

Benefits of Becoming an Open:FactSet Marketplace Partner

The screenshot shows the Open:FactSet Marketplace homepage. At the top, there's a navigation bar with links for English, Sales +1.866.322.8738, Client Center, Developer Portal, Login, and COVID-19 Update. Below the navigation is the FactSet logo and a main menu with Solutions, Marketplace, Services, Insights, Our Company, and a search icon. A prominent banner reads "OPEN:FACTSET MARKETPLACE" with the subtext "The destination for more than 200 best-in-class data feeds, APIs, and products that give investment professionals an edge." A search bar is below the banner. The main content area has a "FILTER BY" sidebar with sections for Consumption Method (API, Data Feed, Solution), Provider (View All, FactSet, Partners), and a "RESULTS" section. The results show three data feed cards: 1) Cybeta Cybersecurity Breach Likelihood & Financial Loss, 2) DATAZORA Japanese Public Company ESG KPI Data, and 3) Floodlight Greenhouse Gas Emissions (GHG) Scopes 1, 2, 3 Each card includes a brief description, a "Sort By: Trending" dropdown, and a "View full catalog (200+ items)" link.

WHAT IS THE OPEN:FACTSET MARKETPLACE?

The [Open:FactSet Marketplace](#) (OFM) is an open data marketplace designed primarily for the investment community. Built on FactSet's four decades of integrating financial data and analytics, OFM allows a wide range of financial and corporate institutions to discover and source premium data, applications, and workflow solutions within a single ecosystem.

Our standard partnership agreement offers a listing on the Marketplace and full access to our sales, marketing, and administration capabilities. Once partners are fully engaged and leads are successfully generated by FactSet, the fulfillment component of the deal (i.e., data delivery) is owned and managed by the partner. FactSet heavily screens all new partners joining the Marketplace to ensure our clients have a high standard of content and data quality alongside a robust and flexible set of vendor-managed delivery options.

An enhanced agreement is also available for highly successful and mutually beneficial partnerships. In these cases, the partner's datasets are connected by our hub-and-spoke data model to help expose relationships between disparate identifiers. This model provides the foundation to integrate and manage disparate data while optimizing the organization of a firm's internal content assets as well as third-party data. For more information on this type of integrated partnership, see [Benefits for Becoming an Open:FactSet Marketplace Partner \(Enhanced\)](#).

WHY BECOME AN OFM PARTNER?

• Greater Exposure and Discoverability

- Generate new leads from various industries as users browse, search, and discover your products within the Open:FactSet Marketplace. FactSet will work with you to create unique provider and product pages that highlight your key selling points and feature your marketing materials, white papers, case studies, and sample data. Additional product-specific collateral can also be created to increase awareness.
- Collaborate with global sales and marketing teams to highlight the best industry use cases for your data. Augment FactSet's comprehensive datasets with those from third-party providers to develop enhanced content solutions for your clients. Leverage frequent, thematic-aligned sales campaigns to further promote your content sets.

• Significant Ownership of Sales Processes

- Rely on FactSet to engage you in every sales opportunity and gain full control over your product/package pricing based on specific client needs. Our global sales team will collaborate closely with partner sales representatives to ensure a smooth process for client onboarding.

• Expanded Distribution Channels and Administrative Assistance

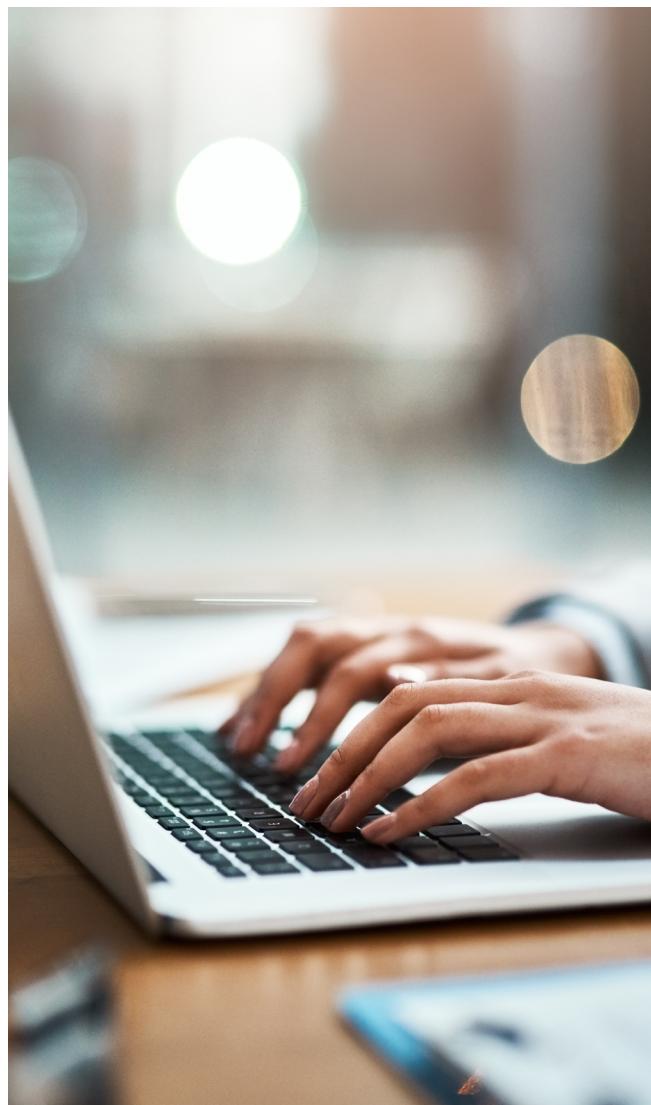
- Take advantage of FactSet's extensive network of users and prospects. Our sales teams are skilled in identifying and proposing unique pairings of your data with our complementary offerings—either from our content collection or other partners.
- Ease your administrative burden. We will manage all contracting and billing, so clients have a single source of truth for the end-to-end sales process.

• Enhanced Data Integrity Assurance and Recommendations

- Leverage FactSet's 40+ years in data management and content integration to complement your offering. During the application process, we will conduct a preliminary analysis of your data as well as a robust series of data integrity checks and balances to ensure all partner products meet the highest possible quality and reliability.
- Receive non-binding recommendations on product packaging and delivery to ensure ease of use and improve overall usability. View suggestions from FactSet's extensive data catalog and trusted, well-defined data standards.

• Flexible and Dynamic Product Packaging

- Allow FactSet to help manage your product portfolio on the Marketplace based on the latest market signals. Submit requests for additional marketplace cards when your new products are released and gain full authority over how data-driven content is provided to clients.
- Work with the Open:FactSet Product Management (OFPMP) team to create product and marketing collateral that potential clients can download while performing data discovery work.



HOW ARE OFM PARTNERS SELECTED?

Partner selection is driven by client demand, industry trends, and a dataset's alignment with content themes that have been prioritized by the OFPM team. The table below identifies the primary themes and subcategories that are currently being prioritized.

In addition to prioritizing partners with data in these thematic categories, the OFPM team leads regular, global go-to-market initiatives focused on them. FactSet's Business Development sales team frequently coordinates marketing and sales efforts to ensure partner content for each theme is efficiently and effectively promoted.

PRIMARY THEMATIC CATEGORY	SUBCATEGORIES*
Business Relationships	Supply Chain, Shipping, Contracts, Loans, Competitors, Corporate Activism, Ownership
Company Reported Data	Fundamentals, Estimates, Corporate Actions, Events, Earnings Call Transcripts, Insider Transactions
Consumer Trends	Retail, Point-of-Sale, Website Traffic, Footfall, Web/Mobile Apps, Surveys
Deep Sector	Technology, Energy (Oil & Gas), Healthcare, Retail & Other Sectors, Weather, Commodities
Economic	Commodities, Health Statistics, Crime Rates, Environmental Risk, Shipping
ESG	Environmental, Social, Governance, Climate
Factor	Derived Values, Research
Human Capital	Compensation, People, Job Listings, Workforce & Individual Characteristics, Insider Transactions
Intellectual Capital	Intellectual Property, Patents, Intangible Assets, Brands
Market Data	Pricing, Short Interest, Mergers & Acquisitions, Ownership, Research
Risk & Compliance	Sanctions, Regulatory, Cyber Risk
Sentiment	Transcripts, Social Media, News
Geolocation	Location-Specific Data
Data Management	Industry/Sector, Classifications, Concordance Service, Corporate Hierarchy

* Ownership, Insider Transactions, Retail, and Commodities thematic subcategories apply to more than one primary thematic category.

HOW DO I GET STARTED?

SIX STAGES TO BECOMING AN OFM PARTNER

Firm submits their [registration](#) on the Open:FactSet Marketplace website

The OFPM team reviews the application and sets up an introductory call with the firm; they are provided with a non-disclosure agreement (NDA) and an OFPM-created questionnaire

Firm submits the OFPM-created questionnaire focused on delivery, support infrastructure, and product packaging

OFPM collaborates with the firm* to create a public-facing product card in the Marketplace

OFPM approves submissions and the Partnerships team defines legal and commercial points for the contract

Firm uploads requested data elements into a private AWS S3 directory for initial quality assurance testing

*The typical onboarding process takes at least six months and is dependent on a variety of factors. FactSet's OFPM and Product Development teams provide frequent updates and progress reports for full transparency and to ensure all timelines are optimized.

Please contact cts.ofcs@factset.com for more information on how becoming an OFM partner will help you maximize the reach and relevance of your data. For the latest list of OFM partners and content themes, please visit the [Open:FactSet Marketplace](#).