The future of European companies in data economy

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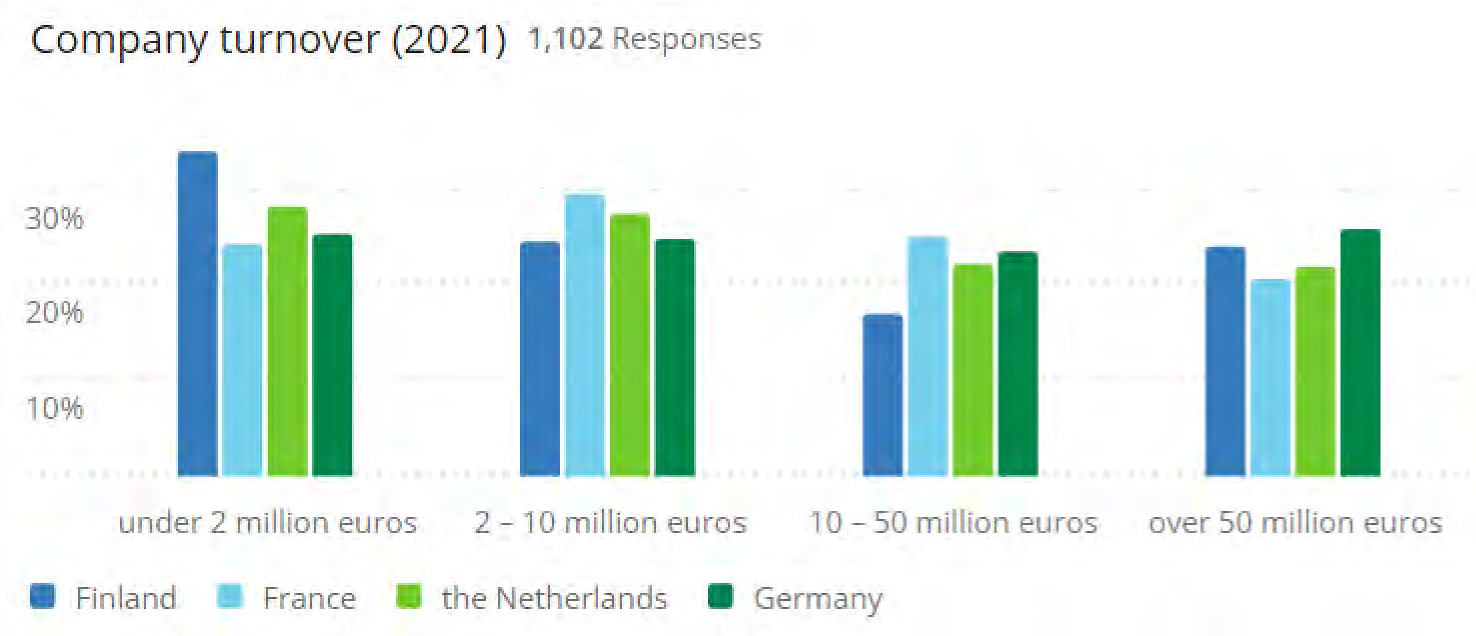
Contents

General information on the survey

Goals and implementation of the survey

- The aim of the survey is to produce content that describes the current state of companies vis-à-vis the goals and principles of the IHAN-project.
- The aim of the IHAN project is a people-oriented European data market, where companies that use data responsibly and open-mindedly thrive on smart services. The IHAN project provides information to support domestic and EU-level decision-making in the form of various reports and studies to raise awareness of the data economy among target audiences and to build common ground rules and tools for more responsible and sustainable digital services. The principle of the IHAN project is that the exchange of data is fair, as the individual controls self-accumulating information and the exchange of data takes place according to common, fair, principles.
- The study was conducted in a b2b panel in March and April of 2021. The results are compared, where applicable, with a similar study conducted in 2019.
- The target group consists of business decision makers in large and medium-sized companies in Finland, France, Germany and the Netherlands. The survey was targeted especially to the following decision-making roles: Chief data/digital officer, business and strategy management, business development management, marketing and customer management as well as information management.
- The study is based on 1,200 responses, that are divided evenly with 300 responses per country. In 2019 there were 1,667 responses in total, with approximately 400 responses per country.
- The margin of error is 5.7%.

Background information
Company turnover



Finnish sample contains the largest share of small companies.

In French sample share of 2-50 million euros turnover companies has increased somewhat from 2019.

In German sample differences between turnover categories have evened out, especially within the highest groups.

In the sample from the Netherlands the responses are quite evenly distributed to all groups. The share of respondents in the lowest and highest groups have diminished.

Comparison by country	Finland		France		Germany		the Netherlands	
	2021	2019	2021	2019	2021	2019	2021	2019
under 2 million euros	34%	35%	24%	29%	26%	28%	28%	38%
2 – 10 million euros	25%	24%	30%	20%	25%	20%	27%	19%
10 – 50 million euros	17%	19%	25%	12%	24%	15%	22%	11%
over 50 million euros	24%	22%	21%	39%	26%	37%	22%	33%

Background information
Company’s main business area

	Finland		France		Germany		the Netherlands	
	2021	2019	2021	2019	2021	2019	2021	2019
Professional, scientific, and technical activities	5%	12%	9%	13%	6%	16%	6%	9%
Other service activities	14%	14%	19%	15%	19%	9%	12%	11%
Manufacturing	11%	13%	9%	9%	10%	7%	16%	12%
Financial and insurance activities	6%	3%	8%	7%	9%	9%	8%	8%
Construction	3%	6%	7%	7%	3%	6%	8%	8%
Real estate activities	4%	3%	3%	2%	1%	1%	1%	0%
Information and communication	18%	9%	4%	7%	9%	9%	9%	10%
Human health and social work activities	6%	7%	7%	6%	12%	9%	7%	7%
Wholesale and retail trade; repair of motor vehicles motorcycles	8%	5%	5%	7%	7%	4%	6%	4%
Administrative and support services	6%	5%	5%	4%	5%	10%	9%	9%
Education	5%	8%	5%	6%	7%	4%	3%	2%
Transportation and storage	3%	3%	6%	6%	3%	4%	5%	5%
Accommodation and food service activities	4%	4%	5%	3%	1%	4%	3%	3%
Arts, entertainment and recreation	3%	4%	1%	2%	2%	4%	2%	3%
Agriculture, forestry, and fishing industries	2%	2%	2%	1%	3%	2%	1%	1%
Electrical, gas, steam and air conditioning supply	1%	1%	1%	1%	1%	2%	2%	2%
Activities of extraterritorial organisations and bodies	1%	1%	1%	2%	0%	1%	1%	1%
Water supply, sewerage, waste management and remediation activities	1%	1%	1%	1%	0%	0%	0%	1%
Mining and quarrying	0%	0%	0%	2%	0%	0%	1%	1%

Background information
Company's main business area

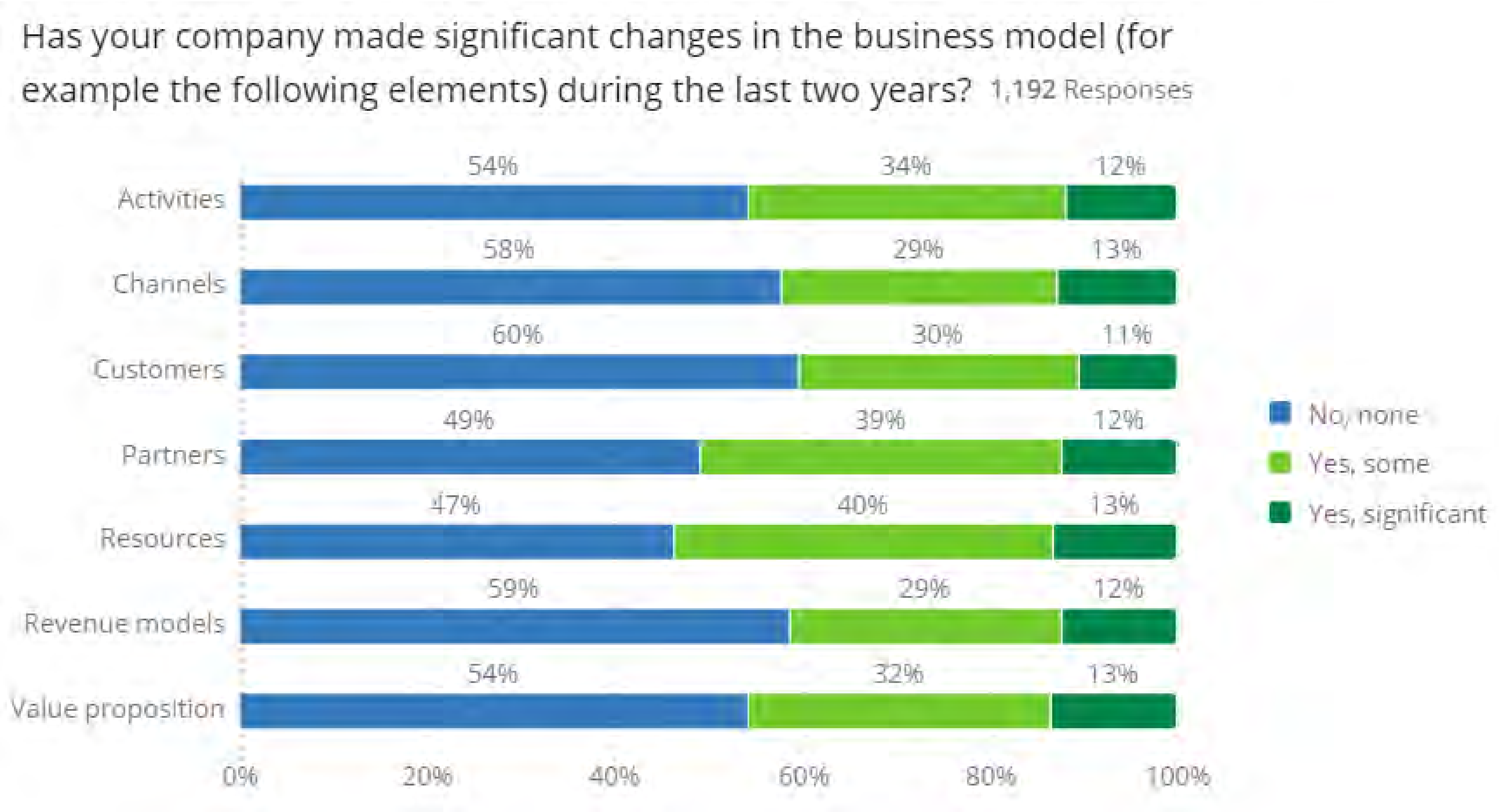
2020: Which of the following statements best describes your company? We mainly operate on the...	Finland	France	Germany	the Netherlands
B2B (business to business)	35%	30%	31%	36%
B2B and B2C (business to business and business to consumer)	38%	37%	28%	30%
B2C (business to consumer)	20%	24%	34%	30%
B2G (business to government	7%	9%	7%	4%

The answer choices have changed in comparison to 2019.

2019: Which of the following statements best describes your company? We mainly operate on the...	Finland	France	Germany	the Netherlands
global B2B market	16%	17%	17%	21%
global B2C market	6%	11%	11%	9%
global B2B market	7%	16%	11%	16%
European B2C market	4%	10%	11%	10%
national B2B market	21%	13%	15%	14%
national B2C market	11%	7%	6%	7%
local B2B market	14%	4%	9%	6%
local B2C market	8%	2%	7%	4%
I don't know / want to say	13%	19%	14%	13%

Data economy and current affairs

Changes in the business model
Overall results



Changes in the business model
Comparison by country

	Finland			France			Germany			the Netherlands		
	No, none	Yes, some	Yes, significant	No, none	Yes, some	Yes, significant	No, none	Yes, some	Yes, significant	No, none	Yes, some	Yes, significant
Revenue mode	**66%**	26%	8%	53%	29%	**18%**	57%	29%	14%	59%	32%	9%
Value proposition	56%	35%	9%	50%	30%	**20%**	50%	34%	16%	**62%**	30%	9%
Customers	**66%**	27%	6%	57%	28%	**15%**	53%	35%	12%	63%	29%	9%
Channels	**66%**	25%	9%	53%	32%	15%	52%	31%	**17%**	60%	30%	10%
Partners	48%	42%	10%	46%	37%	**17%**	46%	43%	11%	**56%**	33%	11%
Resources	34%	54%	12%	48%	33%	**19%**	49%	38%	12%	**55%**	36%	9%
Activities	50%	41%	9%	49%	30%	**21%**	57%	33%	11%	**62%**	31%	7%

Differences between countries are statistically significant for all statements.

Company’s current business operations
Overall results – Averages

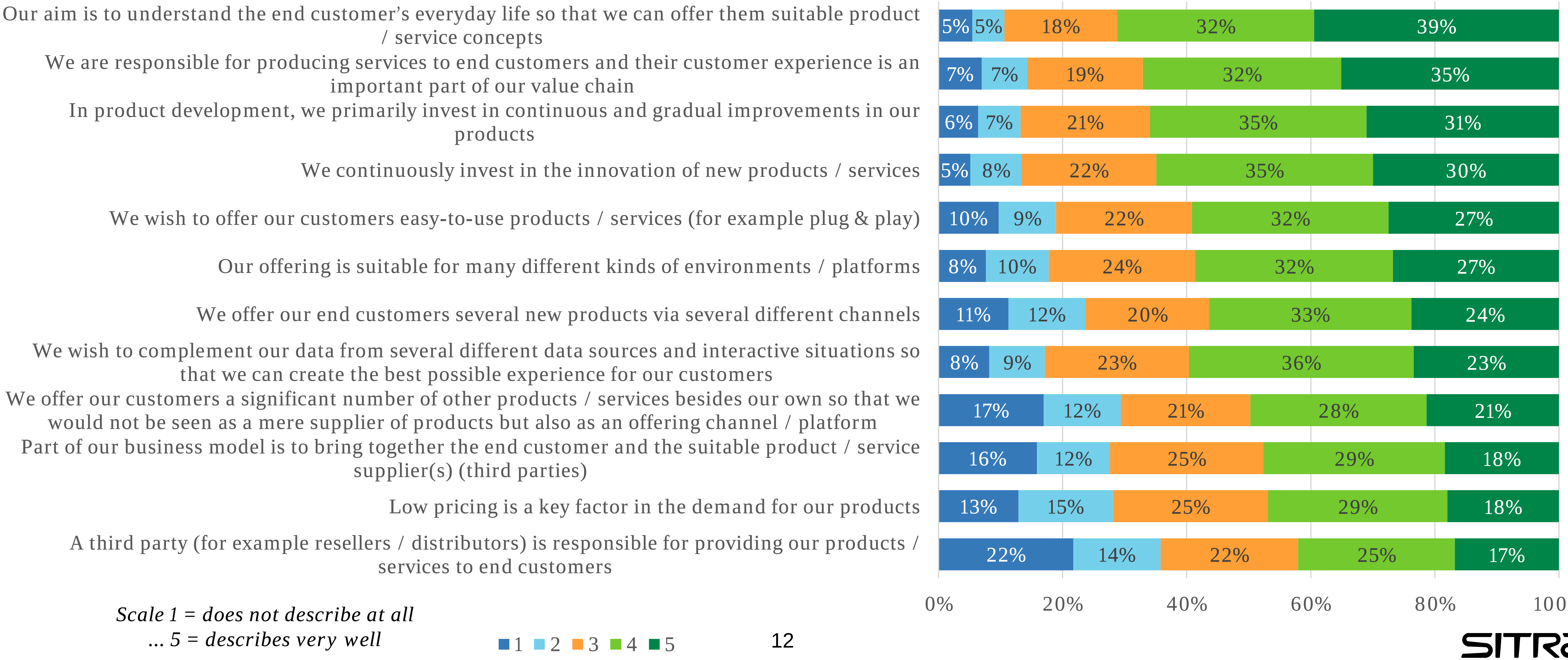
From the following data economy -related statements, choose how well they describe your company´s current business? (N = 1 167)

Scale 1 = does not describe at all … 5 = describes very well

Company’s current business operations

Overall results – Distributions

From the following data economy -related statements, choose how well they describe your company´s current business? (N = 1 167)



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Company’s current business operations
Comparison by country

	Finland		France		Germany		the Netherlands	
	Average	N	Average	N	Average	N	Average	N
Low pricing is a key factor in the demand for our products	3.2	287	**3.4**	279	**3.0**	277	3.3	281
We wish to offer our customers easy-to-use products / services	3.6	282	3.7	272	**3.3**	273	3.7	277
We wish to complement our data from several different data sources and interactive situations so that we can create the best possible experience for our customers	3.5	287	3.7	275	**3.3**	274	**3.8**	279
A third party is responsible for providing our products / services to end customers	**2.7**	284	3.2	275	3.0	272	3.1	278
Part of our business model is to bring together the end customer and the suitable product / service supplier(s) (third parties)	3.1	287	3.3	279	3.1	271	3.4	278
We continuously invest in the innovation of new products / services	3.8	289	3.9	283	**3.5**	278	3.9	284
In product development, we primarily invest in continuous and gradual improvements in our products	3.9	289	3.8	275	**3.5**	273	3.9	276
We offer our customers a significant number of other products / services besides our own so that we would not be seen as a mere supplier of products but also as an offering channel / platform	3.1	288	**3.5**	278	3.1	271	3.3	279
We offer our end customers several new products via several different channels	3.4	287	3.6	279	**3.2**	273	3.6	279
Our offering is suitable for many different kinds of environments / platforms	3.6	281	**3.8**	277	**3.3**	274	3.6	282
Our aim is to understand the end customer’s everyday life so that we can offer them suitable product / service concepts	4.2	286	4.1	278	**3.6**	276	3.9	280
We are responsible for producing services to end customers and their customer experience is an important part of our value chai	4.0	291	3.9	276	3.6	276	3.8	280

Scale 1 = does not describe at all ... 5 = describes very well

Differences between countries are statistically significant for all statements.

Company’s current business operations
Development – Finland

	2019		2021		Change
	Average	N	Average	N	
Low pricing is a key factor in the demand for our products	3.1	399	3.2	287	0.1
We wish to offer our customers easy-to-use products / services	3.6	394	3.6	282	0.0
We wish to complement our data from several different data sources and interactive situations so that we can create the best possible experience for our customers	3.4	403	3.5	287	0.1
A third party is responsible for providing our products / services to end customers	2.8	404	2.7	284	-0.1
Part of our business model is to bring together the end customer and the suitable product / service supplier(s) (third parties)	3.1	404	3.1	287	0.0
We continuously invest in the innovation of new products / services	3.6	406	3.8	289	0.2
In product development, we primarily invest in continuous and gradual improvements in our products	3.7	402	3.9	289	0.2
We offer our customers a significant number of other products / services besides our own so that we would not be seen as a mere supplier of products but also as an offering channel / platform	3.0	399	3.1	288	0.1
We offer our end customers several new products via several different channels	3.2	405	3.4	287	0.2
Our offering is suitable for many different kinds of environments / platforms	3.3	399	3.6	281	0.3
Our aim is to understand the end customer’s everyday life so that we can offer them suitable product / service concepts	4.0	405	4.2	286	0.2
We are responsible for producing services to end customers and their customer experience is an important part of our value chai	3.9	401	4.0	291	0.1

Scale 1 = does not describe at all ... 5 = describes very well

** Changes marked with an asterisk are statistically significant.*

Company’s current business operations
Development – France

	2019		2021		Change
	Average	N	Average	N	
Low pricing is a key factor in the demand for our products	3.6	372	3.4	279	-0.2
We wish to offer our customers easy-to-use products / services	3.7	368	3.7	272	0.0
We wish to complement our data from several different data sources and interactive situations so that we can create the best possible experience for our customers	3.8	376	3.7	275	-0.1
A third party is responsible for providing our products / services to end customers	3.3	369	3.2	275	-0.1
Part of our business model is to bring together the end customer and the suitable product / service supplier(s) (third parties)	3.4	374	3.3	279	-0.1
We continuously invest in the innovation of new products / services	3.9	370	3.9	283	0.0
In product development, we primarily invest in continuous and gradual improvements in our products	3.8	370	3.8	275	0.0
We offer our customers a significant number of other products / services besides our own so that we would not be seen as a mere supplier of products but also as an offering channel / platform	3.5	374	3.5	278	0.0
We offer our end customers several new products via several different channels	3.7	375	3.6	279	-0.1
Our offering is suitable for many different kinds of environments / platforms	3.9	376	3.8	277	-0.1
Our aim is to understand the end customer’s everyday life so that we can offer them suitable product / service concepts	4.0	372	4.1	278	0.1
We are responsible for producing services to end customers and their customer experience is an important part of our value chai	3.9	373	3.9	276	0.0

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Company’s current business operations

Development – Germany

	2019		2021		Change
	Average	N	Average	N	
Low pricing is a key factor in the demand for our products	3.2	370	3.0	277	-0.2
We wish to offer our customers easy-to-use products / services	3.5	362	3.3	273	-0.2
We wish to complement our data from several different data sources and interactive situations so that we can create the best possible experience for our customers	3.4	364	3.3	274	-0.1
A third party is responsible for providing our products / services to end customers	3.2	365	3.0	272	-0.2
Part of our business model is to bring together the end customer and the suitable product / service supplier(s) (third parties)	3.3	364	3.1	271	-0.2
We continuously invest in the innovation of new products / services	3.5	375	3.5	278	0.0
In product development, we primarily invest in continuous and gradual improvements in our products	3.6	368	3.5	273	-0.1
We offer our customers a significant number of other products / services besides our own so that we would not be seen as a mere supplier of products but also as an offering channel / platform	3.2	364	3.1	271	-0.1
We offer our end customers several new products via several different channels	3.4	368	3.2	273	-0.2
Our offering is suitable for many different kinds of environments / platforms	3.4	364	3.3	274	-0.1
Our aim is to understand the end customer’s everyday life so that we can offer them suitable product / service concepts	3.6	365	3.6	276	0.0
We are responsible for producing services to end customers and their customer experience is an important part of our value chai	3.5	370	3.6	276	0.1

Scale 1 = does not describe at all … 5 = describes very well

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Company’s current business operations
Development – the Netherlands

	2019		2021		Change
	Average	N	Average	N	
Low pricing is a key factor in the demand for our products	3.4	400	3.3	281	-0.1
We wish to offer our customers easy-to-use products / services	3.5	389	3.7	277	0.2
We wish to complement our data from several different data sources and interactive situations so that we can create the best possible experience for our customers	3.5	392	3.8	279	0.3
A third party is responsible for providing our products / services to end customers	3.2	397	3.1	278	-0.1
Part of our business model is to bring together the end customer and the suitable product / service supplier(s) (third parties)	3.5	397	3.4	278	-0.1
We continuously invest in the innovation of new products / services	3.7	400	3.9	284	**0.2***
In product development, we primarily invest in continuous and gradual improvements in our products	3.6	400	3.9	276	**0.3***
We offer our customers a significant number of other products / services besides our own so that we would not be seen as a mere supplier of products but also as an offering channel / platform	3.4	401	3.3	279	-0.1
We offer our end customers several new products via several different channels	3.5	393	3.6	279	0.1
Our offering is suitable for many different kinds of environments / platforms	3.5	387	3.6	282	0.1
Our aim is to understand the end customer’s everyday life so that we can offer them suitable product / service concepts	3.7	396	3.9	280	0.2
We are responsible for producing services to end customers and their customer experience is an important part of our value chai	3.7	401	3.8	280	0.1

Scale 1 = does not describe at all ... 5 = describes very well

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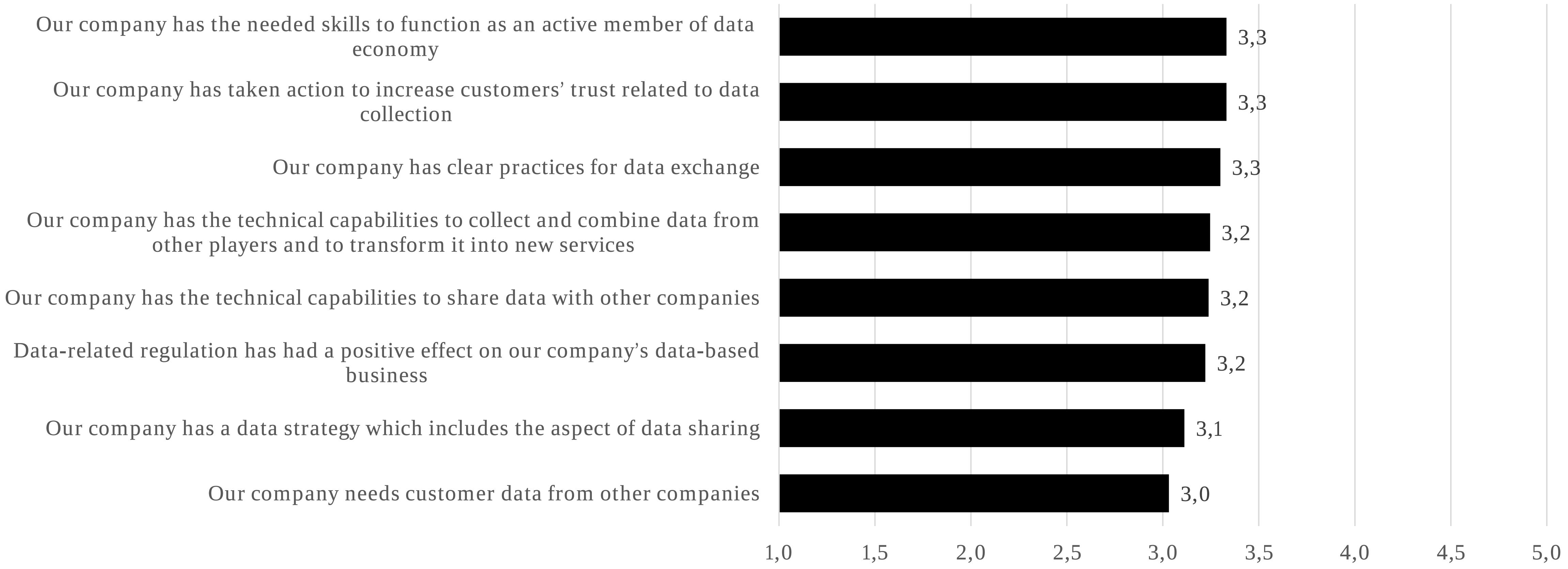
Data economy capabilities
Overall results – Averages

Please evaluate the accuracy of the following statements that measure the maturity level of data economy in your company? (N = 1 197)



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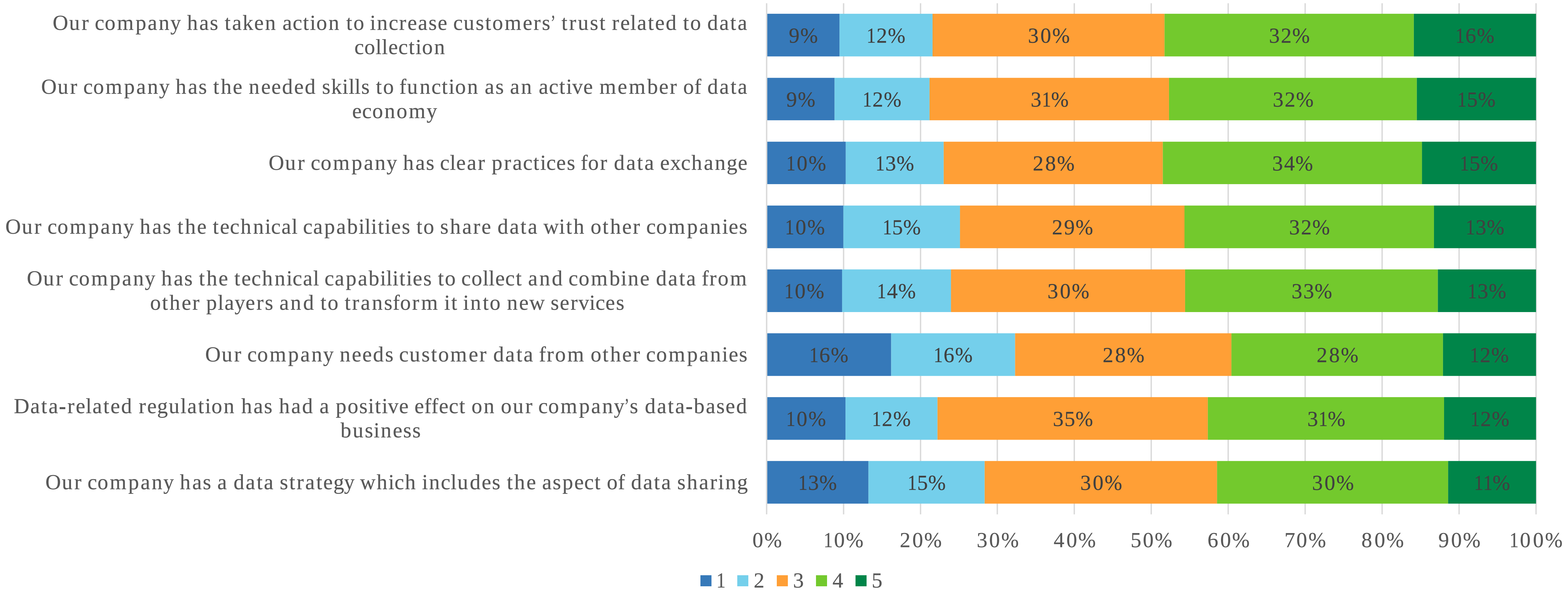
Data economy capabilities

Overall results – Distributions

Please evaluate the accuracy of the following statements that measure the maturity level of data economy in your company? (N = 1 197)



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Data economy capabilities
Comparison by country

	Finland		France		Germany		the Netherlands	
	Average	N	Average	N	Average	N	Average	N
Data-related regulation has had a positive effect on our company's data-based business *	**3.0**	298	3.3	296	3.2	295	3.3	300
Our company needs customer data from other companies *	3.0	299	**3.2**	297	3.0	298	2.9	298
Our company has a data strategy which includes the aspect of data sharing *	**2.9**	299	**3.4**	297	3.0	298	3.2	298
Our company has clear practices for data exchange *	**3.0**	299	**3.5**	298	3.3	297	3.4	300
Our company has the needed skills to function as an active member of data economy	3.3	295	3.4	298	3.3	298	3.3	298
Our company has taken action to increase customers' trust related to data collection *	**3.2**	297	3.4	299	3.3	298	3.4	297
Our company has the technical capabilities to share data with other companies *	3.1	297	3.3	299	3.1	299	3.4	298
Our company has the technical capabilities to collect and combine data from other players and to transform it into new services	3.2	298	3.4	297	3.2	299	3.3	299

Scale 1 = does not describe at all ... 5 = describes very well

** In statements marked with an asterisk, the differences between countries are statistically significant.*

Data economy capabilities
Development – Finland

	2019		2021		Change
	Average	N	Average	N	
Data-related regulation has had a positive effect on our company's data-based business	2.7	419	3.0	298	**0.3***
Our company needs customer data from other companies	2.9	417	3.0	299	0.1
Our company has clear practices for data exchange	2.9	423	3.0	299	0.1
Our company has taken action to increase customers' trust related to data collection	3.1	421	3.2	297	0.1
Our company has the technical capabilities to share data with other companies	3.1	424	3.1	297	0.0
Our company has the technical capabilities to collect and combine data from other players and to transform it into new services	3.1	421	3.2	298	0.1

Scale 1 = does not describe at all ... 5 = describes very well

** Changes marked with an asterisk are statistically significant.*

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Data economy capabilities
Development – France

	2019		2021		Change
	Average	N	Average	N	
Data-related regulation has had a positive effect on our company's data-based business	3.4	397	3.3	296	-0.1
Our company needs customer data from other companies	3.3	396	3.2	297	-0.1
Our company has clear practices for data exchange	3.5	395	3.5	298	0.0
Our company has taken action to increase customers' trust related to data collection	3.6	397	3.4	299	-0.2
Our company has the technical capabilities to share data with other companies	3.5	400	3.3	299	-0.2
Our company has the technical capabilities to collect and combine data from other players and to transform it into new services	3.4	398	3.4	297	0.0

Scale 1 = does not describe at all ... 5 = describes very well

** Changes marked with an asterisk are statistically significant.*

Data economy capabilities

Development – Germany

	2019		2021		Change
	Average	N	Average	N	
Data-related regulation has had a positive effect on our company's data-based business	3.1	402	3.2	295	0.1
Our company needs customer data from other companies	3.1	401	3.0	298	-0.1
Our company has clear practices for data exchange	3.4	403	3.3	297	-0.1
Our company has taken action to increase customers' trust related to data collection	3.4	402	3.3	298	-0.1
Our company has the technical capabilities to share data with other companies	3.4	404	3.1	299	-0.3
Our company has the technical capabilities to collect and combine data from other players and to transform it into new services	3.4	404	3.2	299	**-0.2***

Scale 1 = does not describe at all … 5 = describes very well

** Changes marked with an asterisk are statistically significant.*

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Data economy capabilities
Development – the Netherlands

	2019		2021		Change
	Average	N	Average	N	
Data-related regulation has had a positive effect on our company's data-based business	3.2	423	3.3	300	0.1
Our company needs customer data from other companies	3.2	423	2.9	298	-0.3
Our company has clear practices for data exchange	3.3	423	3.4	300	0.1
Our company has taken action to increase customers' trust related to data collection	3.3	425	3.4	297	0.1
Our company has the technical capabilities to share data with other companies	3.4	427	3.4	298	0.0
Our company has the technical capabilities to collect and combine data from other players and to transform it into new services	3.4	426	3.3	299	-0.1

Scale 1 = does not describe at all ... 5 = describes very well

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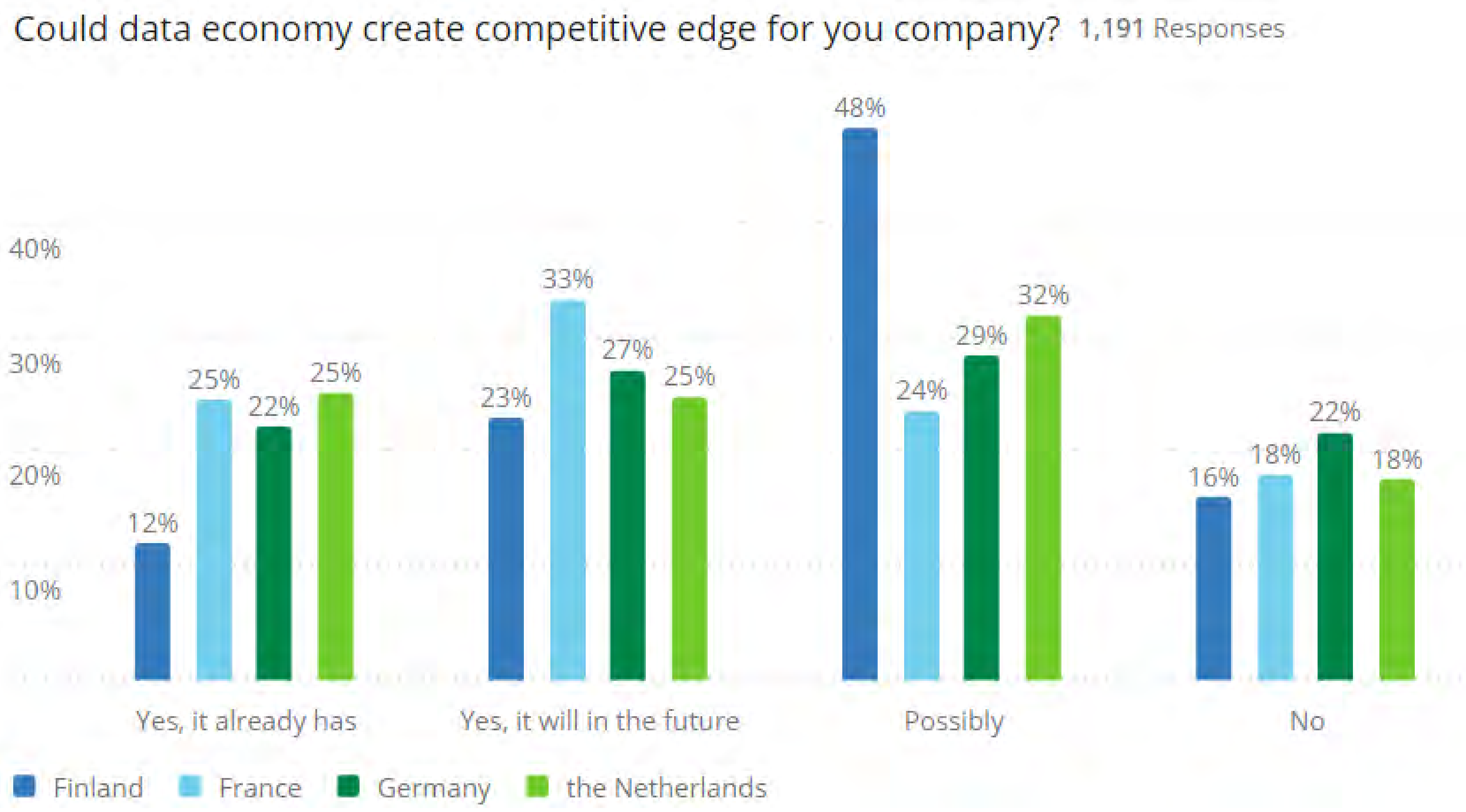
Potential of data economy

Data economy as a competitive edge

Comparison by country



A competitive edge is expected to happen in the future by half of the respondents,
while one quarter says that this already materialized.

Finland is behind other countries regarding this self-assessment

One out of five respondents does not expect this for their own company

Differences between countries are statistically significant.

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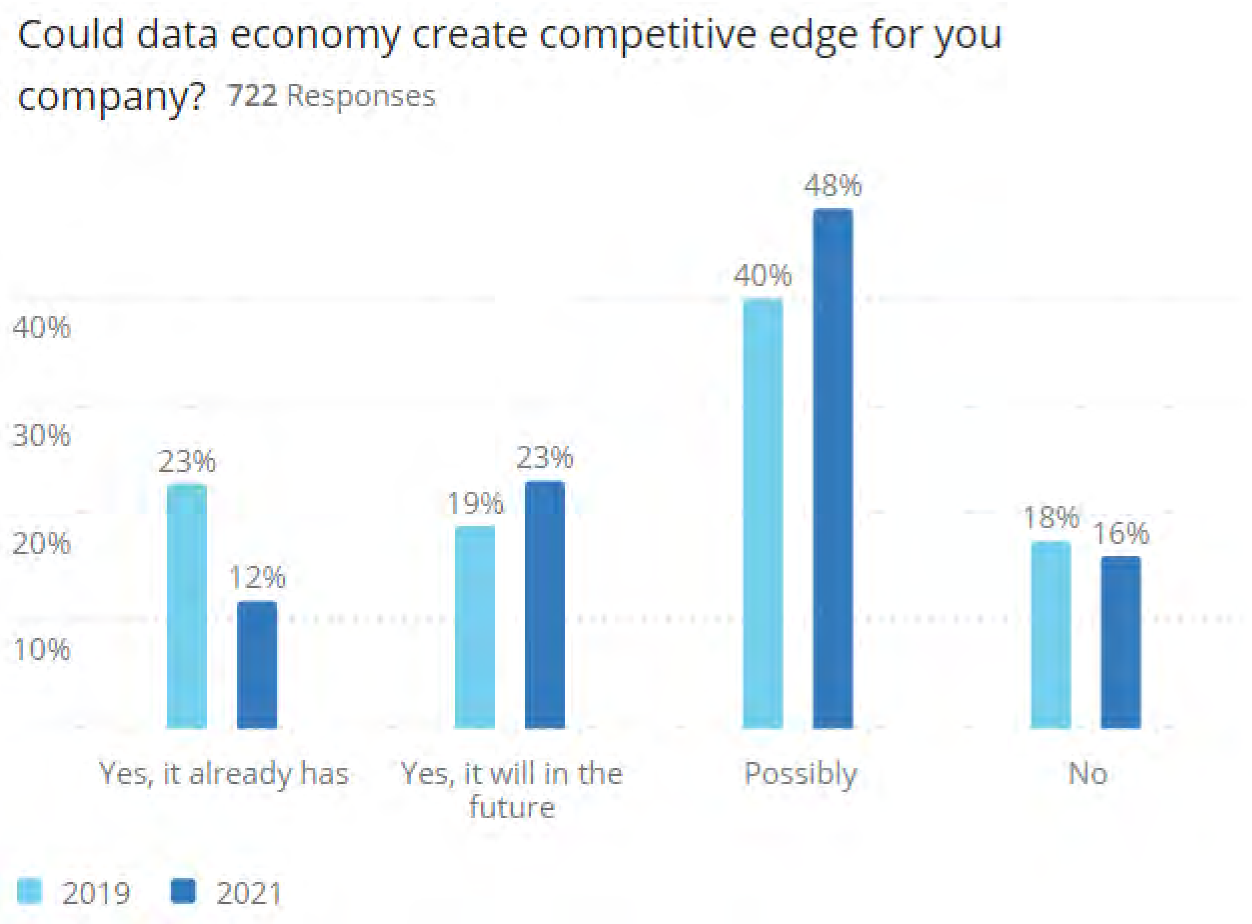
Data economy as a competitive edge
Development – Finland



Finnish respondents
Do expect more to come

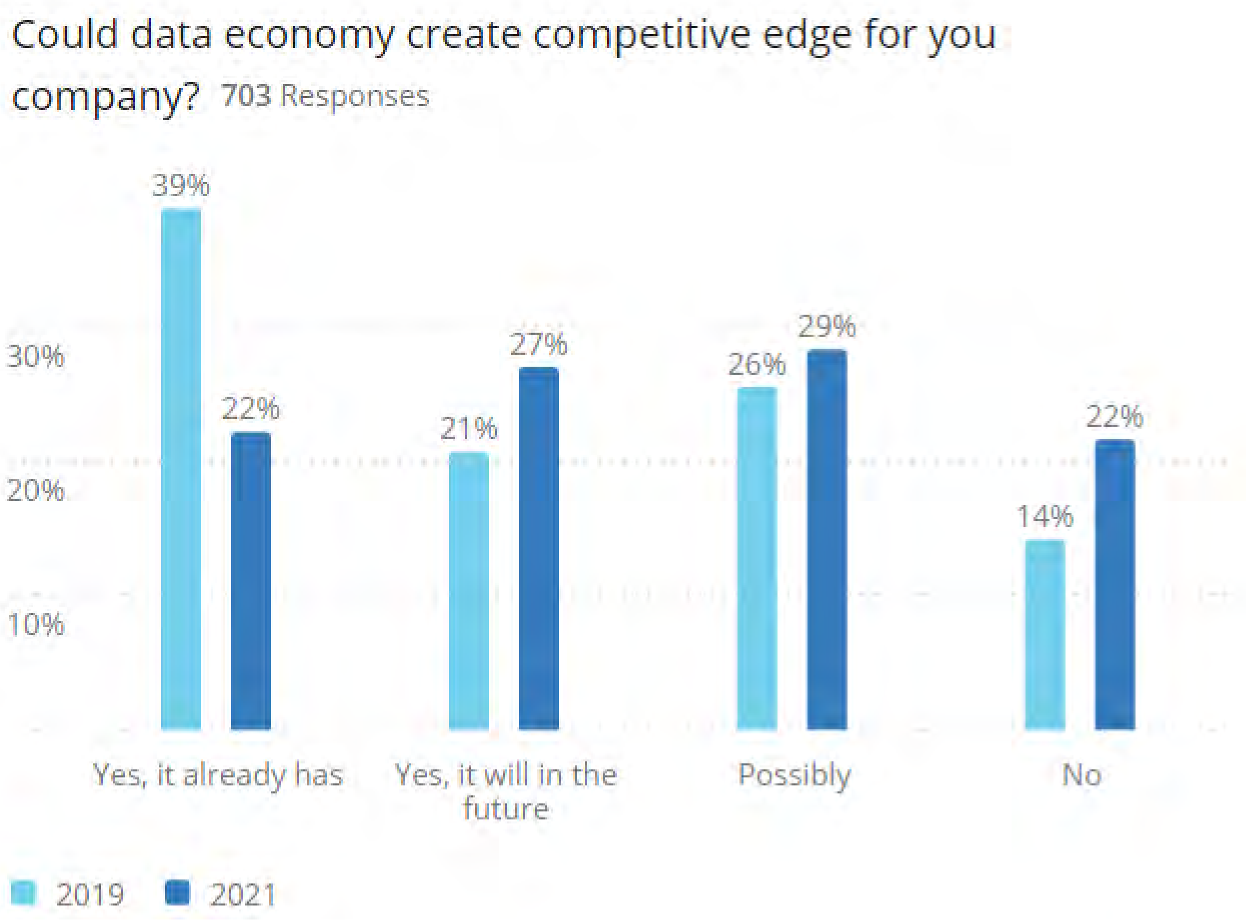
But also do not see that much benefit to have already happened to this point, compared with 2019.

Various achievements could be seen as natural or as a given

The difference between years is statistically significant.

Data economy as a competitive edge

Development – Germany



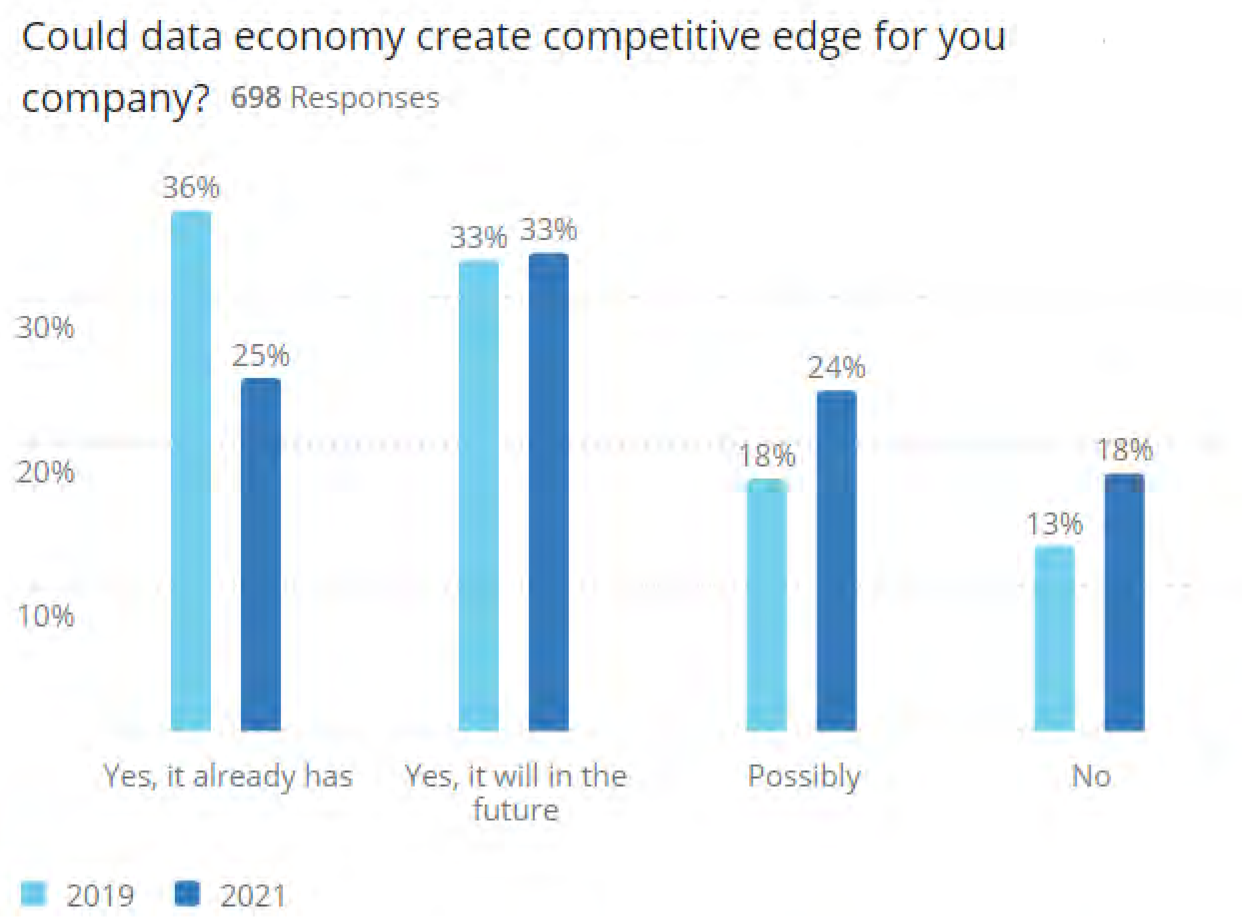
Germany:

Share of those who do say the competitive edge already occurred has declined vs 2019.

Share of less bullish respondents increased.

The difference between years is statistically significant.

Data economy as a competitive edge
Development – France



France:

Share of those who do say the competitive edge already occurred has declined vs 2019.

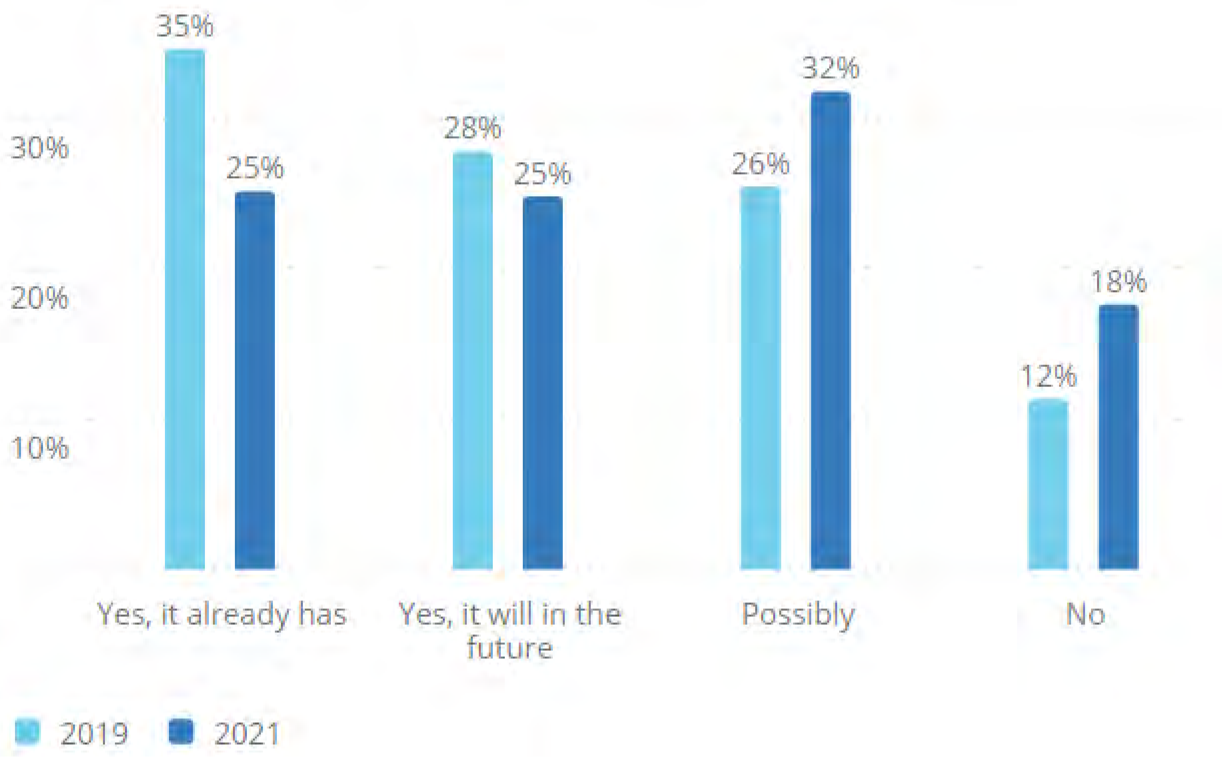
Share of less bullish respondents increased.

The difference between years is statistically significant.

Data economy as a competitive edge

Development – the Netherlands

Could data economy create competitive edge for you company? 722 Responses



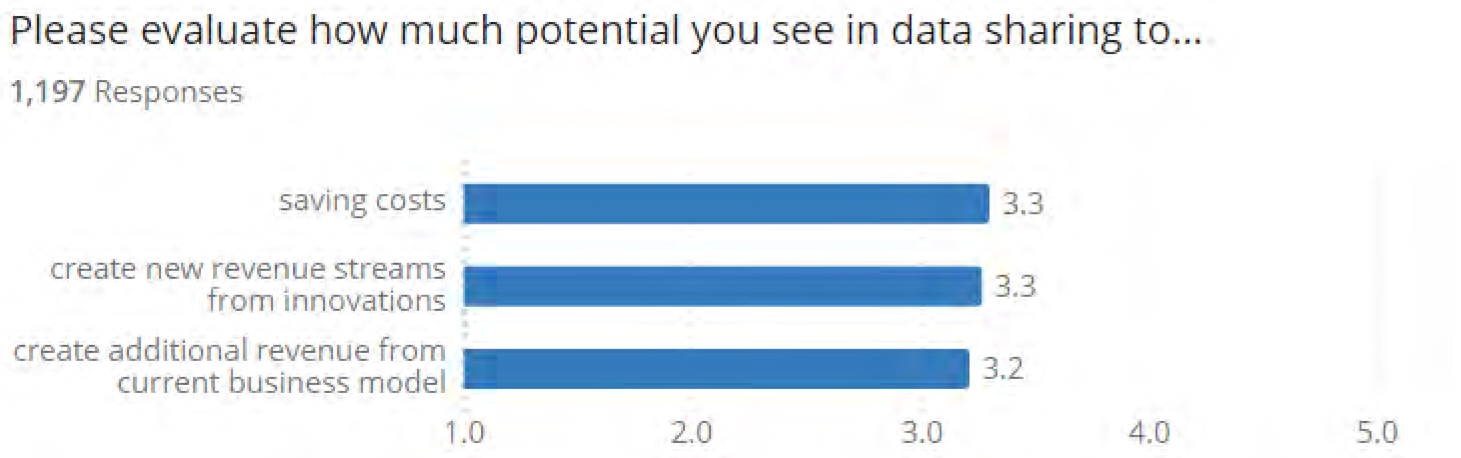
Netherlands:

Same picture:
Share of those who do say the competetive edge already occured declines vs 2019.

Share of less bullish respondents increased

The difference between years is statistically significant.

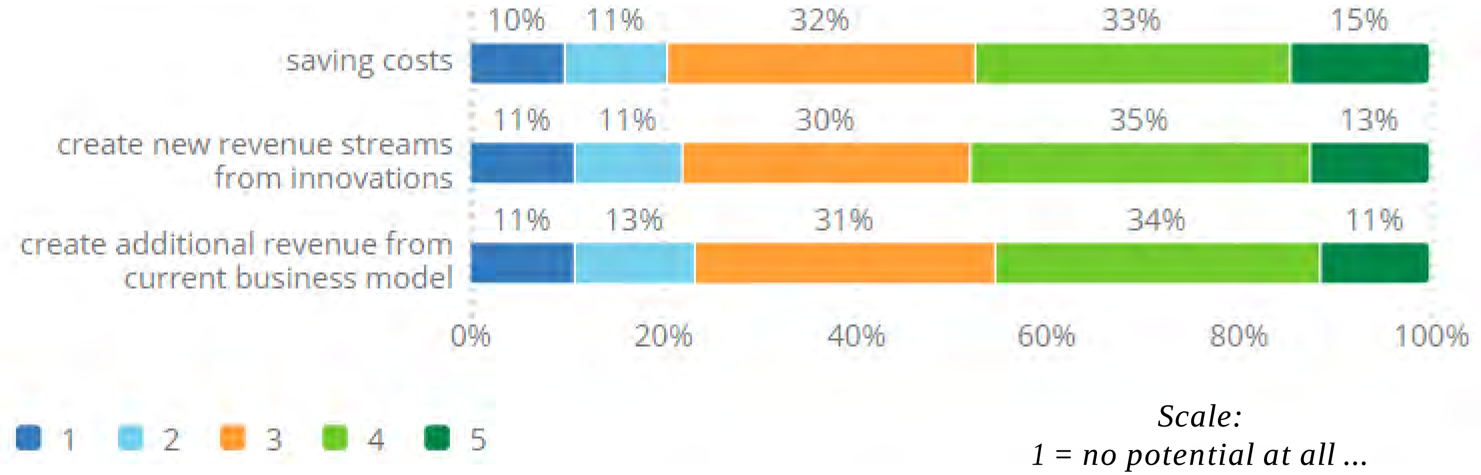
Potential in data sharing
Overall results



Half of the respondents consider the potential by sharing data for

- saving costs and
- creating new revenue streams

as large or very large
Only one in ten sees no potential



Scale:
1 = no potential at all ...
5 = very large potential

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Potential in data sharing
Comparison by country

All four countries are very close to each other

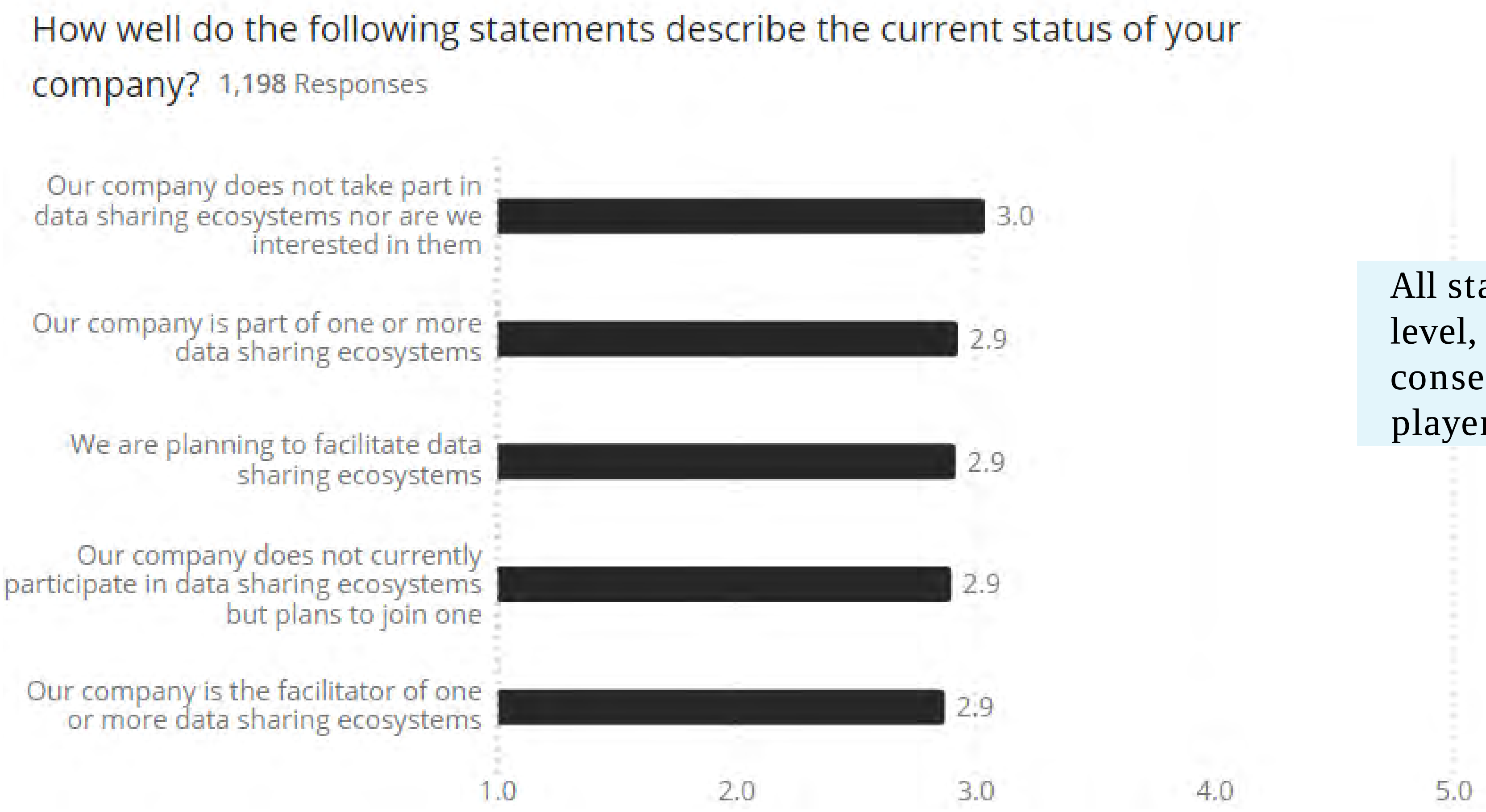
	Finland		France		Germany		the Netherlands	
	Average	N	Average	N	Average	N	Average	N
create additional revenue from current business model	3.2	300	3.4	299	3.1	299	3.2	299
create new revenue streams from innovations	3.2	299	3.4	297	3.2	298	3.3	299
saving costs	3.3	300	3.4	297	3.2	298	3.4	298
	3		1		4		2	

Scale: 1 = no potential at all ... 5 = very large potential

Differences between countries are statistically significant for all statements.

SITRA

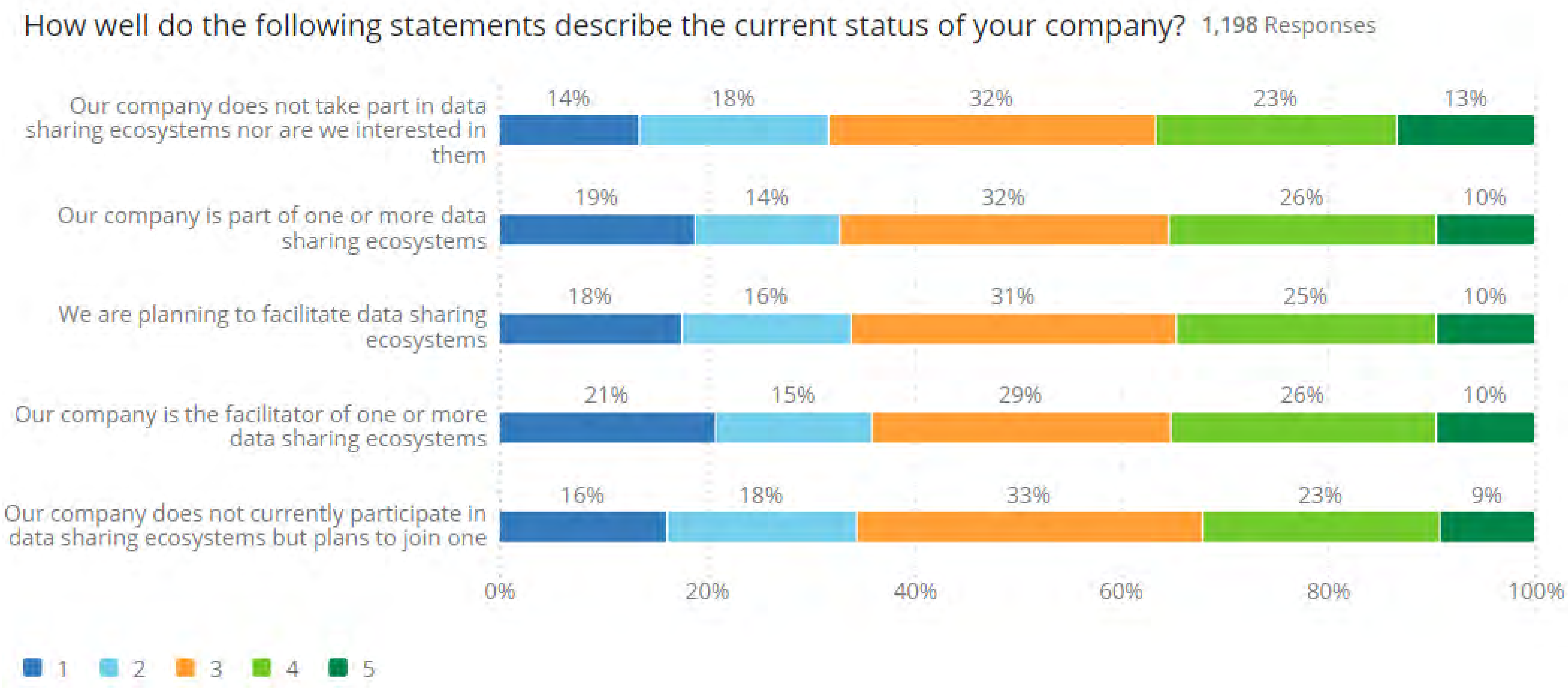
Current status of companies
Overall results – Averages



Scale: 1 = totally inaccurate ... 5 = totally accurate

All statements on same level, with slightly higher consent for not being a player in data economy

Current status of companies
Overall results – Distributions



Scale: 1 = totally inaccurate … 5 = totally accurate

Current status of companies
Comparison by country

	Finland		France		Germany		the Netherlands	
	Average	**N**	**Average**	**N**	**Average**	**N**	**Average**	**N**
Our company does not take part in data sharing ecosystems nor are we interested in them	**2.8**	300	3.1	297	3.1	296	**3.2**	297
Our company does not currently participate in data sharing ecosystems but plans to join one	**2.7**	299	3.0	299	2.9	299	3.0	298
Our company is part of one or more data sharing ecosystems	**2.7**	300	3.0	297	2.9	300	3.1	297
We are planning to facilitate data sharing ecosystems	**2.6**	300	**3.2**	296	2.9	298	3.0	296
Our company is the facilitator of one or more data sharing ecosystems	**2.5**	298	**3.1**	294	2.9	297	3.0	294

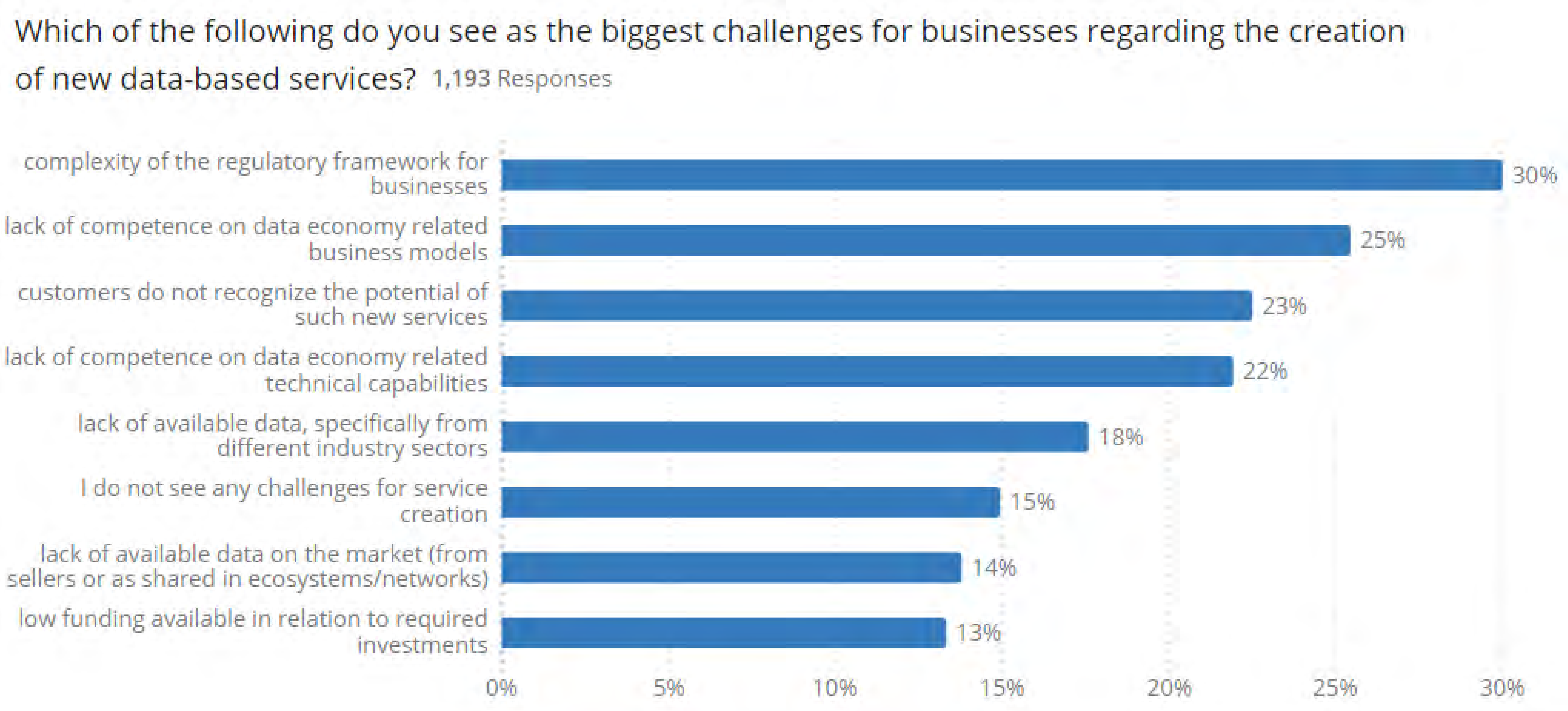
Scale: 1 = totally inaccurate ... 5 = totally accurate

Differences between countries are statistically significant for all statements.

Data economy challenges

Challenges in the creation of new services

Overall results



Challenges in the creation of new services
Comparison by country

Which of the following do you see as the biggest challenges for businesses regarding the creation of new data-based services?	**Finland**	**France**	**Germany**	**the Netherlands**
I do not see any challenges for service creation	13%	12%	13%	**21%**
Low funding available in relation to required investments	**17%**	13%	**9%**	15%
Complexity of the regulatory framework for businesses	**21%**	**36%**	31%	32%
Lack of competence on data economy related business models	26%	25%	27%	24%
Customers do not recognize the potential of such new services	**31%**	24%	22%	**14%**
Lack of competence on data economy related technical capabilities	24%	23%	24%	**17%**
Lack of available data, specifically from different industry sectors	14%	**21%**	21%	14%
Lack of available data on the market (from sellers or as shared in ecosystems/networks)	13%	13%	**17%**	12%

NL: smart & seeing less obstacles (customers´ understanding)
DE: worrying about regulations, but no problem with money raising
FR: even more facing the complexity of regulatory framework
FI: bad money/customer recognition ratio

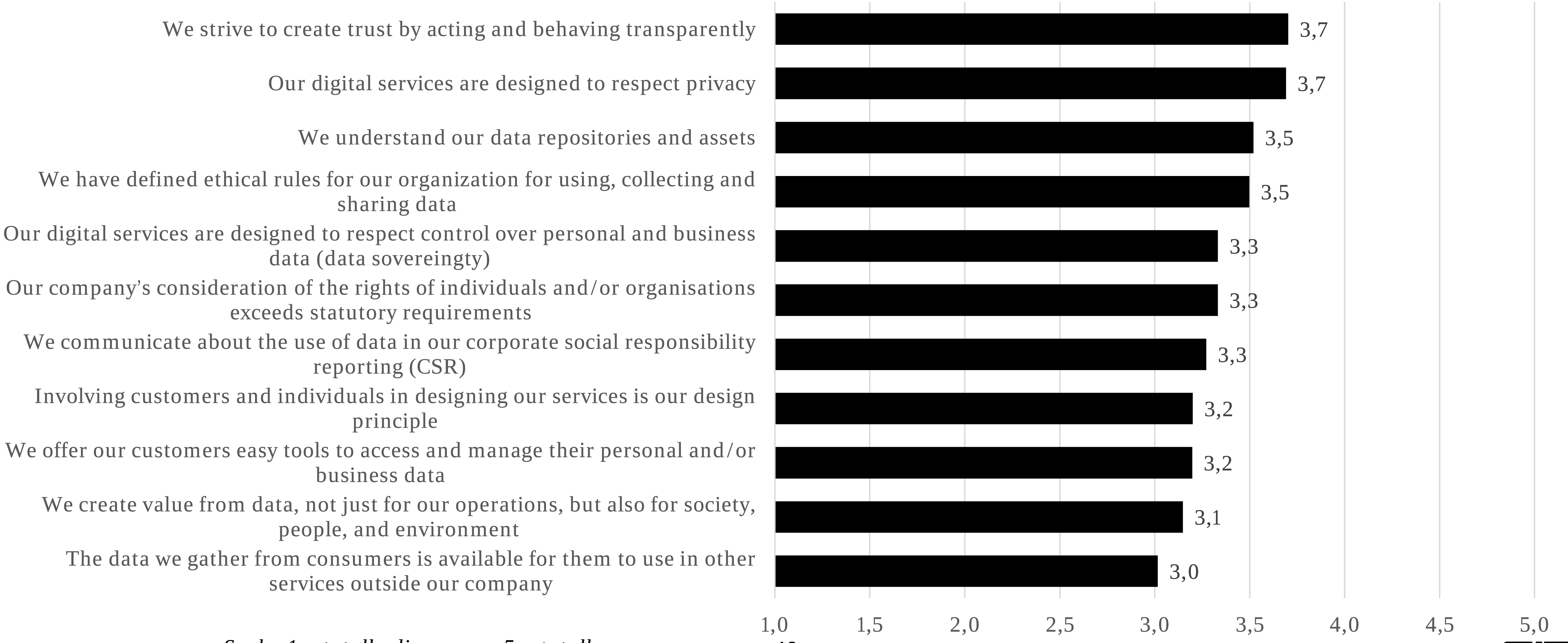
Differences between countries are statistically significant for all statements.

Objectives for fair data economy

Taking objectives into practice
Overall results – Averages

Most of the companies claim to act fair, but not too altruistic

Please indicate whether the following objectives of data use are taken into practice in your company? (N = 1 200)

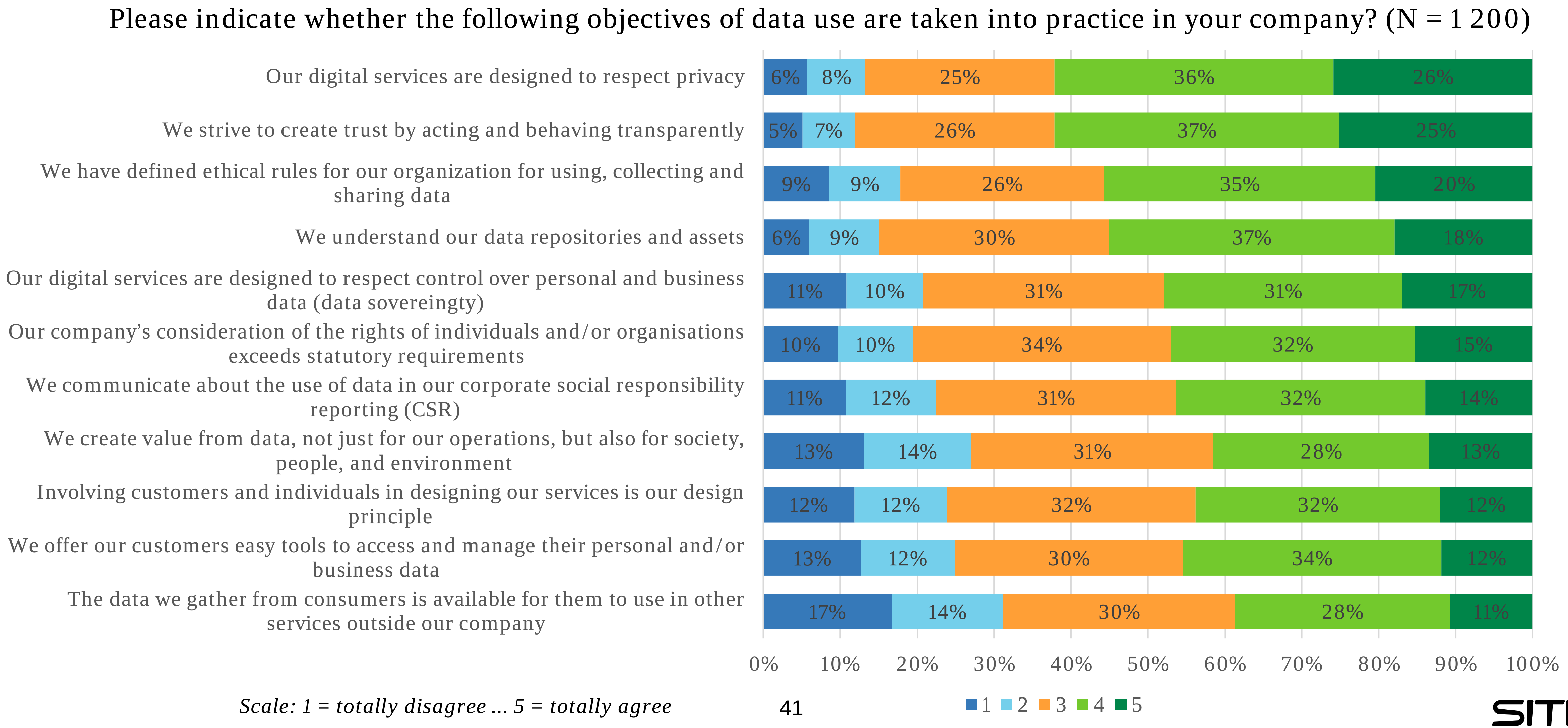


Scale: 1 = totally disagree ... 5 = totally agree

SITRA

Taking objectives into practice

Overall results – Distributions



Scale: 1 = totally disagree ... 5 = totally agree

Taking objectives into practice
Comparison by country

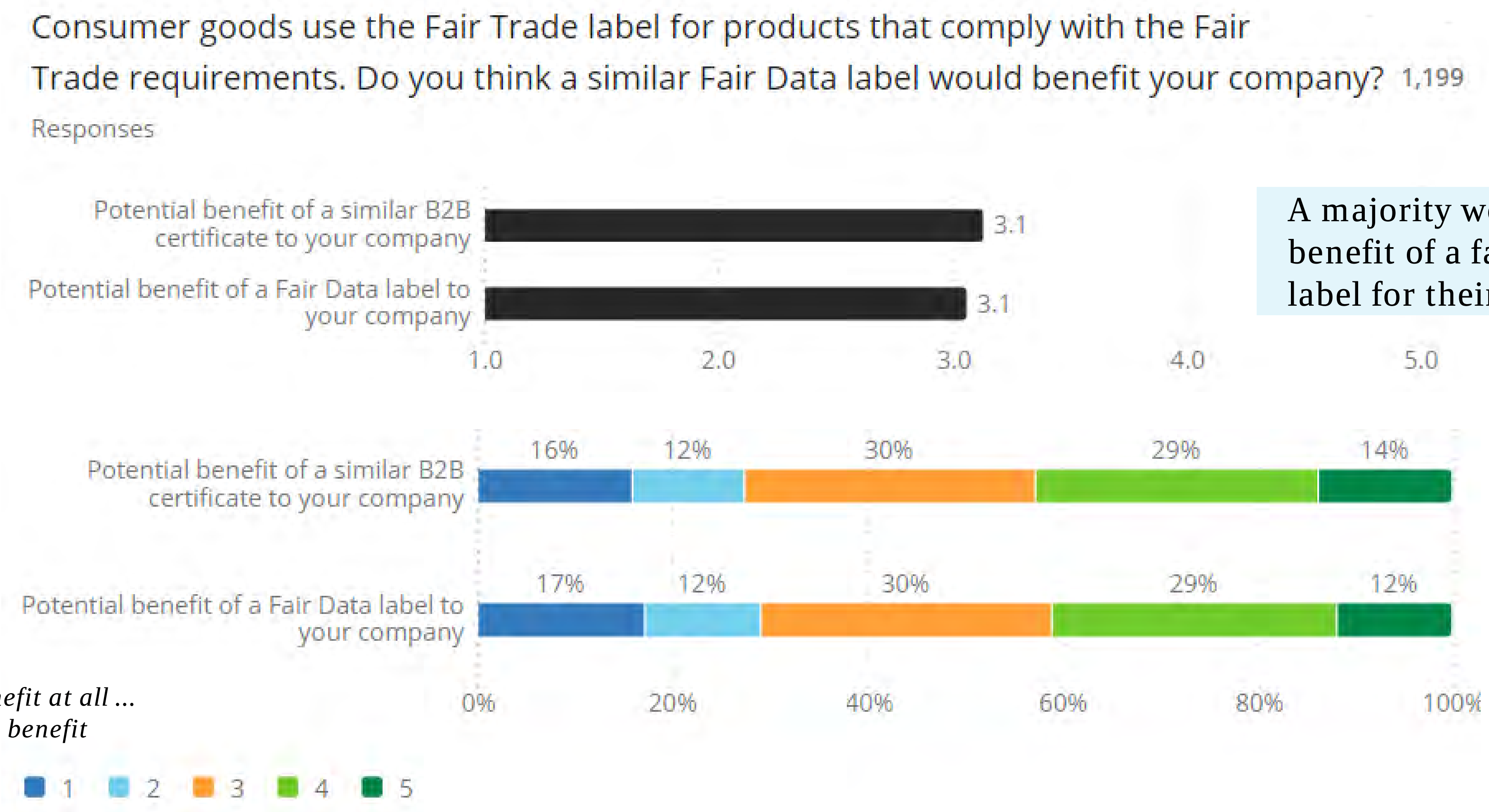
	Finland		France		Germany		the Netherlands	
	Average	N	Average	N	Average	N	Average	N
Our digital services are designed to respect privacy	3.7	300	3.7	298	3.7	296	3.8	300
Our digital services are designed to respect control over personal and business data (data sovereingty) *	**3.1**	297	3.4	297	3.4	298	3.4	298
The data we gather from consumers is available for them to use in other services outside our company *	**2.7**	300	**3.2**	298	3.1	299	3.1	300
We create value from data, not just for our operations, but also for society, people, and environment *	**3.0**	299	**3.3**	298	3.2	299	3.2	299
We have defined ethical rules for our organization for using, collecting and sharing data *	**3.3**	298	3.5	299	3.5	299	**3.7**	298
We strive to create trust by acting and behaving transparently	3.7	298	3.6	298	3.6	300	3.8	298
We offer our customers easy tools to access and manage their personal and/or business data *	**3.0**	300	3.3	298	3.2	300	3.3	299
We understand our data repositories and assets *	**3.4**	295	3.5	299	3.6	299	3.6	300
We communicate about the use of data in our corporate social responsibility reporting (CSR) *	**3.0**	294	3.4	299	3.1	299	**3.5**	299
Involving customers and individuals in designing our services is our design principle	3.1	297	3.2	297	3.2	298	3.3	300
Our company's consideration of the rights of individuals and/or organisations exceeds statutory requirements *	**3.1**	297	3.4	298	3.4	300	**3.5**	300

Scale: 1 = totally disagree ... 5 = totally agree

** In statements marked with an asterisk, the differences between countries are statistically significant.*

Fair Data label

Fair Data label
Overall results



A majority would see a benefit of a fair data label for their company

Scale: 1 = not benefit at all ...
5 = very high benefit

Fair Data label
Comparison by country

	Finland		France		Germany		the Netherlands	
	Average	**N**	**Average**	**N**	**Average**	**N**	**Average**	**N**
Potential benefit of a Fair Data label to your company *	**2.9**	299	3.1	300	**3.2**	298	3.1	300
Potential benefit of a similar B2B certificate to your company	3.0	298	3.2	300	3.2	297	3.1	300

All countries very close together, apart from Finland

Scale: 1 = not benefit at all ... 5 = very high benefit

** In statements marked with an asterisk, the differences between countries are statistically significant.*

SITRA

Fair Data label
Development

FINLAND	2019		2021		
	Average	N	Average	N	Change
Potential benefit of a Fair Data label to your company	3.0	414	2.9	299	-0.1

FRANCE	2019		2021		
	Average	N	Average	N	Change
Potential benefit of a Fair Data label to your company	3.4	397	3.1	300	-0.3

GERMANY	2019		2021		
	Average	N	Average	N	Change
Potential benefit of a Fair Data label to your company	3.2	394	3.2	298	0.0

THE NETHERLANDS	2019		2021		
	Average	N	Average	N	Change
Potential benefit of a Fair Data label to your company	3.4	414	3.1	300	**-0.3***

Scale: 1 = not benefit at all ... 5 = very high benefit

** Changes marked with an asterisk are statistically significant.*

Segmentation of respondents

Backround on respondent segmentation

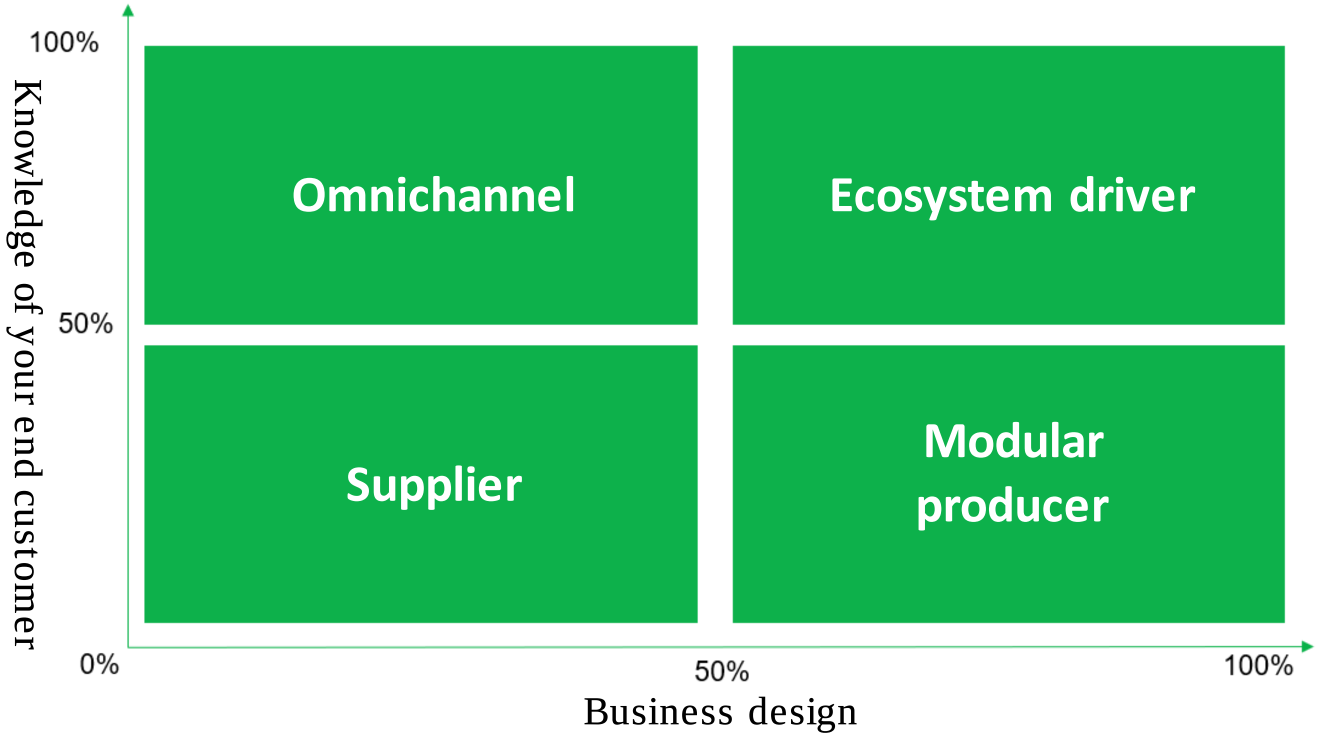
The study included investigation of the nature of the respondent companies' digital business models.

The analysis is loosely based on the MIT Sloan Center for Information System Research's (2017) division model (Weill & Woerner: What's Your Digital Business Model?: Six Questions To Help You Build The Next-Generation Enterprise, HBR Press 2018).

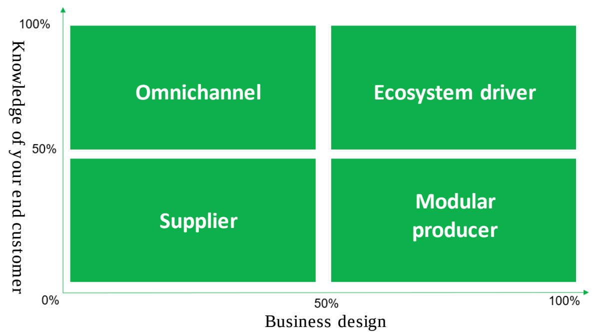
Each of the four digital business profiles (below in a four-square matrix) were converted to corresponding business claims on two axes:

- Y-axis: Maturity of creating and utilizing customer insight.
- X-axis: Refinement of digital business model.

The results of the specific statements are presented in pages 11-17 in this report.



Share of groups in the data



Positioning in a digital business model. All the countries (N=924):

Positioning by country (percentages calculated from classified respondents)	**Finland (N=242)**			**France (N=222)**			**Germany (N=236)**			**the Netherlands (N=224)**		
	2019	**2021**	Change	**2019**	**2021**	Change	**2019**	**2021**	Change	**2019**	**2021**	Change
Omnichannel	47%	48%	+1%	32%	36%	+4%	29%	37%	+8%	31%	36%	5%
Supplier	16%	15%	-1%	18%	17%	-1%	20%	22%	+2%	18%	17%	-1%
Ecosystem driver	13%	13%	-	19%	14%	-5%	17%	19%	+2%	24%	17%	-7%
Modular producer	25%	23%	-2%	30%	33%	+3%	30%	21%	-9%	26%	30%	4%

Finland:

48%	13%
15%	23%

France:

36%	14%
17%	33%

Germany:

37%	19%
22%	21%

the Netherlands:

36%	17%
17%	30%

Share of omnichannel companies significantly higher in Finland.
Share of suppliers and ecosystem drivers are quite even within all markets, slightly higher in Germany.
Share of modular producers highest in France and the Netherlands.
23% (2019: 24%) of respondents could not be classified due to either non-responses or repeated estimations.

Summary

Summary 1/3

- A potentially positive impact of data economy for the own organization is seen by a majority; share of those confirming it already did so has declined, probably as competitors could catch up in the meantime. All in all, close to 50% of respondents see that data economy could create them a competitive edge.
- Generating costs saving is seen as the most important positive outcome. The perception of their own role is a bit fuzzy: on average they ‘do participate a bit’ but the largest part denies an active role. In general, a widely scattered picture
- Biggest challenge for creating new data-based services based on data is the complexity of regulatory framework and lack of competence regarding data economy related business models.
- Companies claim to respect client´s privacy and are transparent in how they handle their data, but aren´t to generous by returning data or value to their customers
- A Label is welcome by all countries, but share of respondents seeing it as creating an advantage declines vs 2019.
- The share of omnichannel players is highest (32-47%), followed by modular producers (21-33%), share of ecosystem drivers is lowest (13-19%)

Summary 2/3

Changes in business model during the last two years:

- Overall comparison between different features of business model development depicts these different themes as having relatively even results: significant changes have been made between by 11-13 percent of the respondents irrespective of the element examined.
- France is the leader in companies making changes to revenue model, value proposition, partners ja activities. Similarly, Germany heads the quartet in making changes to companies' business models as relates to customers and channels. Finland is the clear front runner in making changes to resources.

Company's current business operations:

- All surveyed criteria set between 3.0 – 3.9 points. The most valid criteria (in describing current business operations of the responding companies) is: "our aim is to understand the end customer's everyday life so that we can offer them suitable product/service concepts" and the least valid on the other hand: "A third party (for example resellers / distributors) is responsible for providing our products / services to end customers".
- In country comparisons the Netherlands scores highest in seeking to complement own data with different data sources. France scores highest in e.g. low pricing, third party distribution and platform compatibility. Finland scores best in end customer understanding and providing for the end customer as an important part of company's value chain. Germany scores the lowest on all criteria but one. Finnish results have increased almost throughout since 2019 whereas results in France and Germany are in decline in similar fashion. Netherlands goes both ways.

Summary 3/3

Data economy capabilities:

- Results overall are on relatively similar level between the measured criteria (3.0 – 3.3).
- Highest score is obtained by “Our company has the needed skills to function as an active member of data economy” and “Our company has taken action to increase customers’ trust related to data collection”. Lowest score is found in: “Our company needs customer data from other companies”.
- In country comparisons France forms out as the front runner. Finland has the lowest capabilities (or on par with lowest) in all but one criteria. Yet the development in Finnish results has been notably positive, i.e. results have significantly increased, especially in the terms of the perceived positive impact of data-related regulation (+0,3). In France and Germany the results have declined, some even significantly.

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