Change Notes
For Base4NFDI Basic Service Proposals   -   Initialisation Phase - [Version 3 2024-02-23]

These notes are intended as a reading aid to make it easier to understand the changes to the previous Base4NFDI Initialisation template (version 2). If you have any questions or uncertainties, please do not hesitate to contact the Base4NFDI team (base4nfdi-ta3@lists.nfdi.de).

- **I A. General Instructions**
  - added support for application phase:
    - The Base4NFDI team is now complemented by Section Liaison Officers and Service Stewards who will provide support during the application phase. The Service Stewards with their domain expertise will be accompanying funded Basic Service candidates in the Initialisation, Integration and Ramp-Up phase. To find out more visit https://base4nfdi.de/about/service-stewards.
    - We strongly recommend getting in contact with the Section Liaison Officers (base4nfdi-ta3@lists.nfdi.de) or Service Stewards (base4nfdi-servicestewards@lists.nfdi.de) as early as possible.
  - added specification of section approval:
    - It is now specified that the proposal concept has to be presented, discussed and approved in a Section meeting before the Section spokespersons can submit the final proposal to guarantee a broad approval across the Section.
  - adjusted maximum funding costs:
    - The Consortia Assembly (2024-01-12) agreed that proposals submitting in 2024 are allowed to calculate personnel costs on the basis of DFG Personnel Rates for 2024. This raises the maximum possible funding for each proposal of the Initialisation Phase to € 252.000.
- **II B. Proposal Template**
  - **1. General Information**
    - participating institutions:
      - For clarification, please provide information if partner institutions will receive funding for the Basic Service via Base4NFDI or not.
    - added significance:
      - This addition was highly suggested, e.g. by the Consortia, to provide a brief explanation of the added value to non-technical experts.

- **2. State-of-the-Art of Proposed Basic Service**
  - add rationale, why you think the proposed service can be defined as Basic Service with regard to the Base4NFDI service definition (link to homepage added):
    - We now ask very specifically for the rationale of your Basic Service idea with regards to the Base4NFDI service definition. This assures that you get to very specifically state your rationale and that the Technical Expert Committee as well as the Consortia can refer to this section in this regard.
- **4. Working Concept for the Development of the Basic Service**
  - added training perspective for each phase:
    - Every Basic Service has a target group that needs to be trained in the use / implementation / etc. of your Basic Service. This might become important e.g. for software piloting and testing. We therefore encourage you to consider training activities and the development of training materials as well as proper documentation in your working concept.
  - risk and challenges, specification for three phases
    - It is now more clear that here you should provide an overview on risks and challenges across the Basic Service life-cycle from Initialisation to Ramp-Up Phase.
- **5. Work Programme**
  - added training materials:
    - See above. We encourage you to consider training activities and the development of training materials as well as proper documentation also in your working plan. If you need advice, reach out to the Base4NFDI Training Manager (contact via base4nfdi-office@lists.nfdi.de).
- **Signatures**
  - additional information on signatures needed to submit the proposal
    - We here clarify that the proposal needs to be signed by the Principal Investigators and the person/those persons who can provide legally binding statements for the applying institutions. So if not in concurrence of function, both the Principal Investigators and the heads of the institutes listed in "1. General Information" need to sign the proposal.
- **III Appendix**
  - **b) Letter of Commitment:**

- We are now providing a more precise description of when a Letter of Commitment (LoC) is required and when it is not. If there are any open questions regarding this, feel free to contact the Base4NFDI team.