**Particles, Universe, NuClei and Hadrons for the NFDI**

**Future NFDI – ideas from the TF Governance & Sustainability**

**PUNCH4NFDI General Meeting**

7 July 2025

# Task Force Governance & Sustainability

"… bearbeitet grundlegende Rahmenbedingungen zu Querschnittsthemen fuer die langfristige Organisation von NFDI."

i.e. works on basic boundary conditions of cross-cutting topics for the long-term organisation of NFDI

Workplan 2025: https://zenodo.org/records/15181340 (in German)

Topics on the list (not fully represented here):
- Provision of sustainable services
    1) Development of a business model
    2) Legal conditions for long-term joint usage of existing resources
- Efficient decision structures
    1) Choosing providers based on best aptitude
    2) Decision processes w.r.t. service portfolio
    3) Legal status of the consortia
    4) Duties of members (i.e. institutions) of the association

- Financial flows for services and tasks
    1) Categorization of financial requirements by activity type
    2) Estimate of financial requirements
- NFDI as part of EOSC
    1) Clarification of organizational boundary conditions

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discussion paper written

suggested as next topic

# Categorization of financial requirements by activity type

Governance and networking within the NFDI ("central resources" not only available for the head office)
- Personnel for administration, financial and legal issues
- Software for project management systems, internal communication etc
- NFDI internal networking (consortia assembly meetings etc), international & national networking

Community involvement (on consortium level)
- Organization of events, participation at conferences
- Participation in NFDI sections
- Resources for helpdesks, teaching/ training material, local support

Operation of NFDI services
- Technical operation: hardware resources, security, PIDs and versioning, ...
- Standards support and maintenance for interoperability
- Data curation

Development of (new) services
- Market analysis
- UX design
- Certification processes
- Development of business models and KPIs

These are always only a few examples of activities for each category

# Decision processes w.r.t. the NFDI Service portfolio

Suggestion of a minimum set of criteria, clustered by I) scientific ii) technological and organizational iii) strategic criteria, such as

- Clearly defined use case and user group
- Registration in external repository
- Clearyly defined maintenance cycles
- Existence of service level agreements
- Readable business model
- Interoperability with other NFDI services
- Supporting the NFDI strategy
- ...

Community specific services can be suggested via a consortium ("KgS").

NFDI internal examination of suggested services takes place (possibly by something like a TEC). Results will be published.

The Scientific Senate decides on the onboarding of the service => certification as "NFDI service"

Re-certification will be necessary (e.g. after 3 yrs)

Service portfolio will be managed by a "technical manager", affiliated with the NFDI head office.

# Organizational boundary conditions concerning EOSC

Differentiate between a build-up phase and a operation phase => focusing on the build-up phase

- Work in a small, agile *team*
- The *team* should be imbedded in a NFDI section, which has the mandate of CA and directorate to make decisions
- Only authorized members are allowed to participate in section meetings (can be multiple persons per member inst.)
- At least three section meetings per quarter
- *Team* is established as a staff unit at the NFDI head quarters, consisting the section spokesperson and three staff members (costs: ~260k Euro/ year)

Mandatory EOSC node roles: coordinator, operation manager, security officer, scientific officer

=> intended to be used as generic solution for future similar cooperations

# Thank you!

**The PUNCH4NFDI Consortium**

**Spokespersons**

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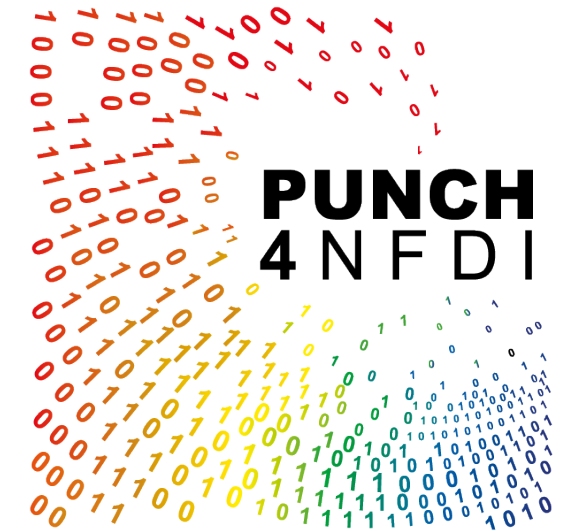Dr. Christiane Schneide (deputy Satzung, DESY, christiane.schneide@desy.de)

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# Acknowledgements