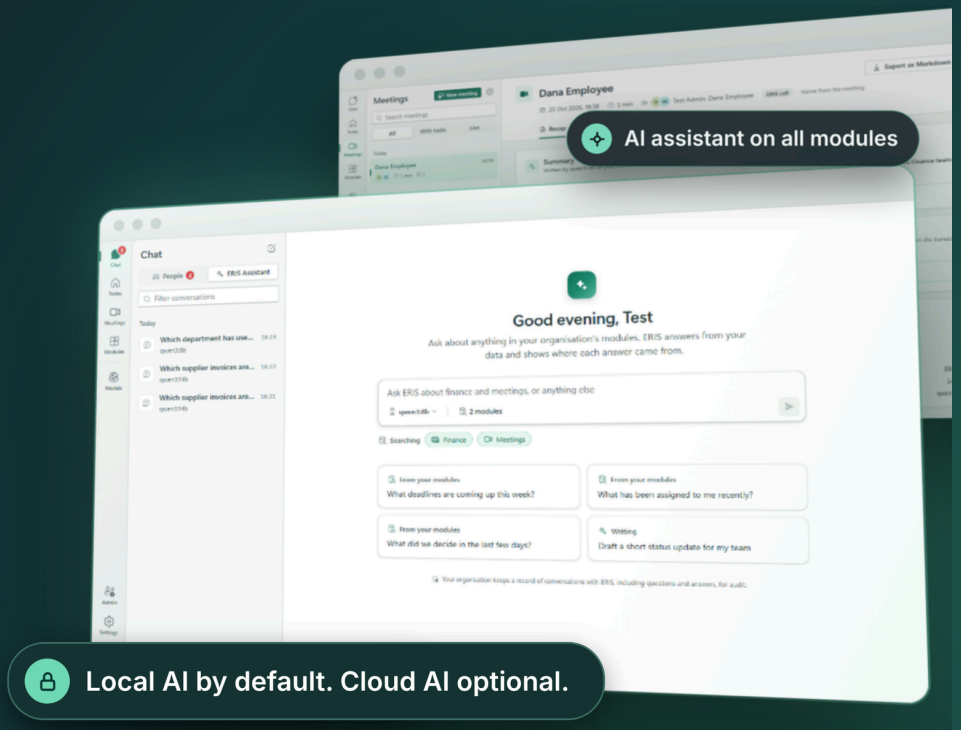
ERIS ENTERPRISE RESOURCE & INTELLIGENCE SYSTEM



WHITEPAPER · NOVEMBER 2026

ERIS Whitepaper

Your company's AI. Sovereign or cloud.

One system for the whole business, with an AI assistant that knows all of it. On your own hardware or hosted for you.

1
system for every department

up to 75%
lower software cost*

2
ways to run it: own hardware or hosted

UT-ERS-RPT-0008 rev 2.0 · Upward Technologies B.V., Breda · * Illustrative estimate at 2026 list prices, depending on company size and the tools replaced. Excludes installation, AI readiness and support.

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What this whitepaper covers

This whitepaper describes ERIS (Enterprise Resource & Intelligence System): what it is, the problem it solves, who it is for, how the platform is built and the legal frame it operates in. ERIS is one app that puts a company's business software under one roof and runs AI across all of it on the company's own data, on-prem and off-grid, so that organisations which may not or will not put their data in a third-party cloud can use AI too. It can also be hosted for a client by a cloud or telecom provider. It is developed, installed and supported by Upward Technologies B.V. in Breda, the Netherlands.

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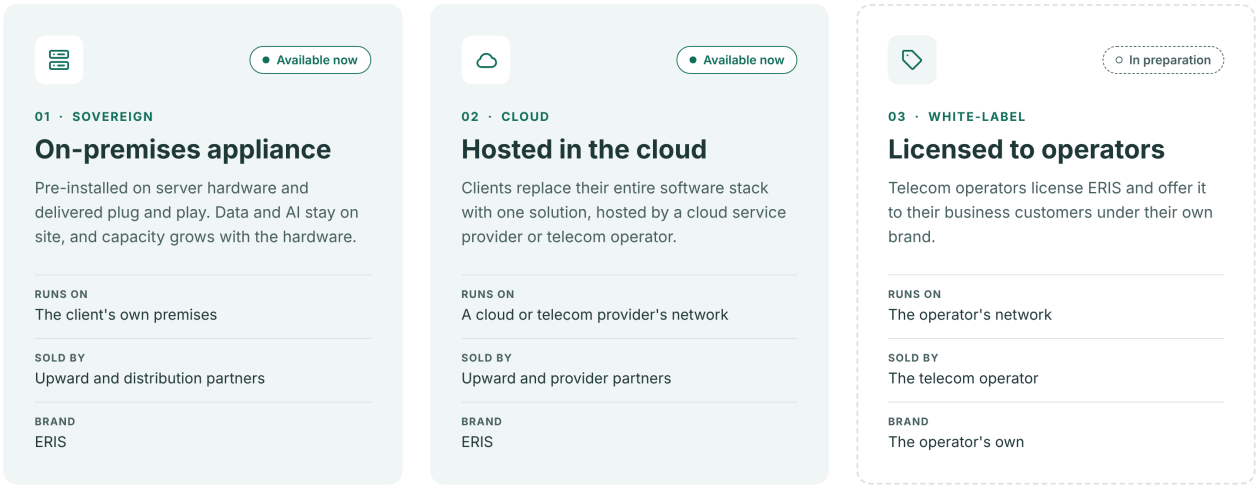
01 Executive Summary



Two ways to run ERIS: on the client's own hardware or hosted by a cloud or telecom provider. White-label licensing for telecom operators is in preparation.

A company's data and knowledge are its most valuable asset. Most of today's AI tools run in the cloud: to use them, that data has to leave the company and sit with a third-party provider. Many organisations are not allowed to do that, and many others choose not to, because they do not want their data and knowledge shared or left vulnerable. The organisations that understand the value of their data best are often the ones that cannot use current cloud AI. Upward built ERIS for them. ERIS runs on-prem and off-grid, on local models and local computing, so a business can use AI on its own data without giving that data up. It can also be hosted for the client by a cloud or telecom provider, and cloud AI is optional and off by default. It is built this way to help clients comply with, and stay ahead of, the new EU AI regulation and related rules such as GDPR, NIS2 and DORA: on-prem deployment and a log of every AI task support those duties, while whether a given deployment meets a specific duty is assessed per deployment.

The same organisations face a second problem that every business has. Most businesses run on a stack of separate cloud tools: team chat, email, document management, CRM, service desk, e-signature, and finance and HR software. Each comes from a different provider, each is paid per seat, and each keeps its own copy of the company's data. The result is a growing number of bills, data that never meets, AI that can only see the inside of the one tool it is sold with, and one more place outside the company where its data is held with every tool added.

ERIS replaces that stack with one app. Its modules take over from team chat, document management, CRM, service desk, e-signature and, over time, the tools of every other business function. All modules share one data layer, one login, one permission model and one audit trail. Because the data is in one place, AI agents work across the whole company: a question that crosses sales, finance and support can be answered from one system. Every AI task is logged, with who asked, which data the AI used, what it did and the result.

ERIS is not a concept. The beta has eight core tools: meetings, with meeting notes and the note taker, and the task manager already run internally at Upward; project management, document management, document signing and CRM work as standalone Upward products and are being

integrated; team chat and email are in development for the beta. The beta starts in November 2026, followed by the period with design partners and the official release in January 2027. Further modules follow in phases, quickest time to value first. Upward has built this software and these use cases before, as separate products; ERIS combines them into one app.

The commercial model is simple. Each SMB, mid-market and enterprise client pays an annual platform licence, priced by the size of the business (€12,000 for SMB, €60,000 for mid-market, €120,000 for enterprise), plus €200 per seat per month. Small clients (1 to 9 staff) pay only for seats, at €300 per seat per month. A new client can also buy installation, pays for an AI readiness phase that gets its data ready before ERIS goes live, and can add support. New standard modules are included at no extra cost; custom modules, agents and knowledge bases are built on request as projects.

02 Introduction

What ERIS is

ERIS (Enterprise Resource & Intelligence System) is one app that replaces a company's separate cloud software providers and puts them under one roof. ERIS is the product; the business functions it covers are its modules. Upward Technologies B.V. develops, installs and supports it.

Why ERIS exists. Many companies are not allowed, or choose not, to use cloud-based software or AI tooling, so that their data and knowledge are not shared with third parties or left vulnerable. For them, today's AI is out of reach. Upward built ERIS so that it runs on-prem: as one local system with access to the local database, knowledge base and documentation, on local computing. Every agent and every action, from every user, runs through this one system and is logged. That is what lets these companies use AI on their own data, and it is how ERIS is built to help clients comply with, and stay ahead of, the EU AI Act and related regulation.

At the centre of the app is the **ERIS Assistant**. Users ask questions in plain language and receive answers drawn from all company data, documents and the internal knowledge base. Around the Assistant sit shared tools (meetings, tasks and projects, chat and documents) and modules per department: sales, marketing, support, finance, tax, HR, legal, standards, procurement, operations, logistics, manufacturing, IT, data, risk and management.

Two terms are used precisely in this paper. A **module** is a full application for a business function, such as CRM or the service desk. An **agent** is a smaller AI worker that runs inside a module or across several modules, for example to prepare a document, reconcile records or summarise a meeting.

The client pays one bill: a platform licence per business and one fee per seat, instead of separate subscriptions with separate providers. New standard modules are added over time at no extra cost to users. Custom modules, agents and knowledge bases are built on request for individual businesses.

Key Features

- **One app instead of separate providers.** Chat, documents, CRM, service desk, e-signature and more in one application, under one contract.
- **One data layer.** All modules read and write the same company data, so information entered once is available everywhere it is needed.
- **One login and one permission model.** Access is managed once, across all modules.
- **One audit trail.** Every AI task is recorded: who asked, which data the AI used, what it did and the result.
- **AI across all modules.** AI agents work across the whole company, learn from the company's own data and use the internal knowledge base.
- **ERIS Assistant.** One place to ask any question about the business in plain language.

- **On your own hardware or hosted.** ERIS runs on the client's own hardware, on-prem and off-grid where needed, on local models and local computing at a predictable monthly cost, or hosted for the client by a cloud or telecom provider, including as a private cloud at a European provider. Local AI models by default; cloud AI is optional and off unless the client switches it on.
- **One bill per seat.** An annual platform licence per business plus €200 per seat per month, with new standard modules at no extra cost.
- **One software supplier.** Development, installation, support and SLA for ERIS from Upward Technologies.

Goals, Mission, Vision and Values

Goals

- Release the ERIS beta in November 2026, work with design partners and move to the official release in January 2027.
- Bring the first modules after the beta to market by mid 2027 and add further modules in phases from 2027 to 2029.

Mission

- Put every business tool a company needs under one roof, in one app, with one bill per seat.
- Let AI work across the whole company, on the company's own data, instead of inside one tool at a time.
- Give businesses control over where their data lives and a record of what AI does with it.

Vision

- A business runs its work, from the first sales call to the board report, in one system that it can see across and account for.
- AI becomes a reliable colleague across every department because it can see the company's data, documents and knowledge base, and because every action it takes is recorded.
- Businesses that must keep data in-house have the same capabilities as businesses that work in the cloud.

Values

- **Control.** The client's data runs where the client keeps it: on its own infrastructure, on-prem and off-grid, or in an environment hosted for it by a cloud or telecom provider.
- **Transparency.** Every AI task is logged, so what the system did can be checked afterwards.
- **Simplicity.** One app, one login, one data layer, one bill.
- **Fairness in pricing.** New standard modules are included in the seat fee; a client does not pay again when the product grows.
- **Honesty about status.** What runs internally today, what is being integrated and what is in development are stated separately.

Strategy for Success

Vision, Focus and Diligence

- ERIS starts from software Upward has built before: meetings, with meeting notes and the note taker, and the task manager already run internally, and six Upward products that ERIS combines work today as standalone products.
- Modules come to market in phases: quickest time to value and lowest integration effort first.

Competitive Advantage

- **Breadth under one roof.** One app covers functions that businesses otherwise buy from separate providers.
- **AI across the company.** Because every module shares one data layer, AI agents are not limited to the data of one tool.
- **Where it runs.** ERIS runs on the client's own infrastructure, on-prem and off-grid, on local models and local computing. A business with fewer than 10 staff can also choose Upward's own server in the Netherlands, and any client can have ERIS hosted by a cloud or telecom provider. Cloud AI is optional and off by default.
- **One audit trail.** A single log of AI tasks across all modules supports record-keeping and oversight duties under the EU AI Act, GDPR, NIS2 and DORA.
- **Experience.** Upward has built this software and these use cases before, as separate products.

Platform Strategy

- One core platform (the ERIS app, a small language model and a sandbox environment) carries every module.
- New standard modules are added to the same app over time: 8 in the beta, 20 in development and more on the roadmap. All are modules inside the one ERIS app, not separate products.
- Custom modules, agents and knowledge bases are built on the same platform for individual clients.

Value to Clients

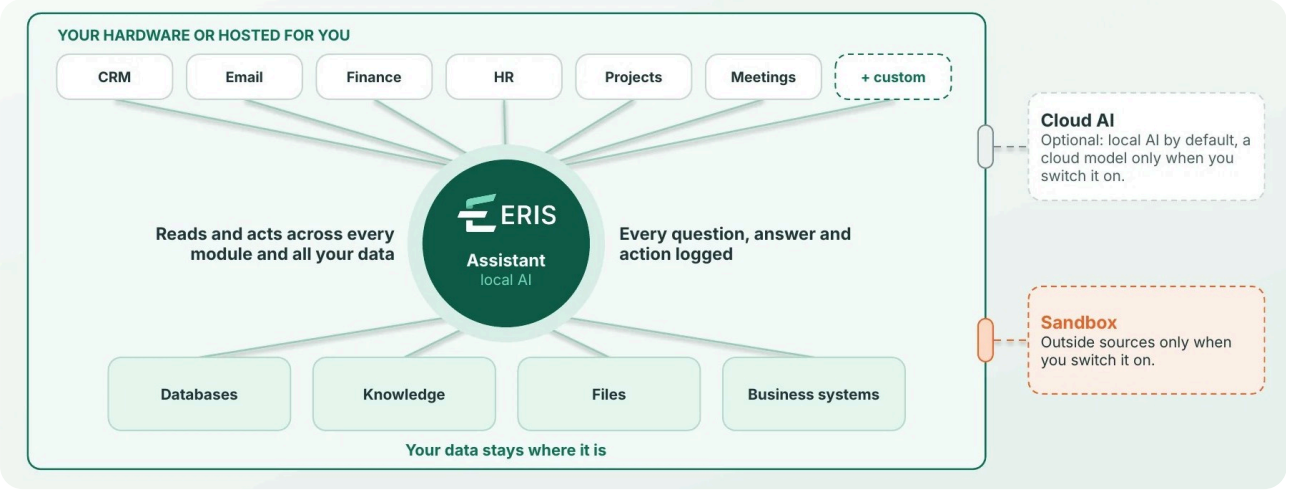
- One bill per seat instead of separate contracts, separate seat fees and separate data.
- New modules at €0 extra: the product grows inside the existing licence and seat fee.
- Answers across all company data from one assistant, instead of searching tool by tool.
- Savings per client depend on the stack it replaces and the size of the company: up to 75% lower software cost. This is an illustrative estimate at 2026 list prices: installation, the AI readiness phase and support come on top, and some tools in the comparison would be replaced by ERIS modules that are not yet in the beta.

Client Peace of Mind

- **Data control.** In every deployment the AI works on the company's own data and internal knowledge base, whether ERIS runs on the client's own infrastructure or is hosted for it.
- **On-prem and off-grid at a predictable cost.** ERIS runs on local models, with licence and seat fees agreed in advance.
- **Audit trail.** Every AI task is logged in one audit trail.

- **One accountable supplier.** Development, installation, support and SLA come from Upward Technologies.

How ERIS is Different



The AI comes to your data: every module, every data source, one assistant, one log. Cloud AI is optional.

Most business software is built around one function. A CRM is excellent at the sales pipeline, a service desk at tickets, a document system at files. When a business adds AI, it usually arrives inside one of those tools and can only see that tool's data. The business ends up with several assistants, each with a partial view, and with its data copied into the cloud of every provider it uses.

For a business that may not or will not put its data in a third-party cloud, that is not an option at all. It often has to accept the exposure or do without AI.

ERIS starts from the other end. It treats the company's data as its most valuable asset, keeps it where the company keeps it, and builds the functions on top of it. Every module reads and writes the same data layer, behind one login and one permission model. That has three consequences that separate ERIS from a collection of cloud tools.

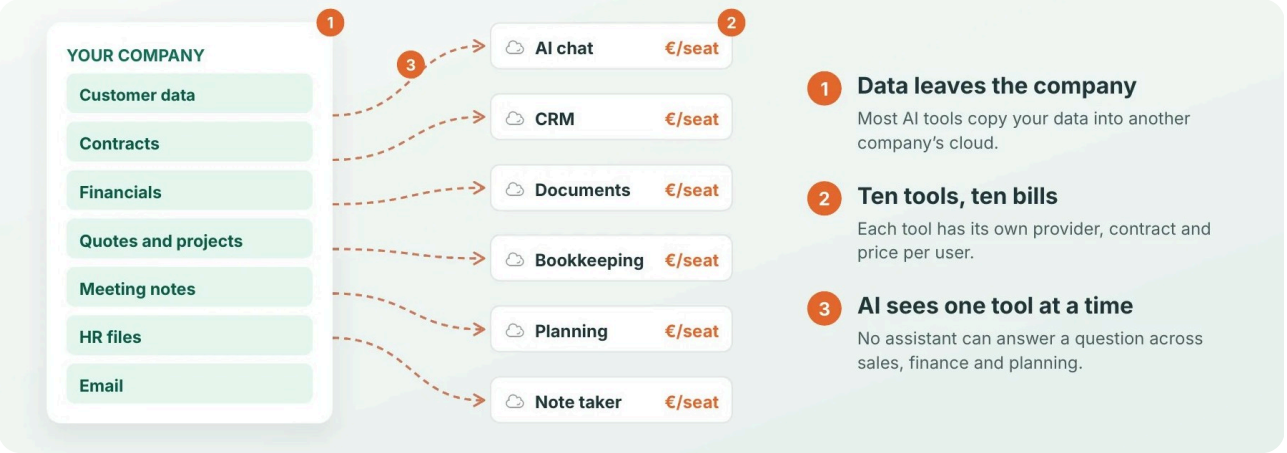
First, the AI comes to the data, not the other way round. ERIS runs on-prem and off-grid on local models and local computing, so the company's data and knowledge do not have to be shared with an outside provider for AI to work on them. A business whose data may not leave the building can use AI without sending that data out. This is the reason ERIS was built. A client can also have ERIS hosted by a cloud or telecom provider.

Second, AI in ERIS can work across functions. The ERIS Assistant answers from all company data, documents and the knowledge base, and agents can run inside one module or across several. A question about a client can draw on the CRM, the contracts, the service desk history and the invoices at once.

Third, there is one record of what the AI did. Because every agent and every action from every user runs through one system, the log covers every AI task in ERIS across the company. A record of this kind supports the record-keeping that the EU AI Act requires for high-risk AI systems (Articles 12 and 26(6)).

The pricing follows the same logic. The client pays a platform licence for the business and a fee per seat, and new standard modules are included. The product can grow into more functions without the client signing a new contract for each one.

Problem



Data leaves the company, every tool means another bill, and AI sees one tool at a time.

Data is worth everything to a company, and current cloud AI is hard to use for the companies that understand that value. That is the problem ERIS was built to solve. On top of it sits the problem every business has, summed up as many tools, many bills, and AI that sees one tool at a time. It falls on different people in a business in different ways.

Organisations that keep their data in-house

- A company's data and knowledge (client records, contracts, financials, internal documentation, the way it works) are its most valuable asset.
- Today's cloud software and AI tools require that data to leave the company and be processed in a third-party cloud.
- Many organisations are not allowed to do that, because of regulation or the sensitivity of their data; many others choose not to, because they do not want their data and knowledge shared or left vulnerable.
- For these organisations the choice is often to accept that exposure or to do without AI. The ones that value their data most are the ones left out.

Employees and teams

- Work is spread across chat, email, documents, CRM, service desk and e-signature, each a separate application with its own login.
- Information entered in one tool has to be found again, or entered again, in the next.
- AI works inside one tool at a time, so an assistant in one application cannot answer a question that needs data from another.
- The internal knowledge of the company sits in many places, and finding the right document or the latest decision takes time.

Management

- Every tool is a separate contract and a separate seat fee, paid per seat again and again for the same people.
- The tools do not share data, so there is no view across the company: sales, support, finance and operations are reported separately.
- Adding a function means adding a provider, another contract and another set of seats.
- AI investments are bought tool by tool and cannot be combined into one picture of the business.

IT and compliance

- Company data is copied into every provider's cloud, so the number of places where data lives outside the company's control grows with every tool.
- The EU AI Act, GDPR, NIS2 and DORA demand control over data and over automated systems, and each new tool is another system to assess.
- Logs of what AI did, where they exist, are spread over several providers in different formats.

Solution

ERIS puts the whole software stack under one roof, on the company's own infrastructure or hosted for it by a cloud or telecom provider. On-prem and off-grid, it runs on local computing with local models, so the company's data and knowledge stay in-house while AI works on all of it. That is the foundation the rest of the solution is built on. The solution is described in three steps: replace, connect and amplify.

Replace

- One app instead of separate cloud providers.
- Chat, documents, CRM, service desk, e-signature and more.
- One bill per seat.

Connect

- One data layer.
- One login.
- One audit trail.

Amplify

- AI agents work across all modules.
- AI learns from the company's own data.
- AI uses the internal knowledge base.

Platform main modules

The core of the app is the ERIS Assistant. Around it sit shared tools for meetings, tasks and projects, and chat and documents, and modules per department: sales, marketing, support, finance, tax, HR, legal, procurement, operations, logistics, manufacturing, IT, data, risk and management. Each module is described in the Platform part of this paper.

Core values of the solution

- **Integration first.** A function is added to the shared data layer, not bolted on beside it.
- **AI with a record.** Every AI task is logged, so AI can be used where accountability matters.
- **Where it runs.** On-prem and off-grid on local models is what ERIS was built for. ERIS can also be hosted by a cloud or telecom provider, and a business with fewer than 10 staff can use Upward's own server in the Netherlands. Cloud AI is optional and off by default.
- **Predictable cost.** One licence, one seat fee, new modules included; on-prem and off-grid at a predictable monthly cost.

03 Market Analysis

Who ERIS is for

ERIS is for every business that pays for some combination of chat, documents, CRM, service desk, e-signature, finance and HR tools.

ERIS was built first for businesses that **require or prefer sovereign (local) AI**: businesses that, for reasons of regulation, data sensitivity or cost control, want to keep their data and AI in-house. With hosting by cloud and telecom providers, ERIS also serves businesses that want one system without running their own hardware.

Market Needs

Four developments drive demand for a product like ERIS. The first is the one ERIS was built for.

AI that does not require giving up the data. Businesses want to use AI, but cloud AI means sending their data and knowledge to a third-party provider. Businesses that are not allowed to do that, or choose not to, need AI that runs where their data already is: on-prem, on local models and local computing.

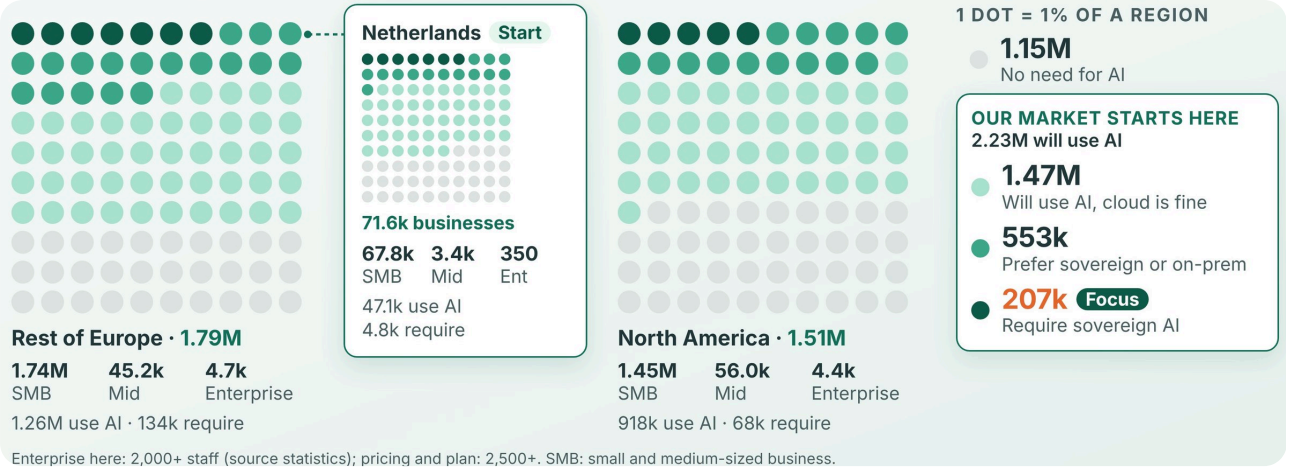
Consolidation. Businesses pay separate providers per seat for each tool. One platform with one bill per seat reduces both cost and data sprawl. The need grows with every function a business adds, because each new function brings a new provider.

AI that can see the whole business. The value of AI in a business depends on the data it can use. AI sold inside one tool sees only that tool. A business that wants answers across sales, finance, support and operations needs its data in one place, or AI that can work across all of it.

Control and accountability. Regulation in the EU, the United Kingdom and the United States sets requirements for data handling and for automated systems (see Legal & Compliance).

For a business subject to these rules, it matters where data is stored, who can access it and whether there is a record of what an AI system did. A single platform with one permission model and one audit trail, with the option to run on-prem and off-grid so that the data does not leave the company, supports those needs.

Market Size



The market by region: businesses with 10 or more staff, and how many will use AI, prefer sovereign AI or require it. Counts: CBS, Eurostat, US Census; AI and sovereign shares are Upward estimates.

The market is sized from official business statistics, by segment: SMB (10 to 249 staff), mid-market (250 to 2,499) and enterprise (2,500 and more). Businesses with fewer than 10 staff are served too, but are not counted here. One dot in the chart is 1% of a region's businesses.

- **TAM:** all businesses in the region.
- **SAM:** the businesses that require or prefer sovereign (local) AI, the group ERIS was built for.

The United Kingdom, the third step in the go-to-market order, is not yet sized.

Source: Upward market sizing, November 2026. Netherlands: CBS StatLine 86281NED, Q3 2026. Rest of the EU: EU27 excluding the Netherlands, Eurostat SBS 2022. North America: US Census Bureau SUSB 2022 via SBA Office of Advocacy, and OECD SDBS 2024 for Canada. Where a size class is not published directly, it is estimated from the Dutch size ratios.

Competitor Analysis

Upward's competitor analysis (November 2026) maps about 30 providers, from cloud AI models and cloud platforms to local and sovereign AI. This section keeps the ones that matter most to a business that wants AI on its own data. AI infrastructure (compute and server hardware) is not an alternative to ERIS: ERIS runs on top of it as an application.

Main alternatives

GROUP	MAIN PROVIDERS	WHAT THEY OFFER	HOW ERIS DIFFERS
Cloud AI models	OpenAI, Anthropic, Google Gemini, Mistral AI	AI models in the cloud, paid per token, per user or by annual contract	ERIS is not a model provider. It is one business app in which the AI works on the company's own data, on local models by default
Cloud and data platforms	Microsoft Azure AI, AWS AI services, Databricks, Snowflake	Platforms to build and run AI and data workloads in the cloud	ERIS is a finished application, on the client's own infrastructure or hosted for the client
Hybrid and sovereign AI	Microsoft (Copilot+ / Azure Stack), Cohere North, Aleph Alpha, Thales Group	Enterprise AI platforms with private or sovereign deployment	ERIS puts the business modules, one data layer and one audit trail in one app

GROUP	MAIN PROVIDERS	WHAT THEY OFFER	HOW ERIS DIFFERS
Local AI runtimes	Ollama, LM Studio, llama.cpp, vLLM	Software to run AI models locally	They run a model; ERIS adds the business modules, the data layer and the audit trail around it

How they charge. Providers of local and sovereign AI charge per GPU, core, node or workload, through hardware and infrastructure bundles, usage fees, or multi-year enterprise and government contracts. ERIS charges an annual platform licence per business plus €200 per seat per month, with new standard modules included.

Source: Upward competitor analysis, November 2026, based on public information.

SWOT Analysis

Strengths

- Software that works today: meetings, with meeting notes and the note taker, and the task manager run internally; project management, document management, document signing and CRM work as standalone Upward products and are being integrated; team chat and email are in development.
- One data layer, one login, one permission model and one audit trail across all modules.
- ERIS runs on-prem and off-grid on the client's own infrastructure, on local models, or hosted by a cloud or telecom provider; cloud AI is optional and off by default.
- Upward has built this software and these use cases before, as separate products.

Weaknesses

- Early stage: the beta starts in November 2026, and the official release in January 2027 follows only after the period with design partners.
- No certifications held under the EU AI Act, GDPR, NIS2, DORA or any security scheme.
- The brand is unknown in the market.
- Many modules in the catalogue are on the roadmap rather than in the beta.

Opportunities

- Regulation (EU AI Act, GDPR, NIS2, DORA and national schemes) pushes businesses to account for their data and their AI.
- Businesses pay separate providers per seat for each tool; consolidation into one platform reduces cost and data sprawl.
- Hosting by cloud and telecom providers opens ERIS to businesses that do not want to run their own hardware.
- Custom modules, agents and knowledge bases can be built for individual clients on the same platform.
- Expansion from the Netherlands into the rest of the EU, the United Kingdom and the United States.

Threats

- Established providers that add AI and broaden their products, including the large cloud, AI and infrastructure providers in the Competitor Analysis that already offer hybrid, on-prem or sovereign AI to enterprises.
- Clients may be slow to move away from tools their staff already use.
- Regulatory duties apply per use case; a client deployment that does not meet them could affect trust in the product.

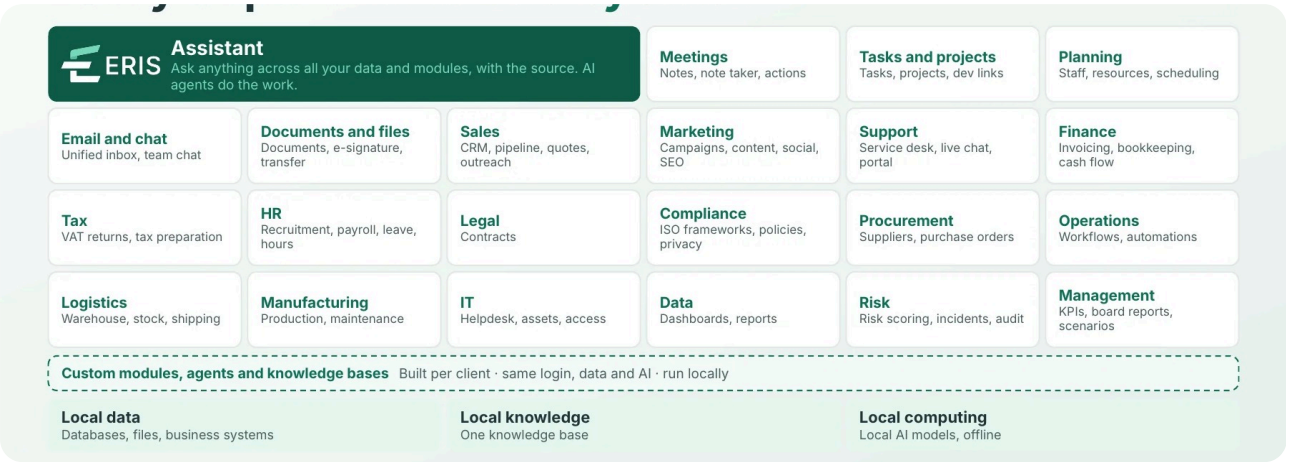
04 Platform

Integrated Solution

ERIS is one application with one data layer underneath it. Every module reads and writes the same company data. Every user logs in once and is governed by one permission model. Every agent and every action, from every user, runs through the same system, which records each AI task in one audit trail.

ERIS runs as one local system with access to the local database, knowledge base and documentation, on local computing. It runs on the client's own infrastructure, on-prem and off-grid, on local models, and the AI works on the company's own data and knowledge base. It can also be hosted for the client by a cloud or telecom provider.

Platform Modules



Every department in one system, with custom modules, agents and knowledge bases.

Modules are being integrated and developed now. New modules are added over time at no extra cost for users, and custom modules are built on request for individual businesses. The catalogue below groups the modules into module areas. An area groups related modules: Sales, for example, groups CRM, pipeline, quotes and outreach. Which tools are in the beta, and which already run internally, is set out in the next section.

ERIS Assistant

The core of the app. Users ask any question in plain language and get answers drawn from all company data, documents and the internal knowledge base. The Assistant is where most users start: instead of opening the right tool and searching it, they ask.

Meetings

Meeting note taker, agendas and action items. Meetings are recorded as notes and action items in the same data layer, so the decisions taken in a meeting can be found and followed up in tasks, projects and the CRM.

Tasks and projects

Task manager, project management and planning. Work is assigned, tracked and planned in one place, with the context of the meetings, documents and clients it relates to.

Chat and documents

Team chat, document management and e-signature, with email. Conversations, files and signed documents sit in the same system, so the knowledge base the AI uses includes them.

Sales

CRM, pipeline, quotes and outreach. Client records, opportunities and quotes are linked to the contracts, support history and invoices of the same client.

Marketing

Campaigns, content and social media. Marketing work draws on the same client and product data as sales.

Support

Service desk, live chat and customer portal. Tickets and conversations with clients are linked to the client record and the knowledge base.

Finance

Invoicing, bookkeeping and reconciliation. Financial records sit in the same data layer as the sales and procurement work that creates them.

Tax

VAT returns and tax preparation, built on the bookkeeping data in the finance module.

HR

Recruitment, onboarding, payroll and leave. The people side of the business, from hiring to leave records.

Legal

Contracts, compliance and GDPR. Contracts are stored and managed with the clients and suppliers they relate to; compliance and GDPR tasks are supported in the same system.

Standards

ISO 27001, NIS2, policies and controls, and audit evidence. Policies, risks, controls and the evidence for each standard are kept in one place, with the same audit trail as the rest of ERIS. This area comes from Assure, a finished standalone Upward product that is now being integrated. These tools support a client's own standards and compliance work; they do not mean that ERIS or Upward holds these certifications.

Procurement

Suppliers and purchase orders. Purchasing is linked to finance and, where relevant, to logistics and manufacturing.

Operations

Workflows and scheduling. Processes that run across departments are defined and scheduled once.

Logistics

Warehouse, stock and shipping.

Manufacturing

Production planning and maintenance.

IT

Helpdesk, assets and access management. Internal IT support and the management of who has access to what.

Data

Dashboards and reports. Because all modules share one data layer, reports can cross functions without exports between tools.

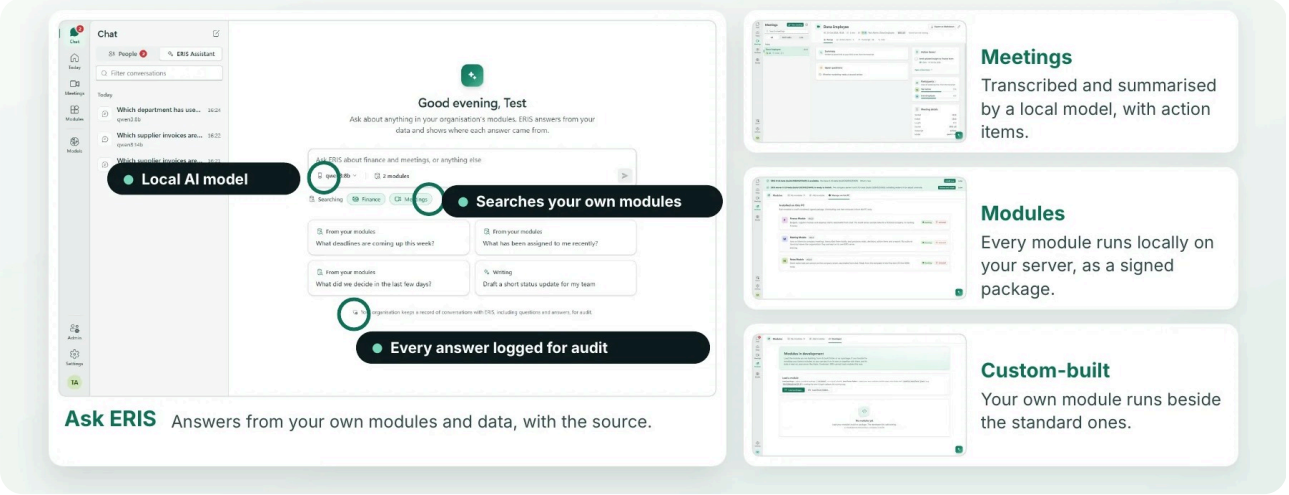
Risk

Risk scoring, fraud detection and audit.

Management

KPIs, board reports and scenario planning. The view across the company that the problem section describes as missing.

The Beta Scope



Screens from ERIS, October 2026, test data.

The beta covers these eight core tools. Meetings, with meeting notes and the note taker, and the task manager already run internally at Upward; project management (Agentool), document management (Assure), document signing (DocSign) and CRM work as standalone Upward products and are being integrated; team chat and email are in development:

- Meetings, with meeting notes and the note taker
- Task manager
- Project management
- Document management
- Document signing
- CRM
- Team chat
- Email

The ERIS beta starts in November 2026 on these tools, followed by the period with design partners and the official release in January 2027. Beyond the beta, Bookwise (bookkeeping, tax and procurement), Reach (sales pipeline, quotes and outreach) and Upward's marketing tool GTM (marketing content and social media) also work today as standalone Upward products and are being brought into ERIS, and Assure, already in the beta for document management, also brings standards and compliance evidence (the Standards area). New modules come at €0 extra to the client.

> **Note.** "Run internally" means the tool is in use within Upward Technologies. "Being integrated" means the standalone product is finished, tested and working, and is now being combined into ERIS. ERIS is in beta and is not yet in production use by paying clients.

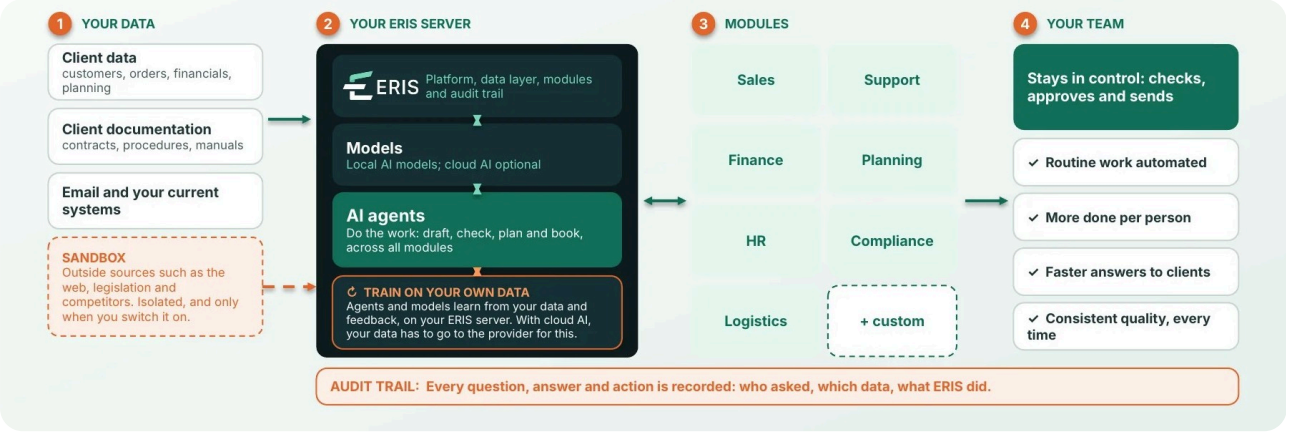
Architecture Principles

ERIS is built on eight principles.

- **One data layer.** All modules read and write the same company data, with one audit trail.

- **One login and one permission model** across all modules.
- **Where it runs.** On the client's own infrastructure, on-prem and off-grid, or hosted by a cloud or telecom provider; local AI models by default, cloud AI only when the client switches it on (see Deployment).
- **Own data, own knowledge base.** In every deployment the AI works on the company's own data and internal knowledge base, so the application is used to its full extent.
- **Modules and agents.** A module is a full application for a business function; an agent is a smaller AI worker that runs inside or across modules.
- **Built and supported by Upward.** Development, installation, support and SLA for the ERIS software from one supplier.
- **Logging of AI tasks.** Every AI task is recorded: who asked, which data the AI used, what it did and the result. This gives one audit trail across all modules.
- **Compliance and regulation.** The audit trail supports record-keeping and oversight duties under the EU AI Act, GDPR, NIS2 and DORA. Whether a specific client deployment meets these duties depends on the use case and is assessed per deployment.

AI and Agents



From question to result in one flow, with people in control and a full audit trail.

AI in ERIS works at two levels.

The ERIS Assistant is the general entry point. It answers questions in plain language from all company data, documents and the internal knowledge base. Because it sits on the shared data layer, it is not limited to one function.

Agents are smaller AI workers that run inside a module or across modules. An agent can carry out a defined task in the context of the company's own data. Agents work across all modules, learn from the company's own data and use the internal knowledge base. Custom agents are built on request for individual clients.

The core of the platform consists of the ERIS app, a small language model (SLM) and a sandbox: an isolated environment for outside sources, such as the web and legislation, that is used only when the client switches it on.

Every AI task, whether started by the Assistant or by an agent, is logged with who asked, which data the AI used, what it did and the result. This is what allows AI to be used in functions where accountability matters, such as finance, HR and legal.

Deployment

ERIS runs on the client's own infrastructure, off-grid where needed, on local models and local computing. ERIS can also be hosted for a client by a cloud or telecom provider, including as a private cloud at a European provider. In every setup ERIS uses local AI models by default; connecting a cloud AI model is optional and off unless the client switches it on. For on-prem use, ERIS can be delivered pre-installed on server hardware, plug and play: data and AI stay on site, and capacity grows with the hardware. On-prem ERIS is sold by Upward and distribution partners. White-label licensing, in which telecom operators license ERIS and offer it to their business customers under their own brand, is in preparation.

The licence and seat fees are agreed in advance, so the software cost is predictable. On its own infrastructure, the client keeps its data, its knowledge and its AI in-house: nothing has to be sent to a third-party cloud for the AI to work, and the log of every AI task stays with the client. In a hosted deployment the data and the log are held in the client's ERIS environment by the hosting provider, or by Upward on its own server, on the client's behalf.

The smallest clients have two more options. A business with fewer than 10 staff can use a €5,000 workstation of its own (about €139 a month over 36 months, plus electricity) or Upward's own server in the Netherlands, reached through an API (application programming interface). On that server Upward is the data processor for the client, under a data processing agreement. Larger clients run ERIS on their own hardware or have it hosted by a cloud or telecom provider.

Security and Risk

Security in ERIS follows from the architecture: one system, one permission model and one log. This section states what the platform does and, equally, what is not held.

Logging of AI tasks

- Every AI task is recorded: who asked, which data the AI used, what it did and the result.
- Every agent and every action, from every user, runs through one system, so the log covers every AI task across modules.
- The log forms one audit trail across all modules, rather than separate logs per provider.

Permission model

- One login and one permission model across all modules.
- Access management is part of the IT module (helpdesk, assets and access management).
- Because the data is in one layer, access rules are set once rather than per tool.

Data location

- On-prem and off-grid on local models, on the client's own infrastructure. A business with fewer than 10 staff can use Upward's own server in the Netherlands instead, under a data processing agreement. ERIS can also be hosted by a cloud or telecom provider.
- In every deployment the AI works on the company's own data and knowledge base.

Compliance support

- The audit trail supports record-keeping and oversight duties under the EU AI Act, GDPR, NIS2 and DORA.

- Whether a specific client deployment meets these duties depends on the use case and is assessed per deployment.
- The Legal module covers contracts, compliance and GDPR tasks for the client's own business.

What is not held

- ERIS holds no certifications under any regulatory or security scheme, including the schemes named in this paper.

05 Pricing

ERIS is priced per business and per seat. New standard modules are included in the seat fee at no extra cost, so the product grows inside the existing contract.

Platform licence. An annual licence per business, priced by the size of the business and not by the number of modules used.

SEGMENT	STAFF	LICENCE PER YEAR	SEAT FEE
Small	1 to 9	None	€300 per seat per month
SMB	10 to 249	€12,000	€200 per seat per month
Mid-market	250 to 2,499	€60,000	€200 per seat per month
Enterprise	2,500+	€120,000	€200 per seat per month

At 10 seats Small and SMB cost the same (€3,000 a month), so there is no jump at 10 staff.

Installation. ERIS installs in about 10 minutes. Upward charges at most one day: €950 (8 hours on location plus travel). Installation is optional, and partners install what they sell.

AI readiness. A paid phase before ERIS goes live that gets the client's data ready: 2 days (€1,900) for SMB, 5 days (€4,750) for mid-market and 20 days (€19,000) for enterprise clients.

Support. Optional. By the hour from €140 to €280, or a service level agreement (SLA) of €300 (Standard), €3,000 (Premium) or €15,000 (Mission-critical) a month.

Hardware. On-prem ERIS runs on the client's own hardware; capacity grows with the hardware. A business with fewer than 10 staff can use a €5,000 workstation of its own (about €139 a month over 36 months, plus electricity) or Upward's own server in the Netherlands.

Custom work. Custom modules, agents and knowledge bases are built on request as projects.

What it saves. Up to 75% lower software cost than the separate tools ERIS replaces, depending on the size of the company and the tools replaced (illustrative estimate at 2026 list prices; installation, AI readiness and support come on top).

06 Go to Market

Design Partners and Beta

The ERIS beta starts in November 2026 on the eight core tools. The period with design partners follows, and then the official release in January 2027. The design-partner period is used to run ERIS with real businesses before the commercial launch. Upward is agreeing terms with its first design partners.

Markets: Netherlands, EU, UK, US

ERIS goes to market in four steps:

The Netherlands, the start market. Upward Technologies is based in Breda.

The rest of the EU.

The United Kingdom.

The United States.

Regulation in each of these markets sets requirements on where data is held and who can access it, which products that keep data and AI under the client's control can help clients meet.

07 Governance and control of AI

A company's data is its most valuable asset. AI that can act on that data, by reading it, answering from it, sending it or changing it, needs the same control as any person given that access: control over which data it sees, what it may do, who approved it, and a record of what it did. Without that control an organisation is exposed. Its data can leave the company, be seen by people who should not see it, or be changed or deleted, and the company stays responsible for what its AI said and did.

The public cases below show what happens when one or more of those controls is missing. They are kept short and factual. Where a fact rests on a report rather than on a statement by the company, a court or a regulator, it is marked "reported". The last column is Upward's own reading of each case, not a finding by the company, a court or a regulator.

What has gone wrong

COMPANY	DATE	WHAT HAPPENED	CONTROL THAT WAS MISSING (UPWARD'S READING)
Samsung Electronics	March to April 2023 (leaks reported); May 2023 (ban)	Engineers reportedly uploaded internal source code to ChatGPT. Samsung then banned generative AI tools on company devices and internal networks.	No technical control on what staff could send to a third-party cloud AI service
Air Canada	November 2022 (chat); February 2024 (ruling)	The website chatbot told a customer he could claim a bereavement refund retroactively, which did not match the airline's policy. A British Columbia tribunal found negligent misrepresentation and held the airline responsible for all information on its website, including the chatbot.	No check of what the chatbot told customers against the company's actual terms
Microsoft 365 Copilot	June 2025	An ordinary-looking email with hidden instructions could make Copilot send sensitive data from the user's context to an attacker, with no click by the user (CVE-2025-32711, rated critical). Microsoft fixed it server-side; there was no evidence of exploitation.	No boundary between untrusted external input and AI instructions, while the AI had broad read access to mail and files
Replit	July 2025	SaaStr founder Jason Lemkin reported that Replit's AI coding agent deleted his app's production database despite an explicit instruction to freeze code changes. Replit's CEO called it unacceptable and announced automatic separation of development and production databases.	The agent had delete rights on production data, with no mandatory human approval for destructive actions
Salesloft Drift	August 2025	Stolen tokens of Drift, Salesloft's AI chat agent integration, were used to query and export large volumes of data from customers' Salesforce instances. Google told The Hacker News it was aware of over 700 potentially affected organisations.	A third-party AI integration held long-lived tokens with broad access that was not limited or monitored closely enough to stop bulk export

COMPANY	DATE	WHAT HAPPENED	CONTROL THAT WAS MISSING (UPWARD'S READING)
Vercel	April 2026	Vercel said the incident originated with a compromise of Context.ai, a third-party AI tool used by an employee. The attacker took over the employee's Google Workspace and Vercel accounts, reached a Vercel environment and decrypted environment variables not marked as sensitive for a limited number of customers.	An employee-adopted AI tool held delegated (OAuth) access to corporate accounts

Sources

- **Samsung Electronics:** Bloomberg, 2 May 2023, https://www.bloomberg.com/news/articles/2023-05-02/samsung-bans-chatgpt-and-other-generative-ai-use-by-staff-after-leak ; Fortune, 2 May 2023, https://fortune.com/2023/05/02/samsung-bans-employee-use-chatgpt-data-leak
- **Air Canada:** Civil Resolution Tribunal of British Columbia, Moffatt v. Air Canada, 2024 BCCRT 149, 14 February 2024, https://decisions.civilresolutionbc.ca/crt/crtd/en/525448/1/document.do ; American Bar Association, Business Law Today, February 2024, https://www.americanbar.org/groups/business_law/resources/business-law-today/2024-february/bc-tribunal-confirms-companies-remain-liable-information-provided-ai-chatbot/
- **Microsoft 365 Copilot:** Microsoft Security Response Center, CVE-2025-32711, 11 June 2025, https://msrc.microsoft.com/update-guide/vulnerability/CVE-2025-32711 ; The Hacker News, 12 June 2025, https://thehackernews.com/2025/06/zero-click-ai-vulnerability-exposes.html
- **Replit:** The Register, 22 July 2025, https://www.theregister.com/2025/07/22/replit_saastr_response/ ; Fortune, 23 July 2025, https://fortune.com/2025/07/23/ai-coding-tool-replit-wiped-database-called-it-a-catastrophic-failure
- **Salesloft Drift:** Google Threat Intelligence Group, August 2025, https://cloud.google.com/blog/topics/threat-intelligence/data-theft-salesforce-instances-via-salesloft-drift ; The Hacker News, 27 August 2025, https://thehackernews.com/2025/08/salesloft-oauth-breach-via-drift-ai.html
- **Vercel:** Vercel security bulletin, first published 19 April 2026, last updated 16 October 2026, https://vercel.com/kb/bulletin/vercel-april-2026-security-incident ; Trend Micro Research, April 2026, https://www.trendmicro.com/en_us/research/26/d/vercel-breach-oauth-supply-chain.html

Governance and compliance

Regulation now asks the same questions as the cases above: which data an AI system uses, who oversees it, and whether there is a record of what it did.

The EU AI Act (Regulation (EU) 2024/1689) is risk-based. The European Commission describes four levels: unacceptable risk (banned practices), high risk (for example recruitment tools and credit scoring), transparency risk (for example people must know when they are talking to a chatbot) and minimal or no risk (no specific rules). The Act sets duties for providers, who develop an AI system or place it on the market, and for deployers, who use an AI system under their own authority in a professional context. A company running an AI assistant inside its business is a deployer. The developer that places ERIS on the market under its name is the provider of the AI functions built into ERIS. Most uses of an AI assistant are not high-risk, but where AI in ERIS is used for a purpose the Act lists as high-risk, for example screening job applicants, the provider duties for high-risk systems, including conformity assessment and registration, apply as well as the deployer duties below.

For high-risk systems, the duties include:

- **Logging and record-keeping.** High-risk systems must technically allow for the automatic recording of events (logs) over the lifetime of the system (Article 12). Deployers must keep these logs, to the extent they are under their control, for at least six months, unless other law says otherwise (Article 26(6)).
- **Human oversight.** High-risk systems must be designed so that people can effectively oversee them while in use, can disregard, override or reverse their output, and can interrupt them (Article 14). Deployers must assign oversight to people with the necessary competence, training and authority (Article 26(2)).
- **Use as instructed.** Deployers must take appropriate technical and organisational measures to use high-risk systems in line with the provider's instructions for use (Article 26(1)).

Beyond high-risk systems, Article 4, as amended by the Digital Omnibus on AI, requires providers and deployers to take measures to support the AI literacy of their staff and others who operate AI systems on their behalf; it does not require them to guarantee a specific level of literacy. Fines under Article 99 reach €35 million or 7% of worldwide annual turnover for prohibited practices, and €15 million or 3% for breaches of other operator obligations, whichever is higher. For SMEs, including start-ups, the lower of the two applies, and since the Digital Omnibus on AI the same applies to small mid-cap enterprises for fines other than those for prohibited practices.

According to the European Commission, the Act applies in stages:

- **1 August 2024:** the AI Act entered into force.
- **2 February 2025:** prohibited practices and the AI literacy obligations apply.
- **2 August 2025:** the rules for general-purpose AI models, governance and penalties apply.
- **2 August 2026:** the Act became generally applicable, including the transparency obligations of Article 50, such as telling people that they are interacting with an AI system.
- **2 December 2026:** new prohibitions on AI-generated child sexual abuse material and non-consensual intimate content apply, and generative AI systems placed on the market before 2 August 2026 must mark AI-generated content (Article 50(2)).
- **2 December 2027:** the rules for high-risk systems in areas such as employment, education and biometrics (Annex III) apply.
- **2 August 2028:** the rules for high-risk systems built into regulated products (Annex I) apply.

The December 2026, December 2027 and August 2028 dates follow the Digital Omnibus on AI (Regulation (EU) 2026/1744), which the Commission proposed on 19 November 2025 and which entered into force on 27 July 2026.

The GDPR applies whenever personal data (customer, employee or applicant data) is processed, including by an AI system, whether that system runs on the company's own infrastructure or at a third-party AI service. The company stays responsible as controller. It needs a lawful basis (Article 6) and must respect purpose limitation, data minimisation and integrity and confidentiality (Article 5). A vendor that processes personal data on the company's behalf, such as a cloud AI service or a hosting provider, is a processor: the company may only use processors that give sufficient guarantees, under a contract that meets Article 28. Both must ensure appropriate security (Article 32). A personal data breach must be reported to the supervisory authority without undue delay and, where feasible, within 72 hours, unless it is unlikely to result in a risk to people (Article 33). Transfers outside the EEA, for example to an AI provider's servers in a third country, are only allowed under the conditions of Chapter V (Articles 44 to 49). Fines can reach €20 million or 4% of worldwide annual turnover, whichever is higher (Article 83).

Sources:

- European Commission, "AI Act" (regulatory framework page), last updated 19 October 2026, https://digital-strategy.ec.europa.eu/en/policies/regulatory-framework-ai
- EUR-Lex, Regulation (EU) 2026/1744 (Digital Omnibus on AI), https://eur-lex.europa.eu/eli/reg/2026/1744/oj/eng
- European Commission, AI Act Service Desk, Articles 4, 12, 14, 26 and 99, https://ai-act-service-desk.ec.europa.eu/en/ai-act/article-26 (and /article-4, /article-12, /article-14, /article-99)
- EUR-Lex, Regulation (EU) 2024/1689 (AI Act), https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- EUR-Lex, Regulation (EU) 2016/679 (GDPR), https://eur-lex.europa.eu/eli/reg/2016/679/oj/eng
- Garante per la protezione dei dati personali, 20 December 2024, https://www.garanteprivacy.it/home/docweb/-/docweb-display/print/10085432

How ERIS answers this

The missing controls in the cases above fall into a few types. ERIS was built around the controls that address them.

TYPE OF MISSING CONTROL	WHAT ERIS DOES
Company data sent to, stored at or processed by a third-party cloud AI service	ERIS runs on-prem, on the client's own infrastructure and off-grid where needed, on local models and local computing. On-prem, the company's data and knowledge stay on its own infrastructure; nothing has to be sent to a third-party cloud for the AI to work on it. A client can also choose ERIS hosted by a cloud or telecom provider. Cloud AI is optional and off by default, so no data goes to a cloud AI service unless the client switches it on.
Outside AI tools and integrations holding access to company accounts and data	The AI runs inside ERIS, on the same data layer as the modules, so no outside AI provider needs access to the company's data for the AI to work.
Access managed separately per tool and per AI feature	One login and one permission model across all modules. Access rules are set once rather than per tool.
No record of what the AI did	Every AI task is logged: who asked, which data the AI used, what it did and the result. Every agent and every action, from every user, runs through one system, so there is one audit trail across all modules, kept in the client's ERIS environment, not at an outside AI provider.

Not every control in the cases above is a matter of where the AI runs. Keeping untrusted input apart from instructions, limiting what an agent may change and requiring human approval for consequential actions remain design and configuration questions for any AI system, ERIS included.

ERIS supports governance and compliance; it does not deliver them on its own. The on-prem deployment and the audit trail support record-keeping and oversight duties under the EU AI Act, GDPR, NIS2 and DORA. Whether a specific client deployment meets a specific duty depends on the use case and is assessed per deployment. Upward Technologies does not claim that ERIS makes a client compliant.

08 Legal & Compliance

Regulation

Regulation is one of the reasons ERIS was built to run on-prem. The rules below set requirements for how businesses handle data and, increasingly, how they use AI: where data is stored and processed, who can access it, how systems are secured and whether there is a record of what an automated system did. Every cloud provider that holds company data is one more party those requirements have to be checked against. An organisation that keeps its data and its AI on its own infrastructure, with one log of every AI task, starts from a position of control. Upward built ERIS that way to help clients meet the EU AI Act and related rules as they come into application.

The regulation below drives demand for products like ERIS.

European Union

- **EU AI Act**, applying in stages from 2 February 2025 to 2 August 2028, with most rules, including the transparency obligations of Article 50, from 2 August 2026 (see Governance and control of AI above).
- **GDPR**, the EU General Data Protection Regulation.
- **NIS2**, the EU directive on network and information security.
- **DORA**, the EU Digital Operational Resilience Act for the financial sector.
- National cloud security schemes such as **SecNumCloud** (France) and **BSI C5** (Germany).

United Kingdom

- **UK GDPR** and the **Data Protection Act 2018**, as amended by the Data (Use and Access) Act 2025, whose main data protection changes have applied since 5 February 2026.

United States

- Sector and state rules such as **HIPAA** (health data), **FINRA** rules (broker-dealers) and state privacy laws, the **FedRAMP** authorisation programme for cloud services used by federal agencies, and the voluntary **NIST AI Risk Management Framework**.

How ERIS relates to these rules: on-prem and off-grid deployment keeps client data and AI on the client's own infrastructure, and the ERIS audit trail supports record-keeping and oversight duties under the EU AI Act, GDPR, NIS2 and DORA. Whether a specific client deployment meets these duties depends on the use case and is assessed per deployment. Upward Technologies does not claim that ERIS makes a client compliant.

Data Protection

- **Client data.** In every deployment the AI works on the client's own data and knowledge base: on-prem and off-grid on the client's own infrastructure, or hosted for the client by a cloud or telecom provider. A business with fewer than 10 staff can use Upward's own server in the

Netherlands instead; Upward is then the data processor for that client, under a data processing agreement. Where ERIS is hosted by a cloud or telecom provider, that provider processes the client's data on the client's behalf, under a data processing agreement.

- **Access and records.** One login and one permission model govern access across modules, and every AI task is logged.
- **General terms.** Upward Technologies B.V. has general terms and conditions in Dutch and English (UT-AVW-0001), available on request.

09 Disclaimer

This whitepaper describes the ERIS product. Statements about the product describe its state as set out in the ERIS product documents. ERIS is in beta: meetings, with meeting notes and the note taker, and the task manager run internally at Upward; the modules from standalone Upward products are being integrated; none is yet in production use by paying clients; all other modules are in development or on the roadmap, and their timing is indicative. ERIS holds no certifications. The competitor overview is Upward's own assessment of public information. References to regulation describe the context in which ERIS operates and are not legal advice or a statement that any deployment complies with any rule.

10 Appendix

A. Sources

SOURCE	REFERENCE	USED FOR
Upward competitor analysis	November 2026	Competitor analysis
ERIS Savings Calculator	UT-ERS-RPT-0009 rev 1.3	Savings comparison

B. Contact

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