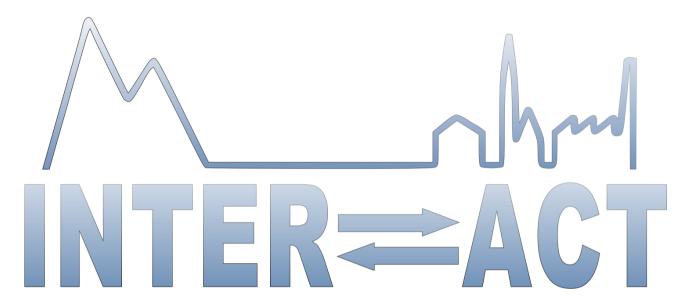# Integrating Activities for Advanced Communities

D3.7- Business plan for INTERACCESS commercial use

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Dissemination Level		
PU	Public	
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the Consortium (including the Commission Services)	
CO	Confidential, only for members of the Consortium (including the Commission Services)	X

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Publishable Executive Summary

The INTERACCESS platform, developed under the INTERACT project, simplifies the management of Transnational Access (TA) and Remote Access (RA) for research infrastructures. It's comprehensive suite of services includes call management, scheduling, document sharing, and advanced reporting, all compliant with EU standards. Over the years, INTERACCESS has evolved with continuous updates to improve functionality and user experience.

Since its launch, INTERACCESS has supported multiple TA/RA calls, evolving into an advanced Transnational Access Platform (TAP). This enhanced platform leverages cutting-edge features to meet diverse user needs efficiently. It is designed to provide flexible customization while maintaining high standards of efficiency and compliance.

TAP's target market includes funding agencies, research consortia, and large-scale initiatives. It's demonstrated success in EU-funded projects positions it as a preferred TA management solution.

The marketing strategy focuses on leveraging TAP's proven success to expand its market reach. Key initiatives include brand development, participation in research-focused events, digital outreach, and strategic partnerships. A flexible and scalable sales model ensures TAP meets the needs of both small research consortia and large networks.

Financial projections anticipate sustainable growth driven by recurring revenues, customization services, and client acquisition. TAP's scalability and adaptability make it an indispensable tool for the research community, offering exceptional value in streamlining TA management and compliance.

1. General Overview

Launched in 2016 within the INTERACT II Project, the INTERACCESS platform was designed to address the need for a robust service that streamlines the management of both Transnational Access (TA) and Remote Access (RA) to research infrastructures.

The platform aimed to simplify all access-related activities, from call management and application processes to EU reporting, ensuring a seamless user experience. It handled these activities in two main areas:

- **Call Management**: Overseeing the entire lifecycle of a call, from opening and grant issuance to project reporting.

- **Access Booking System**: Managing the scheduling of available access to INTERACT research stations and cross-checking them with calls' operational periods.

Over the years, INTERACCESS has been continually updated and customized to enhance performance and provide better support for access management. It has successfully facilitated eleven TA and RA calls for the INTERACT II (GA 730938) and INTERACT III (GA 871120) projects.

From 2020 to 2023, the INTERACCESS platform has continually evolved, integrating new features, such as TINDERACT functionality, that facilitates the monitoring of calendar accesses to research stations, and other advancements that have significantly enhanced the platform's ability to provide increasingly precise and insightful EU compliant reports, driving innovation and efficiency in access management.

In 2024, the strategic decision to integrate the INTERACCESS platform into two major EU funded infrastructure projects, POLARIN (GA 101130949) and AQUARIUS (GA 101130915), led to new needs for innovation and customization. The existing INTERACCESS workflow served as the foundation for developing the new Transnational Access Platform (TAP) workflow. By leveraging cutting-edge technological innovations, the TAP service was enhanced and its functionalities significantly improved, paving the way for a more efficient and consolidated access management system.

2. Transnational Access Platform (TAP)

TAP aims to establish a robust standard continuously innovating process and experimenting across various fields and conditions. This standard is designed to be simple and secure for applicants, comprehensive enough to generate the reports required by involved organizations, and thorough in allowing editors to check and correct applications throughout the entire process.

TAP's strength lies in its flexibility, built upon the robust workflow processes established during the INTERACCESS development and further enhanced through new advancements. The most important

characteristic of the TAP process is its ability to adhere to standards while accommodating customization and exceptions.

2.1. Main Services

The main services provided by TAP includes:

- **Call Management**: Overseeing the entire lifecycle of a call, from opening and grant issuance to project reporting. It includes support from experts with years of experience in call management, who will help to address the needs and focal points.

- **Document Sharing System**: New section designed inside TAP dedicated to document sharing. Inside the document library it is possible to upload all needed documentations; applicant guidelines for application, document templates for CV, recommendation letters, scientific projects, scientific reports, evaluation guidelines for evaluators, etc. For every document a specific level of confidentiality can be set, making the document public, private (available only for editor) or available for a specific category of users (i.e. available only for evaluators, only for applicant...).

- **Access Booking System**: Refined over the years through standard protocols and guidelines, this system allows the comparison and standardization of diverse scheduling methods for all available access. TAP includes several new features for streamlined and efficient, high quality access provision across domains and geographical regions. For example, in the AQUARIUS project, a variety of research infrastructures, from land, river, and sea to sky, are managed through TAP.

- **Reporting**: Providing precise, customizable reports compliant with European standards and following best practices within the research community, ensuring an interdisciplinary approach.

- **Authentication**: Crucial feature in TAP is user's registration, managing and roles/permission allocation. The user entity provider Keycloak, an Open Source identity and access management, allows TAP secure services for user authentication and login across multiple applications with the same Keycloak account. For example, other applications can use the centralized identity of TAP using the openId protocol, oauth2 or SAML. This allows the same credentials to be used across multiple software platforms, eliminating the need to repeatedly manage login, registration, or password recovery. Additionally, enterprise systems such as LDAP can be integrated as an account source, further enhancing the seamless user experience.

2.2. The Support

The support provided by TAP includes:

- **Technical Support** for TAP's customization and development coordinated by experts, specialized in designing and user-based integrated web application, able to support both innovation and customization. The aim is to ensure the technical management of the calls for proposals, including the launch of calls, proposal submission, logistic evaluation, and follow-up (e.g. to ensure the reporting and answers to feedback questionnaires are provided).

- **Management Support** for development of EU compliant flow and tackle the challenge to identify specific needs. Experts will provide guidance for developing the scientific framework, define the evaluation criteria for selecting applications, perform the scientific evaluation of submitted

proposals, and assess the contributions of projects towards the challenges, to adapt the subsequent calls for proposals accordingly.

3. Target Market

In line with the principle of "*from innovation to business*", initiatives have been undertaken to explore the commercialization of TAP. The platform's flexibility and compliance with EU TA management requirements make it suitable for:

- **Funding Agencies**: Interested in adopting TAP to manage their application calls.

- **ERICS and EU-funded Research Infrastructure Consortia**: The platform can be customized to meet their specific needs, as EU TA management standards are uniform across various projects.

The system's adaptability and proven efficiency, coupled with its ability to integrate into various operational frameworks, make it an indispensable tool for a wide array of research and funding entities. Its comprehensive functionality, including streamlined TA management and reporting, ensures that organizations can achieve both efficiency and compliance in their processes.

Additionally, the alignment of TAP with EU requirements and its capacity for customization provide a significant competitive edge. By targeting multi-partner infrastructure research projects, TAP positions itself as one of the best platforms for TA management, capable of addressing many operational needs while delivering consistent value.

4. Competitive Analysis

When INTERACCESS was developed, no comparable systems were available on the market.

While some ad-hoc platforms, (such as *ARIA, Projektträer Jülich, PT Outline*), had been created, they were limited in scope and functionality. They notably lacked essential features such as a comprehensive research infrastructure (RI) management interface, an advanced reporting module, and a user-friendly GUI (graphical user interface), which are critical for efficient TA management.

INTERACCESS not only filled these gaps but also introduced an integrated, all-in-one solution. This comprehensive approach streamlined workflows, reduced administrative burdens, and significantly enhanced the user experience for both operators and applicants.

In 2023, the platform's value was clearly recognized when two Horizon RIA Projects, POLARIN and AQUARIUS, selected INTERACCESS as their TA management system. The adoption of INTERACCESS by these large-scale projects underscored its capability to integrate and leverage successful practices from prior EU initiatives.

The system's ability to streamline all aspects of TA management, from application submission to reporting, and its user-friendly design made it a natural choice for these consortia. Furthermore, this recognition highlighted the platform's distinctive advantage in providing a centralized, efficient, and comprehensive solution, offering significant value in terms of time savings, operational coherence, and compliance with EU standards.

5.   Roles and responsibilities

In 2020, the INTERACT Non-Profit Association (INPA) was established to ensure the long-term sustainability of the INTERACT network and its associated tools.

As part of this mission, INPA took on the responsibility of overseeing the INTERACCESS platform's ongoing evolution and ensuring its continued relevance and effectiveness.

To formalize this transition and foster collaboration, a comprehensive Memorandum of Understanding (MoU) was signed between INPA and INKODE. This agreement outlined a collaborative framework for the ongoing development, maintenance, hosting, and potential expansion of INTERACCESS and its related software, ensuring the platform remains at the forefront of TA management solutions.

5.1. INKODE Responsibilities

The responsibilities of INKODE include to:
- develop, maintain, and host the INTERACCESS platform in alignment with technical requirements provided by INPA.

- implement updates and new functionalities to keep the platform competitive and user-friendly.

- offer dedicated technical support, ensuring smooth platform usage and troubleshooting as needed.

5.2. INPA Responsibilities

The responsibilities of INPA include to:
- define and communicate the technical requirements necessary for platform updates and enhancements.

- actively collaborate with INKODE to resolve issues and optimize platform performance.

- allocate appropriate funding for development and maintenance activities, ensuring timely reimbursements to INKODE for incurred expenses.

- promote the platform's adoption within the research and funding communities, leveraging its strengths as a comprehensive TA management solution.

This partnership underscores a shared commitment to innovation, quality, and adaptability, ensuring that INTERACCESS remains a leading solution in the TA management domain.

6.   Marketing Strategy

The TAP's success with the POLARIN and AQUARIUS projects serves as a foundation for broader market adoption.

The marketing strategy aims to leverage its proven success to capture new markets and establish the platform as the preferred TA management solution across the EU and beyond. Key components of this strategy include:

Brand Development

- Release a renovated version of the platform, TAP (Trans-national Access Platform), emphasizing advanced features and enhanced usability to meet diverse client needs.

- Establish TAP as a recognizable brand within the research and funding community through consistent branding and targeted communications

Event Participation

- Attend high-profile EU and research-focused events such as ICRI (International Conference on Research Infrastructures) to showcase TAP. These events provide opportunities to network with prospective clients and stakeholders, build credibility, and demonstrate the platform's capabilities through live presentations and demonstrations.

Digital Outreach

- Develop and maintain a dedicated webpage for TAP on both INKODE and INPA web sites. The webpage will serve as a central hub for information, user testimonials, and access to demonstrations.

- Utilize the EU Funding & Tenders Portal's Partner Search tool to promote TAP as a tailored solution for consortia seeking TA management tools.

- Create engaging digital content, including recorded webinars, tutorial videos, and case studies, to reach a broader audience and highlight the platform's benefits.

Strategic Partnerships

- Collaborate with existing users like POLARIN and AQUARIUS to gather feedback and refine the platform for broader applicability.

- Leverage testimonials and success stories from these projects to build credibility and attract new clients.

Advertising Campaigns

- Run targeted advertising campaigns on professional and academic platforms frequently used by potential clients such as funding agencies and research consortia.

7. Sales Model and Pricing

The sales model for TAP is designed to accommodate the diverse needs of its users while ensuring sustainability for both INPA and INKODE. It includes a flexible pricing structure to address varying project requirements and budgets.

TAP sales model's goal is to maintain a cost-effective streamlined package that includes essential services such as installation, a basic fee, hosting, analytics, and monitoring. This approach helps to expand the availability of TAP, promoting standardization through the widespread adoption of a consistent system.

At the heart of TAP is its highly stable and tested software. The sales model is designed to be human-centric, built around comprehensive consulting and services, ensuring flexibility and tailored support for each client.

7.1. Services available

The services available are summarized in Table 1.

Table 1. Services available for TAP users.

Service	Frequency	Responsible partner
Installation	One time	INKODE
Basic fee	Annual	INPA
Hosting	Annual	INKODE
Analytics Service	Annual	INKODE
Monitoring Service	Annual	INKODE
Customization	Person Days	INKODE
Technical Support	Person Days	INKODE
Management Support	Person Days	INPA
Advanced training	Person Days	INPA/ INKODE

By integrating these services in different combinations, our sales model guarantees exceptional flexibility and scalability. It is designed to cater to a diverse range of potential clients, from smaller research consortia to large funding agencies, all while upholding TAP's esteemed standards of performance and service.

Every potential client needs will be carefully evaluated case-by-case to ensure that the best combination of services is provided.

7.2. Case Example

To illustrate the flexibility in the system, we can describe two contrasting use case examples:

- For smaller size projects, we offer a streamlined package that includes essential services such as installation, a basic fee, hosting, analytics, and monitoring. For these types of projects, we recommend enhancing the basic package with a few person-days dedicated to technical support and some management support. This addition ensures smooth operation and optimal performance. In this scenario, no customization or advanced training is required.

- For a large project (i.e. an EU Horizon funded consortium) we recommend to invest in customization, advance training, intensified technical and management support for the whole project duration. As for POLARIN and AQUARIUS projects, both INKODE and INPA can be involved in the consortium as beneficiaries or subcontractor, assuring a continuous support both for technical and functional issues.

8. Financial Projections

Financial projections for TAP are based on the expanding adoption of the platform by EU-funded RIA projects, reflecting a growing recognition of its value in simplifying and enhancing TA management. These projections rely on data from comparable projects, including POLARIN and AQUARIUS, which provide benchmarks for client valuation and revenue potential.

8.1. Revenue Projections

Over the next five years, TAP is expected to secure a significant client base within the EU research community. Key factors influencing revenue growth include:

- **Client Acquisition**: Targeting an increasing number of ERICs and RIA networks that require robust TA management solutions.

- **Recurring Revenue Streams**: Annual fees for hosting, maintenance, and support services ensure a steady income base.

- **Custom Services**: Customization, training, and call management services contribute to variable income based on client-specific needs.

8.2. Cost Analysis

Projections include detailed analysis of fixed and variable costs associated with maintaining and improving the platform. These include:

- **Fixed Costs**: Covering hosting, basic maintenance, and platform updates.

- **Variable Costs**: Including customization requests, advanced support services, and marketing expenses.

8.3. Growth Potential

The platform's scalability ensures its ability to handle increased demand as more research and funding entities adopt TAP. Strategic investments in marketing and platform development will further enhance client acquisition and retention, driving sustainable revenue growth.

This financial outlook underscores TAP's potential to deliver consistent returns while expanding its impact on the research and funding landscape.