

Review panel guidance for the consideration of NetDRIVE grant applications

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1. Introduction

The UKRI Net-Zero Digital Research Infrastructure Vision and Expertise (NetDRIVE) project will fund community activities through three calls. The third and final call will be launched in two parts: Part A, described here, is reserved for social-science led proposals looking at how the funders, operators, and users of the Digital Research Infrastructure (DRI) deliver scientific excellence and societal value. Part B will be reserved for investigators funded in the earlier NetDRIVE calls and will deal with integration of existing activities and translation into practice.

Further information is in the guidance for applicants and the application template available from the call web page.

2. Conflicts of Interest

UKRI maintains a [Declaration of Interests policy](#), available in Annex A. We ask that you make yourself familiar with the policy and let us know as soon as possible if you have – or are unsure whether you have - any conflicts of interest with the applications. Please make these known to the panel secretary (netdrive@eng.ox.ac.uk) as soon as possible, particularly if you are an introducer or reader, so that the application can be reassigned to an alternative panel member.

For any application where panel members have been identified to have a conflict of interest, they will be required to leave the room whilst discussions are taking place. During the ranking process, any panel member who is named as a Project lead (previously PI) or Project co-lead (previously Co-I) on an application will be required to leave the room whilst their application is ranked. Panel members may remain in the room for the remainder of the ranking but must not make any comments during discussions for applications where they have a conflict of interest.

If there is doubt as to whether the member should be asked to leave, the Chair may discuss this with the rest of the panel and the NetDRIVE Project leads. The NetDRIVE Project leads have the final decision in any case where there is debate about whether a

conflict of interest exists at all stages of the peer review process and may consult NERC if needed.

3. Panel Confidentiality

Applications are submitted to NetDRIVE at the University of Oxford in confidence and may contain confidential information and personal data belonging to the applicant. NetDRIVE undertakes to the applicants to keep applications confidential and not to use or disclose them except as required for the peer review and funding decision process, or as is required under the Data Protection Act 1998 or the Freedom of Information Act 2000 (or any other law or regulation to which NetDRIVE is or may become subject).

Panel members may not disclose the fact that any of the enclosed applications have been submitted to NetDRIVE or any of the information contained in any of the applications to any person outside the panel or otherwise involved in the peer review and funding decision process. Nor may they disclose or use the information in the applications for any purpose other than as part of NetDRIVE peer review and funding decision process.

The panel's comments on and scoring of these applications will be recorded by NetDRIVE staff at the meeting at which they will be discussed. NetDRIVE will not use these notes or scores, nor disclose them to any person or body except:

- as is necessary to record the decisions of the panel and to inform any other person or body within NETDRIVE or any other body that may be co-funding the applications as part of the funding decision process
- to the applicant as part of NETDRIVE feedback to successful and unsuccessful applicants
- as may be required under the Data Protection Act 1998 or the Freedom of Information Act 2000 (or any other law or regulation to which NetDRIVE is or may become subject)

NETDRIVE will not attribute any comments that are disclosed under the Data Protection Act 1998 or the Freedom of Information Act 2000 to any individual panel member, but the fact that you are a member of the one of the panels is publicly available information. The names of the review panel will be published, following standard UKRI practise. All personal data collected by NETDRIVE will be handled in accordance with the UK Data Protection Legislation and as set out in the [University of Oxford Data Protection Policy](#).

4. Role of the Panel

The primary role of the assessment panel is to review the applications assigned to it by NETDRIVE.

The assessment panel will receive the full application and any additional background information. Using this information for reference, all assessment panels are responsible for:

- providing comments and scores that incorporate all assessment criteria for each application
- producing a final application ranked list

To assist in the prioritisation process, panel members will be assigned, in advance of the meeting, to act as introducers or readers for individual applications. As well as the applications that have been allocated to an introducer or reader, panel members should read as many of the other applications as possible (time permitting). This allows them to put the applications on which they are speaking into context with the rest of those submitted and ensures a full discussion of each application at the meeting. The roles of both introducers and readers are described below.

4.1 Role of Introducers

For each application, two panel members will be nominated as introducers. The role of the first introducer will be to summarise their assessment of the application and lead the discussion on the application. The first introducer will also lead on providing the panel feedback for the application. The second introducer will then add any additional assessment.

4.2 Role of Readers

The role of reader is not as comprehensive as the introducer. Readers are expected to provide a verbal summary and provisional score that incorporates all the assessment criteria for those applications to which they have been assigned. It may be a generalist view on a topic outside of their (main) expertise. Readers are not expected to provide a written summary, but simply to be familiar with the applications to which they have been assigned and be able to provide an opinion on these.

5. The Panel Meeting

5.1 Expectations

NetDRIVE panel members are expected to review and read a selection of proposals before the panel meeting and to attend the review meeting assess all proposals and complete the ranking of proposals as described below. Following the review panel meeting there will be a small amount of administrative correspondence.

The volume of work will depend to a certain extent on the volume and the quality of proposals submitted. We expect, for calls with under £500k of funding, there to be around four hours work in preparation and four hours work for the review panel meeting itself (including a break).

5.2 Before the Panel Meeting

Prior to the panel meeting, it is the responsibility of the introducers and readers to read all the application material assigned to them. Introducers need to be prepared to lead the panel discussion to determine a final score that incorporates all assessment criteria listed in the call guidance for applicants.

Applications may include costs for reasonable adjustments. Where an application includes costs for reasonable adjustment, UKRI will ensure they are eligible, and these should be accepted without comment. Further information on disability and accessibility support for UKRI applicants during the application and assessment process can be found [here](#).

We are committed to the [San Francisco Declaration on Research Assessment \(DORA\)](#). Journal-based metrics, such as Journal Impact Factors, should not be used as a surrogate measure of the quality of individual research articles, to assess an investigator's contributions, or to make funding decisions.

For the purposes of research assessment, please consider the value and impact of all research outputs (including datasets, software, inventions, patents, preprints, other commercial activities, etc.) in addition to research publications. You should consider a broad range of impact measures including qualitative indicators of research impact, such as influence on policy and practice.

The content of a paper is more important than publication metrics, or the identity of the journal, in which it was published, especially for early-stage investigators. Therefore, you should not use journal impact factor (or any hierarchy of journals), conference rankings and metrics such as the H-index or i10-index when assessing UKRI grants.

We encourage you to challenge research assessment practices that rely inappropriately on journal impact factors or conference rankings and promote and

teach best practice that focuses on the value and influence of specific research outputs. If you are unsure about DORA, please speak to the panel convener or the panel chair.

5.2 At the Panel Meeting

During the meeting, the Chair will invite introducers of applications to lead the discussion by summarising their comments. For any applications in the funding frame (i.e. scoring 7 or above), the panel is asked to also comment on the resources requested. The discussion will then be opened up to the readers and the panel by the chair and the final score incorporating all criteria agreed.

Feedback will be provided for every application discussed at the assessment panel meeting.

It is the responsibility of the first introducer to provide a summary of the panel's discussion of the application as feedback to the applicant(s) and as a record of the justification for the panel scores and decisions. The same feedback will also be copied to the applicant's Research Organisation Administration Office.

Reviewers and panellists are not permitted to use generative AI tools as part of your assessment activities, including generating panel feedback. Using these tools can potentially compromise the confidentiality of the ideas that applicants have entrusted to UKRI to safeguard. For more detail see our [policy on the use of generative AI \(2024\)](#). Further, we ask you to not speculate within your assessment whether generative AI has been used to develop the application.

The first introducer should record the key points using the template document provided in [Annex B](#). Second introducers, readers and other panel members should be prepared to provide the first introducer with inputs if they request it. NetDRIVE will provide time as part of the meeting, where possible, for attendees to complete their feedback comments and expects panel members to use any available time to prepare feedback or agree the arrangements for coordinating feedback with other members.

Care should be taken to present the feedback constructively. This should not be a list of strengths and weaknesses like a review but should give context to the key factors that led to the application getting the score it did and should explain how the applicants could have achieved a higher score. Introducers should ensure that the feedback provided is of a sufficient length to ensure that it provides an appropriate level of detail so that the applicants are clear as to why the application received the score it did and can see how it could be improved.

5.3 After the Panel Meeting

The first introducer should send the feedback to the Panel Secretary by e-mail as soon as possible and within one week of the meeting date. Panel members that are eligible to receive attendance fees and wish to receive the panel meeting fee will need to complete the relevant form, see the guidance in [Annex C](#).

6. Application Scoring

The panel must assign a single score between 1 – 10 (highest) to each application (see Table 1). The score must incorporate all assessment areas, and all areas are of equal value. For the assessment area details in full, see Call Guidance on the [call page](#).

Table 1: scoring scale and associated definitions

Score	Definition
10	Exceptional: The application meets all the assessment criteria to the highest standard. It is hard to see how the application could be improved.
9	Outstanding: The application very strongly meets all the assessment criteria.
8	Excellent: The application strongly meets all the assessment criteria.
7	Very Good: The application meets the assessment criteria well but with some minor weaknesses or limitations.
6	Good: The application meets the assessment criteria well but with some clear weaknesses or limitations.
5	Adequate: The application meets the assessment criteria but with clear weaknesses or limitations.
4	Weak: The application meets the assessment criteria but with significant weaknesses or limitations.
3	Poor: The application meets the assessment criteria but has major weaknesses or limitations.
2	Unsatisfactory: The application does not meet one or more of the assessment criteria.

1	Very Unsatisfactory: The application does not meet any of the assessment criteria.
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7. Application Prioritisation and Decisions

Once all the applications have been scored, the panel is then asked to place those that have been identified as a funding priority (i.e. those that score 7 and above in all assessment areas) in priority order. A ranked list of the applications will be compiled based on the scores assigned to each application. The ranking may take into account the aim of achieving a spread of work across all call topics.

Following the panel's prioritisation meeting, the NetDRIVE co-ordinators use the ranked list and the available budget to set a "funding cut-off point". Proposals that fall above this line are supported, while those below it (or those deemed uncompetitive) are rejected.

Proposals will be assigned one of the following three outcomes:

1. **Accepted:** the project will be funded subject to completion of a contract.
2. **Rejected:** the project will not be funded from this call
3. **Rejected with invitation to resubmit:** the proposal is not acceptable in submitted but will be re-evaluated if the panel considers that identified shortcomings could usefully be addressed in a revised submission. There is no guarantee that a resubmitted application will be successful.

Annex A: Declaration of Interests

Declaration of Interest Guidance for UKRI assessors, including reviewers and panellists

Introduction

UKRI is a publicly funded organisation and is accountable to government and the public for its actions and for the way it conducts its business, which must be undertaken in a way that is transparent and guards against potential conflicts of interest influencing the outcome of decisions.

UKRI defines a conflict of interest as a situation in which an individual's ability to exercise judgement or act in one role is, could be, or is seen to be impaired or otherwise influenced by their involvement in another role or relationship. Even a perception of competing interests, impaired judgement or undue influence may be damaging to UKRI's reputation.

The existence of an actual, perceived, or potential conflict of interest does not imply wrongdoing or that the assessor is not well-placed to make an impartial assessment. However, as an assessor, it is vital that they are seen to be impartial at all stages of the decision-making process. Any private, personal, or commercial interests which might give rise to such a conflict of interest must be recognised, disclosed appropriately and either eliminated or properly managed.

Everybody involved in UKRI decision-making and funding processes must comply with UKRI declaration of interest policy <https://www.ukri.org/publications/ukri-declarations-of-interest-policy-and-guidance/>. UKRI will support all individuals to ensure compliance of the policy.

How and why do we collect conflict of interest information

Applicants may declare potential conflicts of interest in their application, related to individuals or organisations. UKRI will endeavour to avoid asking these potentially conflicted individuals/organisations to assess that application when feasible and if the request meets UKRI definitions of a conflict as defined in the UKRI Declaration of Interest Policy.

Reporting, recording, and managing potential conflicts effectively protects assessors (reviewers and panellists) and helps ensuring a transparent decision-making process.

UKRI acknowledges that individuals working in the same research and innovation field may know each other, and therefore, this does not prevent them from assessing an application. However, as assessors, they must declare any interest which they feel would prevent them giving an unbiased assessment, for UKRI awareness and evaluation.

Once an assessor declares interests, UKRI evaluates the declaration of interests and deem them as actual, perceived or no conflict. If the assessor's knowledge/ relationship with the application/ applicants is such that they feel it would be difficult to be impartial when commenting on the application, then we ask them to decline the invitation to be part of the assessment by selecting "conflict of interest" as the reason why.

For Reviewers

Some UKRI review forms contain a confidential section on “declaration of interests”, where reviewers need to disclose relevant information (including a N/A if that is the case). If in doubt, we encourage you to discuss your circumstances with a UKRI office administrator managing the assessment process.

If you are unsure how to proceed, please check with the UKRI member of staff that approached you to carry out the review.

For Panellists

If you are part of a collective decision-making process, such as a panel, a committee or an interview panel, and a conflict of interest has been identified, this can impact your role in the process. It might mean that you have limited access to the application materials related to the conflict, and that you are asked to leave the room when the application is being discussed.

Examples of conflicts of interest for assessors

The list below shows examples of conflicts of interest, including but not limited to review and panel stages. The list is not exhaustive; therefore, you must declare any actual or perceived conflict of interest, reflecting on the perception of both yourself and others.

Personal conflict

- You are named on the application.
- You have assisted the applicants in preparing the application.
- You are named as a project partner, subcontractor, visiting researcher or have any type of relationship with the application.
- You have written a letter of support for the application.
- You have been approached and agreed to be a member of a committee or board connected with the proposed project, for example an advisory group or steering committee/board.
- You are in close regular collaboration with any individuals named in the application, including investigators, research staff, collaborators, subcontractors and project partners, to an extent where you feel uncomfortable being involved in the discussion or you feel unable to give an unbiased opinion.
- You have a personal, financial, or professional relationship with any individuals named in the application.
- You have been any of the applicants’ PhD supervisor, line manager or group leader in the last three years, or the other way around.
- You stand to gain a financial or professional advantage from a particular outcome for an application which you are asked to review.

Organisational conflicts

- You are a current/Emeritus/secondment/visiting member at the same/proposed organisation as any individuals named on the application. This includes holding a position on the governance body or an honorary position within the applicants' current/proposed organisation.
- You belong to an organisation that is a project partner, subcontractor, are a visiting researcher from or to the Organisation.
- You have any type of recognised significant organisational collaboration with the application which would mean that your participation in the assessment would be seen as a conflict.
- You are in receipt of personal remuneration in excess of £5,000 per annum from the applicant's current or proposed organisation.
- Fellowships only: you are at an organisation chosen by the candidate to be the hosting organisation for their fellowship.

Commercial or financial conflicts

- You have any commercial or financial/pecuniary interest, for example where you are a member of an organisation that may benefit financially, directly or indirectly, from any decision made.
- You have stocks or shares in a company named in an application.

How we manage conflicts in our decision-making process

These guidelines set out the procedures for managing real or perceived conflicts of interest. The guidelines apply to all individuals involved in any way in UKRI's assessment or funding processes and have been developed in order to protect the integrity of the decision-making process.

Individual panellists, like others who serve the public, are expected to follow the seven principles of public life set out by the Committee on Standards in Public Life¹ (the Nolan Committee).

Responsibilities for UKRI staff

- UKRI staff will make all reasonable efforts to identify and record any real or perceived conflict of interest that involve anyone related to our assessment and funding processes.
- UKRI staff will not invite any assessor with a known conflict of interest to be part of our assessment process for that application.
- Depending on the conflict of interest and business needs, UKRI staff will consider introducing measures to manage and minimise the risk potentially raised by the conflict.
- UKRI will give assessors the opportunity to self-identify any potential conflict of interest that might not have been apparent in previous stages of the process. We

expect the assessor to identify these to UKRI staff, who will introduce reasonable measures to minimise the risk from this conflict.

- UKRI commits to not sharing application assessment information with assessors that are not involved in the assessment of the application, e.g., reviewer comments will not be shared with conflicted panellists.
- UKRI will manage any conflict that becomes apparent at different stages of the funding process to safeguard the integrity of the assessment. Depending on the nature of the conflict, different measures can be put in place.

For Reviewers

- When you are invited to review an application for UKRI, you will receive a summary of the application and the name(s) of the applicant(s). You must declare any known conflict of interest at this stage and select 'conflict of interest' as a reason when declining the invitation as a result of a known conflict of interest.
- If you are unsure as to whether you have a conflict of interest, you should contact UKRI to discuss your concerns before deciding to accept or decline a review invitation.
- If you accept an invitation to review and then identify a conflict of interest, you must let UKRI know as soon as possible so the nature of the conflict can be assessed and appropriate measures can be taken.
- If a conflict becomes apparent, either to you or to UKRI, after the submission of a review, UKRI will classify your review as 'unusable' and not use it in the decision-making process.

For Panellists

- UKRI will ensure that you are not allocated any application as a panel assessor if you have an identified conflict of interest with that application.
- If you have a known conflict of interest, you will not be able to access application assessment information (e.g., reviewer comments for those applications) to protect the integrity of the assessment process.
- If you believe that UKRI has missed a potential conflict of interest, you must communicate this to UKRI staff as soon as possible to ensure that any measure to mitigate or eliminate the risk can be put in place.
- Depending on the nature of the conflict, your role in the assessment process might need to be altered. This can include your withdrawal from the panel meeting for the discussion of the application.

Notwithstanding any of the above, as a panellist, you may voluntarily choose to withdraw from the discussion of an application at any time if you wish to do so. This may arise for a number of reasons as the discussion of an application develops. The

UKRI staff acting as a secretary to the panel should record in the minutes the point at which an individual ceases to take part in the discussion and leaves the meeting.

Annex B: Panel Feedback Form

Panel scoring and feedback will be collected in an online workbook which will be shared after the close the submissions have been received.

Annex C: Attendance Fees

Panel members are eligible to receive an attendance fee of £200 per meeting with the exception of the following:

- Civil servants and employees of Non-Departmental Public Bodies and Agencies, i.e. bodies whose funds are derived wholly or partly from Votes of Parliament
- NERC Council members
- NERC PRC Chairs
- Observers
- Employees of other Research Councils

An eligible member will receive the full attendance fee regardless of whether they are employed on a part-time basis. Those who are employed both at eligible and non-eligible organisations are entitled to receive full attendance fees.

Members falling into the groups listed above can claim their travel expenses from NetDRIVE.

Attendance fees are based on attendance and not duration i.e. a member attending only half a meeting is still entitled to receive a full attendance fee.

If a member is joining a meeting by videoconference, then an attendance fee should only be paid if they would have received a fee if they had been joining the meeting in person (e.g. a member joining a formal panel or committee meeting by videoconference would receive a fee).

The [expense claim form is available on the University of Oxford website](#). Completed claims should be sent to netdrive@eng.ox.ac.uk.

Annex D: Two Stage Calls

The two-stage call process is designed to support co-design of projects and to ensure that the effort put in during the co-design stage is not wasted while also maintaining appropriate checks on the excellence, and originality of proposals.

The Stage 1 proposal is not simply a shortened form of the full proposal: it includes a statement of intent but must identify key representatives of the DRI community, individuals, institutions and organisations, who are committed to working with the project team to take NetDRIVE outputs into practice. The do-design approach that will be used to develop the full proposal must also be set out (expenses for this process may be requested within the Stage 1 proposal).

The evidence of constructive engagement with community representatives will be critical in the evaluation of the Stage 2 proposal and it is thus critical that the people identified for the role in the Stage 1 proposal have the appropriate roles and experience to provide accurate evaluation.

The Stage 2 proposal should include input from community representatives which will form part of the assessed material.