



Data sharing business models

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Landscape Scan: Dutch Data Sharing Initiatives & Service Providers

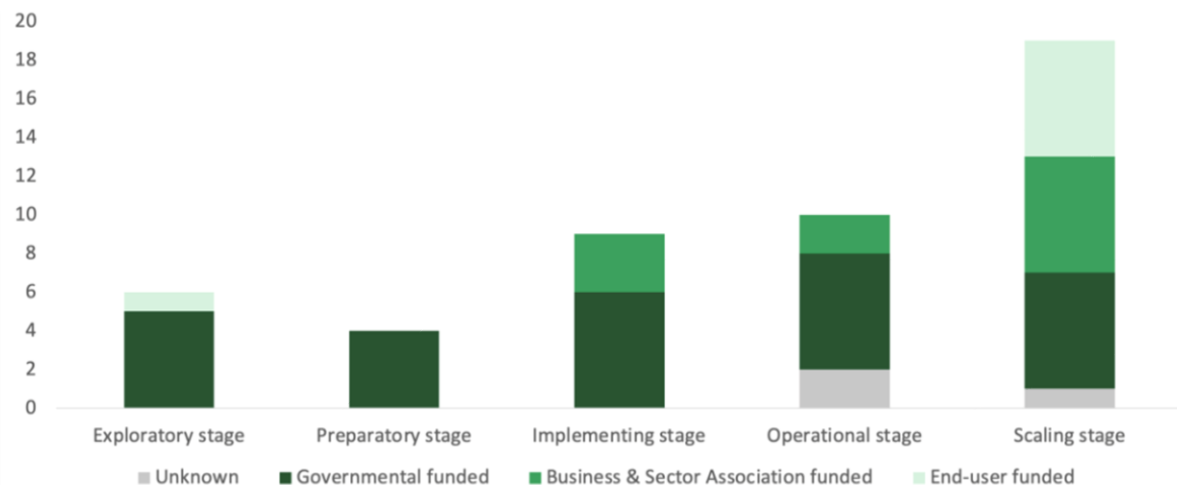
Initial trial version, July 2024

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A4 Findings Data Sharing Initiatives

80% of DSIs rely on governmental or sectoral funding, raising attention to financial resilience & (cross sectoral) business models

Dominant Funding Source per Maturity Stage



Description

Dominant Funding sources for DSIs are:

- (1) governmental or (2) sectoral funds, which can be either one-off subsidies or structural.
- (3) end-users' funding are typically business subscription or transaction fee models.
- (4) for some DSIs funding remained unknown





Key takeaways

- Almost 80% of Dutch DSIs depend on some form of government or sectoral support.
- End-user funding was found exclusively in the scaling stage, with one exception in the exploratory stage.
- For certain sectors, government or sector funding might be a logical and sustainable model. However, for other sectors it might indicate a lack of financial resilience.
- Business models become more complicated in cross-sectoral cases.

Learnings for next version

- In a next iteration of the scan we will add further questions on financial sustainability.

Percentage of data sharing initiatives per Funding Source category

 Dominantly Governmental funded	 Dominantly sectoral funded	 Dominantly End-user funded	 Unknown
55 %	24 %	15 %	6 %

Source: CoE-DSC analysis;

10 Landscape Scan of Dutch DSIs & SPs. Initial trial version. July 2024. Centre of Excellence for Data Sharing and Cloud. All rights reserved.





LNDS

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GROW YOUR OWN OR USE OUTSIDE INVESTORS?



A vibrant, sunlit outdoor market street. People are walking along a path lined with stalls selling fresh produce like oranges, lemons, and tomatoes. The scene is lively with colorful awnings, hanging lanterns, and a clear blue sky. A woman in a white tank top and jeans is walking towards the camera, while others are seen from behind or in profile. The overall atmosphere is warm and inviting.

1. IS THERE A MARKET NEED AND ARE CUSTOMERS RETURNING?



2. IS THE TECHNOLOGY CUTTING EDGE,
FLEXIBLE AND SCALEABLE?



3. IS THERE A UNIQUE AND VALUABLE
STRATEGIC POSITION



4. IS THERE A TRANSPARANT GOVERNANCE
WITH PROTECTION FOR INVESTORS



5. THERE IS A CLEAR REVENUE MODEL AND
PATH TOWARDS MONETIZATION



6. A GREAT TEAM WITH A DEMONSTRABLE TRACK RECORD



Assessing the investability of a data space

Market needs and customers

- Is there a demonstrable need for the data platform in the market?
- Are there customers willing to pay for the services or products?
- Is there growth in usage per customer (more datasets, queries, API calls)?
- Is the Return on Investment (ROI) high?
- Can the platform scale without costs increasing exponentially?

Technological foundation

- Can the platform handle increasing amounts of data and users?
- Is the architecture modular and flexible enough to integrate new technologies or features?
- How well does the platform protect data from cyber threats?
- Is there a clear strategy for semantic interoperability and data quality?

Strategic position

- Is the platform unique compared to competitors?
- Does it have a distinctive technology, network, or data quality?
- Can it function as a central hub in an ecosystem (e.g. healthcare, energy, mobility)?
- Does the platform become more valuable as more users or data partners join?
- Is there a clear growth path to new markets?

Position of Investors

- How is data ownership arranged?
- Is there a well-designed governance model with clear roles and responsibilities?
- Are the interests of investors sufficiently protected?
- Is there a clear exit strategy for investors?
- Are there strategic partners (governments, technology)?

Revenue model & monetization

- Is there an attractive revenue model with clear products and services?
- Are the services measured with clear metrics?
- Are the sources of income repeatable and scalable?
- Can revenue easily grow with user numbers?
- Are customer acquisition costs (CAC) lower than expected revenue per customer (LTV)?
- How much time does it take to break even on a customer?

Team

- Does the team have a good balance between technical and commercial skills?
- Does the team have the skills to go from startup to scale-up?
- Is there experience with fundraising and convincing investors?
- How well can the team cope with rapidly changing market conditions?
- Does the team have experience scaling up?

PERHAPS MIXED MODELS CAN BE FOUND
TO BALANCE CREATIVITY & SCALE



TOWARDS FIRST LOSS PROTECTION &
BLENDED FINANCE SOLUTIONS