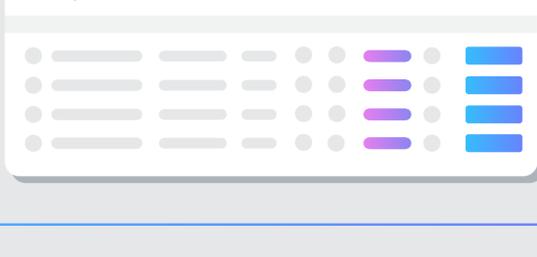


User guide

The Marketplace

1 Introduction

The TechPassport Marketplace is the go-to place to find onboarded suppliers and products. Whilst the Outer Market has an external data set of technology providers, the Marketplace comes populated with vendors who you can immediately engage with.



Suppliers who register for the platform populate their profiles with data that cannot be found publicly. This information can be broken down into three broad categories:

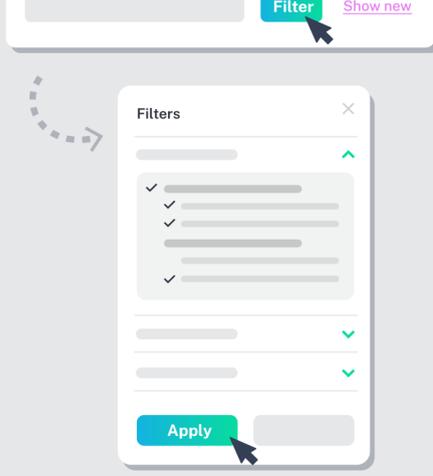
- 01 Company information**
This includes data around funding, ESG, and the financial institutions they have worked with previously.
- 02 Product information**
Answers the obvious question of 'what does this do', but also contains technical information on open source and third party software used, data and access, and fees. We also include a space for suppliers to upload collateral such as demo videos, pitch decks or brochures.
- 03 Enterprise Ready Questions (ERQs)**
The ERQs are a set of compliance and due diligence questions designed by a consortium of banks to help you make risk assessments based on company maturity and how easy they will be for your organisation to onboard.

2 Searching the marketplace

How to search

Search by supplier/product name or use the filter button to narrow down your requirements. You can filter using the comprehensive list of taxonomies, as well as metrics around geography, company age, ERQ completion, insurance and more.

Once you have selected your filters, click the apply button to return a list of products that match your requirements.



Taxonomies versus tags

A product taxonomy is the type of solution or category that it functions within. This comprehensive list is broken down into multiple tiers, and you can filter by the top tier, such as 'digital lending', to show all products within that category, or choose a more specific field such as 'Buy Now Pay Later'. Each product can be classified by up to three taxonomies.

Tags are more general, focussing on the core principles behind the product such as artificial intelligence or data extraction. A supplier can choose up to three tags per product.

Sort by

You can change the order of your search results with the 'sort by' dropdown, in the top right of the page. Choose to sort by recommended, newest to oldest or alphabetically.

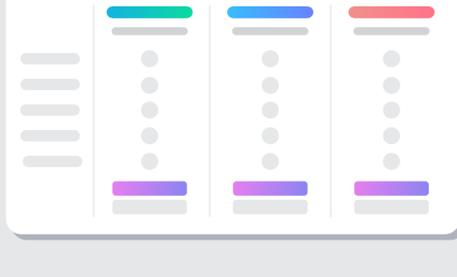


3 Compare products

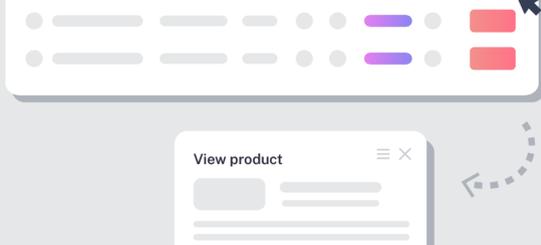
Comparison tool

Using the tick boxes on the left hand side, you can multi-select up to three products and run a side-by-side comparison by hitting the 'compare products' button.

From here you can view full details of a product, add it to a watchlist or make a request.



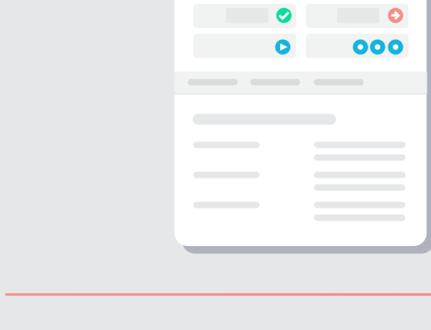
4 Product details



View product

Once you've found a product that matches your requirements, you can view the large amount of information exclusively provided to TechPassport. You can widen the view panel by clicking 'expand'.

The NDA and POC boxes will have green ticks if that vendor has a contract in place with you already. You are still able to send another contract to this vendor if you would like to work with them on a separate project. Head to your dashboard and use the supplier filter in the 'projects and POCs' widget to see exactly how your organisation has engaged with this vendor so far. Select the 'watch video' or one of the 'view collateral' buttons to see the marketing materials the supplier has provided as an introduction to their solution.



Product details

We collect details on the following product metrics:

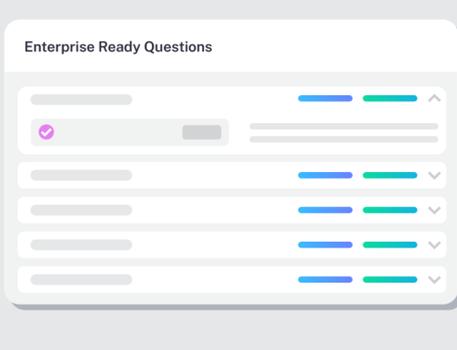
- **Functionality:** what does the product do, and what sets it apart from the competition?
- **Data and access:** can the product be trialled with synthetic data, and are there any geographical or time restrictions the supplier has placed on a POC?
- **Hosting:** where is the solution hosted, and how flexible can this supplier be in this area?
- **Charges:** will a POC cost you? And how much is the solution post POC?
- **What are the frameworks, third party and open source software used to build this product?**
- **Use cases:** who and what within the organisation is the product for?

5 Enterprise Ready Questions (ERQs)

Overview

The Enterprise Ready Questions are a set of onboarding criteria that allows suppliers to accurately demonstrate that they will be able to meet your due diligence requirements. Now before even speaking with a vendor you can have a picture of their maturity and readiness for a client of your size.

The supplier may upload evidence to validate some of the information they have provided, and could have a SOC2 or ISO27001 certificate attached to their profile. You will not be able to view the certificate copies without an NDA in place with the supplier.

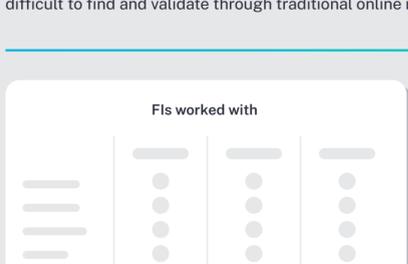


Suppliers self-submit information in the following compliance areas:

- 01 Certification**
What certifications (ISO27001 / SOC2) do they currently hold, and what are their plans for the future?
- 02 Breach notification**
Does the vendor commit to internal process for breach notifications?
- 03 SSDLC**
Do they have an up to date penetration test for their product?
- 04 Application security**
How does the vendor authenticate access to the product?
- 05 Data deletion & retention**
Where does the vendor store customer data, and can it be removed in accordance with regulation and client demand?
- 06 Data privacy**
Which data legislation does the vendor conform to, and does this match the locations from which they provide their services?
- 07 Data storage & separation**
What regions do they hold client data in, and what technical measures are made to protect this data?
- 08 Disaster recovery**
How risky will this vendor be for your organisation?
- 09 Encryption**
What technical measures are used to hide client and PII data?

6 Additional information

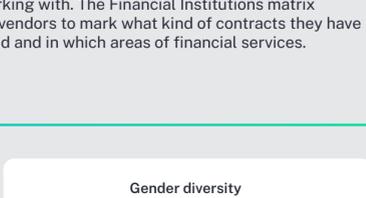
TechPassport collects more information from suppliers that is often difficult to find and validate through traditional online research methods.



Financial Institutions worked with

When making decisions on which supplier to work with for a project, market traction as well as the size and profile of the supplier's current clients are often a key determining factor. However, NDAs and confidentiality clauses make it difficult for suppliers to name who they are working with. The Financial Institutions matrix allows vendors to mark what kind of contracts they have received and in which areas of financial services.

Diversity & inclusion
The company diversity section contains information on the ethnic, gender and neurodiversity make-up of a vendors' board and founders, allowing you to mark them as applicable to any initiatives you may have in this area.



7 Engaging with suppliers

There are a few ways to engage with buyers from their profile or from the marketplace:

Request information

If a supplier has missing information from their profile that is important for you to make a decision on which vendor to work with, click the menu and select this option to send them an automated email letting them know a bank has asked them to fill out their profile.

Request an NDA

Send an NDA directly to the supplier from the platform. Once this is signed you will be able to view their uploaded evidence to validate their product and ERQ data.

Request a POC

Start negotiations with the supplier to enter in to a proof of concept.

