Federal Data Strategy

Analysis report : Executive Summary

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Introduction

Data is often called the “new oil”. Generated in vast amounts, data holds significant economic value if its potential can be harnessed. In the era of generative artificial intelligence, the capabilities for processing data to generate efficient solutions and services have multiplied, driving innovation at an unprecedented pace.

The European Union has established a legislative framework and structured initiatives to regulate data usage and facilitate its flow within society, aiming for positive impacts while respecting individual rights.

In this context, it is crucial for States to assess the value of their data economy and determine how to leverage this data to maximise positive economic and societal impacts.

To explore how Belgium could capitalise on data to support its economy, the FPS Economy commissioned a study to propose a Belgian Data Strategy.

The Belgian strategy for the data economy aims to strengthen the country’s competitiveness in a fast-growing sector and to foster innovation, value creation and social well-being. The strategy is based on a study of the current situation and outlook for the data economy in Belgium, drawing on the following sources:

- An **analysis of the Belgian data economy**, looking at the value of data in organisations and for the Belgian economy, as well as the areas of skills, data culture, infrastructure and regulation in the Belgian data economy.
- A **comparison with neighbouring countries**, France, Germany, the Netherlands and the UK, which have also developed or are in the process of developing their own data strategies. The comparison highlighted a range of actions and initiatives within these countries that could inspire a Belgian data strategy.
- **Stakeholders were consulted** through interviews and an online survey, which made it possible to gather their needs, expectations, concerns and suggestions and to validate the SWOT matrix. Stakeholders from priority sectors (Energy, Mobility, Health, Public Administration and Manufacturing) were also approached during workshops to determine the strategic priorities for these sectors in the context of a national data strategy. A final workshop was organised to determine the cross-cutting conclusions for the Belgian economy. The strong alignment of the conclusions from each of the workshops generated the basis for the strategic recommendation.

Key Results of the Belgian Data Economy Analysis and Comparison with Neighbouring Countries

- Belgium's data economy grew from €14.860 billion in 2020 to €17.795 billion in 2023, with an average annual growth rate of 6%.
- The data economy's contribution to Belgium's GDP rose to 4.2% in 2023, positioning the country above France but below Germany, the Netherlands, and the UK. However, Belgium's growth rate for this indicator is lower than that of its neighbours.
- Belgium has several advantages when it comes to using data to boost its international competitiveness. The high level of digitalisation of large companies in Belgium improves the quality and availability of data for analysis. Large Belgian companies are making effective use of data to improve their processes and products.
- Belgium is facing several key challenges, such as a lack of coordination between the various levels of government, particularly regarding the opening and standardisation of data and the steps linked to training, the complexity of its institutional structure and the shortage of skills and talent.
- SMEs often lack data expertise, limiting their ability to fully exploit available data.
- Belgium has the lowest proportion of data professionals among neighbouring countries and below the EU average, showing the most unfavourable evolution in the EU regarding the intensity of data professionals in companies.
- Belgium has opportunities to seize, such as the development of the single European data market, the growing demand for data-based solutions, the emergence of new technologies and new business models, and the creation of synergies between sectors and regions.
- The upcycling and reskilling of workers has great potential for the creation of data professionals. The training of women in data professions in Belgium offers interesting potential if the country activates this public in the same way as neighbouring countries.
- Belgium also faces threats such as the accelerating economic and organisational changes caused by the emergence of generative—data-driven—AI, international competition, dependence on foreign players, not to mention the risks associated with data security, privacy and ethics, social and territorial inequalities, and the environmental impacts of digitisation.

Key Learnings from Stakeholder Consultations

The stakeholder consultation brought to light several elements (see summary in the appendix), mainly shortcomings in terms of standards and the sharing of interoperable data (FAIR). The need for clear, standardised governance across the Belgian institutional landscape was also identified, as was the lack of data maturity at the decision-making and political levels in particular. Finally, the stakeholders formally declared the need for an operational capacity to support the action plan.

A Proposed Federal Strategy for Belgium

The overarching ambition of this strategy is "**Belgium 2030 towards a Data-Driven Economy**", aiming for Belgium to be among the top five European countries in data economy growth relative to GDP by 2030.

The weight of the data economy in Belgian GDP increased from 3.9% in 2020 to 4.2% in 2023, putting Belgium in line with the European average, ahead of France (3.1%) but behind Germany, the Netherlands and the UK (4.9%, 5.4% and 6.9% respectively). Given that Belgium's growth prospects on this indicator are lower than those of its neighbours, it is important to take action on this indicator and curb future trends, otherwise the country risks losing its competitive edge.

Strategic Goals

To activate the Belgian data economy by 2030 and, beyond that, to generate a positive impact on the Belgian economy as a whole and the country's competitiveness in relation to its neighbours, a transversal objective and four strategic objectives have been defined.

Transversal objective: Deliver tangible results through an effective organisation supported by clear, results-oriented governance at all levels and strong central leadership.

> This objective will require the various levels of government to give a clear mandate to a central operational team, with clear governance for all.

Strategic objective #1: Increase the number of talented people working in the data economy.

> This objective will involve aligning, in coordinated approaches between the federal and federated entities, the actions of organisations linked to raising awareness—from a very young age and throughout one's career—and training in data-related professions and skills. It will also require support for the Belgian market and all the organisations involved in attracting and retaining talent in these professions.

Strategic objective #2: Make Belgium one of the most dynamic European territories in terms of collaboration and innovation between public and private structures around data.

> This will involve increasing collaboration between public players at all levels of power, demanding maximum sharing of interoperable ("FAIR") and high-quality data, capitalising on existing initiatives in the area and encouraging public-private collaboration, particularly at the level of Data Spaces, at national and international level. The involvement of everyone, citizens included, will be important to maximise the societal impact.

Strategic objective #3: Provide Belgian stakeholders with a clear and stable regulatory framework for data.

> The effective and rapid implementation of regulations such as the DGA and the Data Act, and the establishment of a framework of trust are necessary to accelerate the involvement of stakeholders and the economic impact of data.

Strategic objective #4: Encourage the development of secure, high-performance data-sharing infrastructures.

> Data sharing must rely on secure and efficient infrastructures and platforms, with a focus on sovereignty for sensitive data.

Operational Plan

The action plan to put the strategy into practice is based on five key areas:

Steering of the strategic plan by a **Delivery Unit** led by a **National Data Facilitator**[1]

> This first involves defining the desired national governance of the strategic data plan, with the support and commitment of all necessary stakeholders, and its practical implementation before the end of 2024.
>
> This is followed by all the work involved in measuring and monitoring all the selected initiatives over time, reviewing and adapting the plan with a view to achieving the objectives set: in short, steering the plan with the guiding philosophy of being a facilitating body that identifies and helps the relevant stakeholders to deliver their part of the work, in a collaborative approach but with strong leadership.

Workstreams linked to **collaboration** around data and **standards**

> The aim of this area is to activate concrete collaboration around data in the field, in a dynamic driven by the implementation of use cases and relying on the active participation of motivated and committed stakeholders. This collaboration will indirectly result in the definition of the standards required for data exchange and the implementation of the tools needed for this.

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[1] Proposed name to be validated by political decision-makers. Alternatively, the name Belgian Intergovernmental Data Facilitator (BEIDF) has also been considered.

Data Spaces will be the preferred vehicle for organising this collaboration between public and private players.

This axis will ensure that energies are not dispersed, starting first with strategic sectors and initiatives with the greatest impact for Belgium.

In practical terms, the work will focus first on prioritising the Data Spaces, then on supporting their launch (integration of public/private players, sectoral governance, identification of the necessary data/tools, etc.) and then on supporting their activities (funding, facilitating interaction, links with Europe, evaluation of progress, etc.). The work will focus on the definition of standards and the selection followed by the supply of use cases.

Regulatory-related projects

This area will focus on putting in place, in close cooperation with the European level, the regulatory framework needed to enable and facilitate the sharing and use of data, including through Regulatory Sandboxes. It will seek to strengthen trust and responsibility in the data economy, by guaranteeing the protection of personal data, ensuring the security and resilience of information systems, applying ethical principles and European values, and involving citizens in data governance. It will also be responsible for stimulating, encouraging and, where necessary, imposing this sharing. Finally, the National Data Facilitator will ensure that any obstacles to the rapid implementation of the new European regulations are identified, and will work actively to remove these obstacles effectively, with the help of the governance bodies.

Infrastructure-related projects,

This area will focus on putting in place an infrastructure suited to the ambitions associated with this strategy.

Projects linked to **training** and **data culture**

This axis will focus on developing the skills and talents needed for the data economy, by strengthening education and initial and continuing training, attracting and retaining qualified profiles, and promoting diversity and inclusion in the data sector. It will ensure that organisations are supported in this task and that the Belgian labour market is an attractive market for producing, attracting and retaining these skilled profiles around data.

Recommendations

The implementation of the Belgian strategy for the data economy, under the leadership of the National Data Facilitator and its Delivery Unit, requires the commitment and mobilisation of all stakeholders, starting with those in the strategic sectors, as well as regular monitoring and evaluation of the progress made. The Belgian strategy for the data economy will be adapted to changes in the context and to feedback from experience. The Belgian strategy for the data economy aims to be a catalyst for the development of a dynamic, competitive, responsible and inclusive sector, serving the country's economic growth and social well-being.

To achieve the ambition of increasing the weight of the data economy in GDP, it will be necessary to support a proactive dynamic based on collaboration between institutional stakeholders and with the private sector.

A prerequisite for the success of this approach is to integrate the various levels of Belgian government into the strategy by emphasising the common interest and win-win nature of the participation of the federated entities in the national dynamic. In the health, mobility and energy sectors, for example, the challenges go well beyond regional borders, and effective coordination between all levels of government and entities (including regulators) is essential if they are to be tackled effectively, while respecting each other's prerogatives. A first recommendation would therefore be to oversee the governance of the project by a body including the various federal institutional stakeholders and those belonging to the federated entities, and to define a clear mandate for the National Data Facilitator, who will report to this governance body. It will be important for the governments to commit to the objectives that the National Data Facilitator and its Delivery Unit will have to achieve.

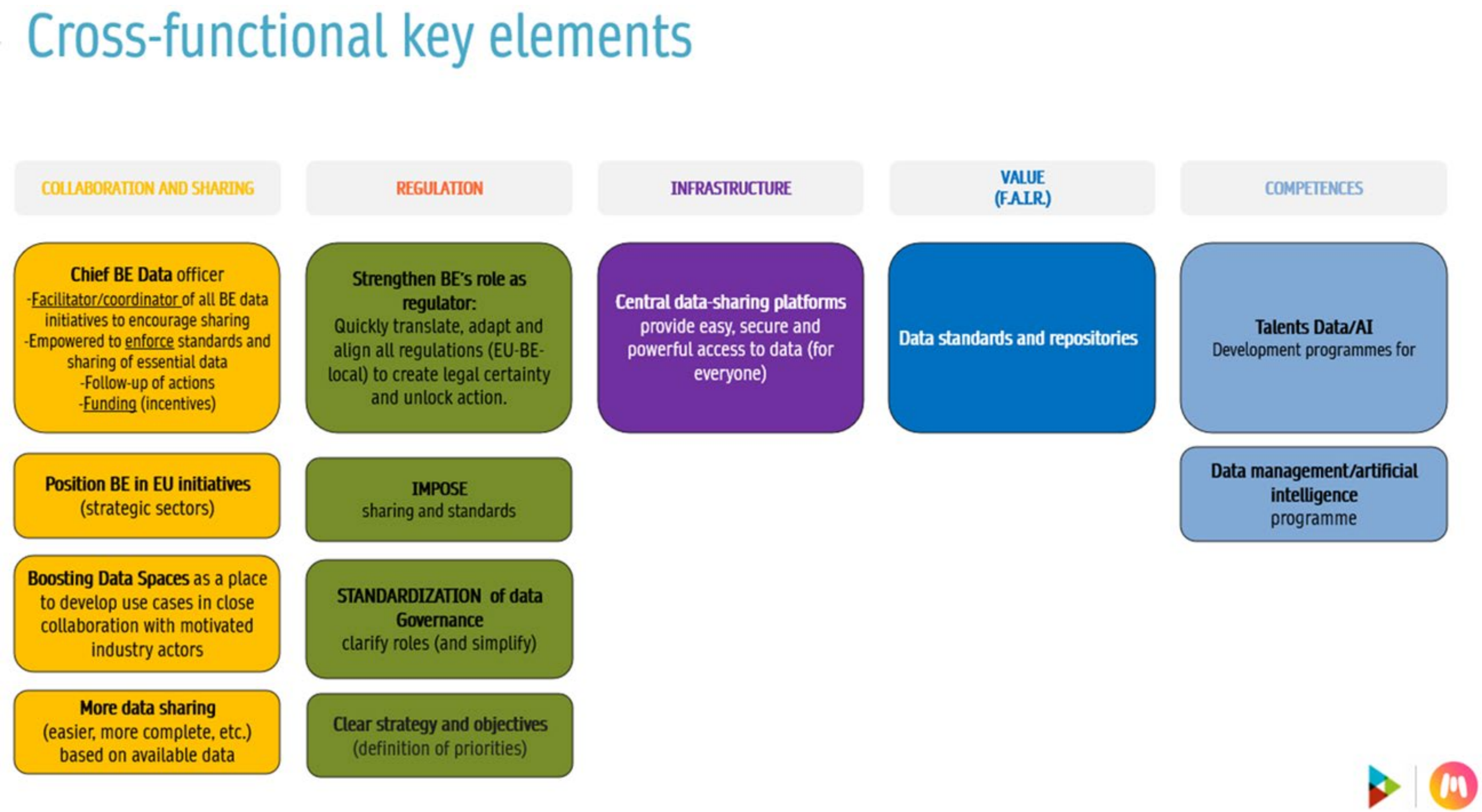
In addition, strong collaboration between public and private players will be needed to ensure that visions and standards are aligned, and that the approaches initiated are fully adopted. To achieve this, Belgium should support initiatives centred on the implementation of concrete use cases based on the sharing of data, in which players wishing to move forward will become fully involved, starting with sectors that are strategic for the development of Belgium's economy. We recommend that this be done in particular through the Data Spaces, which are fully in line with this collaborative dynamic geared towards results and impact.

Belgium is home to a large pool of researchers and experts, both academic and private, who are internationally recognised and whose skills could be put at the service of the national data strategy. The third recommendation concerns the integration of research institutes specialising in data into strategic governance and the creation of a committee of experts, possibly under the patronage of federal science policy bodies.

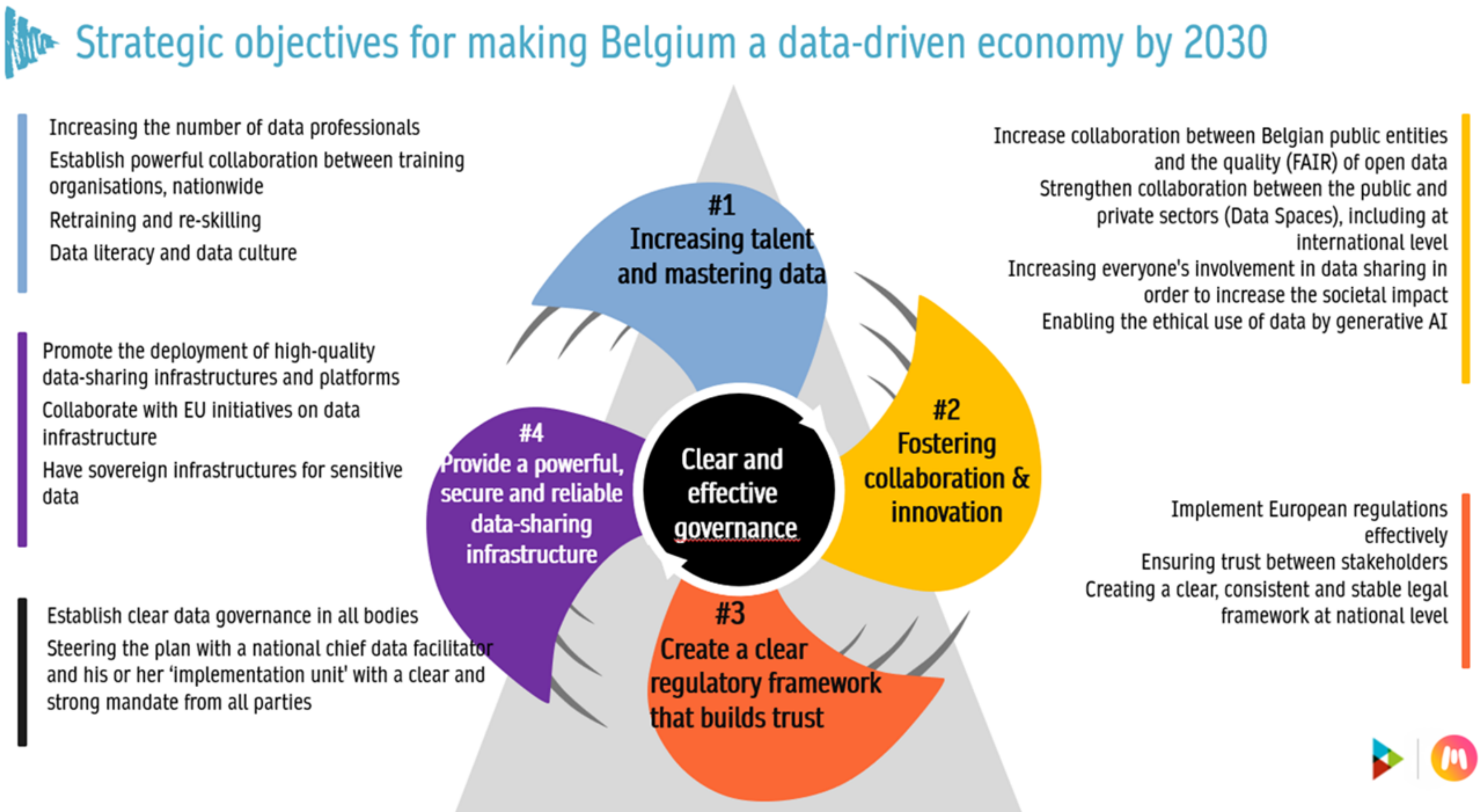
Lastly, it will be important to provide this strategy with the resources it needs to fulfil its ambitions, by enabling the creation of a support team (Delivery Unit) for the National Data Facilitator and by funding the actions of the national data strategy. The fourth recommendation is therefore to set aside a budget that will enable this strategy to be implemented over the period of the next legislature by launching the process as early as 2025, once the operational structure and governance of the project have been rapidly put in place.

ANNEX. Key summary diagrams

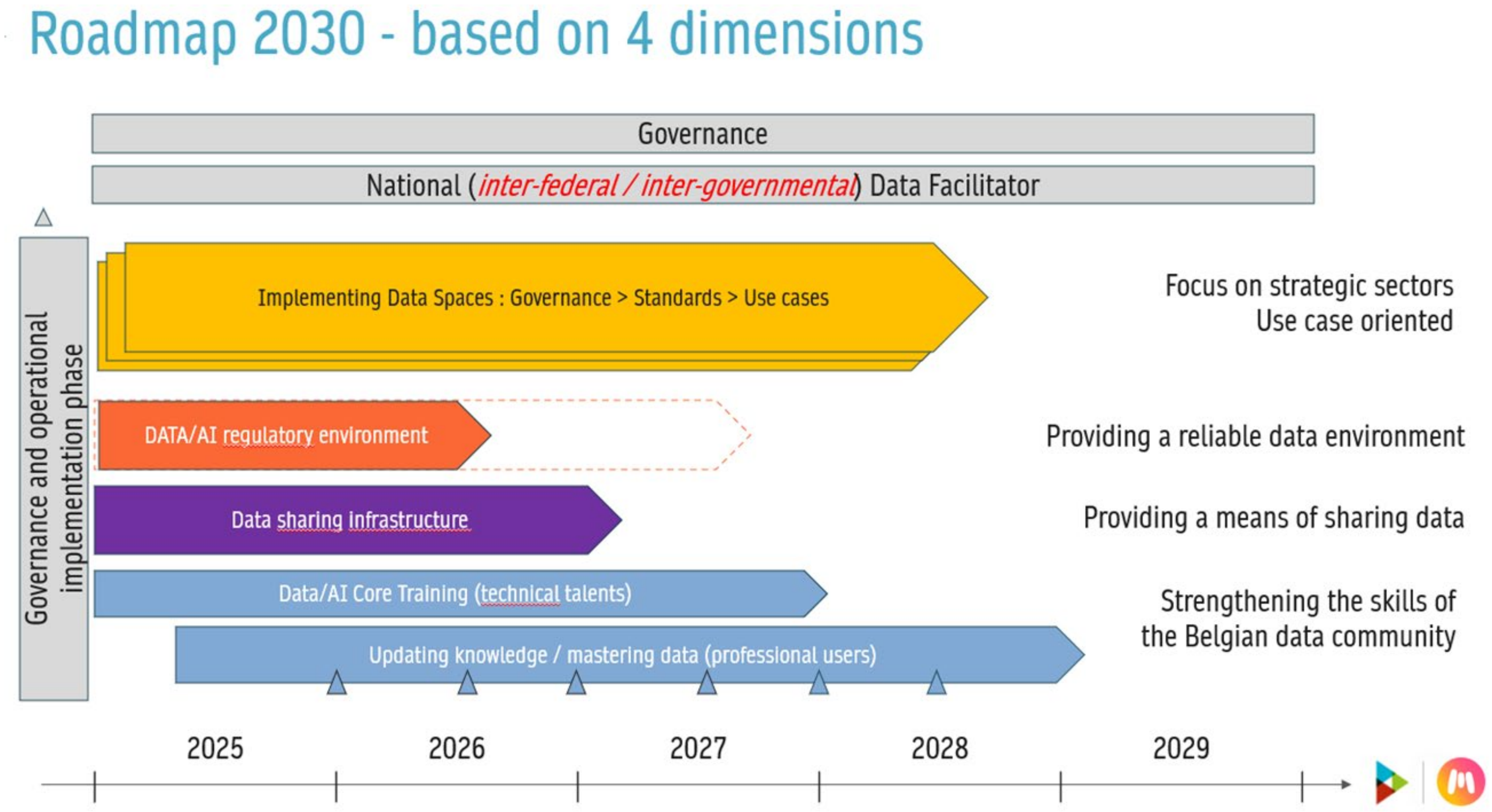
Cross-functional key elements raised by the stakeholders consulted



Strategic objectives for making Belgium a data-driven economy by 2030



Roadmap 2030 - based on 4 dimensions



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