

# Sensyze

## DataFlow

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The only modern data pipeline built for  
data sovereignty, compliance and control.

Open-Source Core

Self-Hosted

No Monthly Lock-In

# Regulated industries are trapped between compliance risk and unaffordable SaaS tools.

## **Data Sovereignty Mandate**

Banking (DORA), healthcare (HIPAA), and public-sector organisations cannot send data to foreign SaaS clouds. Compliance violations carry multi-million euro fines.

## **SaaS Pricing Spirals Out of Control**

Fivetran and Hevo charge per row synced. At production scale (1TB+/day) costs can exceed \$50,000/month. Mid-market teams have no viable alternative.

## **Self-Hosted Tools Require Specialists**

Open-source alternatives (Airbyte, Kafka, Debezium) demand a dedicated DevOps/data engineering team to deploy and maintain. Most teams simply don't have that.

# A modern data pipeline that runs entirely on your servers.

Open-source core · Visual + code interface · Single-command setup · Air-gapped capable · No consumption-based pricing



## Visual Pipeline Builder

Drag-and-drop editor lets any analyst build pipelines — no engineering background needed.



## Runs On Your Infrastructure

Deploy in minutes with a single command. On-premises, air-gapped, or private cloud — your choice.



## Built-in Observability

Per-node execution logs and latency tracking. Alerts on every node — see exactly what your data is doing.



## Code When You Need It

Drop into Python or SQL for complex transformations, side-by-side with the visual editor.



## Durable Workflow Engine

Pipelines recover automatically from any failure. No data loss, no duplicate records.

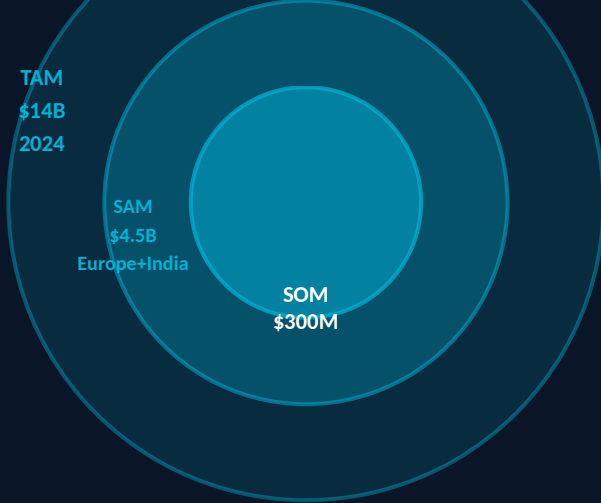


## In-Container Analytics

Run heavy transformations without any external database. Everything stays inside your boundary.

# \$14B market, growing at 11-12% annually. On-premises segment: largely uncontested.

Source: Straits Research, Grand View Research, SkyQuest — April 2026. Global data integration market.



## \$14B

Global market in 2024

*Grand View Research*

## \$30B+

Projected by 2030 (CAGR 11-12%)

*Multiple analyst consensus*

## 0

Modern on-prem tools with visual  
builder

*Competitive gap*

## 7x










Lower 5-yr TCO vs SaaS leaders

*\$510K vs \$3.67M*

🎯 Primary targets: Financial Services · Healthcare · Insurance · Government/Defence — sectors where on-prem deployment is mandatory, not optional.

# Built and working — not promises.

## ✓ Implemented & Validated

-  Drag-and-drop visual pipeline builder
-  Code-based pipeline interface (Python & SQL)
-  On-premises deployment via single-command setup
-  Air-gapped mode — operates with zero internet access
-  Real-time change data capture from source databases
-  Failure-resilient workflows — auto-retry, no data duplication
-  Distributed processing for large data volumes
-  Per-node observability: execution logs and latency tracking
-  In-container analytics — transformations without external dependencies

## 🗺 On the Roadmap

- Vertical pipeline template marketplace
- AI pipeline assistant (any language)
- Sector-specific connector packs
- SOC 2 Type II certification
- Connector marketplace

# We are the only modern, open-source platform with a visual builder AND true on-premises deployment.



## Where every competitor falls short:

Competitor	Their Gap	Sensyze Wins
Fivetran / Hevo	SaaS-only, USD billing	On-prem + open-source
Airbyte	Complex DIY setup	Visual builder + managed
Matillion	Enterprise cost & complexity	Simple, affordable
Informatica	Legacy, high cost	Modern stack, 7x cheaper
Meltano	CLI-only, no visual builder	Full visual + code dual-mode

Note: Fivetran offers limited hybrid deployment via HVR technology at enterprise tier. No competitor combines visual builder + true on-premises + sub-\$100K support cost.

# Open-source core. Three revenue streams.

Red Hat model — platform is free and open-source. Revenue comes from support subscriptions, compliance packs, and a template marketplace.



## Support Subscriptions

Annual support contracts — cost scales with organisation size and compliance needs, not with how much data is moved.

- › **Community** — Free — self-managed, community forum
- › **Professional** — Business hours support + security patches
- › **Enterprise** — 24/7 SLA + dedicated support engineer
- › **Enterprise+** — Air-gapped & compliance certification packs



## Compliance Packs

Purpose-built add-on packs for regulated industries — pre-configured policies, audit logging, and certification documentation.

- › **GDPR Pack** — EU data boundary enforcement + DPA audit trails
- › **HIPAA Pack** — PHI isolation + BAA documentation templates
- › **DORA Pack** — ICT resilience reporting + third-party risk logs
- › **DPDP Pack** — India data residency + consent pipeline tooling



## Templates Marketplace

Practitioners publish vertical pipeline templates. Sensyze takes a revenue share. Buyers deploy pre-certified pipelines in minutes.

- › **Creators** — Engineers publish templates they already use
- › **Buyers** — Teams deploy certified vertical pipelines instantly
- › **Examples** — BFSI reconciliation, HIPAA claims, ad-spend ETL
- › **Revenue** — Platform takes a share on every paid template sale

# Four structural advantages no competitor can replicate together.

## 01 Self-Hosted by Design

Not a cloud tool with an export button. Every architecture decision starts from the constraint: must run on any server, anywhere, with zero cloud dependency.

## 02 No Consumption-Based Pricing

Pricing is support-based, not per-row or per-connector. Organisations pay for expert help and certified connectors — not for every row of data they move. Costs are predictable at any scale.

## 03 Visual Builder + Code — In the Same Tool

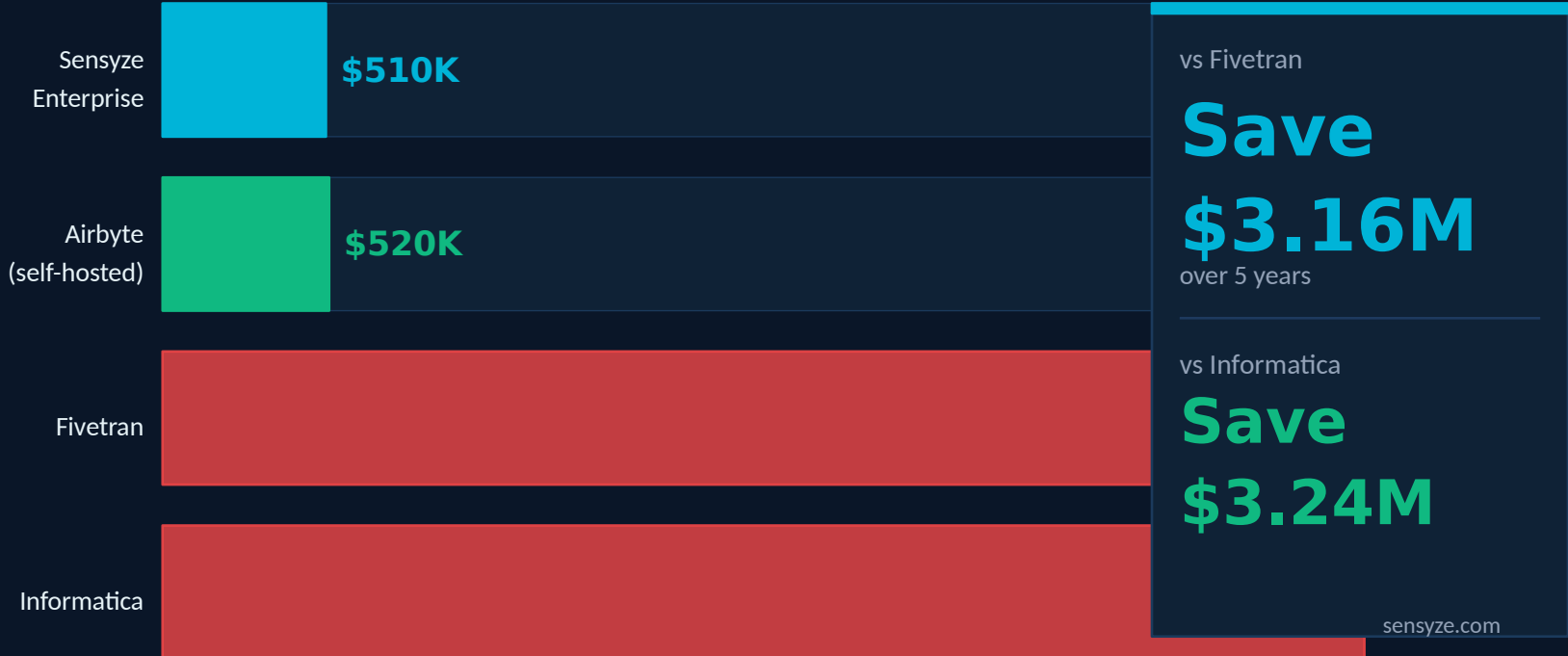
Most on-premises tools are code-only CLIs. Most visual tools are cloud-only SaaS. Sensyze is the only platform combining a full drag-and-drop visual editor with Python and SQL code support in a self-hosted environment.

## 04 Templates Marketplace

Practitioners publish and monetise their own pipeline templates. Creates a community flywheel: more templates → more users → more creators.

# 7x lower total cost of ownership over five years vs SaaS leaders.

Assumes mid-market deployment: 10 pipelines, 1 TB/day, 3-person data team. Source: internal TCO model validated against vendor pricing pages.



# Four major regulations now mandate data sovereignty — Sensyze is built for this.

EU · DORA

## Digital Operational Resilience Act

Effective Jan 2025

Mandates ICT risk management and data sovereignty for all EU financial institutions. Third-party SaaS providers face direct oversight. Organisations are actively reducing dependency on US-based cloud tools.

EU · GDPR

## General Data Protection Regulation

Enforced since 2018, fines rising

Requires personal data to stay within EU or adequacy-agreement jurisdictions. Cross-border SaaS pipelines are under increasing scrutiny. Fines reached €4.5B globally in 2023.

US · HIPAA

## Health Insurance Portability Act

Updated enforcement 2024

Healthcare organisations must maintain BAAs with every vendor that touches PHI. SaaS tools without on-prem options create unacceptable compliance exposure for hospitals and insurers.

 · DPDP

## Digital Personal Data Protection Act

India, effective 2025

Requires data fiduciaries to store personal data within India. Creates immediate demand for on-premises pipelines that guarantee data residency — a gap no current tool fills for the Indian market.

# APPENDIX

Supporting research, detailed comparisons & data sources

# A1 · Full Feature Comparison

Fivetran surpassed 740 connectors as of Dec 2025 (Gartner MQ). Airbyte uses ELv2 licence (permits internal commercial use).

Dimension	Sensyze	Fivetran/Hevo	Airbyte	Matillion	Informatica
Visual Builder	✓ Full drag-drop	● Basic mapping	✗	✓	✓ Complex
On-Premises / Air-Gapped	✓ Native	✗ SaaS-only	✓	● Ent	✓ Legacy
Single-Command Setup	✓ Docker Compose	N/A (SaaS)	● Moderate	✗	✗
Python & SQL transforms	✓	✗	● SQL/TypeScript	✓	✓
Real-time data capture	✓	✓	✓	●	✓
Per-node observability	✓	✓	●	✓	✓
Open-source core	✓ BSL→Apache 2030	✗ Proprietary	✓ ELv2	✗	✗
5-yr TCO (mid-market)	\$510K	\$3.67M	\$520K	\$1.5M+	\$3.75M
INR billing	➡ SOON Planned	✗ USD via Stripe	N/A (OSS)	✗	✗

# A2 · Regulatory Tailwinds — Deep Dive

Note: Fivetran does offer HIPAA Business Associate Agreements on their Business Critical tier. Sensyze advantage remains for teams preferring on-prem or unable to qualify/afford that tier.

DORA

## EU Digital Operational Resilience Act

Effective: 17 January 2025

- Covers all EU financial entities — banks, insurers, investment firms, crypto-asset service providers
- Mandates ICT risk management frameworks and third-party provider oversight
- Direct scrutiny of data integration tooling used in critical operations
- Organisations must demonstrate data sovereignty and the ability to switch providers

GDPR

## General Data Protection Regulation

Enforced: May 2018 | Fines escalating

- Cross-border data transfer requires Standard Contractual Clauses or adequacy decisions
- SaaS-based pipelines that route EU personal data through US infrastructure carry growing legal risk
- Supervisory authority enforcement actions increased 168% between 2021 and 2024
- On-premises deployment eliminates cross-border transfer risk entirely

HIPAA

## US Health Insurance Portability & Accountability Act

Updated enforcement: 2024

- Every vendor touching Protected Health Information (PHI) must sign a Business Associate Agreement
- Cloud-only vendors create compliance exposure for hospitals, insurers and health-tech companies
- On-premises deployment removes PHI from third-party custody entirely
- Market: 6,000+ US hospitals + 900,000+ healthcare businesses affected

DPDP

## India Digital Personal Data Protection Act

India: Effective 2025

- Requires data fiduciaries to store and process Indian personal data within India
- Creates immediate demand for pipelines that guarantee domestic data residency
- No major data integration vendor has built explicit DPDP compliance tooling
- India: 100,000+ funded startups + entire regulated BFSI sector affected

## A3 · Customer Segmentation by Deployment Need

Sensyze targets the three highest-value, most compliance-constrained segments — those with fewest viable alternatives.

Segment	Deployment Requirement	Market Size	Primary Constraint	Sensyze?
Enterprise SaaS	Cloud-only acceptable	Large	Cost	🟡 Secondary
Mid-Market Tech	Cloud preferred, on-prem opt	Medium	Complexity	🟡 Secondary
<b>Regulated Enterprise</b>	On-premises mandatory	Large	Compliance	✅ <b>Primary</b>
<b>Government / Defence</b>	Air-gapped mandatory	Medium	Security	✅ <b>Primary</b>
<b>Financial Services</b>	Data sovereignty required	Large	DORA / RBI	✅ <b>Primary</b>
<b>Healthcare</b>	HIPAA-compliant hosting	Large	Privacy law	✅ <b>Primary</b>

Strategic insight: The four highlighted segments — Regulated Enterprise, Government, Financial Services, and Healthcare — represent the highest-value, most under-served customers with the fewest viable alternatives in the market.

# A4 · 5-Year TCO Breakdown

Assumes: mid-market deployment — 10 pipelines, 1 TB/day data volume, 3-person data team. All figures USD.

Cost Component	Fivetran / Hevo	Airbyte (OSS)	Apache Hop	Informatica	Sensyze
Licence / Subscription	\$2.94M	\$0	\$0	\$2.5M	<b>\$350K (support)</b>
Infrastructure	\$0	\$260K	\$500K	\$1M	<b>\$150K</b>
Engineering overhead	\$730K	\$260K	\$750K	\$250K	<b>\$10K</b>
Training & onboarding	\$0	\$0	\$250K	\$0	<b>\$10K</b>
<b>Total (5 years)</b>	<b>\$3.67M</b>	<b>\$520K</b>	<b>\$1.5M</b>	<b>\$3.75M</b>	<b>\$510K</b>

## Key cost drivers explained:

- Fivetran/Hevo: row-based pricing. At 1TB/day ≈ 870M rows/day, commercial plans reach \$500K–\$730K/year.
- Engineering overhead = FTE cost for pipeline maintenance. Sensyze's visual builder and managed deployment cuts this dramatically.
- Sensyze support cost: \$70K/yr (Enterprise tier) × 5 years = \$350K. Infrastructure estimated at \$30K/yr.

## A5 · Market Data Sources & Validation

Research Firm	Period	Market Size	CAGR	Notes
Straits Research	2025-2033	\$13.44B (2024)	11.25%	Conservative baseline used in deck
SkyQuest Technology	2024-2032	\$16.83B (2024)	12.2%	Upper range
Grand View Research	→ 2030	\$15.18B (2024)	12.1%	Mid estimate
Precedence Research	2025-2034	\$17.10B (2025)	12.06%	Most recent
MarketsandMarkets	→ 2030	\$17.58B (2025)	10.9%	Conservative CAGR

### Figures used in this deck:

- TAM: "\$14B+" — derived from Grand View Research (\$15.18B, 2024). Rounded conservatively.
- CAGR: "11-12%" — consensus across all five firms. Range is verified.
- SAM: "\$4.5B" — approximately 30-33% of global total (EU + India regulated sectors). Analyst consensus places EU at ~28-33%.
- SOM: "\$300M" — internal estimate for year 3-5 addressable pipeline in target verticals. Not verified by third party.