

D2.3

Brokerage System

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Abstract

The Brokerage System is a crucial part of the NGI Sargasso project that facilitates collaboration between entities from different regions and countries. The matchmaking process is an important aspect of this system, which has been designed to make it more efficient, given the complexity of the call and the need for teams from European, USA and Canadian entities to apply. The matchmaking procedure is carried out by the NGI Sargasso team by cross-referencing data from European and U.S. entities to create balanced teams with similar areas of collaboration. The matchmaking process plays a crucial role in the success of the NGI Sargasso matchmaking system, as it allows entities to collaborate effectively, fostering innovation and driving progress in the Next Generation Internet field. The final step in the process is the creation of consortia that will apply together to open calls. The role of the EU manager is to facilitate this process, ensuring that it is as smooth and efficient as possible for all entities involved.



Keywords

NGI Sargasso, Brokerage, Matchmaking, Open Call, USA, Canada, EU, Next Generation Internet.

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CL	Classified information as referred to in Commission Decision 2001/844/EC	
CO	Confidential to GENOMED4ALL project and Commission Services	

*** Deliverable types:**

R: document, report (excluding periodic and final reports).

DEM: demonstrator, pilot, prototype, plan designs.

DEC: websites, patent filings, press and media actions, videos, etc.

OTHER: software, technical diagrams, etc.

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Abbreviations

NGI	Next Generation Internet
AI	Artificial Intelligence
USA	United States of America
EU	European Union
CA	Canada



1. Executive summary

The advent of the digital age has transformed the landscape of research and innovation across the globe. As international collaboration becomes increasingly vital to address complex, multifaceted challenges, it is essential to facilitate seamless connections between researchers and institutions from different regions. In this context, the NGI Sargasso Brokerage System project aims to connect USA-Canadian researchers with their European counterparts, fostering collaboration, knowledge exchange, and the development of ground-breaking solutions that could jointly apply to our calls for proposals.

The Brokerage System has been designed to bridge the gap between research communities in the United States, Canada, and Europe. By leveraging a system of this nature, we expect to lower the entry bar to our general open call. Building the connections among both sides of the Sargasso might be challenging in some cases and having this free support services may facilitate the access to the programme to entities which might be discouraged due to their lack of network on the other side.

The platform will serve as a one-stop-shop for researchers, innovators, and institutions seeking to establish partnerships, share resources, and pursue joint projects. The system will cater to a diverse range of scientific disciplines within the Next Generation Internet topics, ensuring that experts from various fields can effectively collaborate and contribute to the global research ecosystem.

The primary objectives of the NGI Sargasso Brokerage System are:

- ❑ To simplify the process of identifying and establishing connections between researchers and institutions in the United States, Canada, and Europe.
- ❑ To provide a user-friendly platform that supports the seamless exchange of information, resources, and expertise.
- ❑ To foster an environment of open innovation and collaboration, encouraging the development of interdisciplinary solutions to pressing global challenges.
- ❑ To promote international cooperation and contribute to the growth and impact of the research communities across the participating regions.

To achieve these objectives, the NGI Sargasso Brokerage System will incorporate a range of features tailored to the needs of its users, verified profiles, profile search functionality, personalised recommendations for meetings, direct access to the open call applications and direct touch with NGI Sargasso team to be informed, first-hand, of project events and outcomes.

In conclusion, the NGI Sargasso Brokerage System is set to become an indispensable tool for fostering international collaboration and innovation within the Next Generation Internet research community. By offering a comprehensive, user-friendly platform that addresses the challenges of connecting researchers and institutions across the United States, Canada, and Europe, the system will not only facilitate seamless collaboration but also contribute to the growth and impact of the research communities within these regions. The platform's features, designed with the needs of its users in mind, will enable more entities to participate



in the program, ultimately leading to the development of ground-breaking solutions under the Next Generation Internet topics. As we move forward, the NGI Sargasso Brokerage System will continue to evolve and adapt, ensuring that it remains a vital resource for driving international cooperation and unlocking the full potential of cross-border research and innovation.

2. Introduction

NGI Sargasso project introduction

The EU, the USA and Canada share the values of democracy, human rights, the rule of law, and economic and political freedom, and have overlapping foreign policy and security concerns. Close cooperation and strategic relations with the USA and Canada remain a priority for the EU.

The Next Generation Internet (NGI) initiative supports this vision of building bridges internationally, especially with the USA and Canada. In fact, there have been many initiatives since 2016 focused on enhancing collaboration and cooperation in the development of NGI technologies, services, and standards with the USA and/or Canada. The advancement of emerging topics for the EU NGI and corresponding USA and Canadian programmes such as trust and data sovereignty, digital identity, internet architecture renovation, decentralised technologies, and standards, it is of outmost importance to shape the future Internet.

In this context, **NGI Sargasso's mission is to catalyse transatlantic collaboration** on the development and experimentation of innovative ideas, implementation of prototypes, and contribution to standards and open-source communities on technology trends with the potential to reshape tomorrow's NGI technologies and services.

The project will run five open calls for proposals, attracting +300 EU + USA and/or Canada teams working on emerging topics for the Next Generation Internet, **and will support up to 96 projects** that will be benefited from both equity-free funding and capacity-building services in a 9-month programme.

NGI Sargasso Brokerage System introduction

NGI Sargasso Brokerage System is a platform designed by Sploro that aims to build bridges between the research communities in the United States, Canada and Europe. The main objective of the platform is to simplify the process of identifying and establishing connections between researchers and institutions in these regions, thus reducing the barrier to entry to the general open call, which requires the participation of European entities in collaboration with others from the USA and/or Canada.

The Brokerage System is designed to serve as a single-entry point for researchers, innovators and institutions wishing to establish partnerships, share resources and conduct joint projects. It will cater to a wide range of scientific disciplines within the Next Generation Internet themes, ensuring that experts from diverse fields can collaborate effectively and contribute to the global research ecosystem.



To achieve its objectives, the NGI Sargasso Brokerage System incorporates several features to facilitate networking, such as verified profiles, profile search functionality, personalised meeting recommendations, direct access to open call requests and direct contact with the NGI Sargasso team to be informed, first-hand, of project developments and outcomes. The platform's features are tailored to the needs of its users, allowing more entities to participate in the programme and ultimately leading to the development of ground-breaking solutions within the framework of Next Generation Internet themes.

In conclusion, the NGI Sargasso Brokerage System is designed as a comprehensive, user-friendly platform that addresses the challenges of connecting researchers and institutions across the United States, Canada and Europe. It fosters an environment of open innovation and collaboration, encouraging the development of interdisciplinary solutions to press global challenges. The platform promotes international cooperation and contributes to the growth and impact of research communities in participating regions.

The process

The NGI Sargasso Brokerage System is a step-by-step process designed to facilitate international collaboration and innovation within the Next Generation Internet research community. Here are the steps involved in the entire process of the NGI Sargasso Brokerage System:

Step 1: Create a profile on the Sploro Platform

The first step for users is to create a profile on the Sploro Platform to apply for the NGI Sargasso Brokerage System. The user needs to provide their basic details, scientific disciplines, areas of expertise, and other relevant information.

Step 2: Validation Stage

Once the user creates their profile, the Sploro team takes care of the validation stage. The created profiles are validated, and the user is notified of the validation status. The validation process ensures that the user's profile is complete and meets the required standards.

Step 3: Join the NGI Sargasso Community

Once the profile is validated, it is added to the NGI Sargasso community to carry out the matchmaking and creation of the work and collaboration teams. The community consists of researchers, innovators, and institutions seeking to establish partnerships, share resources, and pursue joint projects. The NGI Sargasso Brokerage System's platform enables experts from various fields to collaborate and contribute to the global research ecosystem.

Step 4: Matchmaking and creation of teams

The NGI Sargasso Brokerage System facilitates matchmaking between researchers and institutions across different regions. The platform simplifies the process of identifying and establishing connections between researchers and institutions in the United States, Canada, and Europe. The system uses advanced algorithms to match the right individuals and institutions, thus creating work and collaboration teams. The platform offers personalized recommendations for meetings, and users can directly access open call applications.



Step 5: Apply to open calls

The last step is the application process in the open calls of the teams that have been formed thanks to the platform. The NGI Sargasso Brokerage System provides direct touch with the NGI Sargasso team to stay informed of project events and outcomes. The open calls are designed to encourage the development of interdisciplinary solutions to press global challenges. The NGI Sargasso Brokerage System's platform promotes international cooperation and contributes to the growth and impact of the research communities across the participating regions.

In conclusion, the NGI Sargasso Brokerage System is a comprehensive platform that streamlines the process of identifying and establishing connections between researchers and institutions in the United States, Canada, and Europe. The platform provides a multi-step process that enables users to create a profile, get validated, join the NGI Sargasso community, carry out matchmaking, create work and collaboration teams, and apply for open calls. The platform's features are designed with the needs of its users in mind, making it a vital resource for driving international cooperation and unlocking the full potential of cross-border research and innovation.

NGI Sargasso Brokerage System operations

The NGI Sargasso Brokerage System is integrated in the **preparation phase**, an essential part of the Open Calls process, which involves providing interested entities with all the necessary information and tools to participate in the NGI Sargasso program.

In this case, the preparation phase includes the release of **guidelines on 01.06.23**, which will provide potential applicants with detailed information on the NGI Sargasso program's objectives, topics, eligibility criteria, and application requirements. The guidelines will serve as a roadmap for interested entities, helping them understand what the NGI Sargasso program is all about and what they need to do to participate.

Additionally, during the beginning of May, **the Sploro platform and the Brokerage system will be made available to interested entities**. The Sploro platform will enable users to create profiles and participate in the Brokerage system that will serve as hub for the community around NGI Sargasso and as a matchmaking tool, connecting users with relevant partners and resources. This platform can be accessed through the link provided:

cascadefunding.sploro.eu/application/new?program=ngi-sargasso-brokerage-service

Overall, the preparation phase is crucial for ensuring that interested entities are well-informed and equipped to participate in the NGI Sargasso program successfully. By providing clear guidelines and access to user-friendly tools, the preparation phase can lower the entry bar for potential applicants, ensuring a more diverse and competitive applicant pool.



Ways to promote the service

The NGI Sargasso Brokerage service will be promoted as an integral part of the Open Calls application process, and as such, it will be included in all the materials and communications produced within the Open Calls Dissemination and Communication campaign. This campaign will use different channels, depending on the target groups addressed:

- ❑ Project website: ngisargasso.eu
- ❑ Social media campaigns organised through the NGI Sargasso profiles ([LinkedIn](#), [Twitter](#) and [Mastodon](#)) as well as the partners'.
- ❑ Newsletters:
 - NGI Sargasso project newsletter and the partners' Newsletters (ESF newsletter goes to nearly 10,000 researchers across over 80 countries).
 - Third-party Newsletters, such as the NGI Newsflash produced by the NGI Outreach Office, or the NGI Digest, produced by the [NGI online community platform](#), with +4,000 subscribers between the both of them.
- ❑ Press Releases generated during the Open Calls lifetime.
- ❑ Mailing campaigns addressed to a network of more than 10,000 contacts.
- ❑ NGI Sargasso Infowebsinars and online Matchmaking events, which will happen at least twice per cut-off date.
- ❑ Events attended by the project and its partners, as well as through cross-dissemination actions with the NGI Outreach Office and collaboration with related projects such as NGI Enrichers.

Also, the Brokerage service will be included, along with the information provided to potential applicants, in all the project materials produced during the Open Calls campaign, such as flyers and videos.

3. NGI Sargasso Brokerage application

The **registration process** for the NGI Sargasso Brokerage System is **straightforward and user-friendly**. To start, users must navigate to the registration page on the [Sploro platform](#) and **fill in the required fields**. These fields include the startup/company/project name, first name, last name, email, and password. This information is necessary for the system to create a unique profile for each user and facilitate the matchmaking process.

Additionally, users can choose to log in using their Google account, which can simplify the registration process even further. This option enables users to import their Google profile information automatically, saving time and effort.



The screenshot shows a web interface for the Sploro platform. At the top, a dark blue header contains the Sploro logo and the text "You are applying for NGI Sargasso Brokerage Service". Below this, the main content area is titled "Start your application". It features a form with several input fields: "Startup/Company/Project Name", "First Name", "Last Name", "Email", and "Select your password". A red button with a Google logo and the text "Sign Up with Google to fill the form below" is positioned above the "First Name" field. Below the "Select your password" field, there are two checkboxes for terms and conditions, and a blue "Next" button at the bottom. To the right of the main form, a smaller box contains the text "Already have an account?" and a blue "Go To Login" button with a right-pointing arrow.

FIGURE 1. REGISTRATION FORM

Once the user has entered the necessary information and agreed to the platform's terms and conditions, **they will receive a confirmation email** to the address provided during registration. This email will contain a **link** that the user must click **to confirm their account** and activate it. After the account is activated, the user will be able to log in to the platform and modify their profile, including adding additional information such as their areas of expertise and current projects.

Overall, the registration process for the NGI Sargasso Brokerage System is designed to be quick and easy, allowing users to start exploring the platform's features and capabilities in a matter of minutes.



Account Activation

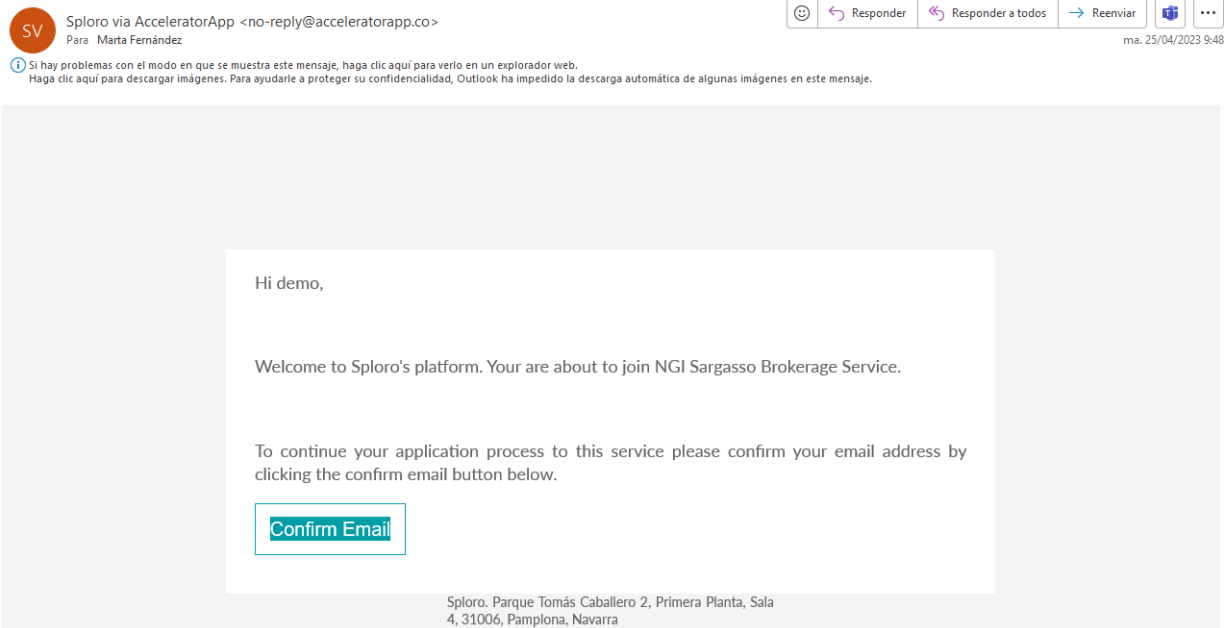


FIGURE 2. CONFIRMATION EMAIL

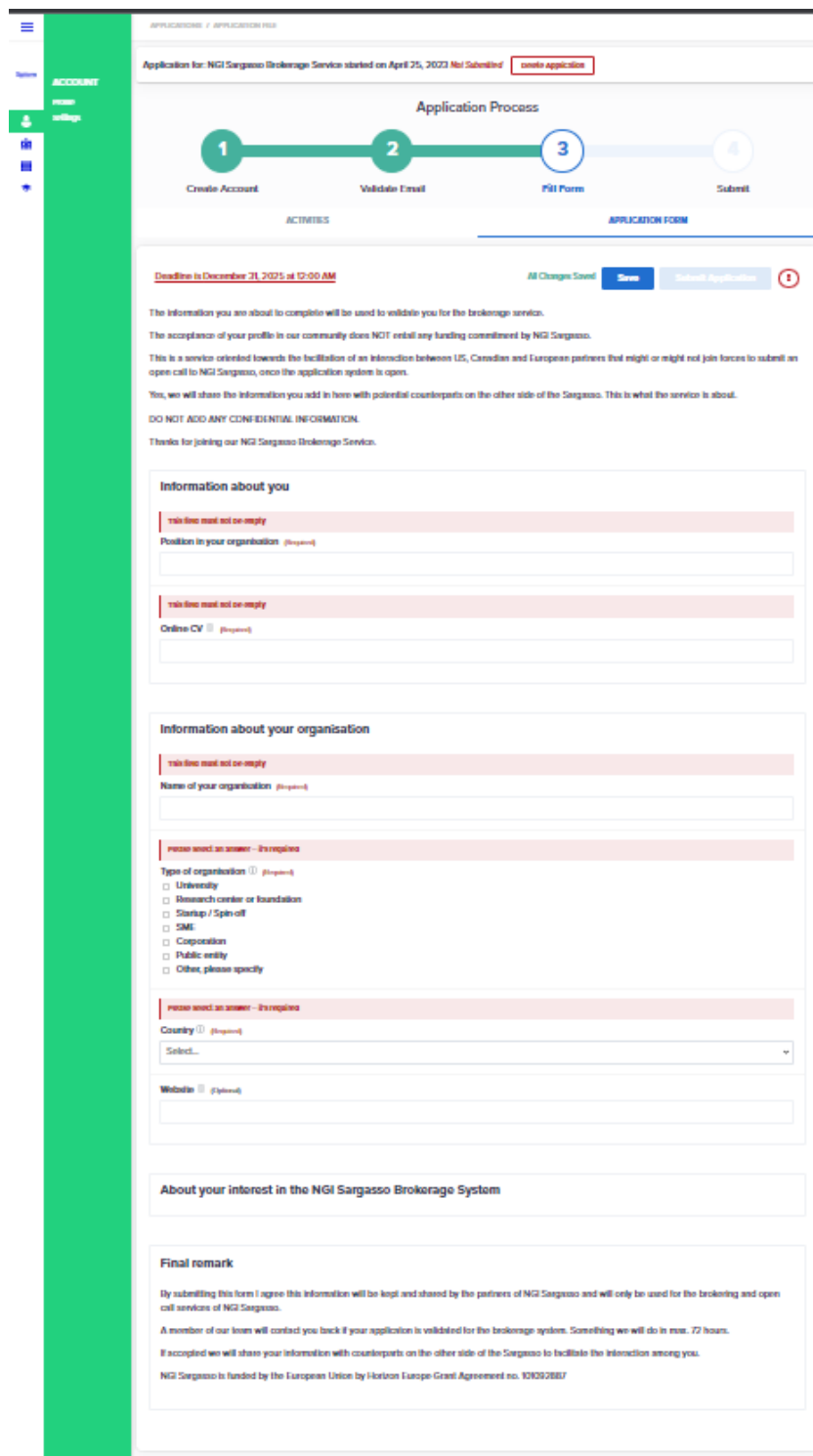
The next step is to fill in the **NGI Sargasso Brokerage System application form**, which requires the applicant to provide personal information and details about their organisation. This includes the name of the startup/company/project, the type of organisation, the country where it is based and the organisation's website.

In addition to this basic information, there is a section on the application form where applicants can **express their interest** in the NGI Sargasso Brokerage System. This information will be made publicly available to **potential partners** who also wish to develop a future proposal for the NGI Sargasso in open calls for proposals and to form the teams that will apply.

The application form is designed to collect relevant information about the applicant and their organisation in a straightforward way, which will be used to determine whether they are a good fit for the NGI Sargasso Brokerage System. This information will also be used to create a profile for the applicant on the Sploro platform, which will allow them to participate in the matching and team building process. **The information required will be kept simple but useful, with the idea that it is in the videocalls that they will be able to reach out and get to know each other to create the teams.**

Overall, the application process for the NGI Sargasso Brokerage System is straightforward and designed to be easy to use. By providing basic information about the applicant and their organisation, the application form allows the NGI Sargasso team to assess whether the applicant is a good fit for the programme and to help match them with potential partners with similar interests.





Application for NGI Sargasso Brokerage Service started on April 25, 2023 Not Submitted [create application](#)

Application Process

- 1 Create Account
- 2 Validate Email
- 3 Fill Form
- 4 Submit

ACTIVITIES APPLICATION FORM

Deadline is December 31, 2023 at 12:00 AM [All Changes Saved](#) [Save](#) [Submit Application](#) 1

The information you are about to complete will be used to validate you for the brokerage service.
 The acceptance of your profile in our community does NOT entail any funding commitment by NGI Sargasso.
 This is a service oriented towards the facilitation of an interaction between US, Canadian and European partners that might or might not join forces to submit an open call to NGI Sargasso, once the application system is open.
 Yes, we will share the information you add in here with potential counterparts on the other side of the Sargasso. This is what the service is about.
 DO NOT ADD ANY CONFIDENTIAL INFORMATION.
 Thanks for joining our NGI Sargasso Brokerage Service.

Information about you

this field must not be empty
 Position in your organisation (required)

this field must not be empty
 Online CV (required)

Information about your organisation

this field must not be empty
 Name of your organisation (required)

please select an answer - it's required
 Type of organisation (required)
☐ University
☐ Research center or foundation
☐ Startup / Spin off
☐ SME
☐ Corporation
☐ Public entity
☐ Other, please specify

please select an answer - it's required
 Country (required)
 Select...

Website (required)

About your interest in the NGI Sargasso Brokerage System

Final remark

By submitting this form I agree this information will be kept and shared by the partners of NGI Sargasso and will only be used for the brokering and open call services of NGI Sargasso.

A member of our team will contact you back if your application is validated for the brokerage system. Something we will do in max. 72 hours.

If accepted we will share your information with counterparts on the other side of the Sargasso to facilitate the interaction among you.

NGI Sargasso is funded by the European Union by Horizon Europe Grant Agreement no. 101092887

FIGURE 3. APPLICATION FORM



An email will be sent to applicants once their proposal has been successfully uploaded:

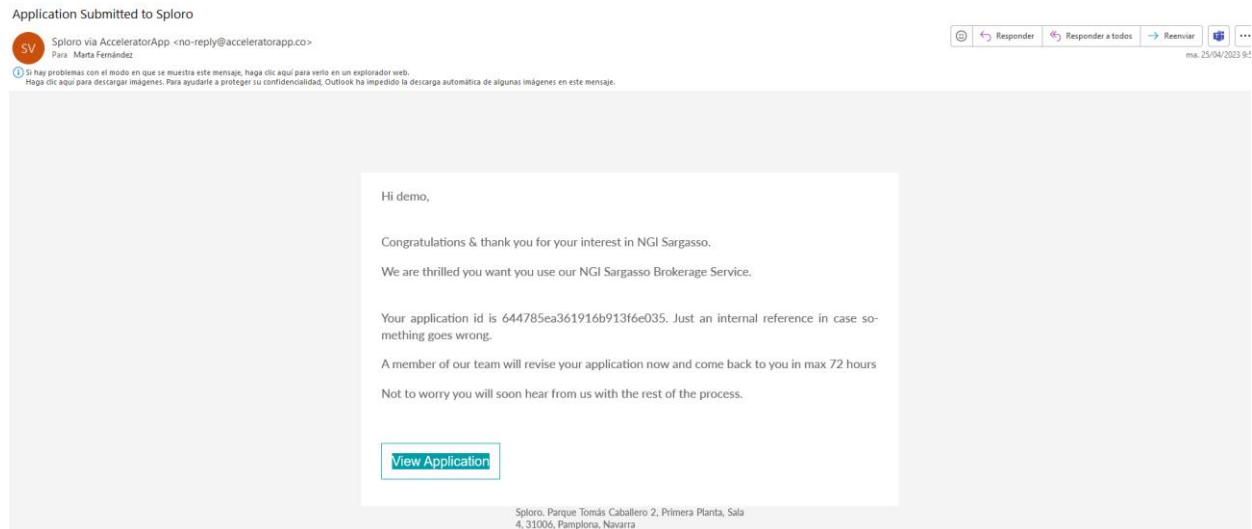


FIGURE 4. CONFIRMATION EMAIL OF APPLICATION SUBMITTED

4. Manual validation of profiles

Once the form is filled, **the Sploro team will carry out a short assessment validation** to activate the account or discard the application in case of ineligibility. Three aspects will be considered:

- ☐ Eligible country.
- ☐ Not a corporation.
- ☐ Truthful information provided in the form.

The idea of this validation is to prevent companies that cannot apply from accessing the programme and slowing down the process.

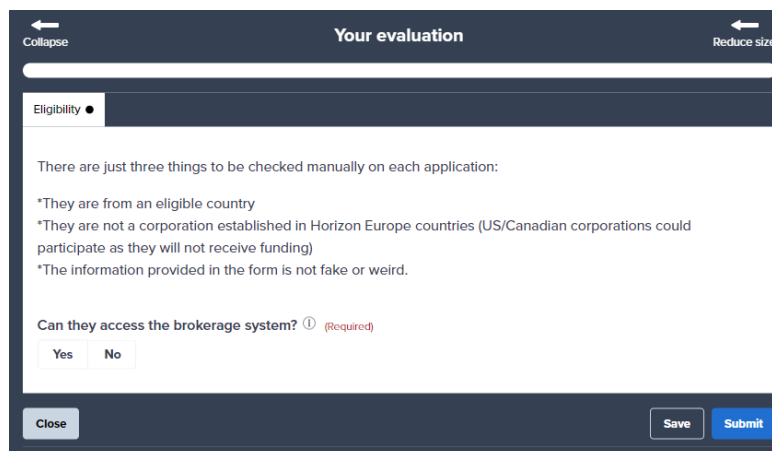


FIGURE 5. EVALUATION FORM



This project has received funding from the European Union's Horizon Europe Research and Innovation program under Grant Agreement No. 101092887

Those proposals selected to be part of the NGI Sargasso Brokerage System will be informed via email and also on the Sploro's platform. After this email, the matchmaking process as such begins.

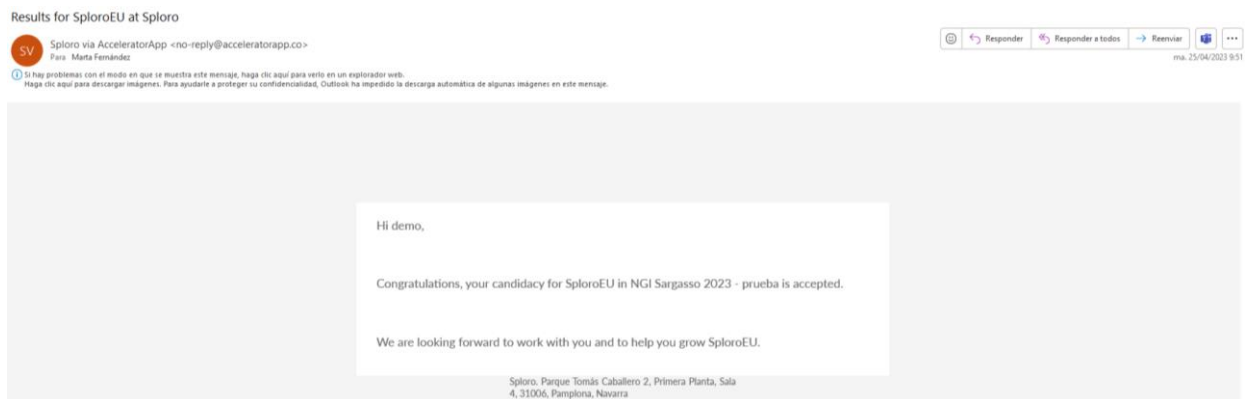
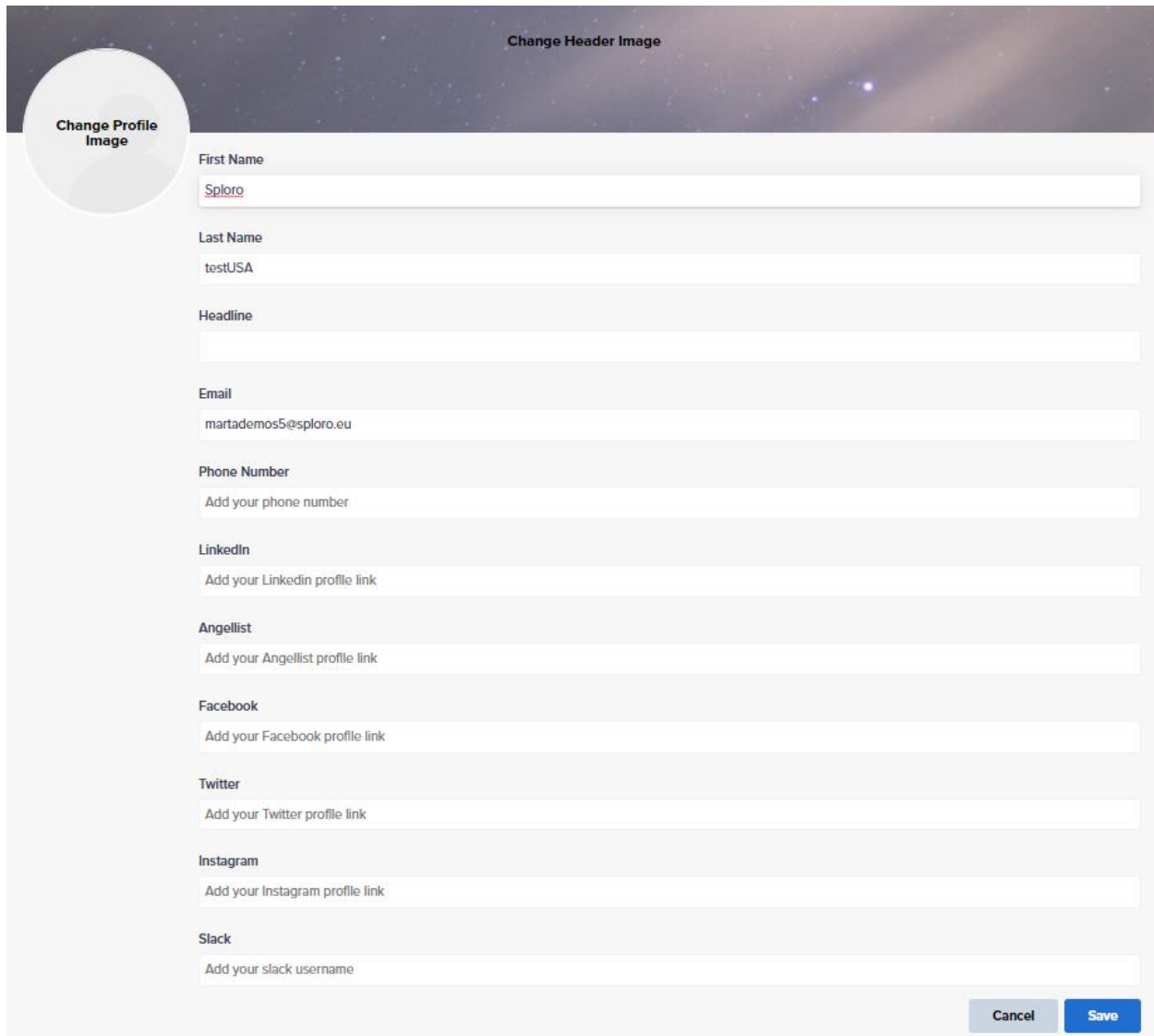


FIGURE 6. CONFIRMATION EMAIL OF APPLICATION ACCEPTED

Once users have been accepted and validated within the platform, **they must complete their profile in detail**, with **relevant information** about their interests and areas of study. This is important because, although direct contact will be made in the video call, it is the consortium's way of knowing the **interests of each one** and being able to align and unite them with those of another participant on the other side of the Atlantic.





Change Header Image

Change Profile Image

First Name
Sploro

Last Name
testUSA

Headline

Email
martademos5@sploro.eu

Phone Number
Add your phone number

LinkedIn
Add your LinkedIn profile link

Angellist
Add your Angellist profile link

Facebook
Add your Facebook profile link

Twitter
Add your Twitter profile link

Instagram
Add your Instagram profile link

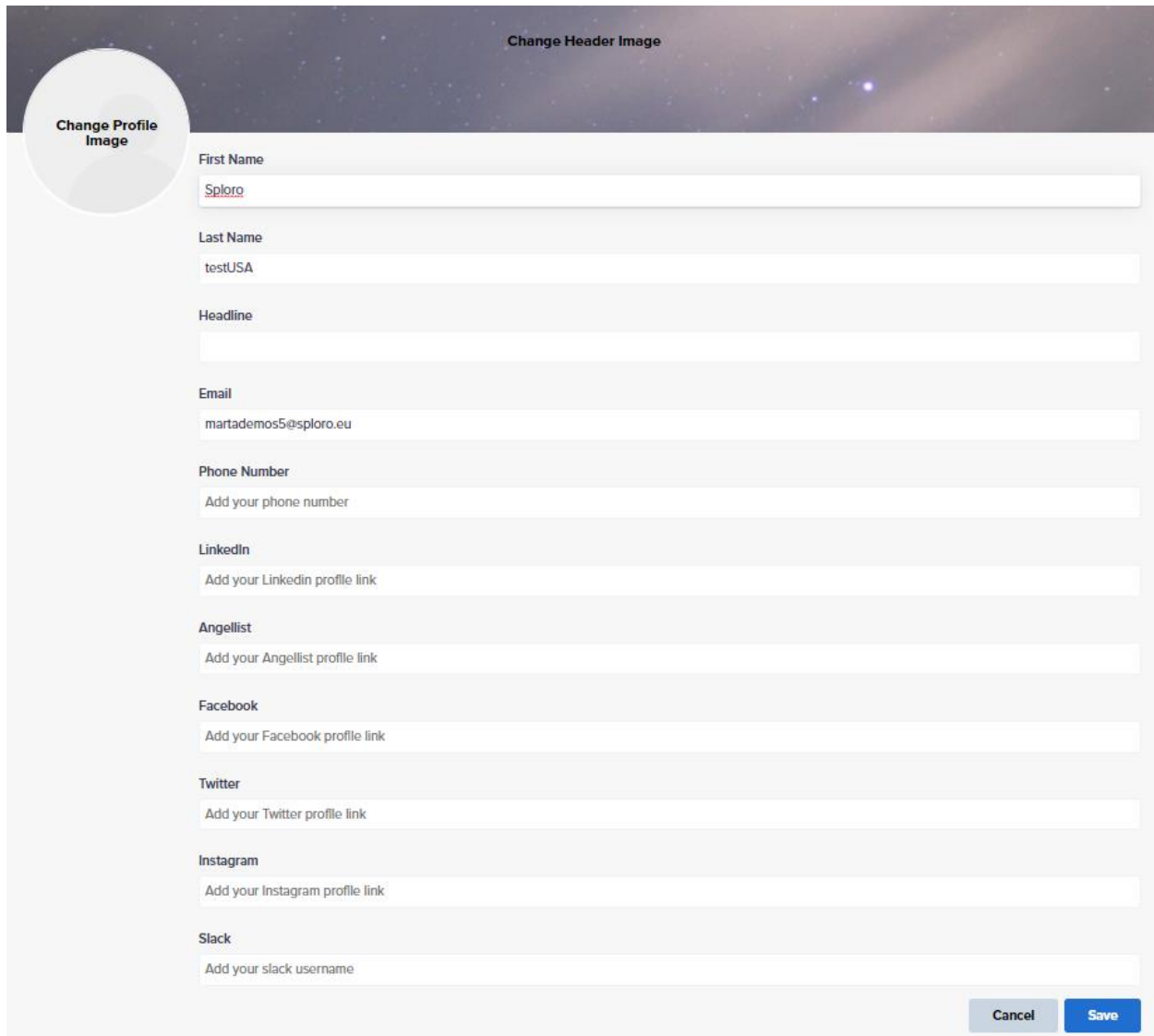
Slack
Add your slack username

Cancel Save

FIGURE 7. PERSONAL INFORMATION UPDATE

It is important to fill in the **personal information**, but also that required information in the **Startup profile** that we have created so that the rest of the participants can get to know more about you.





Change Header Image

Change Profile Image

First Name
Sploro

Last Name
testUSA

Headline

Email
martademos5@sploro.eu

Phone Number
Add your phone number

LinkedIn
Add your LinkedIn profile link

Angellist
Add your Angellist profile link

Facebook
Add your Facebook profile link

Twitter
Add your Twitter profile link

Instagram
Add your Instagram profile link

Slack
Add your slack username

Cancel Save

FIGURE 8. STARTUP INFORMATION UPDATE



5. Matchmaking

The Sargasso NGI brokerage system relies heavily on the **matchmaking process** to ensure its success. This process has been specifically designed to increase **efficiency** in the face of the complexity of the call, which requires the collaboration of teams from European, US and Canadian entities. The NGI Sargasso team conducts the **offline matchmaking process by cross-referencing data from European, USA and/or Canadian** entities that have applied to the brokerage system, to create teams with similar areas of collaboration.

To ensure that the teams are well balanced and able to create high quality proposals, the NGI Sargasso team takes into account the experience, interests, objectives and other relevant factors of the entities. This process allows entities from different countries and regions to collaborate effectively, driving innovation and progress in the Next Generation Internet field.

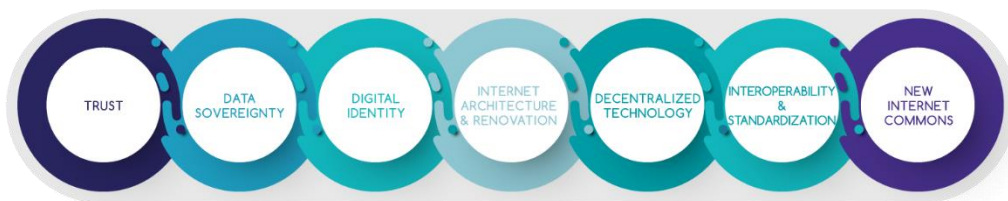


FIGURE 9. NGI SARGASSO KNOWLEDGE AREAS



FIGURE 10. NGI SARGASSO TECHNOLOGY DOMAINS

Once the proposals are accepted, the **data is analysed to establish correspondences**, such as areas of expertise and technology domains. The origin of the applicant entities is also taken into account to match European and American entities and to create future working teams. This data is cross-referenced in an Excel file and **"tags"** are assigned to each company's profile on the platform to generate events between them.



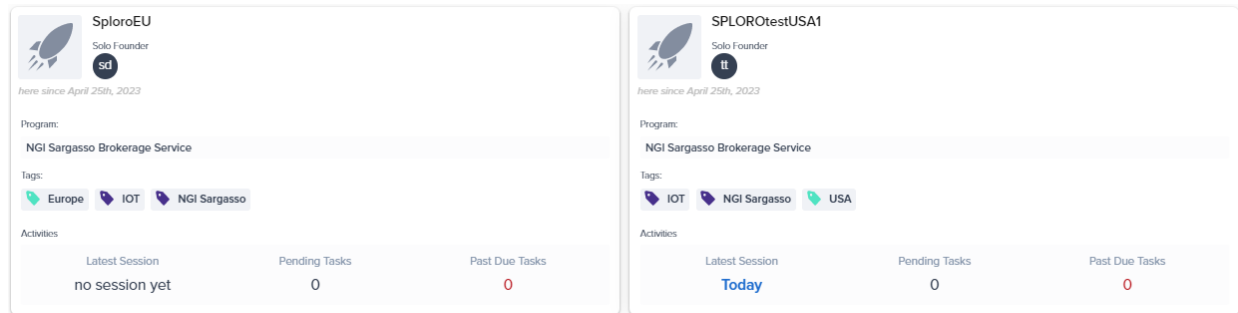


FIGURE 11. TAGS VIEW

These events are created by Sploro on the platform and **allow entities to hold video calls** with others with similar interests on the other side of the Atlantic. **The events are customisable**, and the funnel administrator can add **different features** such as room capacity, date, time and filters. The consortium ensures that meetings take place and connections are reliable and based on each user's areas of interest. The NGI Sargasso team is committed to facilitating this process and ensuring that it runs smoothly and efficiently for all entities involved.

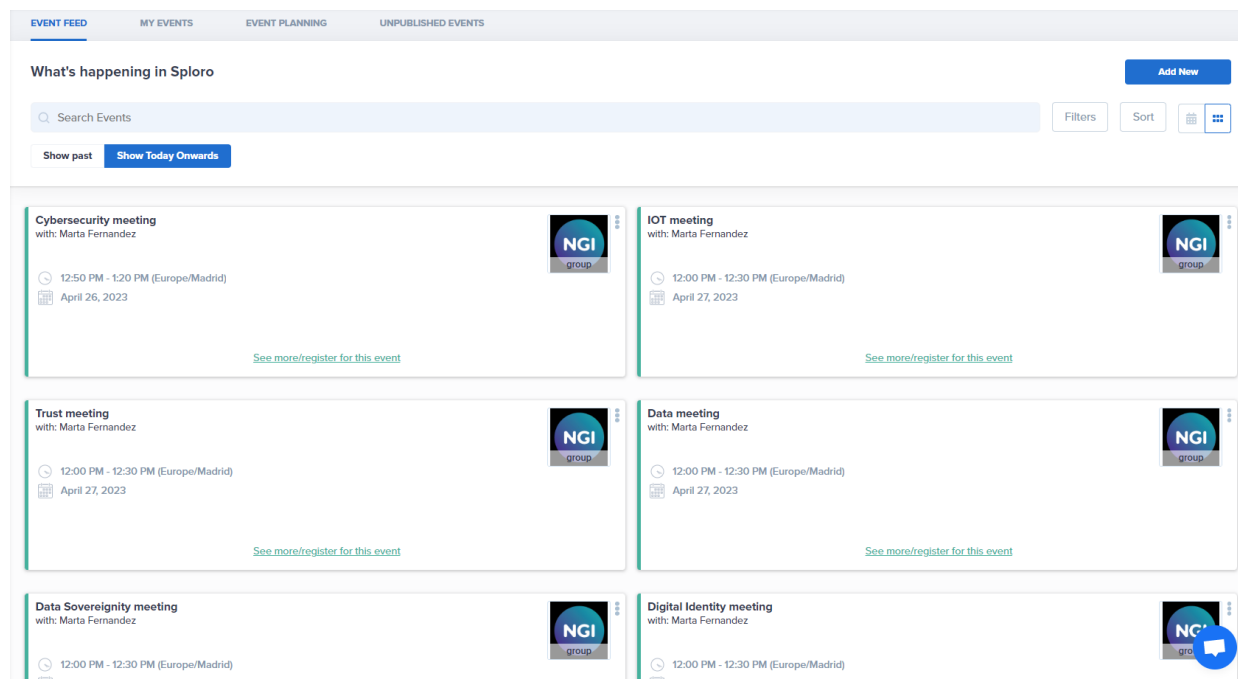


FIGURE 12. EVENTS VIEW

The link to the meetings will be provided by the consortium and the Airmeet online platform will be used. In this way, it is intended that the consortium is aware of and can keep a record of the meetings that take place. The first session will tentatively take place on the 6th of June.

Airmeet platform permits to automatise meetings rooms and create speed networking sessions.



STRUCTURE	DESCRIPTION
Presentation – 25 min The aim of the event	<ul style="list-style-type: none"> • Presentation of NGI Sargasso Open Call • Introduction of dynamics and platform initial exploration
Speed Networking	<ul style="list-style-type: none"> • Potential open call candidates can meet – they will be segmented by country-of-origin EU <> USA/Canada
Meeting in Tables	<ul style="list-style-type: none"> - Potential owners of technologies can showcase in private rooms their solutions and meet with others.

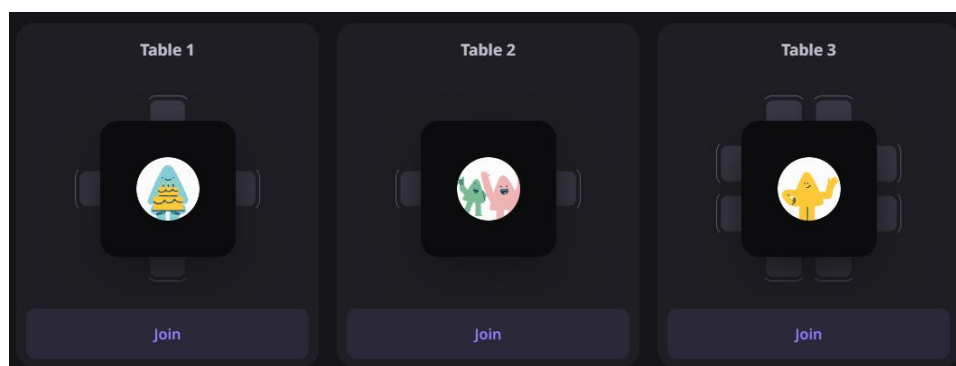


FIGURE 13. SCREENSHOT OF MEETING IN TABLES

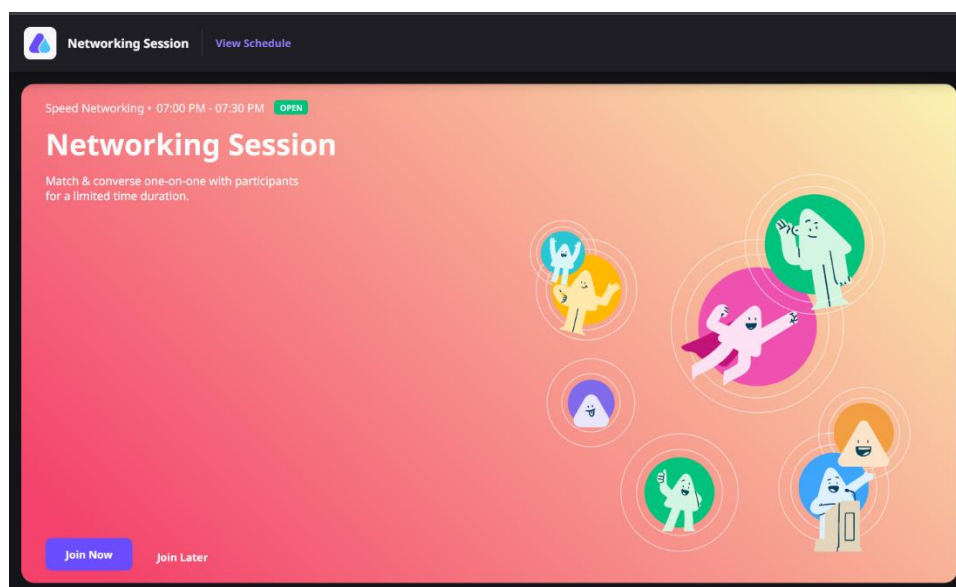


FIGURE 14. SCREENSHOT OF THE SPEED NETWORKING SESSION



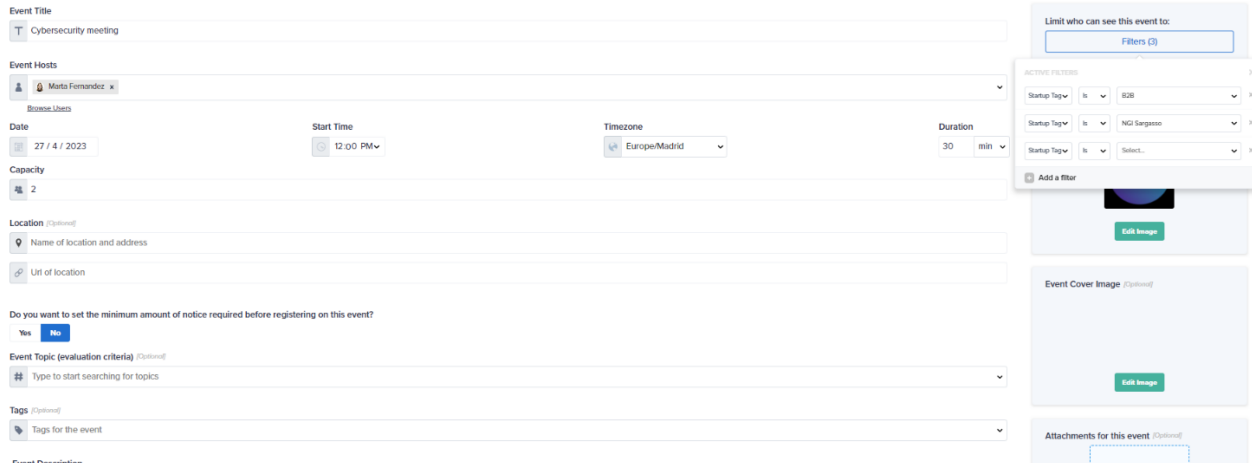


FIGURE 15. CUSTOMIZATION VIEW

6. Joint applications

The final step of the whole process is the creation of consortia that will apply together to our open calls. The ultimate purpose of the Sargasso NGI intermediate system's matchmaking process is the formation of consortia. The NGI Sargasso team builds teams with comparable areas of collaboration and may provide high-quality suggestions by cross-referencing data from European and American companies. After analysing the data of interest for each company, the NGI Sargasso team matches European and American entities to form future working teams that can apply to open calls together. The NGI Sargasso team guarantees that organisations from various nations and regions may interact successfully and drive development in the field of Next Generation Internet by enabling the creation of consortia.

7. Conclusions

In conclusion, it can be stated that NGI Sargasso's intermediation system plays a crucial role in the matchmaking process and in the future success of the Open Calls, since without this procedure of connection between companies, success would be much lower due to the difficulty of finding a partner with whom to form a USA/Canada working team.

It has been decided that the matchmaking procedure will be offline and carried out by the NGI Sargasso team in order to achieve higher quality connections and interest for the participants. This process, which consists of cross-referencing data from European and American entities to create teams with similar areas of collaboration, takes into account the experience, interests and objectives of the entities to ensure that the teams are well balanced and can produce high quality proposals.

Going forward, the goal is to ensure that the pairing process is smooth and efficient for all entities involved, and that the consortia created through this process deliver successful



proposals that drive progress in the Next Generation Internet field. To this end, continuous monitoring and evaluation of the matchmaking process will be carried out to identify areas for improvement and ensure that it continues to be effective in fostering collaboration and innovation among entities from different countries and regions.

