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DOI: https://doi.org/10.3897/arphapreprints.e214299

Guide for Marketing of Indexed Taxonomic Expertise

David Dopazo, Laura Tilley, Ana Casino

ARPHA Preprints *Author-formatted document posted on 03/09/2026.* DOI: https://doi.org/10.3897/arphapreprints.e214299

TETTRIs

TETTRIs

Transforming European Taxonomy through Training, Research, and Innovations

Guide for Marketing of Indexed Taxonomic Expertise

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WP 3 / Naturalis - T3.3 / CETAF

Document: Deliverables Template
Version: v.02
Date: 18/12/2025

Revision:

no.	Reviewer	Status	Notes
v02	Ana Casino	Under review	comments
		Approved	

Settings	Value
DELIVERABLE	
Deliverable title:	<AS REPORTED IN THE DoA>
Deliverable n°:	Dx.y
WORK PACKAGE	
Work Package	WP3
Work Package Leader	Naturalis Biodiversity Center
Task	T3.3
Taske Leader	CETAF
Type:	Report
Lead beneficiary:	CETAF
Citation:	
Due date of deliverable:	31 January 2026
Actual submission date:	
Deliverable status:	

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Document Control Information

Settings	Value
Document Title:	Deliverables Template
Project Title (Acronym):	TETTRIs
Document Authors:	
Project Coordinator	Technical Coordinator: Ana Casino, CETAF Financial Coordinator: Frederik Hendrickx , RBINS
Doc. Version:	V02
Sensitivity:	-
Date:	

Document Approver(s) and Reviewer(s):
NOTE: All Approvers are required. Records of each approver must be maintained. All Reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Institution	Action	Date
Anton Guntsch	Reviewer	FUB BGBM	Reviewed	23/01/2026
Michael Magee	Reviewer	NHMD	Reviewed	24/01/2026
Ana Casino	Approver	CETAF	Approved	30/01/2026

Document history:
The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Owner. Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes

Configuration Management: Document Location
The latest version of this controlled document is stored in <location>.

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Abstract

This guide describes the design, positioning and operational strategy of the Taxonomic e-Services and Expertise Marketplace developed under the TETTRIs project. The Marketplace is conceived as a structured and navigable index that enhances the discoverability, accessibility and mobilisation of taxonomic expertise and services across Europe. It addresses the fragmentation of taxonomic capacity by providing a centralised, FAIR-aligned platform that supports expert registration, structured metadata, and linkage with research infrastructures and knowledge aggregators.

The document outlines the platform architecture and information schema, defines target audiences and value propositions, and presents a phased strategy for adoption, engagement and long-term sustainability. It also describes pathways for future interoperability, including persistent identifiers, metadata alignment and potential API-based access, while clarifying governance, data management and ethical considerations. By connecting expertise supply with scientific, policy and applied demand, this guide supports the effective use of taxonomic knowledge to address biodiversity challenges at European and global scales.

Keywords

Taxonomic expertise; Taxonomic services; Biodiversity knowledge; Navigable index; FAIR principles; Persistent identifiers; Research infrastructures; Knowledge aggregators; Interoperability; Platform architecture; TETTRIs; Marketing; Communication.

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Executive Summary

This document presents a strategic guide for the implementation, adoption and sustainable use of the Taxonomic e-Services and Expertise Marketplace, developed within the framework of the European project TETTRIs. The Marketplace is conceived as a structured and navigable index that enables the identification, connection and activation of existing taxonomic capacity in Europe, including both individual experts and specialised services.

The guide explains how the Marketplace operates as a **single entry point** to taxonomic expertise, addressing a long-standing challenge in the biodiversity knowledge landscape: the fragmentation and limited visibility of taxonomic capacity. Through standardised registration processes, harmonised metadata and FAIR principles, the platform improves the **discoverability, traceability and accessibility** of taxonomic expertise, without replacing existing scientific channels or automating expert knowledge.

The document outlines the **key target audiences**, their needs and their roles within the Marketplace ecosystem, as well as the mechanisms for progressive adoption, from institutional pre-launch onboarding to platform consolidation and maturity. A phased roll-out strategy is described, prioritising early engagement of institutions and experts before broader outreach, ensuring that the Marketplace delivers tangible value from its initial stages.

In addition, the guide defines the **communication, engagement and incentive actions** required to support sustained participation, together with a set of **SMART objectives** and a monitoring framework based on Key Performance Indicators (KPIs) to assess adoption, usage and impact over time. Clear principles for governance, data management, ethics and GDPR compliance are also presented.

Overall, this document provides a practical and coherent framework to position the Marketplace as a European reference infrastructure for activating taxonomic capacity, supporting research, innovation and applied biodiversity needs, while laying the foundations for its future evolution and integration with knowledge aggregators and research infrastructures.

1. Introduction

A European entry point to discover, connect and activate taxonomic expertise.

This document describes the design, structure and use of the Taxonomic e-Services and Expertise Marketplace, developed within the framework of the European project **TETTRIs** (Transforming European Taxonomy through Training, Research and Innovation). The Marketplace brings together a curated and centralised space where users can:

- Discover and access high-quality taxonomic e-services.
- Find and connect with taxonomic experts across disciplines, institutions and regions.
- Register and showcase expertise and services to increase reach, credibility and collaboration opportunities.
- Strengthen the discoverability and recognition of taxonomic experts at all career stages.

The platform responds to a long-standing challenge in the biodiversity knowledge landscape: the fragmentation and limited discoverability of taxonomic expertise in Europe. Offered as a free and open service, the Marketplace lowers participation barriers and ensures that anyone can freely search for, find and explore taxonomic expertise and scientific-based services.

By embedding FAIR principles (Findable, Accessible, Interoperable and Reusable) into its data model and workflows, the Marketplace supports the discoverability and accessibility of expertise and services and provides clear descriptions to help users assess their relevance and suitability for specific needs. Responsibility for the actual delivery, usability and any technical or financial conditions of the services rests with the respective service providers.

Enhancing the recognition and traceability of taxonomic capacity across Europe supports more informed decision-making, facilitates collaboration and enhances knowledge transfer, while also linking European expertise to global efforts. In doing so, the Marketplace helps strengthen connections between scientific expertise and applied biodiversity work, while providing a reliable knowledge base that can inform policy-relevant processes. As part of TETTRIs, it contributes to a wider shift in how taxonomy is recognised and mobilised—reinforcing taxonomic capacity and supporting the flow of essential scientific knowledge to societal actors working to address biodiversity challenges at a continental scale.

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2. Purpose, scope and methodology

2.1. Purpose

The purpose of this guide is to describe and support the implementation, adoption and sustainable use of the Taxonomic e-Services and Expertise Marketplace as a structured and navigable index of taxonomic expertise and services. Specifically, the document aims to:

- explain how the Marketplace is organised, populated and used by different audiences;
- support the visibility, accessibility and traceability of taxonomic expertise at European scale;
- provide guidance on sustainable update, curation and future linkage with research infrastructures and knowledge aggregators;
- outline communication, outreach and engagement actions that support adoption and long-term sustainability.

The Marketplace itself is conceptualised and piloted as an online system that provides a centralised platform, serving as a single-entry point for anyone seeking to access taxonomic experts or taxonomic e-services, regardless of location or institutional affiliation. This guide therefore focuses not only on the initial launch of the platform, but also on fostering early participation from experts and institutions and outlining the actions needed to sustain long-term engagement, while ensuring that the Marketplace remains flexible and dynamic in its operation.

More broadly, the guide serves as a reference for aligning messages, materials and communication efforts across the different organisations involved.

2.2. Scope

The scope of this document covers both the structural and operational aspects of the Marketplace and the measures required to support its adoption and sustainability. It covers:

- The **structure and functionality** of the Marketplace platform.
- The **metadata** supporting the structured index.
- The manual registration and future automated enrichment **pathways.**
- The **key messages** and positioning that should guide communication.
- The target **audiences** and the role each group plays in adoption.
- The **channels, tools and materials** to be used throughout the project.
- The approach to **engagement** (incentives and community-building).
- The **indicators** that will help monitor progress and assess impact.
- The principles for responsible handling of **data and GDPR compliance**.
- The **main risks** that could affect adoption and how they can be mitigated.

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2.3. Methodology

The strategy presented here draws on several complementary inputs. These include: a) an analysis of the needs and motivations of the different user groups, carried out using a simplified Value Proposition Canvas; b) a mapping of the main target audiences; and c) the definition of a basic communication pathway, from initial awareness through to active engagement. These elements inform the structure of the guide and are further developed in the relevant sections that follow.

3. Platform Architecture & Information Schema

This digital platform is designed to organise and present taxonomic expertise and specialised services in a consistent and accessible way. Its primary function is to provide a structured environment in which individual experts can register their professional profiles and the taxonomic services they offer, and in which users from different sectors and disciplines can easily locate accurate and up-to-date information.

The Marketplace is conceived as a domain-specific entry point for taxonomy, with the capacity to connect to broader European service hubs such as the European Open Science Cloud (EOSC).

The platform is built around two core components:

- **Taxonomic Expert Directory:** The use of harmonised formats enables profile comparison, advanced search functionality and interoperability with other information systems.
- **Catalogue of taxonomic e-services:** Each service description follows a clear structure (type, scope, requirements, availability), making it easy for users to understand and select suitable options.

3.1. Architecture and operation

The platform applies a FAIR-aligned data model to ensure consistency, traceability and reusability. It offers filtering tools, taxonomic categories and user contact options, supported by internal workflows that maintain information quality without adding unnecessary complexity for contributors or administrators.

3.2. Functional boundaries

The Marketplace does not provide direct access to taxonomic knowledge or expertise. Instead, it enables users to identify and contact taxonomic experts, who remain responsible for sharing their knowledge and delivering services.

3.3. Sandbox for initial deployment

To support the early stages of development and assess operational workflows, a **sandbox** environment has been created. **This preliminary version demonstrates the basic functioning of the Marketplace**. Although it does not yet include a

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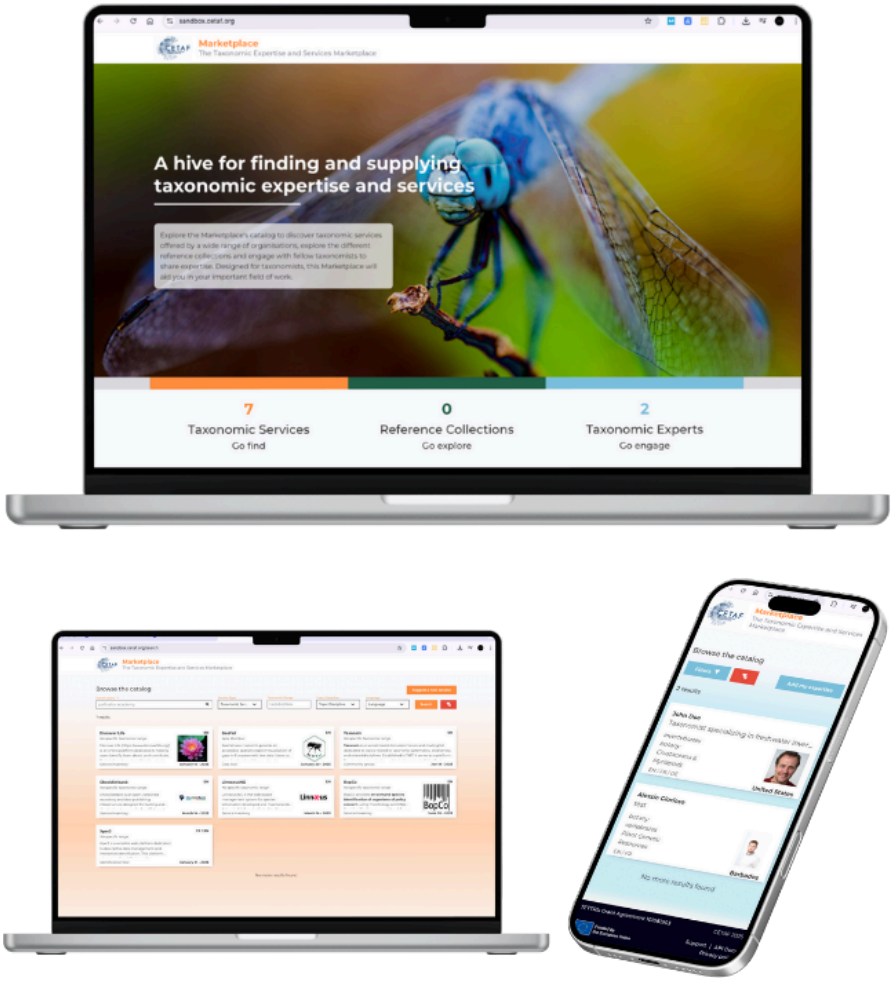
final visual identity or a fully optimised user experience, it offers a functional representation of the system and its core structural elements.



3.4. Structure of the Marketplace platform

Overall, the Marketplace serves two main types of users. **The first group comprises taxonomic experts** (e.g. professional taxonomists, researchers and citizen scientists), who can register and describe their expertise through the platform. **The second group includes users seeking taxonomic expertise**, who use the Marketplace to search for specialists and review structured information about their expertise.

The following section provides a step-by-step description of how these two user groups interact with the Marketplace, focusing on expert registration and expert discovery. For the initial release of the Marketplace, taxonomic experts register their expertise manually. During the TETTRIs project, potential approaches for automated linkage to external sources of taxonomic expertise information were explored and are described in subsequent sections. The present section focuses specifically on the manual registration process for taxonomic experts.

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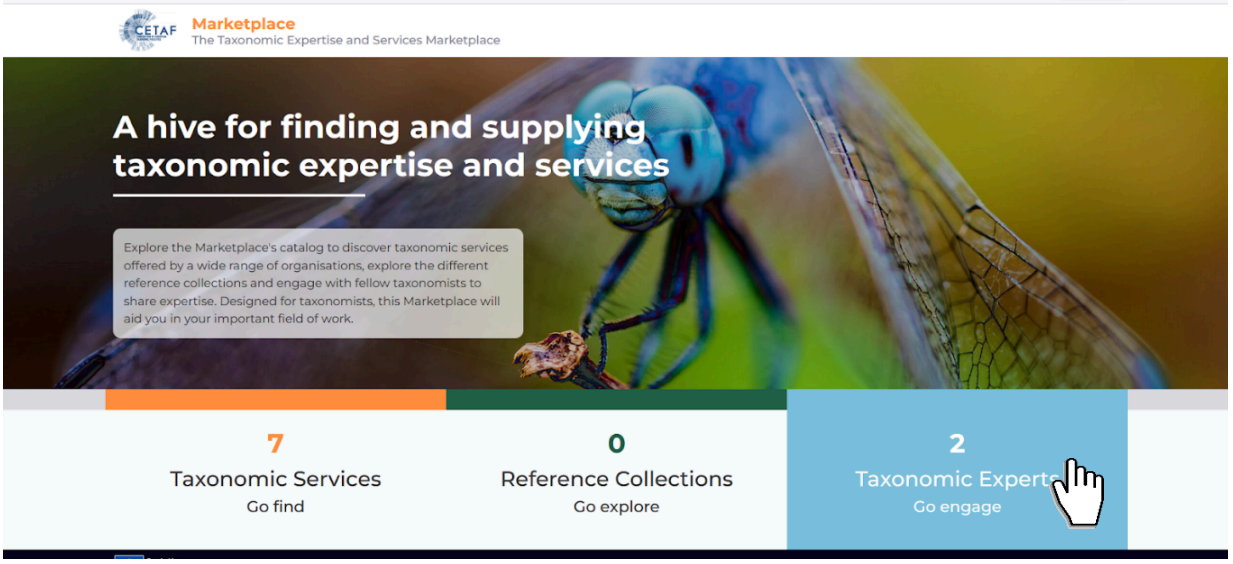
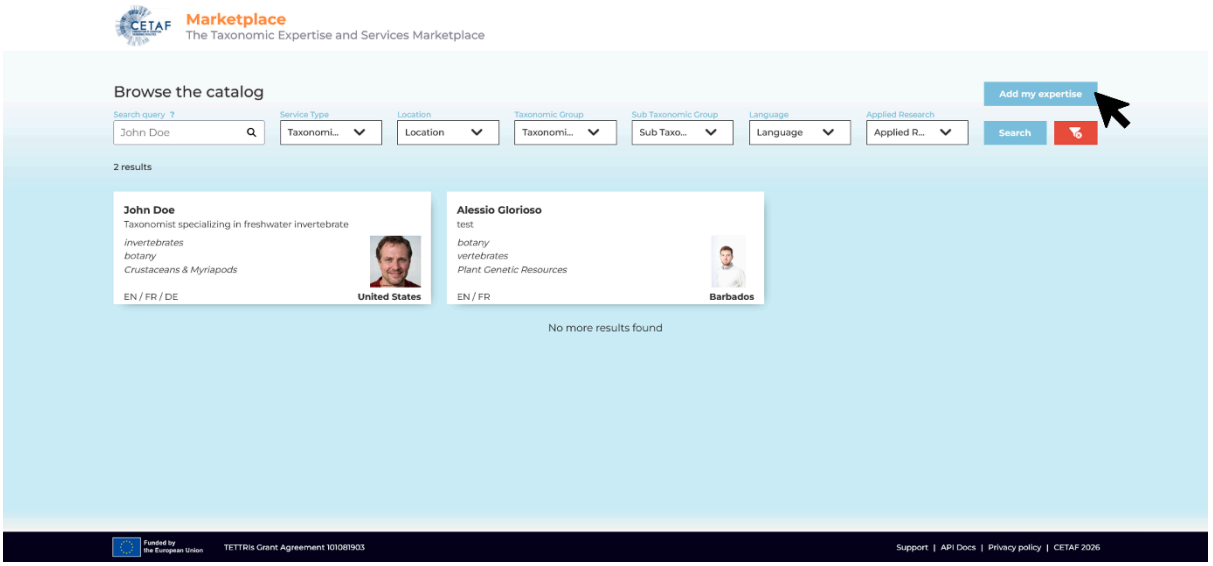
3.4.1. Registering expertise manually:

The following text provides a step by step walk through, with screenshots on how taxonomic experts can register their expertise in the Marketplace.

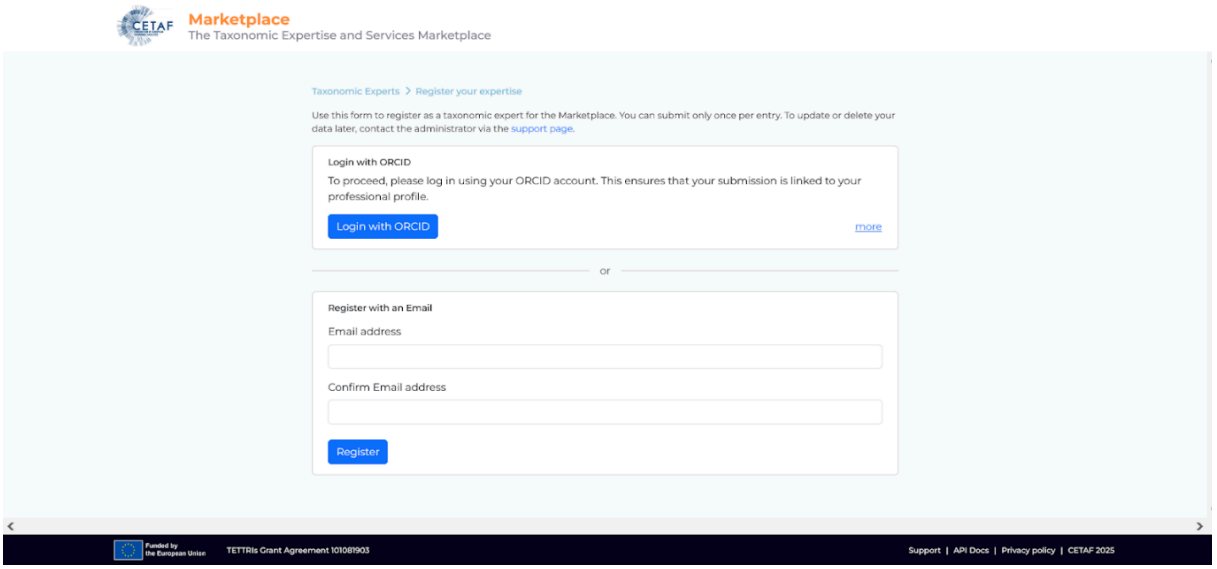
1. For an expert to register themselves manually they need to go to the marketplace. On the front page click on the Taxonomic Experts tap.



2. They will be navigated to a place below, on the top right hand-side of the screen users should click the add my expertise.



3. Users will need to log in either using their ORCID ID or their email address.



4. Once logged in, the user is presented with a registration form asking for them to fill in details about their expertise. The table below shows the list of fields they are asked to fill in.

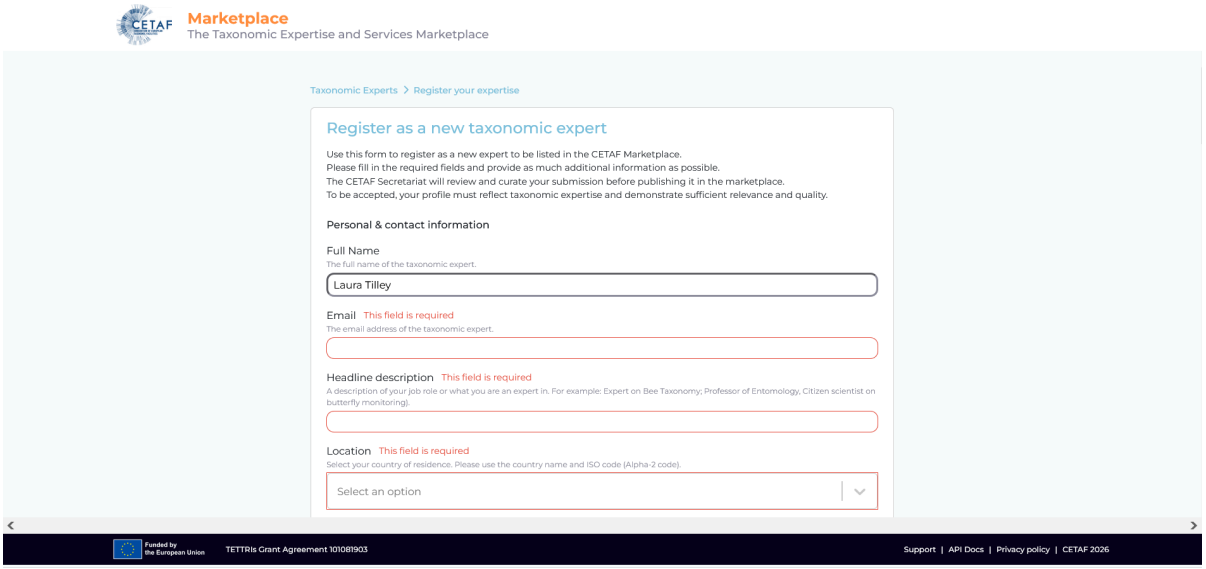


TABLE OF METADATA FIELDS USED FOR THE REGISTRATION OF TAXONOMIC EXPERTS IN THE MARKETPLACE

Field name	Answer type
PERSONAL & CONTACT INFORMATION	
Full Name* *The full name of the taxonomic expert.*	Free text
Email* *The email address of the taxonomic expert*	Free text
Headline description* *A description of your job role or what you are an expert in. (E.g. Expert on Bee Taxonomy; Professor of Entomology, Citizen scientist on butterfly monitoring).*	Free text
Location* *Select your country of residence. Please use the country name and ISO code (Alpha-2 code).*	Predefined list of Country names in English and ISO code (Alpha-2 code). One choice allowed.
Supporting Language* *The languages that you are proficient or fluent in. Please use one of the language codes from the IETF BCP 47 standard.*	Predefined options. Multiple choice.
Affiliated Organisation* *The affiliated organisation Using the ROR lookup will use the identifier and name of the selected organisation.*	Free text or can be found by adding ROR ID.
Expertise biography *A brief description of your expertise, skills and services.*	Free text
Personal webpage links *Links to your personal webpage, blog, or other online profiles.*	Links
Profile image	Upload image
TAXONOMIC & RESEARCH SCOPE	
Taxonomic discipline* *The taxonomic discipline that you are an expert in. For example: Entomology, Botany, Ichthyology, etc*	Predefined options
Taxonomic sub-discipline* *The taxonomic sub-discipline. For example: Coleoptera, Lepidoptera, Diptera, etc.*	Predefined options
Taxonomic scope* *You can list in more detail the Taxonomic, orders, Families or genus you are an expert on. Please if possible write the scientific names and english common name e.g. Hymenoptera/bees*	Free text

Geographic region* *The geographic region that you are an expert in. For example: Europe, South America, Africa, etc.*	Predefined options
Stratigraphy age *The stratigraphy age that you are an expert in. For example: Cretaceous, Jurassic, etc.*	Free text
Taxonomic methodology *The taxonomic methodology that you are an expert in. For example: DNA barcoding, Morphology, etc.*	Predefined options
Applied research *Keywords that describe your expertise. For example: Taxonomy, Biodiversity, Conservation, etc.*	Predefined options
EDUCATION AND EXPERIENCE	
Education level* *Select the highest level of education you have received. You can choose multiple options.*	Predefined options
Employment status *Provide your current employment status. This information helps with statistical analysis and gives users of the marketplace insight into the professional experience of the expert. You can select up to two options.*	Predefined options
Taxonomy Experience *Select your years of experience in taxonomy. This helps gauge your professional background in the field.*	Predefined options
PUBLICATION NUMBER	
Identification keys	Number
Research papers	Number
Books	Number
Other	Number
EDUCATION AND TRAINING PROVISION	
Training course title	Free text
Training course description	Free text
Content URL	URL
DEST URL	URL.

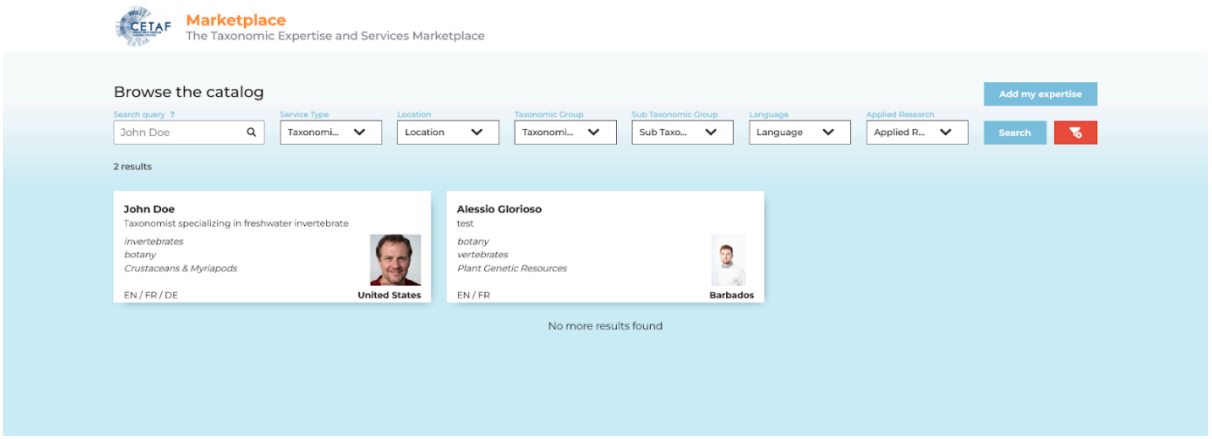
3.4.2 Searching for expertise

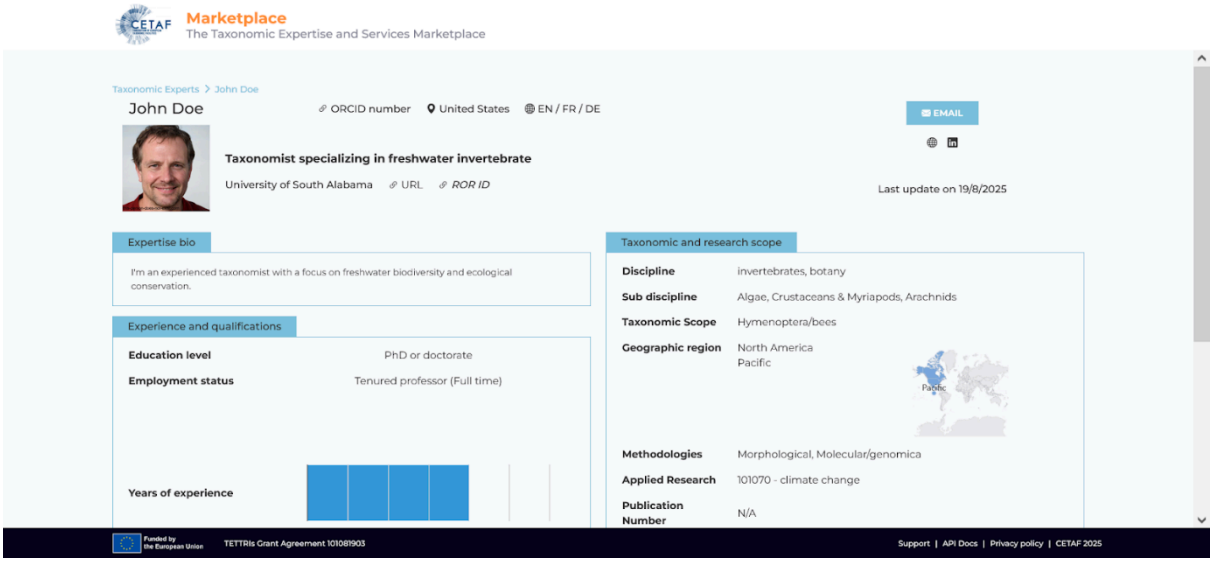
The following text provides a step by step walk through, with screenshots on how taxonomic experts can register their expertise in the Marketplace:

From the Marketplace homepage, users select Taxonomic Expertise to access the expertise overview page. This page supports both free-text searching and filtered browsing, allowing users to identify expertise relevant to their needs.

Available filters include geographic location, taxonomic discipline and sub-discipline, supported languages, and applied research areas. The applied research filter is particularly useful for users who are less familiar with formal taxonomic terminology, enabling searches based on problem-oriented or thematic concepts (e.g. soil science, population ecology).

Applying one or more filters returns a set of expertise profile cards summarising key information about each expert. Selecting a profile card opens the full expert profile page, which presents the metadata about the expert, provided during registration in a clear and structured layout.





3.5 Linkage with knowledge aggregators and research infrastructures

The development of the Taxonomic e-Services and Expertise Marketplace under Task 3.3 has been informed by complementary work carried out in Task 3.2, which investigated the feasibility of automated workflows for identifying and aggregating information on taxonomic expertise from existing open platforms.

Within Task 3.2, automated and reproducible workflows were explored to assess how taxonomic expertise could be inferred and characterised by combining data from multiple open infrastructures, including bibliographic, knowledge graph and biodiversity data platforms (Groom et al. 2025). This work demonstrated that expertise-related signals can be derived from heterogeneous sources when supported by persistent identifiers, harmonised metadata and open interfaces. The results provided evidence that cross-platform aggregation of taxonomic expertise information is technically feasible.

Task 3.3 builds on these findings from a different perspective and scope. Rather than implementing automated aggregation within the Marketplace, Task 3.3 focuses on delivering a structured, navigable and user-facing index of expertise that can be directly populated, curated and used by experts and stakeholders. The Marketplace therefore operates as a standalone service in its current form, relying on manual registration and self-curation by experts. However, in future developments automated work-flows will be integrated.

Any direct implementation of automated data workflows or live integrations with external knowledge aggregators would require additional technical development, governance arrangements and sustainability planning beyond the scope of the present task.

Building on the exploratory automated workflows developed under Task 3.2 and the operational Marketplace delivered under Task 3.3, several concrete next steps can be identified to progressively enable automated or semi-automated linkage with external knowledge platforms.

STEP 1: PILOT SEMI-AUTOMATED PROFILE ENRICHMENT

The first step would be to implement controlled, optional enrichment of expert profiles at the point of registration or update. This could include retrieving basic identity, affiliation and publication metadata via ORCID and OpenAlex following user consent. Imported information should be clearly labelled as system-suggested and require expert validation before publication.

STEP 2: DEFINE A FORMAL MAPPING BETWEEN MARKETPLACE METADATA FIELDS AND EXTERNAL METADATA

A lightweight mapping specification should be developed that aligns selected Marketplace fields with corresponding metadata elements available from external

platforms (such as persistent identifiers, identity and affiliation records, and bibliographic metadata). This mapping would focus on high-confidence fields (e.g. affiliations, publication counts, taxonomic keywords) and explicitly exclude qualitative or interpretative fields best authored by experts themselves.

STEP 3: INTRODUCE TAXONOMIC SCOPE SUGGESTIONS BASED ON AUTHORITATIVE SOURCES

Taxonomic scope suggestions could be generated using publication metadata and name matching against authoritative backbones such as the GBIF Taxonomic Backbone, ZooBank and IPNI. These suggestions would support, but not replace, expert-defined taxonomic scope.

STEP 4: DEVELOP A READ-ONLY API FOR EXTERNAL DISCOVERY AND REUSE

Once the internal mapping between Marketplace fields and external metadata sources has been stabilised, a read-only application programming interface (API) could be developed to allow external research infrastructures and platforms to query and reference Marketplace expertise profiles.

The API would support access discovery of expertise while avoiding duplication of content or tight coupling between systems. Versioning and access controls would ensure stability and sustainability over time.

STEP 5: DEFINE GOVERNANCE, CONSENT AND UPDATE MECHANISMS

Before any automated linkage is expanded, governance arrangements should be agreed, including consent management, update frequency, error correction and responsibilities for maintenance. These mechanisms are essential to ensure trust, data protection compliance and long-term sustainability.

STEP 6: EVALUATE ALIGNMENT WITH RESEARCH INFRASTRUCTURES AND POLICY NEEDS

Finally, pilot integrations should be evaluated in collaboration with selected research infrastructures and policy actors to assess whether enriched or linked expertise profiles improve discoverability, usability and alignment with societal and policy demands.

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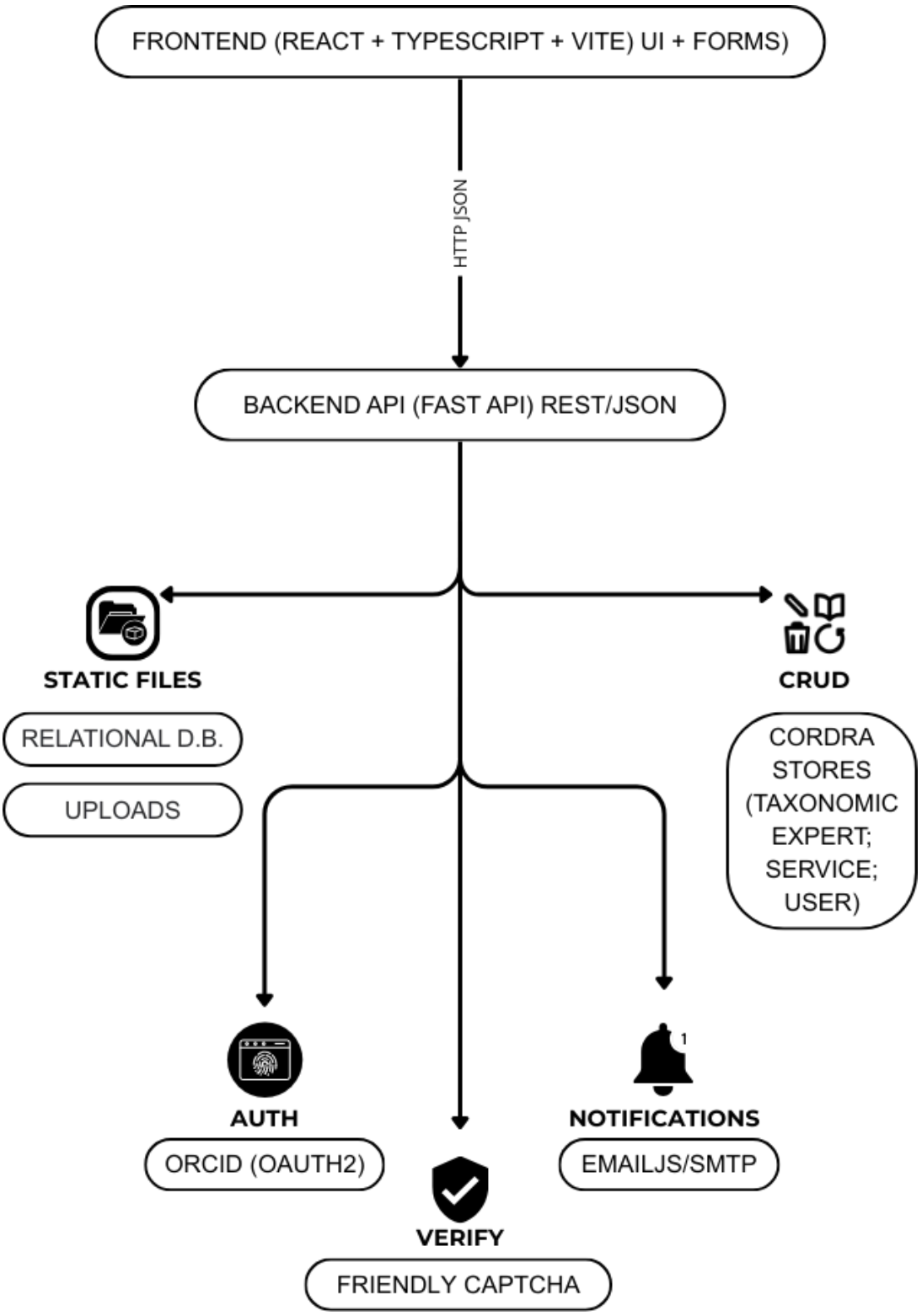

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4. Technical interoperability & aggregator linkage

While Section 3 describes the functional and informational architecture of the Marketplace, the following provides a more technical overview of how interoperability and linkage with external aggregators and research infrastructures can be implemented in practice.

The Marketplace is designed for interoperability so it can bridge between taxonomic expertise and global biodiversity aggregators. By adhering to the FAIR Digital Object (FDO) framework, the platform ensures that every service and expert profile is a machine-actionable entity capable of linking with international infrastructures such as GBIF, DiSSCo, ORCID, and ROR.

4.1. Machine-Actionable Architecture

To facilitate seamless integration, service and expert descriptions are stored as FDOs and automatically assigned a Persistent Identifier (Handle). These are globally resolvable through standard proxies (e.g., https://hdl.handle.net or https://doi.org), ensuring permanent link integrity for citations and system cross-referencing.

The Marketplace employs a dual-access strategy:

- Human-Centric: Rich HTML interfaces for manual discovery and navigation.
- Machine-Centric: Native JSON outputs accessible via REST and Digital Object Interface Protocol (DOIP) APIs (see documentation).

The APIs allow existing biodiversity infrastructures to programmatically query, retrieve, and (if granted) update records, effectively embedding the Marketplace into the daily workflows of Research Infrastructures.

4.2. Standardized Metadata & Linked Data

The data model is constructed using the JSON-API standard, ensuring a consistent structure for developers. To maximize interoperability with the broader European and global data landscapes, the Marketplace utilizes a multi-namespace approach:

- erp (EOSC Resource Profile): Derived from the EOSC profile to ensure compatibility with European Open Science Cloud standards.
- ods (Open Digital Specimen): Aligning with the DiSSCo standard for Digital Specimens.
- dcterms (Dublin Core): For foundational bibliographic and descriptive metadata.
- cetaf: Custom namespaces for domain-specific taxonomic requirements.

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The metadata schema leverages schema.org at its core, enriched with controlled vocabularies from data.europe.eu, SPDX, and ISO. By natively supporting and validating PIDs such as ROR (for institutional identification) and ORCID (for researcher identity), the Marketplace is designed to be capable of synchronising with global expert registries, reducing manual entry and ensuring data provenance.

4.3. Enhanced Machine Actionability (EMA)

To further automate the interpretation of data by third-party systems, the FDOs support specific FDO Profiles. These profiles can be registered in the EOSC Data Type Registry, enabling "typing" of the data that allows external aggregators to understand exactly how to process a "Taxonomic Expert" or a "Service" record without human intervention. See for example the Taxonomic Expert FDO Profile and an example Expert digital object which can also be found by its PID (Handle): https://hdl.handle.net/20.500.14547/643e3fb2e7cb910cba0b.

Technical documentation for the APIs and schemas are maintained as open specifications, allowing for rapid development of connectors by GBIF and DiSSCo developer communities.

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5. Target Audiences and User Journeys

The following describes each key audience, their motivations and their role within the Marketplace ecosystem. For selected audiences, illustrative user journeys are included to demonstrate typical usage patterns and practical value.

5.1. CETAF member institutions

- **Who are they?**
  - Natural history museums, universities, research centres hosting scientific collections and taxonomic expertise...
- **What they need**
  - A coherent way to present institutional capacity.
  - Visibility for their scientific staff and associated services.
  - Support for competitive project proposals.
  - Reinforcement of their European scientific profile.
- **Role in the Marketplace**
  - They act as mobilising agents capable of bringing large numbers of experts into the platform and ensuring information stability.

5.2. Taxonomic experts

- **Who are they?**
  - Researchers, senior specialists, early-career scientists, technical staff and independent experts working in taxonomy, across public and private entities linked to biodiversity.
- **What they need**
  - A suitable means to increase professional visibility at European level.
  - A reliable hub to present and describe their expertise in a structured way.
  - Access to collaboration and project opportunities.
  - A structured way to showcase specialised services to potential users.
- **Role in the Marketplace**
  - They are the core community. The quality and representativeness of the platform depend directly on their participation.
- **Example User Journey: From Invisible Specialist to Project Lead**
  - **The Scenario:** An early-career specialist in dark taxa wants to participate in a large Horizon Europe consortium but lacks the network.
  - **The Path:** They create a FAIR-aligned profile in the Marketplace, linking their ORCID and specific "service capabilities" (e.g., *COI Barcoding for Coleoptera*).
  - **The Outcome:** A project coordinator searching the Marketplace finds the expert via the registry and invites them to lead a Work Package, increasing the expert's professional visibility and funding access.

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5.2. European research infrastructures and networks

(DiSSCo, LifeWatch ERIC, ERGA/IBOL, GBIF, ECSA, etc.)

- **Who are they?**
  - Organisations that deliver data, tools and services to broad scientific communities.
- **What they need**
  - Reliable, up-to-date expert directories.
  - FAIR-aligned, interoperable components.
  - Support for validation and specialised advisory tasks.
- **Role in the Marketplace**
  - They are multipliers. Their engagement extends the Marketplace's visibility and usage beyond taxonomy.
- **Example User Journey: Automated Expert Validation**
  - **The Scenario:** DiSSCo receives an automated annotation from an AI model (SAIL) regarding a specimen identification that requires human verification.
  - **The Path:** The DiSSCo system queries the Marketplace API to identify available experts with the specific taxonomic "Service Profile" required for that specimen group.
  - **The Outcome:** The expert is notified, performs the validation, and the "verified" status is pushed back to the DiSSCo Digital Specimen, ensuring high data integrity through an interoperable loop.

5.3. Non-taxonomist researchers

- **Who are they?**
  - Ecologists, geneticists, conservation scientists, evolutionary biologists, environmental scientists, citizen scientists...
- **What they need**
  - Quick access to suitable specialists.
  - Reliable validations.
  - Complementary technical services.
- **Role in the Marketplace**
  - They are high-frequency users, generating continuous activity and demonstrating the platform's practical value.

5.4. Public administrations and environmental agencies

- **Who are they?**
  - Authorities involved in conservation, environmental assessment, species management and control, monitoring and compliance.
- **What they need**
  - Robust scientific evidence.
  - Clear access to qualified experts.
  - Efficient support for technical or regulatory questions.
- **Role in the Marketplace**

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  - They reinforce the Marketplace's institutional legitimacy and provide stable, recurrent use.
- **Example User Journey: Rapid Response to Invasive Species**
  - **The Scenario:** A national environmental agency detects an unknown insect potentially threatening local crops.
  - **The Path:** The agency officer uses the Marketplace to find a qualified taxonomist providing identification services for pest insects.
  - **The Outcome:** Within hours, a verified specialist is contracted, the species is identified as non-invasive, and the agency avoids an expensive and unnecessary quarantine rollout.

5.5. Policy makers

- **Who are they?**
  - Entities involved in shaping environmental policies, strategies, directives and national or EU positions.
- **What they need**
  - Access to trustworthy expert knowledge.
  - Clear traceability of information.
  - Mechanisms to consult independent specialists.
- **Role in the Marketplace**
  - They connect the Marketplace to European policy frameworks such as the Green Deal and the EU Biodiversity Strategy for 2030.

5.6. Education and training sector

- **Who are they?**
  - Universities, lecturers, programme coordinators, training initiatives...
- **What they need**
  - Expert input for teaching and training.
  - Access to specialists for content development or guidance.
- **Role in the Marketplace**
  - They support knowledge transfer and contribute to the long-term sustainability of taxonomic capacity.

5.7. Industry and consultancy

- **Who are they?**
  - Companies and consultants working in environmental impact, agriculture, biotechnology, biosecurity, renewable energy and infrastructure.
- **What they need**
  - Immediate access to qualified providers.
  - Transparent descriptions of capabilities and services.
  - Technical reliability and traceability.

- **Role in the Marketplace**

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- They are applied users, demonstrating real-world value and demand for taxonomic services.

5.8. Editors and scientific journals

- **Who are they?**
  - Editorial staff seeking qualified reviewers for taxonomic manuscripts.
- **What they need**
  - Verified, up-to-date expert profiles.
  - Clear identification of reviewers with appropriate expertise.
- **Role in the Marketplace**
  - They enhance the Marketplace's scientific credibility by using it to support peer review.

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6. Value proposition

Considering the described target audiences, and to understand how the platform is adopted and used, it is important to distinguish between adopters (including early and later adopters)—those who build and consolidate the platform's content—and end users—those who rely on it to meet scientific, technical or regulatory needs.

This distinction reflects functional and behavioural roles, not separate audience categories, and helps clarify how the Marketplace grows and maintains long-term relevance.

6.1. Adopters: Who they are and what value they receive

TAXONOMIC EXPERTS

- **Value Offered:**
  - Enhanced professional visibility at European scale.
  - A structured profile that reliably communicates expertise.
  - Opportunities to mobilise expertise, collaborate with others and participate in projects.
  - A dedicated space to present specialised services to potential users.
- **Why they are adopters**
  - Their participation determines the depth and representativeness of the platform.

EUROPEAN RESEARCH INFRASTRUCTURES

- **Value Offered:**
  - FAIR-aligned components ready for integration.
  - Reliable expert directories for assessment, validation and advisory tasks.
  - Opportunities to embed Marketplace functionalities into broader services.
- **Why they are adopters**
  - Their uptake broadens the platform's impact beyond taxonomy.

CETAF INSTITUTIONS

- **Value Offered:**
  - A coherent and standardised presentation of institutional capacity.
  - Increased visibility of scientific staff.
  - Support for project proposals and international networking.
  - Tools to manage expert and service information internally.

- **Why they are adopters**
  - They can mobilise large expert communities and anchor the platform's early growth.

6.2. End users: Who they are and what value they receive

End users engage with the Marketplace to resolve practical needs. Their activity generates demand, visibility and long-term relevance.

NON-TAXONOMIST RESEARCHERS

- **Value Offered:**
  - Quick identification of suitable experts.
  - Access to complementary technical services.
  - Increased rigour and efficiency in multidisciplinary research.

PUBLIC ADMINISTRATIONS AND ENVIRONMENTAL AGENCIES

- **Value Offered:**
  - Reliable scientific evidence for regulatory processes.
  - Direct access to qualified experts.
  - Efficient support for assessments and technical enquiries.

EDUCATION AND PUBLISHING SECTORS

- **Value Offered:**
  - Access to experts for training or content development.
  - Support for high-quality scientific review and communication.

POLICY MAKERS

- **Value Offered:**
  - Improved understanding of available taxonomic capacities and resources, from the supply side.
  - Clear traceability of expertise to support informed policy decisions.
  - Alignment with EU biodiversity and sustainability objectives.

INDUSTRY AND CONSULTANCY

- **Value Offered:**
  - Access to specialised taxonomic service providers.
  - Transparent information on service capabilities, availability and technological readiness levels.
  - Technical support for regulatory compliance.

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7. Value Map & Customer profile

The Value Map & Customer Profile provides a structured overview of how the Taxonomic e-Service & Expertise Marketplace aligns its resources and functionalities with the real needs of its users. It is anchored in the definition of the demand–supply interfaces and the provider–user approach, helping to identify what different audience categories require and what the platform offers in response, as well as how users can enrol as direct participants in the Marketplace.

This framework illustrates how the platform addresses key scientific and operational challenges to which taxonomic experts and service providers contribute, generating tangible added value in terms of visibility, efficiency and collaboration.

VALUE MAP	COSTUMER PROFILE
Products & Services (What the Marketplace Offers)	**Customer Jobs (What participants do)**
Open-source platform based on FAIR principles	Share and promote taxonomic expertise through a harmonised model
Structured profile pages with standardised metadata	Become discoverable for collaboration
Persistent identifiers	Support coherence and alignment between biodiversity data, expertise and policy needs.
Controlled-vocabulary registration form	Offer or request identification/verification services
GDPR-compliant data management	Provide or seek mentorship
ORCID, ROR and professional profile integration	Ensure visibility, recognition and interoperability
Advanced filtering and free-text search	Identify regional or domain-categorised experts.
Direct expert contact	Facilitate scientific and applied exchanges

Pain Relievers / Challenges (How the Marketplace Helps)	**Pains (User Challenges and Impediments)**
Centralised expert information	Low visibility outside institutions

Structured presentation of expertise	Time-consuming expert discovery
Visibility for independent and early-career experts	Limited participation in policy processes
Reduces repetitive self-promotion	Maintenance burden of personal websites
GDPR compliance reduces privacy concerns	Fragmented information across sources
Visibility through established networks and recognised organisations (e.g., CETAF)	Limited connection with NGOs, government, consultancy
Gain Creators (How Value Is Created)	**Gains (User Benefits)**
Public, structured profiles	Increased visibility
Persistent identifiers for citation	Professional recognition
Improved discoverability through structured search	New collaboration opportunities
Integration with trusted identifiers	Expanded networks
Direct communication channels	Quick overview of experts
Coherent and trustworthy information	Reduced promotion effort

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8. Unique Selling Points

Several characteristics distinguish the Marketplace from existing resources:

- **USP 1**
  It is the only European platform that brings together taxonomic experts and e-services in a single, curated space, organised by specialisation domains and research fields, and spanning multiple countries.

- **USP 2**
  It follows FAIR principles by design, ensuring interoperability and long-term usability.

- **USP 3**
  It is open, free and community-governed, ensuring sustained relevance beyond individual projects.

- **USP 4**
  It improves the discoverability of experts at different career stages, including early-career and independent specialists.

- **USP 5**
  It provides structured, comparable information, making it easier to understand the breadth and depth of taxonomic capacity.

- **USP 6**
  It supports cross-sector use, from research and conservation to public authorities and industry.

These features position the Marketplace as a valuable addition to Europe's biodiversity knowledge infrastructure.

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9. Key Messages

This section outlines the core strategic messages that should guide all communication related to the Marketplace. The aim is to ensure that each audience receives information aligned with its needs, motivations and expected level of engagement.

Messages are concise, institutional and impact-oriented, and each is explicitly linked to the audience segment for which it is most relevant.

- **“The Marketplace makes Europe’s taxonomic capacity visible.”**
    - **Audiences**: Experts, CETAF institutions, public administrations, policy makers.
    - **Focus**: recognition, legitimacy and institutional cohesion.
- **“The Marketplace enables quick, reliable and transparent access to the right taxonomic specialist.”**
    - **Audiences**: Taxonomic experts, non-taxonomist researchers, industry and consultancy, administrations.
    - **Focus**: operational efficiency, scientific accuracy and traceability.
- **“The Marketplace provides a common, standardised framework for presenting taxonomic expertise and services.”**
    - **Audiences**: CETAF institutions, European infrastructures, scientific publishers.
    - **Focus**: interoperability, clarity and consistency.
- **“The Marketplace is an open, FAIR-aligned platform that supports collaboration and the reuse of biodiversity-related data.”**
    - **Audiences**: Scientific community, infrastructures, administrations.
    - **Focus**: sustainability, technical compatibility and transparency.
- **“The Marketplace connects science, public policy and industry to address biodiversity challenges.”**
    - **Audiences**: Policy makers, administrations, industry, institutions.
    - **Focus**: strategic impact and alignment with the European Green Deal and the EU Biodiversity Strategy for 2030.

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10. Marketing Goals & SMART Objectives

The marketing strategy for the Marketplace combines long-term ambition with specific, measurable targets for the first two years, while providing a baseline for sustained communication and engagement activities over time. This structure ensures clarity of direction, facilitates progress monitoring and supports alignment with European scientific and policy priorities.

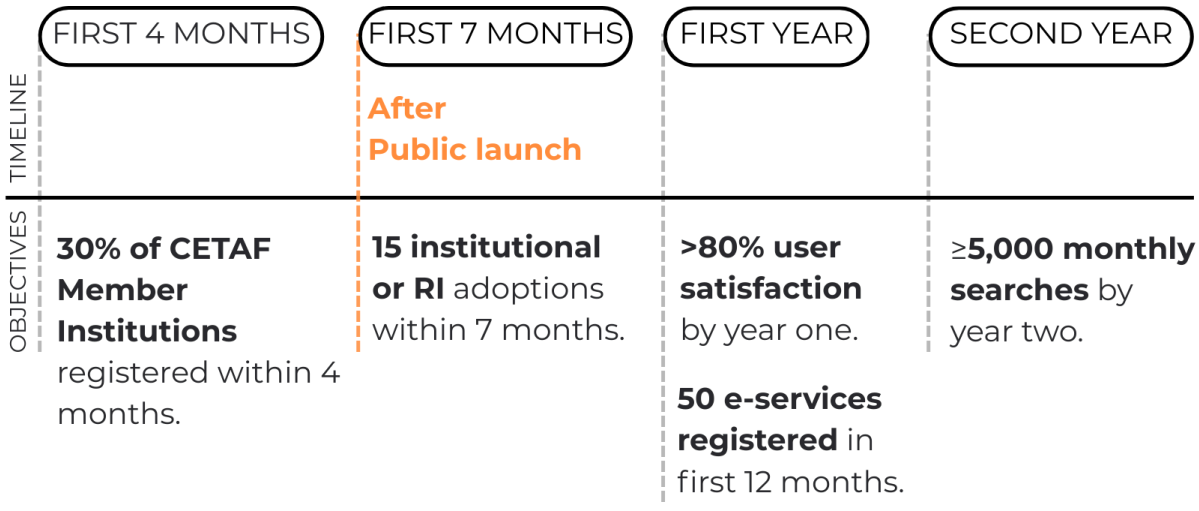
Objectives are presented at two levels: high-level strategic goals, and Specific, Measurable, Achievable, Relevant and Time-Bound (SMART) objectives for the first two years.

10.1. High-level strategic goals

- Establish the Marketplace as the primary **European hub for taxonomic expertise**.
- Drive early **adoption** among experts and institutions.
- Achieve long-term **sustainability** and recurring user **engagement**.
- Promote the **visibility and relevance of taxonomy** for society, policy and industry.

10.2. SMART objectives (first two years)

The following figure visualises the SMART objectives for the first two years of operation, translating strategic goals into time-bound adoption and performance targets. These objectives include an initial preparation and seeding phase prior to the public launch, aimed at ensuring a critical mass of expertise and services. Progress is assessed using the Key Performance Indicators (KPIs) defined in Section 14.



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11. Marketing Strategy: Actions, Channels & Materials

Several mechanisms and tools will be used to implement the marketing strategy for the Marketplace. This section describes how target audiences will be activated, how key messages will be articulated and deployed, and which actions, channels and materials will support the Marketplace throughout its development.

11.1. Marketing channels

To reach all target audiences effectively, the strategy integrates a diverse set of communication and outreach channels:

- **INSTITUTIONAL CHANNELS**
  - CETAF networks and member institutions
  - TETTRIs communication channels
  - European Research Infrastructures (DiSSCo, LifeWatch ERIC, GBIF)
  - National agencies, environmental authorities and regulatory bodies (support)
  - Scientific and professional associations and thematic communities of practice

- **DIGITAL CHANNELS**
  - Marketplace website
  - LinkedIn (targeted campaigns tailored to each audience)
  - Quarterly CETAF newsletter
  - Short explanatory videos distributed through institutional networks.

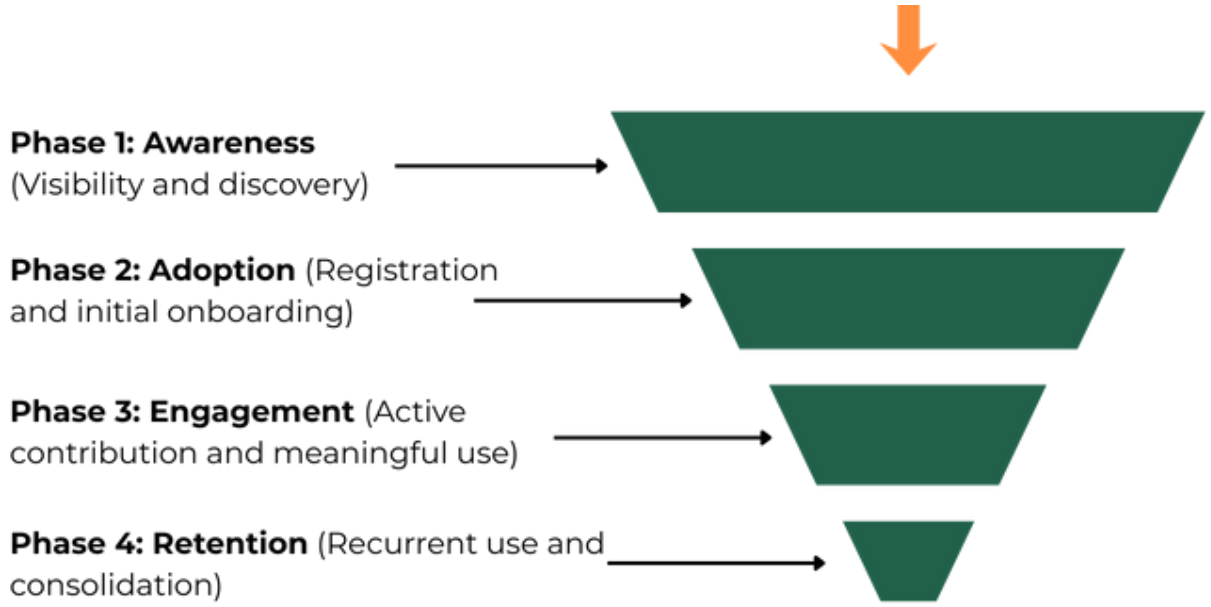
- **ACADEMIC AND COMMUNITY CHANNELS**
  - Scientific congresses and symposia
  - Thematic webinars and workshops
  - Scientific societies, journal editors (like European Journal of Taxonomy) and taxonomy networks

- **INDUSTRY AND APPLIED-SECTOR CHANNELS**
  - Sectoral associations
  - Environmental consultancy networks
  - Events focused on biodiversity, impact assessment, conservation, regulation and biotech applications

11.2. Marketing funnel

The deployment of the Marketplace follows a structured, stage-based process over a two-year timeframe. **Before the Awareness phase begins**, an initial seeding and onboarding phase is carried out within the CETAF network to ensure that a critical mass of expert profiles and taxonomic e-services is available when the platform is first promoted externally (see Section 12.1, Preparation Phase of the Roll-out Plan).

Following the public launch, the marketing funnel supports users from the moment they discover the platform to the point at which their engagement becomes sustained and increasingly autonomous. Over time, communication efforts progressively shift from activation and engagement towards supporting long-term sustainability, resilience, and the continuous evolution of the Marketplace.



PHASE 1: AWARENESS

Objective: ensure the scientific, institutional and applied communities are aware of the Marketplace and understand its purpose.

Key actions:

- European press release at launch.
- Institutional launch video and short thematic explainer videos
- Dissemination through CETAF, TETTRIs, Research Infrastructure networks, and other major projects involving the taxonomic community, through which new e-services are being developed.
- Presence at scientific and sectoral conferences.
- Publication of concise content emphasising benefits and use cases.

PHASE 2: ADOPTION

Objective: convert awareness into actual registrations and first contributions.

Key actions:

- "Register Your Expertise" campaign targeting individual taxonomic experts.

- A dedicated outreach and engagement campaign for service providers, focusing on linking existing e-services to the Marketplace and supporting their standardised presentation.
- Quick-start guides for experts and institutions.
- Introductory webinars explaining core workflows, including onboarding for both experts and service providers.
- Support for pioneer institutions and service providers undertaking coordinated onboarding and addressing interoperability and harmonisation requirements.
- Accessible onboarding materials tailored to the needs of different user groups.

PHASE 3: ENGAGEMENT

Objective: encourage regular use of the platform and sustained publication of services.

Key actions:

- Thematic webinar series tailored to different audience groups.
- Marketplace Ambassadors network.
- Publication of real use cases illustrating practical value.
- Thematic campaigns to strengthen under-represented areas of expertise.
- Dissemination at high-profile European scientific events.

PHASE 4: RETENTION

Objective: maintain user activity and secure long-term continuity.

Key actions:

- Quarterly CETAF newsletter with updates and opportunities.
- Continuous UX/UI improvements based on user feedback.
- Periodic reminders to update profiles and services.
- Technical integration and interconnection with European Research Infrastructures, including the European Open Science Cloud (EOSC), particularly within the environmental and biodiversity domains, to enhance long-term value.
- Advanced training or thematic guidance when needed.

11.3. Marketing materials

Marketing materials provide clarity, consistency and practical support for outreach and user onboarding. They are structured into three categories:

INSTITUTIONAL MATERIALS

- Official Marketplace presentation
- Institutional communication kit for CETAF, Research Infrastructures and service-providing institutions.
- Project information sheet
- Visual templates for institutional dissemination

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DIGITAL MATERIALS

- Official Marketplace launch video (high-level overview of purpose, scope and audiences.
- Short explainer videos (registration, search, service publication)
- Infographics illustrating how the Marketplace works
- Static and animated banners for digital diffusion
- Quick-start guides tailored to experts, institutions and end users

EVENT MATERIALS

- Roll-up banners and visual display materials
- QR cards for rapid access to the platform
- Concise brochures (digital and print)
- Short audiovisual assets for presentations and workshops

12. Visual Identity and Communication Principles for the Marketplace

This section provides high-level branding and visual guidance for the Taxonomic e-Services and Expertise Marketplace. Its purpose is to ensure coherence, clarity and continuity in the visual and editorial presentation of the Marketplace across its lifecycle, while allowing sufficient flexibility for future evolution.

These guidelines are not intended to replace or duplicate the official TETTRIs Brand Guidelines. Instead, they offer complementary principles to support the operation and communication of the Marketplace as a long-term, community-driven service.

12.1. Brand positioning and governance context

The Marketplace has been developed within the framework of the TETTRIs project and therefore aligns with TETTRIs' visual identity and communication principles during the project lifetime.

At the same time, the Marketplace is hosted, governed and sustained by CETAF as a community service. CETAF ensures its continuity, exploitation and long-term relevance beyond the end of TETTRIs, regardless of subsequent project developments. This dual context requires a branding approach that:

- Acknowledges its origin within TETTRIs
- Ensures continuity and endorsement by CETAF
- Allows gradual evolution without disrupting recognition or trust

As a result, the Marketplace branding is conceived as progressive and adaptive, rather than fixed or project-bound.

12.2. Core visual principles

Across all applications, the Marketplace visual identity should reflect the following principles:

- **Scientific credibility and neutrality.** The visual language should support trust, rigour and professionalism, avoiding overly commercial or promotional aesthetics.
- **Clarity and accessibility.** Interfaces and materials should prioritise readability, intuitive navigation and inclusiveness for diverse user groups.
- **Biodiversity-centred imagery.** Visual elements should be grounded in natural history, taxonomy and biodiversity, reinforcing the scientific scope of the service.
- **Calm and consistent tone.** Colours, typography and layouts should convey stability, coherence and continuity over time.

12.3. Visual identity elements

Imagery

The Marketplace adopts imagery aligned with the TETTRIs visual universe, with a focus on European flora and fauna. Photographic content should be naturalistic, high-quality and free from excessive overlays or textual elements.

Colour palette

The colour palette of the Marketplace is derived from the official TETTRIs identity and is characterised by high-contrast, clearly defined colours suitable for digital interfaces, scientific communication and data-driven environments.

The reference palette includes:

- Cyan. HEX: #78D3AC / CMYK: 43; 0; 27; 17
- Dark Cyan. HEX: #21614A / CMYK: 66; 0; 23; 62
- Deep Ocean Blue. HEX: #05041D / CMYK: 73; 79; 0; 89
- Bright Orange. HEX: #FFBE3E / CMYK: 0; 25; 76; 0
- Light Blue. HEX: #7BC1DC / CMYK: 44; 12; 0; 14
- Pure White. HEX: #FFFFFF / CMYK: 0; 0; 0; 0

These colours may be used as reference across interfaces, visual accents, infographics and communication materials related to the Marketplace during the TETTRIs project phase. Their use should prioritise contrast, legibility and functional clarity.

Typography

Montserrat is used as the primary typeface, reflecting the clean, solution-oriented identity of TETTRIs. Its wide range of weights allows flexible application across interfaces, headings and editorial content.

12.4. Application within the Marketplace

The principles described above are reflected in the current Marketplace sandbox and user interface, which serves as a practical reference for the application of these guidelines. While specific visual implementations may evolve over time, the underlying principles of clarity, consistency and scientific integrity should remain stable.

Logos and institutional identifiers are applied in line with governance responsibilities. During the TETTRIs project, appropriate visual acknowledgment is maintained. As the Marketplace transitions into a fully operational CETAF service, CETAF branding provides institutional endorsement and continuity.

This approach ensures that the Marketplace can evolve from a project output into a sustained community service without requiring abrupt visual or branding changes.

12.5. Relationship with existing brand guidelines

This section complements existing TETTRIs brand guidelines and does not override them. Any future adjustments to the Marketplace's visual identity should respect both CETAF governance principles and the need for continuity with established recognition, ensuring a smooth transition over time.

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13. Roll-out plan & timeline

As a complement to the SMART Objectives, the following roll-out plan and timeline present a five-phase approach covering all key actions to be implemented during the first two years of the Marketplace. This phased plan provides a clear, sequential view of the steps required to support a coordinated launch, progressive adoption and the consolidation of the platform over time.

13.1. Roll-out plan

PREPARATION PHASE: PRE-LAUNCH
Months 1–3
This phase focuses on the technical and organisational groundwork necessary for the phases that follow. The aim is to ensure that the Marketplace is ready for public release and that all communication efforts are aligned.

- Completion and validation of the sandbox environment.
- Technical and editorial review of metadata structures and registration forms.
- Development of communication materials: presentations, key messages, visual assets and brief guides.
- Coordination with all actors involved in the launch.
- Targeted engagement of first institutional adopters within the CETAF network to seed the platform with expert profiles and initial e-services, including dedicated onboarding support.
- Internal training for the communication and outreach teams.

INITIATION PHASE: LAUNCH
Month 4
The launch acts as the first visible milestone of the Marketplace and sets the tone for the following months. A well-coordinated launch increases awareness, builds trust and encourages initial registration.

- Publication of a coordinated press release through CETAF, TETTRIs and participating institutions.
- Outreach to specialised media outlets.
- Organisation of a launch event open to relevant stakeholders and the press.
- Real-time coverage through social media.
- Start of a paid advertising campaign on LinkedIn, running for at least three months.

EARLY ADOPTION PHASE
Months 5–8
The main purpose of this phase is to reach a critical mass of active users and linked e-services, enabling the Marketplace to begin generating visible interactions and tangible value.

- Direct support for institutions adopting the platform.
- Thematic campaigns to encourage expert registration in specific disciplines.
- Targeted actions to identify, link and onboard existing available e-services.
- Publication of featured content such as “Rising Experts”, “New Contributors”, etc.
- Short explanatory webinars on functionalities and use cases.
- Integration of initial testimonies and emerging success stories.

CONSOLIDATION PHASE

Months 9–12

Once initial adoption is achieved, efforts shift to stabilising usage, refining the experience and supporting broader engagement.

- User experience review and implementation of improvements based on feedback.
- Targeted campaigns directed at independent experts or underrepresented domains or taxa, as well as specific geographical regions.
- Development of communication materials specifically tailored to applied users (administrations, NGOs, consultancies).
- Broader dissemination through specialised newsletters and professional networks.
- Focused actions to connect with service providers and enable the linkage of additional e-services to the Marketplace.
- Preparation of quarterly activity reports with usage metrics and observed trends.

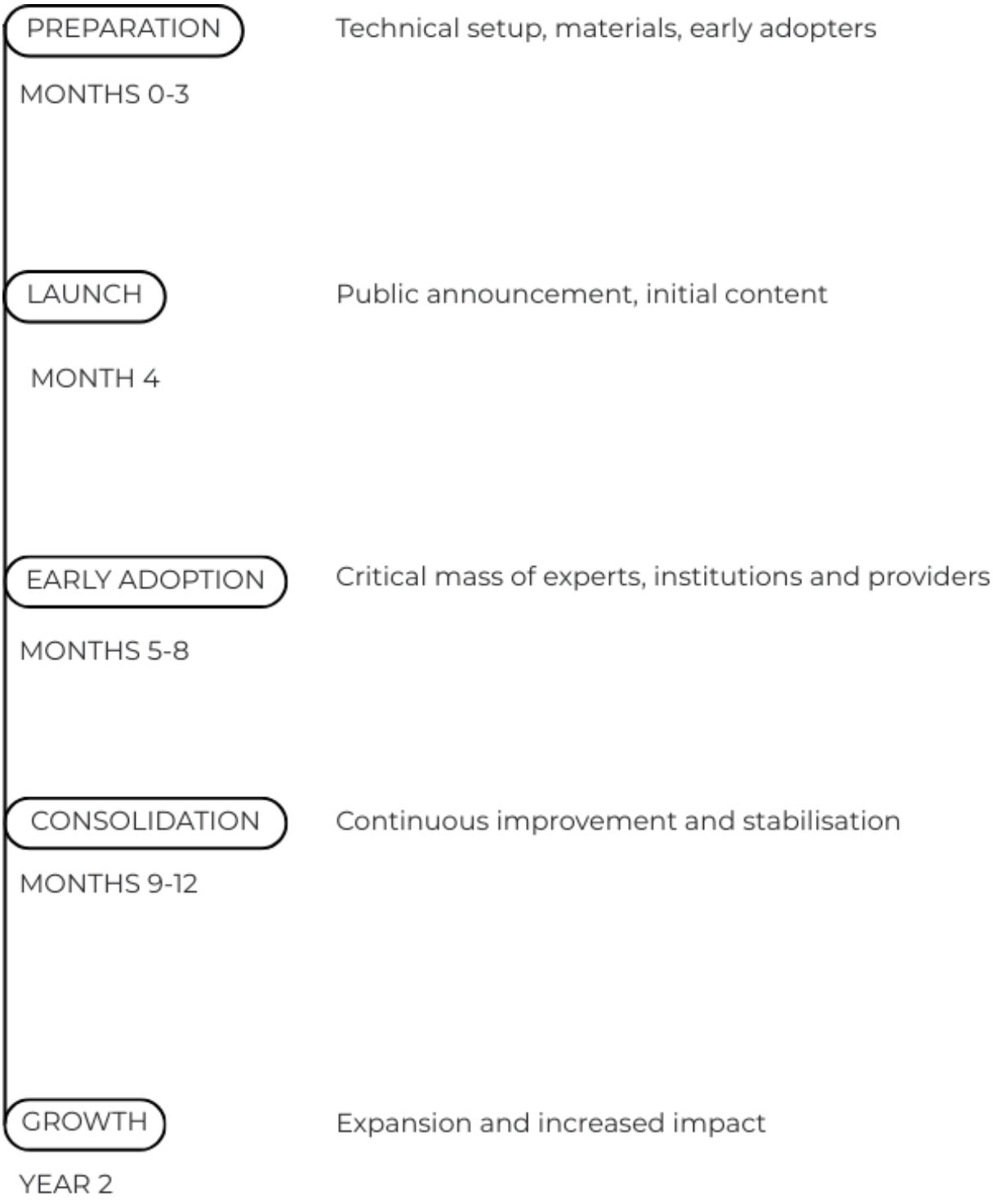
GROWTH AND MATURITY PHASE

From Year 2 onwards

The Marketplace should position itself as a European reference point.

- Introduction of new features and enhanced interoperability.
- Alliances with European infrastructures, service providers and thematic initiatives.
- Publication of regular use cases and collaborations originating from the platform.
- Strengthening community engagement activities.
- Targeted campaigns for applied audiences.

13.2. Timeline



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14. Incentives & engagement

Beyond a strong launch strategy, the Marketplace must offer users clear reasons to remain active over time. To support this, a set of simple, familiar actions will be implemented, drawing on practices that work well in other digital platforms and professional communities.

These measures are designed to strengthen visibility, encourage participation and help the community grow in a steady, organic way.
The activities to articulate sustainable use and enhancement over time, as well as to foster engagement, include the following:

- **Featured sections: “Rising Experts”, “New Contributors”, “Expert of the Month”**
  These sections act as a dynamic window into community activity. They make it easy to discover new profiles, highlight recent contributions and foster the sense that the platform is alive and continually evolving. They also encourage users to keep their own profiles up to date. Featured sections will be curated through light-touch editorial oversight coordinated by CETAF (through eventually, the Marketplace management team), ensuring transparency, fairness and alignment with the platform’s objectives.

- **“Early Adopter Badge”**
  Recognising those who join the platform early reinforces a sense of community and rewards early commitment. This type of distinction is common in scientific and professional platforms because it provides visibility and a modest reputational boost without adding extra work for the user. Additional badges could be progressively introduced in future phases to recognise other forms of engagement, such as keeping profiles up to date or providing particularly rich and well-documented information, subject to platform priorities and resources.

- **Institutional visibility for new adopters**
  When a new institution joins the Marketplace, this will be communicated to users and its logo will appear for a period of time in a carousel on the homepage. This strengthens trust in the platform, shows that the ecosystem is expanding, and offers institutions immediate and visible acknowledgment of their participation.

- **Peer recommendations**
  Allowing users to recommend colleagues or collaborators adds a valuable layer of peer recognition, which is particularly appreciated in scientific communities. The more a profile is recommended, the more visible it can become in searches or featured blocks—creating a positive dynamic without relying on artificial gamification.

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- **Webinars and use cases:**
  The platform will offer short webinars on taxonomic disciplines, technical services or practical experiences. These sessions are typically well received, as they offer real value, highlight specific expertise and maintain engagement without demanding extensive time from participants. Over time, success stories linked to collaborations initiated through the Marketplace will be actively showcased, increasing the attraction, use and endorsement of the services included in the Marketplace.

- **Personal statistics dashboard**
  Users will have access to basic metrics that reflect their visibility on the platform: number of visits received, interest from different institutions, or alerts about similar profiles they may wish to explore. These insights help users understand the reach and relevance of their presence in the Marketplace.

- **Gentle alerts and reminders**
  Discreet, non-intrusive notifications can help users keep their information up to date and stay aware of relevant developments. These may include suggestions for completing missing details, notices about new related experts or updates that may be of interest.

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15. KPIs and Monitoring Framework

To allow an effective assessment of the implementation of the Marketing Strategy, a set of Key Performance Indicators (KPIs) is defined as part of the monitoring framework for the evolution of the Marketplace. These indicators are designed to track adoption across target audiences, assess the effectiveness of marketing actions, and support evidence-based decision-making. The framework combines quantitative and qualitative indicators aligned with the SMART objectives and is based on regular review cycles that enable continuous improvement over time.

15.1. Qualitative KPIs

For adoption and growth

- Total number of registered experts
- % of CETAF experts registered
- Number of adopting institutions
- Number of registered e-services
- Number of taxonomic groups (taxa) represented

Usage and access

- Monthly number of searches
- Number of profile and e-service views
- Monthly traffic to the Marketplace
- % of returning users

Engagement and activity

- Number of experts with updated profiles
- Number of updated e-services
- Participation in webinars and training events
- Number of institutions actively adopting or contributing services to the Marketplace

15.2. Quantitative KPIs

Service quality

- Overall user satisfaction (>80 % baseline target)
- User experience (UX) assessment
- Perceived ease of use
- Perceived clarity of onboarding processes

Functional impact

- Perceived usefulness of the Marketplace for finding experts
- Usefulness for publishing and showcasing e-services
- Perceived contribution to collaboration and networking

Institutional perception

- Feedback from pioneer and adopting institutions
- Evidence of integration into workflows or internal processes
- References to the Marketplace in proposals or European projects

15.3. Monitoring frequency & reporting

In order to identify trends, anticipate challenges and prioritise high-impact actions, reporting must follow a clear frequency and KPI measurement cycle. Monitoring will take place as follows:

- **Quarterly**: retention analysis, institutional activity, campaign participation.
- **Biannual**: evaluation of overall performance, user satisfaction and improvement priorities
- **Annual**: strategic impact review and refinement of the monitoring framework.

15.4. Data collection and analysis tools

- Marketplace analytics dashboard.
- Internal records of expert profiles and e-services.
- Webinar and training participation data.
- User surveys and structured feedback forms.
- Reports from pioneer and adopting institutions.
- Interaction with the Marketplace content on Social Media.

16. Risk Management

Risk management is essential to ensure the effectiveness, sustainability and long-term impact of the platform. This section identifies the main risks that could affect the site's deployment, together with the preventive and corrective measures designed to mitigate them. The objective is to ensure stable performance, adequate adoption and coherent evolution in line with the needs of the taxonomic community and the sectors that rely on it.

RISK	DESCRIPTION	MITIGATION
Low initial adoption by experts or institutions	Possible hesitation to register due to lack of awareness, perceived complexity or limited time.	• Targeted "Register Your Expertise" campaign • Simplified institutional onboarding • Short benefit-oriented webinars • Clear, concise communication materials • Pioneer institutions acting as multipliers
Limited updating of profiles and services	Users may not maintain their profiles or services, reducing platform value.	• Automated reminders • Quick-start guides and short tutorials • Soft incentives (e.g., "updated profile" visibility) • UX improvements to simplify the update process
Unclear understanding of the platform's purpose	Some users might incorrectly assume that the Marketplace evaluates or certifies expertise.	• Clear messaging on what the Marketplace is and is not • Explicit documentation and disclaimers • Clarifying content integrated into webinars and communications • Visible notices within the platform interface
Heterogeneity in the quality of e-services	Variations in detail or structure may affect usability and reliability.	• Standardised templates • Guidance materials with examples • Light-touch review to ensure minimal consistency • Controlled allocation of services, ensuring they are

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		only listed once proven and operational following an initial piloting phase • Continuous refinement based on user feedback
Technical limitations or interoperability challenges	Integration with European infrastructures or increased traffic may pose challenges.	• Iterative UX/UI improvements • Ongoing performance monitoring • Technical collaboration with DiSSCo and other Research Infrastructures (e.g. LifeWatch ERIC, ELIXIR), as well as with publishers, catalogues, repositories, aggregators and other related actors • Flexible, scalable platform design

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17. Data Management

The diversity of data integrated into the Marketplace requires the application of clear principles governing data ownership, processing, protection and accessibility. These principles are defined in line with European legislation and established best practices in research infrastructures, ensuring responsible data handling while supporting openness and reuse.

The Marketplace is operated by CETAF, which ensures its long-term operation, the overall quality of the data made available and the regular updating of the platform. By providing open access to resources, CETAF acts as a custodian and promoter of the data integrated into the Marketplace, facilitating their dissemination while supporting consistency and quality over time.

17.1. Ownership

Data entered into the Marketplace remain the property of the individuals or institutions that produce them.

- Experts retain ownership of the information contained in their professional profiles.
- Institutions retain ownership of the data associated with their services, collections or resources.
- The Marketplace does not acquire rights over the content, beyond what is strictly necessary to display it within the platform.

This principle ensures clarity, accountability and respect for authorship.

17.2. Curation

Data curation aims to ensure **quality, consistency and usability**:

- Structured templates are used to ensure clarity and comparability across profiles and e-services.
- Content is displayed exactly as submitted, except for minor formal corrections.
- The platform performs light validation checks to avoid duplicates or basic inconsistencies.
- Updates rely on user responsibility, following a self-curation approach typical of scientific infrastructures.

Light validation checks and minor formal corrections are coordinated by the Marketplace management team under CETAF, following transparent and minimal criteria, without evaluating the scientific content of the information provided.

17.3. Consent and Ethics

The Marketplace follows principles of **integrity, transparency and voluntary** participation:

- Users must provide explicit consent to publish their professional information and any other specific personal information, where required. Consent is reinforced through the use of stable identifiers (such as ORCID for individuals and ROR for institutions), ensuring clear attribution and traceability.
- The platform clearly explains the purpose, scope and visibility of data processing.
- No sensitive personal data will be exposed through the platform. Where specific data (e.g. gender or affiliation information) are collected for analytical, monitoring or dashboarding purposes, this is done only with the explicit consent of the individuals concerned and is handled in accordance with applicable data protection rules.
- Any relevant change in data processing practices will be communicated in advance and will require renewed consent where legally necessary.

17.4. GDPR compliance

The Marketplace complies fully with the General Data Protection Regulation (GDPR):

- Personal data are processed on the basis of informed consent.
- Users may exercise their rights to access, rectification, erasure and portability at any time.
- Technical and organisational measures ensure confidentiality, integrity and availability.
- Data are stored on infrastructures compliant with applicable EU standards.
- Only data strictly required for the platform's operation are retained.

17.5. Copyrights

The following principles apply:

- Authors retain full copyright over all textual and descriptive content they provide.
- The Marketplace holds only the rights required for internal display and dissemination.
- Logos, images or institutional materials may only be published when users or institutions hold the appropriate rights.

17.6. Data Access

Data access is based on a model of responsible openness:

- Expert profiles and e-services are publicly visible, except where specific restrictions apply.
- Data are displayed transparently to support discovery, collaboration and legitimate reuse.
- The platform may provide bulk access to non-personal metadata, in line with GDPR.
- Unauthorised commercial use of the data is not permitted.

This balanced approach ensures both accessibility and protection.

APPENDIX 1

ID	Reference or Related Document	Source or Link/Location
1	*Folder documents*	LINK
2		
3		
4		
5		
6		
7		
8		

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