

SME / SPIRE



Turning the challenges of
INSPIRE implementation into
business opportunities for
European geo-ICT SMEs

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Powered by INSPIRE
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outline

1. smeSpire project & study
2. first results of smeSpire survey
3. conclusions
4. reflections + future work

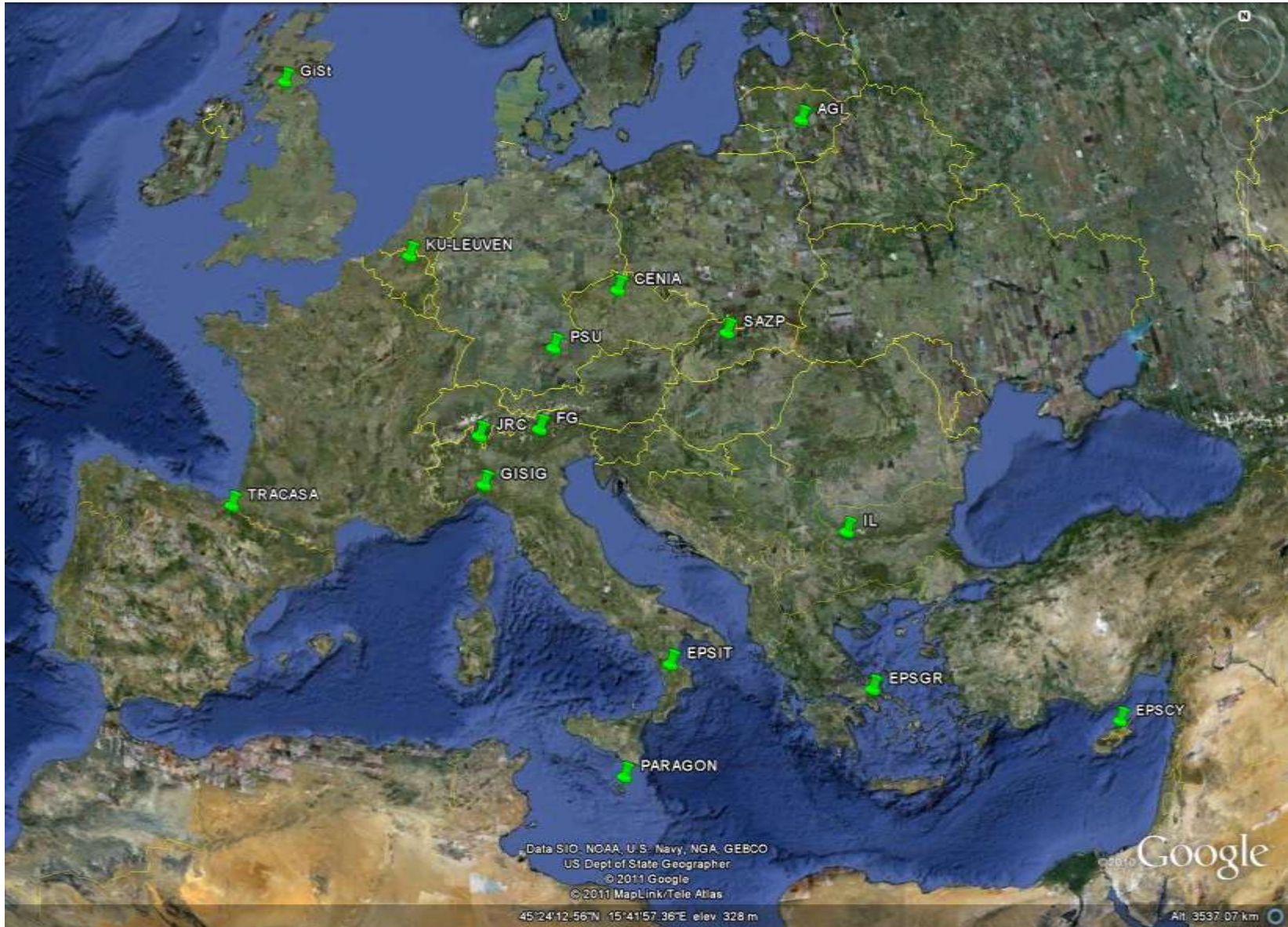
central questions

1. What are the main characteristics of the Geo-ICT sector in Europe?
2. How is the Geo-ICT sector in Europe currently involved in the implementation of INSPIRE?
3. Do Geo-ICT companies in Europe have the skills and knowledge to participate in the implementation of INSPIRE?
4. Does INSPIRE already have an impact on the innovative performance of Geo-ICT companies in Europe?

smeSpire project

- Rationale of smeSpire:
SMEs can enable countries to fulfill the INSPIRE Directive, creating new market opportunities with increased potential for innovation and new jobs.
- Objective of the project:
“to encourage and enable the participation of SMEs in the mechanisms of harmonizing and making data available.”
- Duration: May 2012 – April 2014

smeSpire - partnership



1. **STUDY** : Assess the market potential for SMEs in relation to INSPIRE and characterize obstacles for geo-ICT companies to enter this market
2. **TRAINING**: Develop a multilingual package to train environmental data analysts in the maintenance and exploitation of data
3. **BEST PRACTICES**: Collate, translate and exploit a Best Practice Catalogue in the management of environmental content
4. **TRANSFER**: Create a network capable of transferring result-driven knowledge throughout Europe

smeSpire study involves 3 data collection activities:

- document analysis (studies, policy documents, statistics, ...)
- **survey among Geo-ICT companies in Europe**
- interviews with companies, associations, public authorities

Online survey launched in November 2012

Questionnaire has 3 main parts and includes more than 30 questions:

- Part 1 - general characteristics
- Part 2 - activities, knowledge and skills
- Part 3 - impact of INSPIRE

By February 2013, more than 190 Geo-ICT companies had completed the survey

Figure: number of employees

Findings:

- Majority of companies are small (<50)
- 60% of companies are 'micro' enterprises
- 10% of companies are 'medium-sized' (<250)

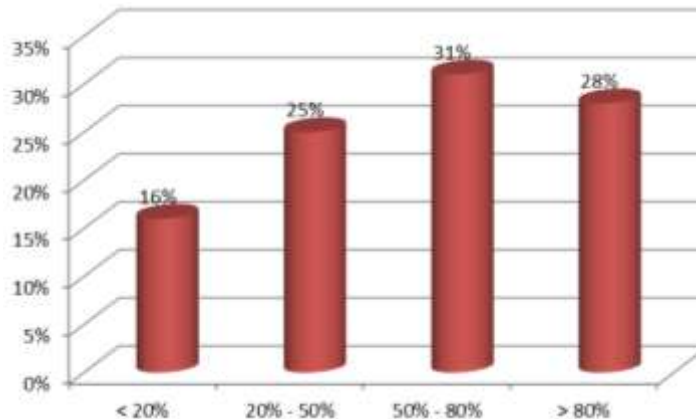
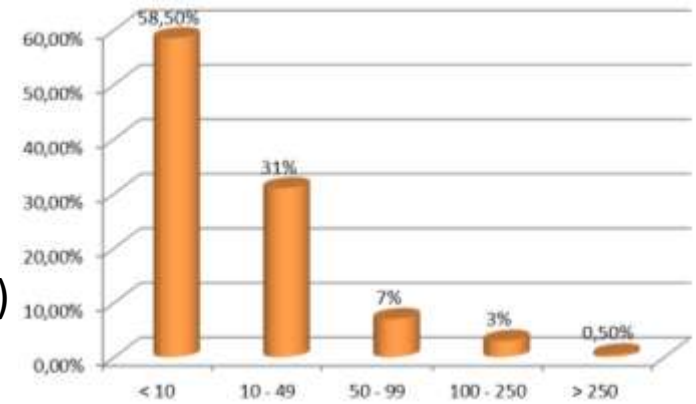


Figure: percentage of activities providing products/services to public sector

Findings:

- Public sector as main customer
- Majority of companies strongly dependent from public sector

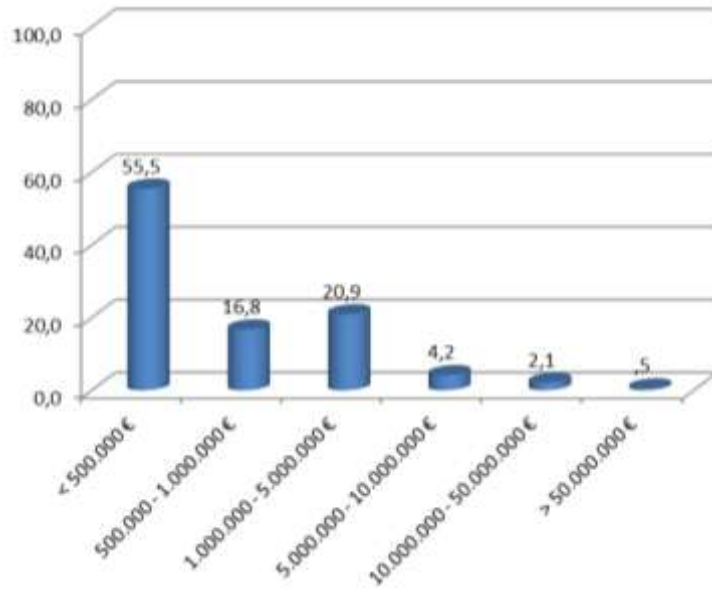


Figure: annual turnover in 2011

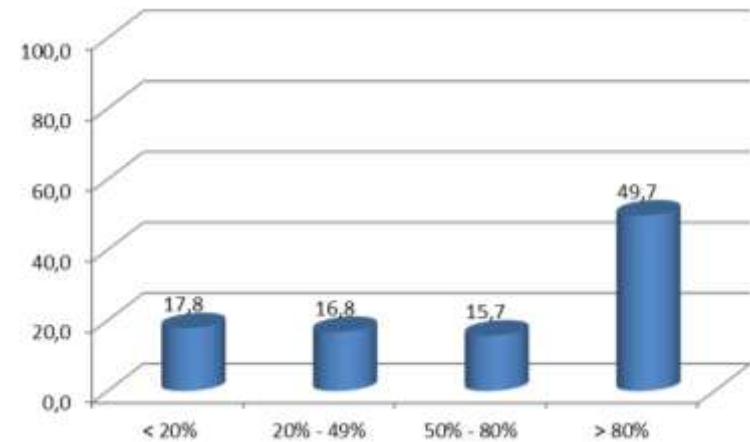
Findings:

- Almost all companies are small (turnover < EUR 10 million)
- Majority of companies are ‘micro enterprises’ (< EUR 2 million)

Figure: ‘geospatial’ turnover

Findings:

- 65% of the SMEs mainly focus on geospatial activities
- Besides ‘mainly Geo-ICT’ also some ‘partly Geo-ICT’ companies



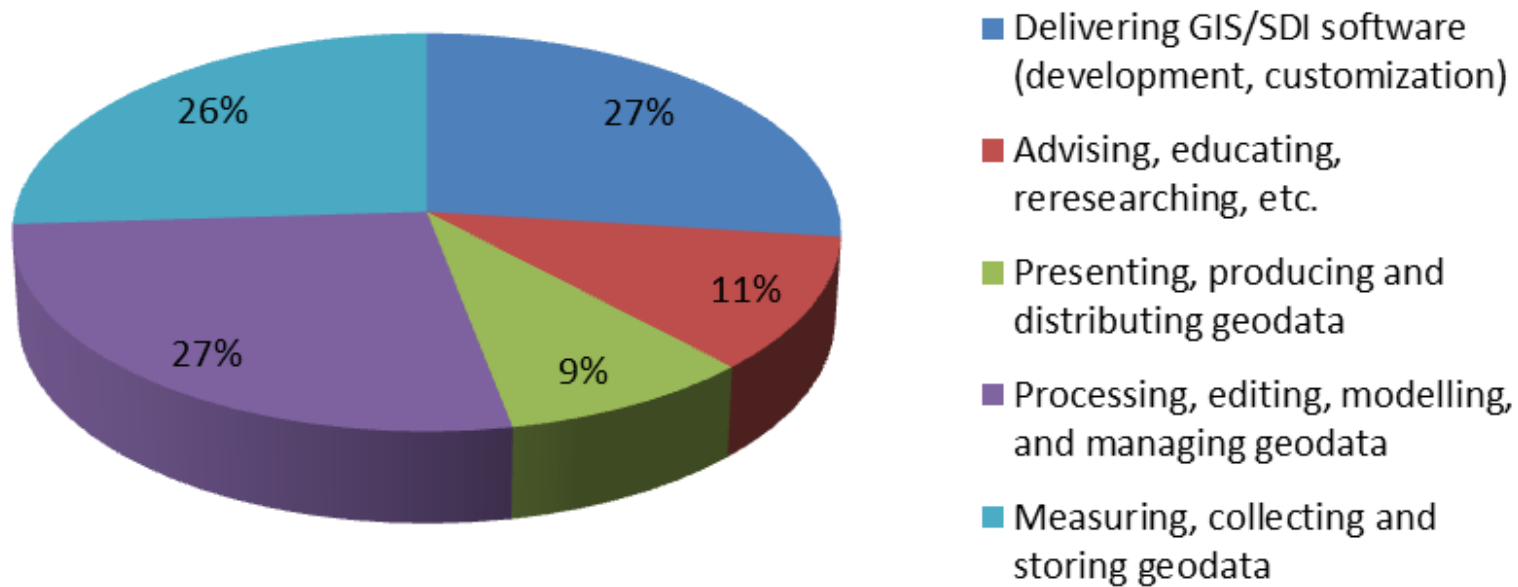


Figure: primary area of activities

Findings:

- 3 main groups of activities: software – input - throughput
- Only a limited number of SME's focussing on software development
- Processing, editing, modelling and managing geodata are important activities of Geo-ICT SMEs → potential for INSPIRE!

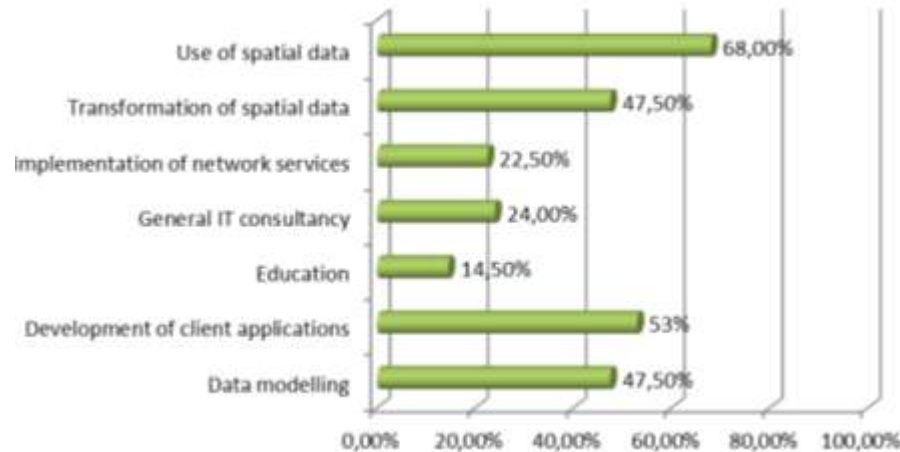


Figure: activities

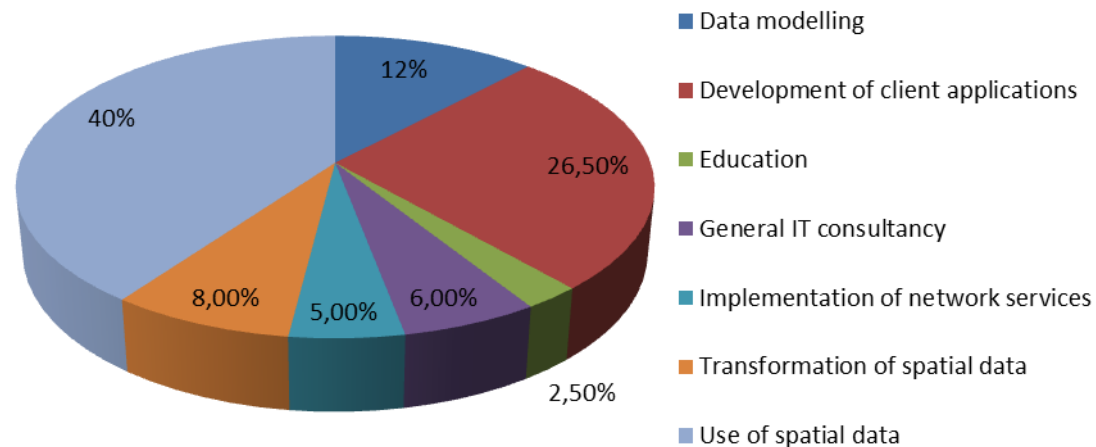
Findings:

- Majority of companies are data users
- Implementation of network services is rather weak compared to modelling and transformation

Figure: primary activities

Findings:

- Primary activities are the use of spatial data and application development
- 20% primarily active in data modelling and transforming



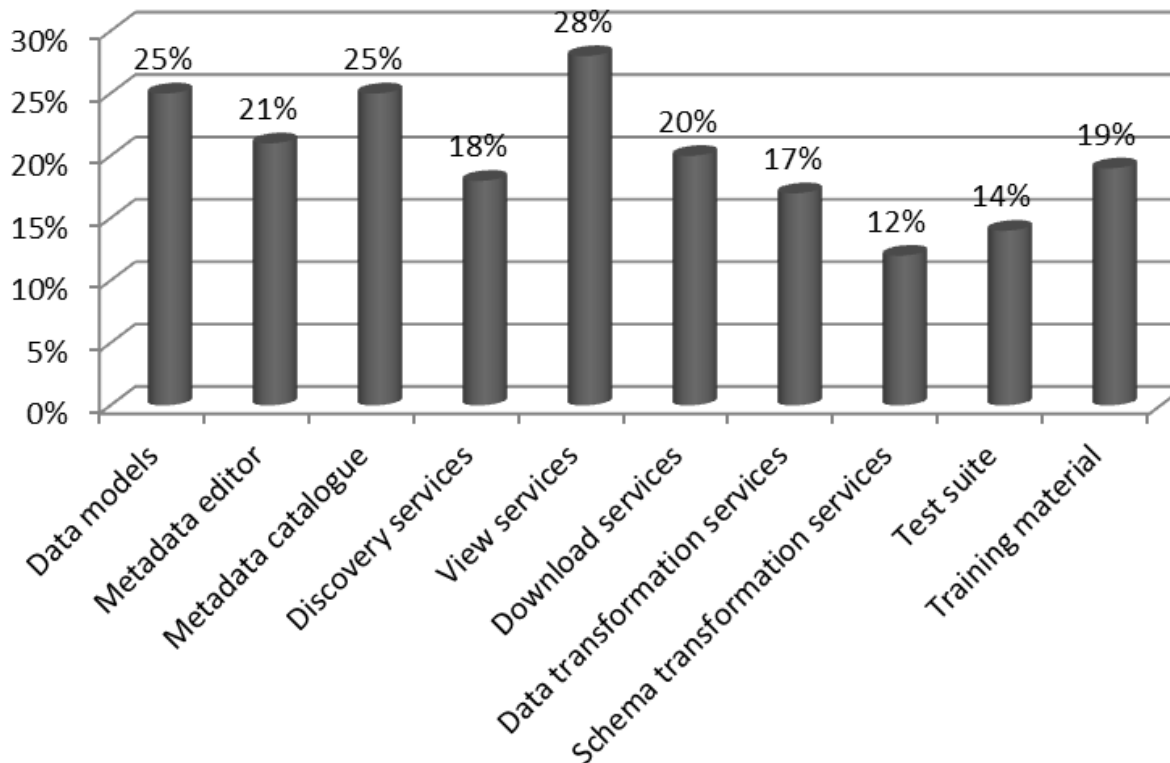


Figure: current development of INSPIRE compliant components

Findings:

- Limited involvement in INSPIRE (maximum 28%)
- Companies mainly involved in development of view services, metadata catalogue and data modelling

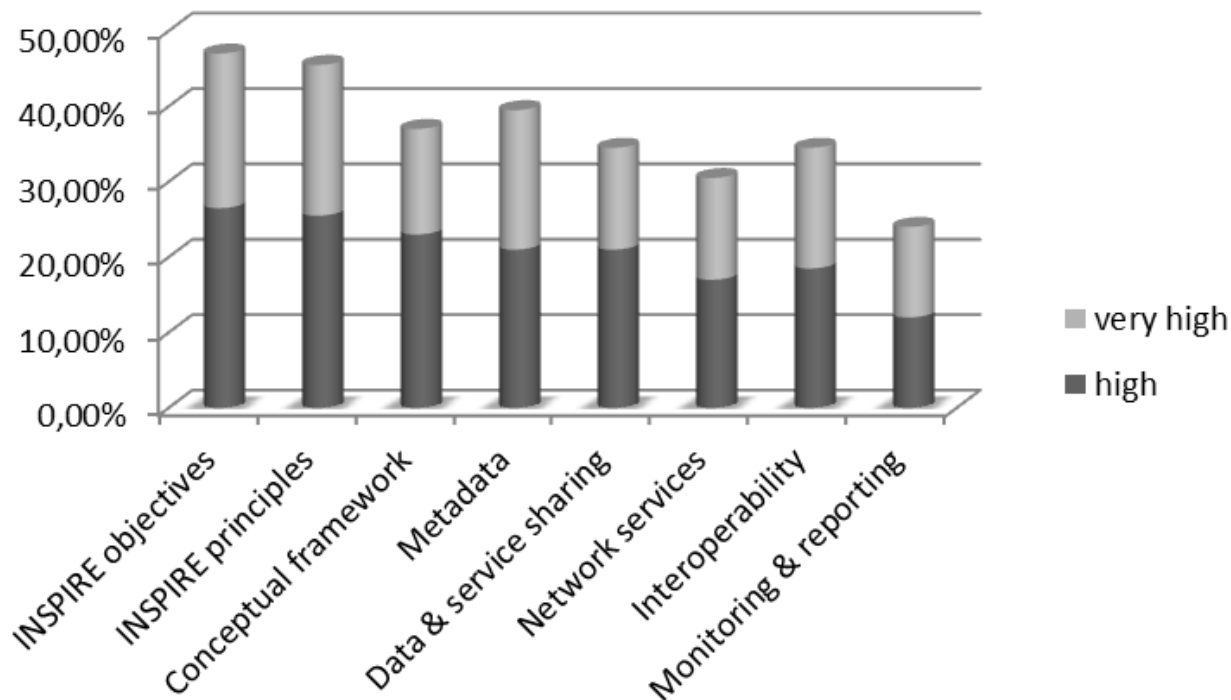


Figure: knowledge in the organization of INSPIRE and INSPIRE regulation

Findings:

- Knowledge of general objectives and principles quite high
- Metadata > interoperability > network services

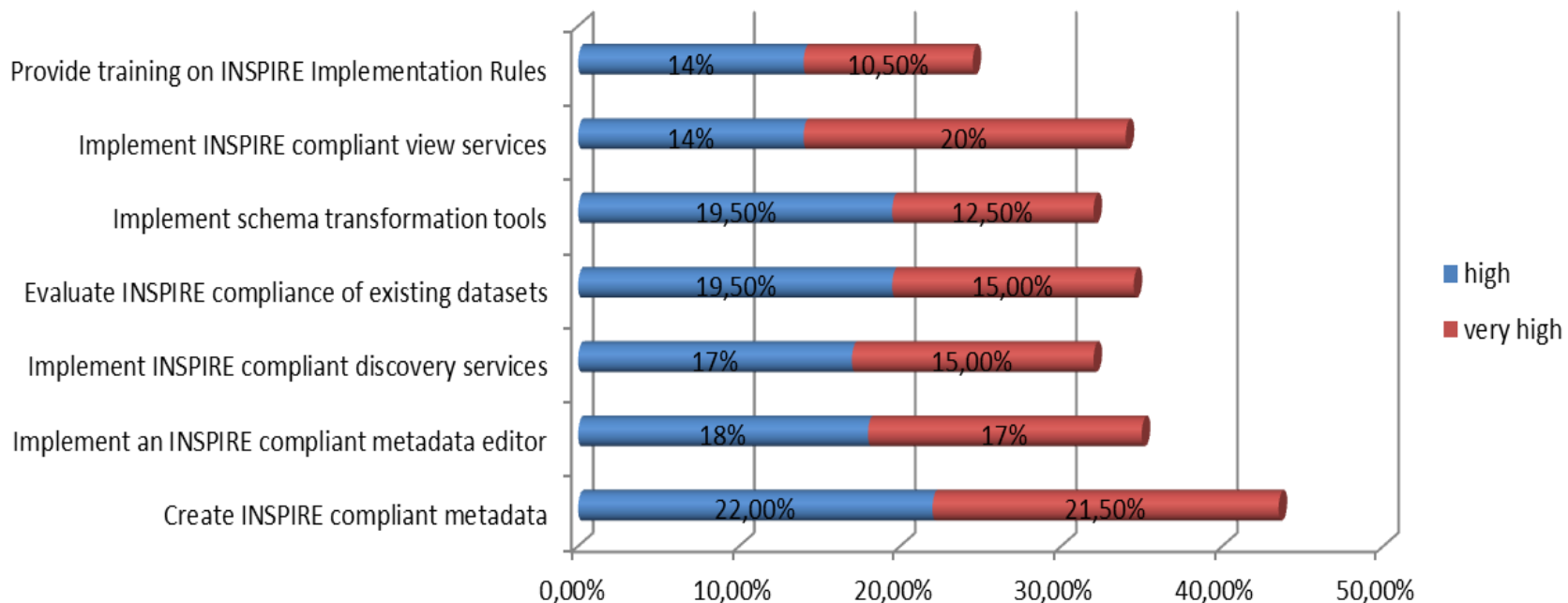


Figure: ability to perform INSPIRE-related activities (high and very high)

Findings:

- Competences needed to implement INSPIRE are available
- Differences between competences are small
- Providing training? Need for cooperation with actors in education & training

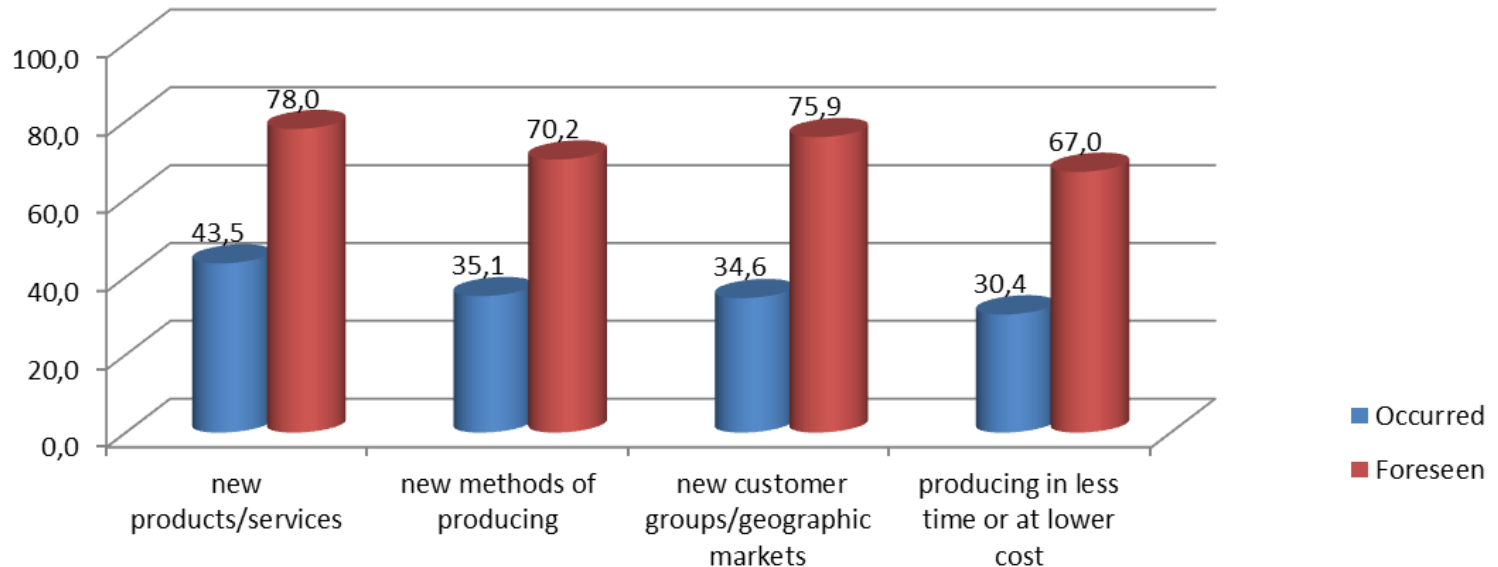


Figure: changes already occurred and/or foreseen due to INSPIRE Directive

Findings:

- impact of INSPIRE already quite high, and expected to increase in future
- current impact related to introduction of new products/services
- future impact related to new products/services and new customers

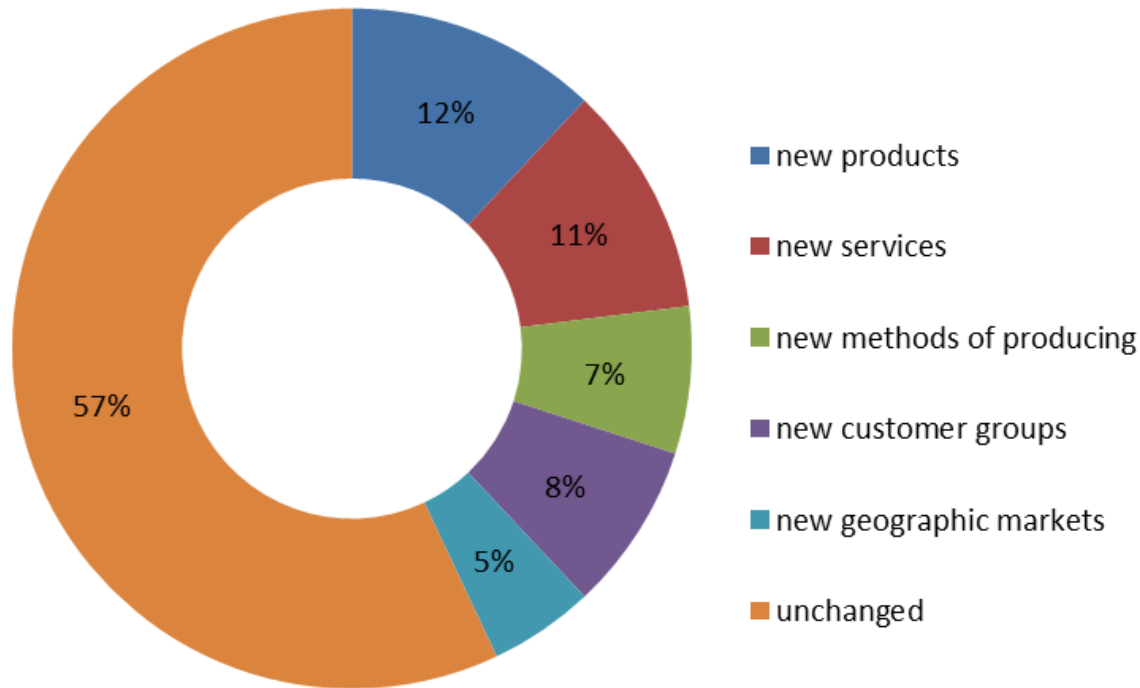


Figure: changes in total turnover in 2011 due to INSPIRE (average percentages)

Findings:

- INSPIRE already has an impact on companies' turnover
- changes mainly related to introduction of new products and new services

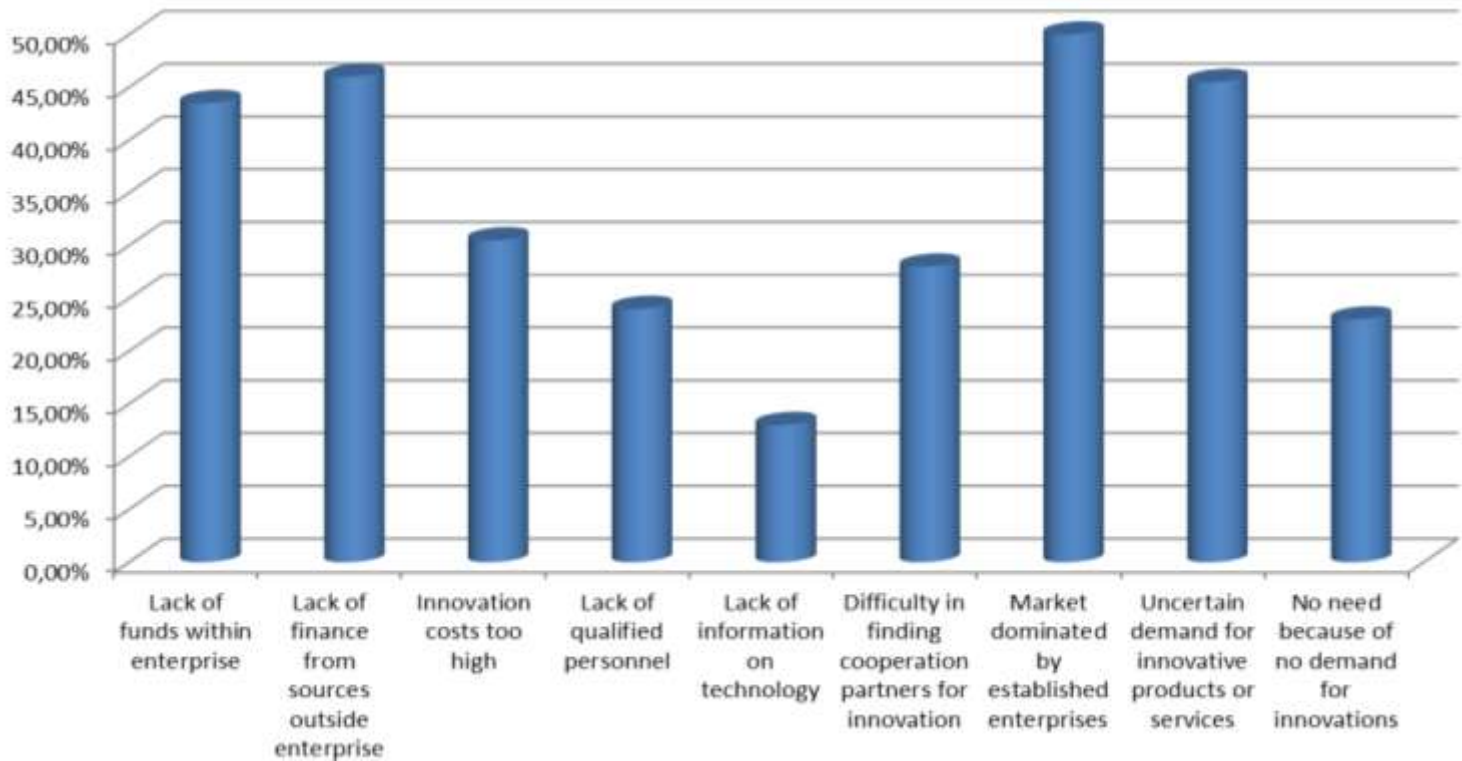


Figure: barriers that hinder or prevent innovation

Findings:

- Main barrier: dominance of market by established enterprises
- Several barriers related to financial aspects
- Internal and external barriers

1. What are the main characteristics of the Geo-ICT sector in Europe?

- what is 'the' Geo-ICT sector? mainly Geo-ICT vs partly Geo-ICT
- a lot of small enterprises (less than 50 employees and turnover < EUR 10 million)
- spread over different stages in spatial information chain

2. How is the Geo-ICT sector in Europe currently involved in the implementation of INSPIRE?

- public sector as most important customer
- mainly involved in the use of spatial data
- involvement in implementation of INSPIRE is relatively limited

3. Do Geo-ICT companies in Europe have the skills and knowledge to participate in the implementation of INSPIRE?

- general awareness about and knowledge of INSPIRE
- competences needed to implement INSPIRE are available
- metadata and view services as main areas of expertise

4. Does INSPIRE already have an impact on the innovative performance of Geo-ICT companies in Europe?

- impact of INSPIRE already quite high, and expected to increase
- new products and services + new customer markets
- despite internal and external barriers to innovation

1. Difficulties to reach companies, especially if they are not aware of INSPIRE
2. What do we know about companies that did not participate?
3. Specialization or not? *Do some organization have all the knowledge or is knowledge spread over different organizations?*
4. Survey provides a very general view on the European Geo-ICT sector. *No information on activities beyond INSPIRE, little information on organizations' motivations, etc.*
5. Behavior and activities of companies are also determined by public sector

future work

1. Additional efforts to improve the survey response rate
2. Non response analysis to assess representativeness of survey sample
3. Group comparisons to explore the relationships between different variables and to analyze similarities and differences between different types of companies
4. In-depth interviews with companies to understand, interpret and enrich the results of the survey (focus on innovation!)
5. In-depth interviews with public sector organizations on their policy regarding the involvement of companies in implementing INSPIRE

thank you!

- Questions – Comments?
- **Want to participate?**
- smeSpire study:
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