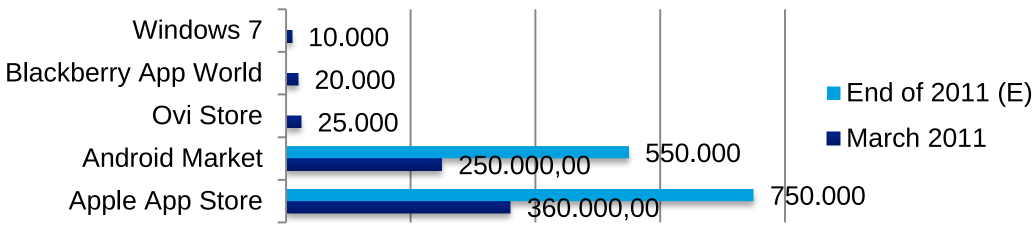
3. Survey of mobile apps submitted to five app contest *(BE, FI, NO, US, UK)*

4. Analysis of mobile apps on marketplaces and contests – percentage, country of origin, type of PSI used, number of downloads

4. Interviews with 5 developers of PSI based apps on drivers and barriers for developing PSI-based apps

Interviews: Belgian app developing company (more than 100 apps); Independent app developer (fuel prices); French app transport company (Paris and London transport app), *Norwegian consultancy developing apps and the NO data.gov portal; Polish transport app developer;*

Apps market snapshot (1/2) – main conclusions



Exponential growth of the apps market (namely Apple and Android app stores) in number of apps, downloads and stores revenues

Timeframe		2010	2011	2014
Apps downloads eEstimations	Gartner	8.2 bln (Gartner	17.7 bln (Gartner)	185 bln (Gartner)
	IDC	10.9 bln (IDC)	25 bln (IDC)	76.9 bln (IDC)

The Apple App store hit 10 bln download milestone on the very beginning of 2011.

Timeframe	2010	2011 E	2014 E
Revenues – app stores for smartphones and tablets	$2.2bln (IHS)$15 bln (Gartner)	$15 bln (Gartner)	$35 bln (IDC) and $38bln (Forrester)

The soaring revenues and the spike in number of downloads has not yet created widespread business opportunities and employment growth in the sector

Lack of stable business models, predominance of the freemium model matched with the search of additional revenues in advertisements and in-app purchases

New apps will be more complex and social, based on different sorts of datasets and features and deliver real-time local information

Objective D – Apps market snapshot (2/3)

My City Way – no revenues yet but aims to sell ads and build partnerships, already secured $US 5M of venture capital investment

Metro Paris: unique price for downloads and additional services. (PSI + other data, – points of interests, augmented reality)

Novel datasets, added-value and many datasets, long-term effects, benefits to end-users already visible

Husetsweb - environmental advice on housing through use of house registers coupled with additional sets of data

Brightscope: retirement plan reports

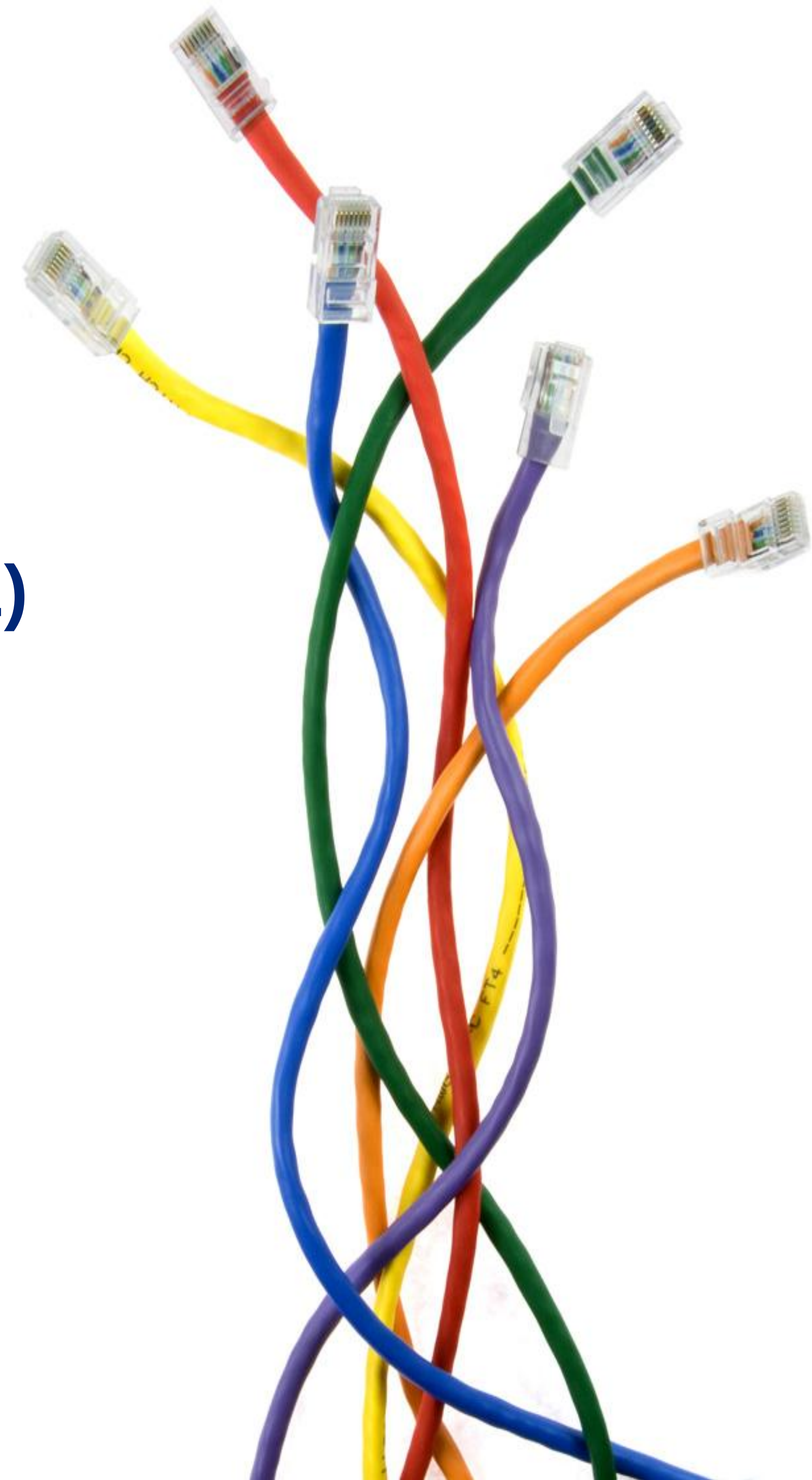
Apps market snapshot (3/3) – main conclusions

- Substantial share of PSI-based apps in **weather and transport apps**, other datasets underexplored, navigation apps based on open alternatives to PSI data, free weather apps using US data

- Apps contests show the **hidden value** of less commercially explored PSI data (novel datasets and unexpected re-use)

- **Drivers**: need for stable PSI re-use rules and easy and free access to raw data, rapid innovation, experimenting with business models

- **Barriers**: PSBs entering the apps market, changing licensing rules, reluctance to pay for free available data, cost-recovery regime privileges PSBs and big re-users on app market, unique price for app in conflict with the yearly fees, lack of standards in data release



Data.gov portals (E)

Methodology – objective E – Data.gov portals

Objective E

Selection of indicators and portals

Desk research and web survey and email requests (15 data.gov portals)

National: UK, FI, DK; AU, NZ, US

Regional: ES: Asturia, Catalonia, Basque Country, IT – Piedmonte Region, Utah, US

Local: Helsinki Region, FI; London, UK; Rennes, FR; NYC, US

Case studies on four data.gov portals cases (Basque Country, France, Denmark, UK)

Interviews: Catherine Lippert from digitaliser.dk; James Forrester and Elyria Miller from UK data.gov; Alberto Ortiz de Zarate, director of the Open Data Euskadi Project (Basque Country); Séverin NAUDET, Director, Etalab

Objective E – Data.gov portals (1/2)

Final list of Indicators:

1.Number of datasets available or number of **dataset listing pages**

2. Five star linked data system of Tim Berners-Lee, i.e.

data availability, machine-readable data, non-proprietary formats , linked data, link your data to other people's data to provide context

4. Clear reuse conditions (license free or license bound)

5. Position of the governing body (high-level, low-level)

6. Accessibility – anonymous access

7.Take-up by citizens: visits, unique visitors, data downloads, conversion rate (click-throughs to data hosting websites) in case of web repositories

8.Take-up by application developers: number of apps, app contests entries numbers

9. Availability of take-up data on the website

10. Range of government agencies contributing dataset listings

11. Availability of 'suggest a dataset' form

11. Presence of guidelines, events and other capacity building strategies

12. Community engagement indicators (number of blog comments, tweets, activity on for a, ATOM feeds subscriptions, other feedback channels metrics)

Basic data

- Datasets vary from 6200 to 5, with huge differences in the type of data made available
- Datasets download numbers also varies from 320.000 to 250 per month.
- Number of apps developed varies from 934 government and 236 citizen-developed apps in the US to 12 in Catalonia
- Apps competition remain popular – 30 apps on average and 430 at EU Open Data Challenge
- The portals' budgets vary considerable from 9,2M$ so far spent on data.gov to a hundred thousands EUR for European national and regional initiatives.
- Large-scale initiatives are also those that encounter higher take-up and are managed at top political level

Objective E – Data.gov portals (2/2)

Success factors:

- **Presence of high-level political commitment, still, there are first and foremost the initiatives of committed individuals.**
- **Low hanging fruit strategy most commonly employed**
- **High data quality and value of data more important that number of datasets**
- **Secured funding for several years**
- **Engagement strategies for citizens (apps repositories) and re-users**

Other conclusions

Portals do not have any direct impact on **pricing regimes**

Transparency and innovation-fostering as two main **underlying goals**

PSI-based apps – an important source of **popularizing open data**

CCBY as most popular licensing scheme in Europe (FR, UK – tailored licenses, US – free license)

Greatest impact overall are not the re-users revenues or employment growth in the sector but the **indirect economic impac**t in terms of efficiency of the market disposing **more and rapidly available information**