

Cross-Case Analysis of
10 International Funders

EMERGING PRACTICES IN RESEARCH ASSESSMENT

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1. INTRODUCTION

Research funding agencies play a central role in shaping research cultures, career trajectories, and the norms of research assessment. Their evaluation practices influence what is valued, who succeeds, and how scientific progress is defined. In recent years, international discussions on reforming research assessment have intensified, particularly through the work of the Coalition for Advancing Research Assessment (CoARA), the Declaration on Research Assessment (DORA), the Global Research Council (GRC), and broader community movements towards Open Science and responsible assessment.¹

Across geographical, organisational and disciplinary divides, these initiatives call for greater transparency, fairness, inclusion, and a shift towards qualitative assessments supported – but not dominated – by quantitative indicators.²

In preparation of the EU High-Level Presidency Conference on Reforming Research Assessment (CeRRA), held in Copenhagen on December 3-4, 2025, the present report presents findings from ten case studies of international research funding agencies. The included funders represent a diverse ecosystem: public agencies, private foundations, independent research charities, and mission-driven institutions.

Their mandates range from research support across scientific domains to more targeted thematic programmes. They span from basic curiosity-driven research to impact-oriented interventions. Together, the case studies illustrate a broad variety of approaches to promoting **responsible research assessment** (RRA), from funders that explicitly align with CoARA and DORA principles to foundations that rely on more traditional mechanisms for peer review but increasingly incorporate openness, societal impact, and diversity as dimensions of evaluation.

Foundations	
Independent Research Fund Denmark	Public
Villum Foundation	Private
Velux Foundation	Private
Novo Nordisk Foundation	Private
Augustinus Foundation	Private
German Research Foundation	Public
Volkswagen Stiftung	Private
Riksbankens Jubileumsfond	Public
Wellcome Trust	Private
The Health Foundation	Private

The purpose of the study is to map how the included funding agencies articulate and operationalise research assessment; identify similarities and differences; and situate their practices within ongoing international debates. The report does not present any assessment of funders or rank their approaches or practices. Instead, we provide a descriptive analysis of different approaches to research assessment that situates the different organisations within the emerging global discussions on responsible research assessment.³

The analysis draws on publicly available documents – such as strategy statements, guidelines, calls, templates, policies, websites – as well as desk research undertaken for each funder. In addition, several cases have been validated by informal interviews with research grant officers or directors at the relevant funding agency. Although this method does not capture all internal practices or non-public procedures, it allows us to present a semi-structured comparison of assessment frameworks, use of metrics, treatment of diverse contributions, approaches to Open Science, governance structures, and involvement in international reform movements.

By placing the case studies in a unified analytical framework, the report aims to support discussions about reforming research assessment in Denmark and Europe; provide reference points for further learning; and inform emerging conversations about the evolving roles of research funders in shaping the research ecosystem.

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2. ANALYTICAL FRAMEWORK

The analytical framework used in this report draws on international guidelines, particularly those emerging from CoARA, DORA, and the Global Research Council's "Transforming Assessment" initiative. The following dimensions have been used to structure each case study:

1. Purpose and position in the research system

This dimension identifies the funder's mission, scope, and strategic role. It captures whether the organisation focuses on broad research support, mission-driven thematic programmes, interdisciplinary initiatives, or sector-specific areas.

2. Relevance to international research assessment reforms

This dimension examines explicit commitments or implicit alignment with major reform movements. Key reference points include CoARA Membership and action plans, DORA principles, national or organisational frameworks for responsible research assessment, and engagement in Open Science, FAIR data, or transparency initiatives.

3. Assessment principles and process

This dimension describes how applications are evaluated, including the balance between peer review, panel evaluation, and internal validation; use of advisory committees or external experts; transparency of decision-making; measures to ensure fairness and manage conflicts of interest; and the extent of dialogue or iteration between applicants and reviewers.

4. Use of quantitative vs. qualitative indicators

This dimension explores whether the organisation explicitly limits the use of journal metrics, emphasises qualitative narrative descriptions, recognises diverse contributions, or adopts structured templates for CVs, outputs, or competences.

5. Diversity, equity and inclusion

This covers how organisations address diversity in review panels, applicant guidance, team composition, gender balance, and inclusiveness in assessment criteria. It includes both formal policies and emerging practices.

6. Open Science and Open Access policies

This section examines funder policies on Open Access publishing, open data, data management plans, transparency of methods, and recognition of open contributions.

7. Governance and review structures

This dimension looks at the composition and size of boards or committees, reviewer selection processes, distribution of responsibilities between secretariats, panels, and boards, and advisory structures.

8. International alignment

This assesses how closely the funder's practices map onto global reform trends, including qualitative, expert-driven review; recognition of diverse outputs; ethical and responsible use of indicators; emphasis on research environment and culture; support for early-career researchers; and transparency and accountability.

9. Other observations

A short, factual synthesis of notable characteristics presented in a short form and without recommendations or assessment of practices and principles.

This analytical framework ensures comparability across funders while respecting their distinct mission and context. It enables a systematic cross-case overview of how assessment practices are evolving in response to international debates.

3. CROSS-CASE SUMMARY

Across the reviewed funders, several patterns emerge that reflect both shared tendencies and distinct approaches to responsible research assessment practices and principles. First, all funders maintain peer review and qualitative expert assessment as the core mechanism for evaluating grant proposals. The structure varies from individual expert reviews to multi-stage panel processes. Across the different approaches, qualitative judgment remains central in all cases. Some international funders, such as Wellcome Trust and the German Research Foundation, explicitly discourage the use of journal-level metrics and require applicants to provide contextualised descriptions of their contributions. Others rely on more traditional assessment criteria without formal statements about metrics. It is clear from the analysis that qualitative review dominates.

Alignment with international reform movements differs across the sample. Wellcome Trust, German Research Foundation, Volkswagen Foundation, Independent Research Fund Denmark, and Villum Fonden show explicit engagement with CoARA and DORA, integrating international research assessment principles into their reviewing policies. Most of the included funders support openness through detailed Open Science requirements. While emphasising quality research as well as societal impact, several of the Danish funders do not formally participate in CoARA (Novo Nordisk Foundation and Augustinus). Nonetheless, their assessments reflect elements of responsible assessment practices, such as qualitative evaluation and recognition of collaborative efforts and interdisciplinary contributions.

Third, Open Science policies vary across funders. Some have lengthy Open Access policies, explicit data-sharing requirements, and expect data management plans to be submitted. Others include general encouragements with no formal requirement. Open source and open data practices are required by Volkswagen, Wellcome Trust, and UK Health Foundation but is also emphasized by others. To varying degrees, the funders are in the process of revising their open science policies and principles in light of the current geopolitical situation and call for data security and integrity.

Fourth, diversity, equity and inclusion practices are identified across all cases. Some organisations implement structured gender balance rules for review panels (e.g., Riksbankens Jubileumsfond, Wellcome Trust, Volkswagen), while others monitor diversity or embed it in organisational strategies as an important item for consideration (Villum Foundation, Velux Foundation, Novo Nordisk Foundation, German Research Foundation, Independent Research Fund Denmark). A few funders – particularly mission-driven and smaller foundations – describe diversity and inclusion principles only sparsely in publicly available guidelines.

Fifth, the recognition of diverse research contributions is emphasized by several funders. The German Research Foundation and Wellcome's emphasis on research culture and contributions beyond publications demonstrate more structured approaches. Several funders support disciplinary diversity and collaborative contributions but do not articulate this explicitly as an assessment principle. Overall, all funders in the sample are oriented towards research quality and societal impact as the main drivers of funding programmes, with local differences in how to implement and realise these objectives. In varying degrees,

research culture, diversity, openness, team effort, and nurturing well-functioning research environments are found across all funders

Governance and decision-making structures vary from Board of Governors to large multi-stage and cross-panel review systems with various thematic panels (e.g., Novo Nordisk, Villum, Riksbankens, Wellcome, and Independent Research Fund Denmark). In most cases, Boards retain final authority, often supported by advisory committees and external review panels that provide recommendations. Qualitative assessment and an awareness that funders – not metrics or indicators – are responsible for funding decisions are pervasive throughout the mapping.

At a glance, all funders rely on qualitative peer review while their engagement with responsible research assessment principles differs. Some are deeply embedded in international reform processes such as CoARA and DORA; others operate through established practices that partially align with broader global trends. Only a small group of funders stay agnostic towards the future of assessment. Most of the reviewed funding bodies have an active policy for responsible research assessment and take an active stance to promote more equitable, open and collaborative research cultures. The resulting ecosystem is heterogeneous while also converging towards the same norms, reflecting institutional histories, mandates, and strategic priorities.

Funder	RRA Alignment	Use of Metrics	Open Science	DEI Attention
DFF	Strong	Low	National policy	Moderate
Villum Fonden	Strong	Low	National policy	High
Velux Fonden	Strong	Low	National policy	Moderate
Novo Nordisk Fonden	Implicit	Moderate	Strong	Moderate
Augustinus Fonden	None	None	Not Specified	None
DFG	Strong	Very low	Strong	High
Volkswagen Stiftung	Strong	Low	Strong	Moderate
Riksbankens Jubileumsfond	Strong	Low	Strong	High
Wellcome Trust	Very strong	Very low	Strong	High
Health Foundation	Moderate	Very low	Moderate	Moderate

4. INDEPENDENT RESEARCH FUND DENMARK

Independent Research Fund Denmark (DFF) is Denmark's primary public funder of investigator-led research across all scientific domains. The council supports curiosity-driven, bottom-up research and plays a central role in advancing early-career opportunities. Its remit focuses on strengthening Denmark's knowledge base, supporting research talent, and advancing disciplinary depth as well as interdisciplinary work where relevant. Each year, the fund also allocates thematic funding to political and strategic initiatives.

DFF participates in broader policy conversations regarding assessment and has publicly committed to CoARA principles. DFF's practices align with international movements and DFF's policies reflect a stable, peer-review-driven model that incorporates qualitative judgment, and which is explicitly framed within RRA reform agendas.⁴

Applications to DFF undergo a detailed review process that includes eligibility and administrative screening by the secretariat, assessment by the fund's scientific councils, in some cases external reviews, and final funding decisions by all members of the relevant council or committee. Assessments focus on research quality, novelty, the applicant's qualifications, feasibility, and the project's potential contribution to its field; reviewers assess both the scientific content and the applicant's research trajectory. However, as a result of DFF's implementation of the CoARA principles, the assessment criteria will be adjusted in the coming call for proposals in alignment with the agreement.⁵

DFF emphasises qualitative peer review and has banned the use of Journal Impact Factor metrics. DFF is working on introducing a structured and CoARA-aligned format for CVs and publications lists. While applicants may list some bibliometric indicators, they hold no formal evaluative weight; qualitative judgment of contribution quality remains central. DFF has also embarked on a project to define 'inappropriate' and 'appropriate' uses of quantitative indicators.

DFF places strong emphasis on promoting gender balance and equal opportunity. DFF values that its procedures and assessment criteria are sensitive to the gender balance of applicants and grants. Accordingly, several initiatives are in place to ensure attention to, and potentially contributions to improving, the gender balance of applicants and grants: e.g. compensating for maternity/paternity leave and family-related absence, learning from other international research councils; mapping initiatives and experiences on equal opportunities; and recording special data to monitor the progress of the gender composition among applicants, and the success rate of men and women when applying for instruments relative to the share each gender make of the total applicant pool. Diversity considerations may also emerge more indirectly through reviewer training and awareness of bias; panel composition generally aims for gender balance where possible. However, gender is not a criterion in the final funding decision.

DFF follows national Danish policies on open access and FAIR data. Applicants are expected to comply with institutional and national mandates, and data management plans may be

required for relevant calls. Open Science expectations are framed through national policy rather than separate DFF-specific requirements.⁶

DFF is structured into five discipline-specific councils and a cross-council committee, each with a chair, members, and secretariat. Councils are composed of recognised and active researchers with expertise in relevant fields, and governance emphasises independence of scholarly judgment and broad disciplinary representation. In addition to this, a number of ad hoc members are appointed each year to committees in order to allocate politically designated thematic funds.

DFF aligns strongly with international practice in its focus on qualitative expert review, and has explicitly adopted CoARA and a formal responsibility-driven assessment framework. Practices reflect shared principles, including peer review centrality and avoidance of metrics misuse. DFF expects to complete its implementation of CoARA in 2027.

Overall, DFF operates a highly structured and established peer-review system, emphasising scientific quality, feasibility, and qualifications –framed through RRA terminology. It processes align with established norms of responsible peer review, with extensive explicit engagement in international reform movements.

DFF is currently in a transition phase, revising its assessment procedures and developing new CV formats as part of its ongoing CoARA-aligned reforms. The fund maintains a strong emphasis on the originality and quality of the project idea and reduced reliance on publication-based indicators. This work also reflects a broader effort to expand the understanding of merit by recognising a wider range of research roles, outputs and contributions, and by moving towards a more holistic evaluation in which applicants and projects are assessed as a coherent whole

5. VILLUM FONDEN

Villum Fonden is a major Danish private foundation supporting research in technical and natural sciences, as well as science education. It focuses on long-term investments in research environments, large grants for curiosity-driven research and talent development, and plays a key role in supporting high-risk, high-gain research.

In recent years Villum Fonden has aligned itself with international reform efforts. It is a member of CoARA and jointly with Velux Fonden (see below) has committed itself to the principles of ARRA, adopting a five-year joint CoARA Action Plan. The plan commits the foundations to annual evaluations and outlines four work packages addressing diversity, peer review quality, transparency, and experimentation with new tools. A concrete example is the Villum Experiment programme with experiments with anonymous review of proposals. The foundation supports diverse research contributions, interdisciplinarity, and assessment of research potential. Its funding model often emphasises originality, scientific ambition, collaboration, synergy, and the quality of the research environment.⁷

Assessment involves administrative screening, expert peer review by international specialists, panel deliberations, applicant interviews for selected programmes, and final decisions by the foundation's board. Criteria include excellence, originality, feasibility, and the applicant's research potential; for large grants, significant attention is paid to the institutional setting and the applicant's ability to establish or expand a research environment.

Villum Fonden emphasises qualitative assessment, including narrative descriptions of achievements, research ambitions, and long-term vision. Evaluation requests structured information on publications, funding, and supervision. The foundation's emphasis is placed on qualitative evaluation of the applicant's overall record and potential. In its CoARA Action Plan, the foundation explicitly commits to avoiding inappropriate use of publication-based metrics such as Journal Impact Factor and h-index, and to strengthening qualitative, person-centred evaluation through structured CVs and narrative self-assessment.⁸ Bibliometric measures are formally prohibited in the CV template, although reviewers may still consult public profiles such as Google Scholar at their own discretion.

Villum Fonden has explicit and broad guidelines for diversity, aiming to strengthen diversity in science by focusing on female representation. Its targets include gender balance among applicants and grantees, and at least 30–40% women in committees. The foundation encourages gender diversity in review processes and promotes research environments that are inclusive and supportive. Villum Fonden works to promote diversity and inclusivity, with a strong focus on female representation. To support this, initiatives include earmarked postdoc funding for women, family support packages, gender-neutral calls, and expanded eligibility for applicants with parental leave. Gender data are systematically monitored and presented to committees, and evaluation procedures are regularly reviewed for bias.⁹

Villum Fonden promotes transparency and expects grantees to follow standard Open Access mandates through their institutions. While not a central feature of its assessment policies, Open Access and data sharing are often considered aligned with good scientific practice.

A professional secretariat oversees calls and coordinates review processes, while final funding authority rests with the board. Panels typically include international experts, ensuring external perspective and disciplinary breadth.

Villum Fonden aligns with international RRA discussions, particularly through its emphasis on qualitative review, research environment quality, and long-term capacity building. It is formally part of CoARA and practices are broadly consistent with responsible peer review norms.

Villum Fonden's processes are characterised by strong reliance on international expert review and interviews. Explicitly framed through RRA principles, the funder's emphasis on research synergy, leadership, and environment reflects an advanced, qualitative approach to assessment.

6. VELUX FOUNDATION

VELUX FONDEN is a Danish philanthropic foundation established by the VKR Group and the Kann Rasmussen family. Its mission emphasises promoting a democratic and sustainable society and an enlightened and inclusive community, and it supports independent basic research in the humanities and social sciences, ageing research, and cultural initiatives. Within the research system, VELUX FONDEN plays a distinct role by focusing on areas less covered by traditional public funding and by enabling long-term, interdisciplinary, and public impact-focused research environments. Funding covers four broad grant areas – human and social sciences research and culture; social interventions; environmental initiatives ('Et hav i balance'); and programs on transitions in adult life – each with distinct calls and reporting requirements.

In 2023, VELUX, together with Villum Fonden joined CoARA, committing to qualitative assessment of diverse outputs supplemented by responsible metrics.¹⁰ The plan has a five-year horizon and outlines a series of work packages to change internal procedures, such as revised CV templates, reviewer training, independent observers at committee meetings to monitor bias, and publication of evaluation reports.¹¹

VELUX does not formally subscribe to the Declaration on Research Assessment (DORA). Nonetheless, its publicly stated strategy emphasises transparency, inclusivity, and sustainability—values that resonate with DORA. Its funding of humanities and social-science basic research, as well as ageing and cross-disciplinary themes, positions it in proximity to global debates on research culture and broad contribution recognition.¹²

Assessment involves administrative screening of applications, expert peer review (internal or external) depending on research domain, panel deliberations, and final decisions made by the foundation's board. Assessment criteria include originality and methodological quality, feasibility, institutional anchoring, and societal relevance, particularly in areas such as ageing research.

The Human and Social Science research programme pursues two interconnected goals: free, curiosity-driven fundamental research and cross-sector research-to-practice collaboration. The foundation considers cross-sectoral collaboration essential for a sustainable democracy and therefore funds projects that combine rigorous scholarship with real world engagement.¹³

Across grant areas, the foundation emphasizes robust theoretical and methodological grounding, feasibility, originality and realistic budgets, a clear purpose and potential to contribute to culture, democracy or social welfare, and that projects should involve partnerships between researchers and practitioners and outline how results will be disseminated and anchored in institutions and society, both nationally and internationally.

CoARA principles are introduced at project start-up meetings and in dialogues with departments and research leaders, ensuring that expectations about responsible assessment are aligned throughout the wider research ecosystem

The foundation emphasizes qualitative assessment; narrative descriptions of research questions, interdisciplinary ambition, institutional environment, and societal relevance dominate review criteria. Bibliometric indicators are not used while publication lists are assessed for relevance and quality (not counting or journal impact metrics).

VELUX adheres to Philea's Principles of Good Practice, which specifies a commitment to independent governance, ethical standards and public accountability. The principles also call for board diversity in terms of gender, origin and age. The foundation does not have an independent formal diversity policy for assessment committees or applicants. The research programme's description makes no reference to gender balance or equity considerations. However, its strategic orientation towards inclusive and sustainable societies suggests an implicit attention to equity and inclusion. Diversity in panel composition and applicant opportunities is referenced, though less detailed than in some peer funders.¹⁴

The CoARA action plan acknowledges the need to reduce bias and proposes new CV templates that account for periods of leave and non-traditional career paths, as well as formal training and guidelines for reviewers.

Open Access expectations follow national Danish policies, and the foundation encourages dissemination beyond academia. Its research programmes emphasize public engagement, interdisciplinarity, and broader knowledge use. While specific open science mandates are less explicit than in other large funders, the foundation's emphasis on transparency and societal relevance supports open science practices.

A professional secretariat administers calls and coordinates review procedures; panels include external experts as necessary, including non-academic practitioners for cultural or applied projects, and final funding decisions reside with the board of the foundation.

Velux Fonden aligns with international responsible research assessment practices by using qualitative peer review, valuing diverse and interdisciplinary contributions, and emphasising societal relevance. It is formally a signatory of CoARA and has published detailed policy frameworks for CoARA compliance similar to international funders.

VELUX FONDEN offers a distinctive contribution to the funding ecosystem by focusing on humanities, social sciences, ageing research and interdisciplinary grant programmes as well as Impact Labs. Its assessment practices are rooted in qualitative evaluation and societal relevance. The explicit engagement with international reform frameworks is strong, and the foundation's values and operational practices resonate with key aspects of responsible research assessment.

7. NOVO NORDISK FOUNDATION

The Novo Nordisk Fonden (NNF) is one of the world's largest philanthropic foundations, providing extensive funding for biomedical, natural sciences, and technical research, as well as innovation, education, and humanitarian causes. Within Denmark and internationally, NNF plays a major system-shaping role due to the scale of its investments and its long-term commitments to research infrastructures, talent programmes, and strategic research centres.

NNF is not formally part of CoARA or DORA but has articulated principles that align with responsible research assessment. Its strategic priorities emphasise research quality, societal impact, long-term capacity building, and collaborative research environments. The foundation's large-scale programmes often incorporate structured evaluation frameworks and a holistic understanding of research excellence (beyond bibliometrics etc.).

NNF has launched a public grant dashboard with real-time data on funding and demographics, stating that it is the first foundation in the world to give Open Access to all its grant-giving data.¹⁵ Furthermore, NNF staff participate in international experimental platforms such as AFIRE.¹⁶

NNF's assessment processes vary by programme type but typically include secretariat screening, external international expert peer review, panel discussions and ranking, interviews for major programmes, and final decisions by the board or committees. Assessment criteria generally include scientific excellence, novelty, feasibility, leadership potential, research environment, and expected societal or scientific impact; large programmes, such as Challenge Programmes or infrastructure grants, involve multi-stage evaluation with strong emphasis on strategic relevance and interdisciplinary collaboration.

NNF's practices are grounded in qualitative expert judgement, and all programmes are based on peer review by committees of international experts. The foundation supports a wide spectrum of contributions – from biomedicine to art and cultural research, as well as supporting a wide range of activities beyond traditional research, such as education, outreach, infrastructure, and arts, with dedicated committees and prizes for science teaching and communication.¹⁷ Quantitative indicators such as impact factors or rankings are not applied to grant evaluation.

However, NNF is working actively to co-create impact frameworks based on a variety of data sources. These frameworks are not only used for final reporting and assessment but are part of the learning journey throughout the research process.¹⁸ An impact framework consists of qualitative goals combined with strategic use of metrics, for example, PP(top 1-10%). Charts with numbers and proportion of highly cited publications are used to create network analysis, heat maps, and to study field development. Use of h-index is not part of the impact framework, and metrics are avoided especially for assessment of early-career researchers. Some bibliometric measures are used in combination with tracking clinical guidelines and patents but are not considered as stand-alone assessment tools.¹⁹

Publication lists and scientific achievements are contextualised within narrative descriptions; bibliometrics do not play a role in decision-making. Narrative CVs are not mandated but

several programmes encourage broader descriptions of contributions, leadership, and interdisciplinary team collaboration.

NNF's public strategy emphasises broad societal benefit and includes a diversity policy, with concrete targets for gender representation. Diversity is considered in talent programmes and panel composition, and some initiatives – especially within education and outreach – highlight inclusion.

NNF's 2024 Diversity Policy explicitly covers evaluation bodies. It mandates diverse representation on all boards, scientific committees and advisory panels, with targets such as at least 40% representation of underrepresented genders in leadership roles by 2027. Committees are expected to follow action plans addressing gender and other diversity factors.²⁰ NNF has adopted a formal diversity policy, which sets targets for representation in governance and review structures, and it has begun to monitor panel composition.

NNF supports Open Access publishing and expects compliance with institutional or national mandates. Data management practices are addressed in certain calls, particularly in biomedical and life sciences. The foundation funds open infrastructure initiatives and supports international collaborations which promote openness. However, the foundation does not have a unified Open Science policy framework across all programmes, partly because of privacy and data security measures.²¹

Governance relies on a combination of internal committees, external reviewers, and the foundation's board of directors. Major programmes often have dedicated advisory committees and scientific steering groups, and reviewer selection generally emphasises international expertise and disciplinary breadth.

While not formally a CoARA signatory or member, NNF's approach – emphasising expert review, high-quality research environments, and long-term strategic investments – aligns with international principles of responsible evaluation. The foundation's scale and strategic focus position it as an influential actor in shaping assessment expectations in Denmark.

In 2023 NNF launched a public interactive dashboard providing real-time data on all its grants – both historically and currently. The dashboard shows success rates and breakdowns of awards by applicant age, gender, institution and scientific area. All individual grants and recipients are also listed on the NNF website (searchable by year, category, etc.), making the portfolio very transparent. Like with other foundation, grantees must report on progress annually. And continued reporting (1-5 years after completion) is required to track outcomes. NNF uses these reports to monitor impact against pre-set markers.²²

NNF employs a rigorous, structured, and multi-stage assessment system centred on scientific excellence, leadership, and societal impact. Although the foundation does not officially adopt RRA frameworks, its processes are broadly consistent with qualitative, expert-driven assessment practices and responsible use of metrics. NNF is co-sponsor of Research of Research Institute (RoRI) as well as several other metascience initiatives that helps highlight the role of responsible research assessment.

8. AUGUSTINUS FONDEN

Augustinus Fonden is a Danish private foundation supporting arts, culture, heritage conservation, and selected research fields. Compared to other funders, its role in the research ecosystem is more targeted, focusing on areas where investments have added value, particularly cultural heritage and niche or specialised research areas.

Augustinus Fonden does not engage with CoARA, DORA, or similar initiatives. It operates a philanthropic model where assessment is guided by the foundation's mission and board discretion. Elements of responsible research assessment, such as narrative evaluation and expert judgement, appear in the funding principles, but the foundation does not explicitly articulate research assessment principles.

Calls for funding define excellence by qualitative criteria. Proposals are expected to present clear research objectives, robust theoretical and methodological frameworks, originality and international excellence, feasibility, clear budgets, and strong institutional integration. Interdisciplinary, multi-institutional collaborations are encouraged. Projects must include plans to disseminate results beyond academic peers to the public.²³ Innovation, publications, collaborations, feasibility, and patient and societal impact are considered important in proposals.²⁴

Assessments typically involve internal screening, consultation with expert advisors as needed, and board deliberation and decisions. Criteria focus on scholarly quality, feasibility, cultural or societal significance, and alignment with the foundation's priorities. For culture and heritage projects, practical relevance and public impact may play a significant role. Assessment is less formalised than in major public science funders.

Assessment is qualitative, relying on narrative project descriptions and expert judgement. Quantitative indicators or bibliometrics are not part of the process; decisions are based on the perceived merit and relevance of the proposal rather than formalised metrics. The foundation stresses professionalism and integrity in processing applications. It has policies on reviewer impartiality, expertise and mandates to ensure fairness.²⁵

There is no publicly stated policy or explicit mention of diversity in assessment processes. The foundation's focus areas may indirectly support diverse cultural expressions. Open Science is not a central component of Augustinus Fonden's mission. Research outputs are expected to follow academic norms, but no Open Access or data-sharing requirements are publicly specified.

The foundation is governed by a board of directors who handles the majority of assessment work, with occasional expert consultation. Governance is streamlined, reflecting the foundation's size and mission-driven funding model. Augustinus Fonden's assessment approach aligns broadly with elements of international responsible research assessment: in particular qualitative expert review, while it does not actively engage with global reform movements or international assessment frameworks.

Augustinus Fonden operates a focused, mission-driven funding model with qualitative

assessment and minimal formalisation. While not aligned with RRA frameworks, its reliance on expert judgement situates it broadly within traditional philanthropic assessment practices.

9. DEUTSCHE FORSCHUNGSGEMEINSCHAFT (DFG)

The German Research Foundation (DFG) is Germany's principal research funding organisation for basic science, supporting investigator-driven research across all disciplines. It has a central role in shaping research infrastructures, training networks, international collaborations and long-term scientific excellence in Germany and beyond. As such, DFG not only awards grants but defines significant norms and standards across the German research ecosystem and is influencing how institutions, researchers and funders assess quality.

DFG has explicitly engaged with responsible research assessment reform. It is a signatory of the Declaration on Research Assessment (DORA), and in 2022 adopted positions that emphasise quality over quantity in research assessment.²⁶ The DFG supports the Coalition for Advancing Research Assessment (CoARA) as a key initiative for a cultural change in research assessment. The DFG is committed to reforming research assessment by moving away from inappropriate uses of journal-based metrics like the Journal Impact Factor (JIF) and h-index, and instead focusing on qualitative evaluation supported by responsible use of quantitative indicators.²⁷

DFG has introduced a mandatory CV template that invites narrative descriptions of contributions and explicitly discourages the use of journal-level metrics such as impact factor or h-index in evaluation. DFG's stance is that reform must stem from the scientific community rather than being imposed top-down, underlining the foundation's leadership in debates about how assessment cultures should change.²⁸

Applicants to DFG programmes undergo a structured process that includes external expert review of the proposal, deliberation in review boards, and decision by the Joint Committee. During screening and review, DFG applies formal quality assurance checks to ensure compliance with rules, the absence of discriminatory review comments and consistent review practice across schemes. Review criteria, defined in its guidelines, emphasise the quality of the project, clarity of objectives and work programme, the qualifications of applicants, and the suitability of the research environment.

DFG CVs are a hybrid format that combines narrative and tabular information to provide a more holistic assessment of an applicant's academic achievements, including both standard research outputs and non-publication-based accomplishments. Introduced by the DFG in 2023, this template allows applicants to explain their research in context and highlight career circumstances that may have influenced their work, such as family responsibilities or other burdens, to foster a fairer evaluation process.²⁹ The ambition is to prioritise the substance of scholarship and to broaden the spectrum of recognised outputs, although some commentary suggests that implementation still varies across panels.

DFG has developed advanced diversity and inclusion practices compared to other funders. The Foundation monitors gender equality via annual surveys in coordinated programmes, offers training for reviewers on diversity and bias, and requires institutions applying for certain funding lines to demonstrate commitment to equality and diversity. While DFG's primary

public documentation focuses on quality and excellence, its structural frameworks embed diversity as a contributing dimension of research capacity and environment.

DFG strongly supports Open Science principles.³⁰ It requires data management plans where appropriate, mandates that DFG-funded publications be made openly accessible when possible, and promotes long-term data stewardship. Its position on academic publishing calls for recognition of a wider set of research outputs and the removal of publication venue prestige from assessment criteria. These policies place DFG among the more proactive funders in Europe regarding openness and transparency.

DFG's governance is multi-layered. Elected review boards draw on internal and external experts; standing committees, including the joint committee, make final funding decisions; secretariat functions manage quality assurance, conflict-of-interest checks and procedural compliance. Reviewers and committee members operate under strict confidentiality, disclosure and bias-avoidance rules.

DFG's practices are highly aligned with global responsible research assessment frameworks. Its leadership in restricting reliance on metrics, prioritising qualitative narrative elements, expanding recognised output formats and embedding openness is consistently referenced in international reform literature. At the same time, DFG maintains that any reform must originate within the scientific system rather than being externally imposed—a stance that nuances its position in global debates.

DFG represents a mature, systemic example of responsible research assessment. Its explicit prohibitions on metrics, adoption of hybrid CVs, recognition of diverse contributions and strong Open Science policies set the foundation apart from many funders. However, practices varies across panels and that translation of policy into implementation is still ongoing.

10. VOLKSWAGEN STIFTUNG

Volkswagen Stiftung is an independent, non-profit foundation dedicated to supporting research and higher education in various fields. It is Germany's largest private research foundation, supporting the humanities, social sciences, life sciences, engineering and interdisciplinary research. It plays a distinctive role by funding high-risk, experimental and cross-cutting research themes, often operating in areas less commonly supported by public agencies. The foundation is known for innovative programme formats and strategic funding lines that stimulate new research directions.³¹

Volkswagen Foundation is a member of CoARA – Coalition for Advancing Research Assessment and a 2022 signatory of Declaration on Research Assessment (DORA). The foundation explicitly emphasizes responsible practices in the use of research indicators and promotes transparency, openness and methodological diversity. Several programmes encourage research that advances Open Science practices, with some explicitly referencing the need for diverse outputs and non-linear research trajectories.³²

Assessment typically involves a multi-stage procedure that includes an internal eligibility and relevance check, external expert review, panel discussion, and final board approval. Calls often include two-stage submissions, with an initial outline phase followed by invitation of selected applicants. Criteria include originality, risk-taking, interdisciplinary quality, feasibility, team composition and potential impact. Emphasis is placed on novelty and intellectual ambition rather than track-record metrics.

The foundation itself is regularly submitted to evaluations to monitor funding concepts, instruments, and procedures. External evaluations serve to provide assessments of the efficiency and goal attainment of the management and funding activities as well as to identify future perspectives. For each specific evaluation, an evaluation panel comprising up to independent external experts is recruited. They should be open to new ideas, methods, and concepts that cross the borders of single disciplines. By July 2019, the Foundation had completed evaluations of eight funding initiatives within the general funding schemes and two funding programs within the "Niedersächsisches Vorab" as well as nine funding and management areas.³³

Volkswagen is firmly committed to qualitative assessment, and reviewers are instructed to focus on substance and novelty rather than indicators. The foundation adopts a broad understanding of contributions, allowing applicants to highlight diverse outputs including data, software, exhibitions or collaborative work; metrics may appear in background materials but do not drive decisions.

Publicly available documents indicate increasing attention to diversity in team composition and equitable participation in research processes. Some programmes include explicit references to promoting diversity of perspectives, interdisciplinary exchange and inclusive research environments. Volkswagen is addressing the issue of diversity as a cross-cutting topic within its activities.³⁴

Besides its principled commitment to diversity, the Foundation also distinguishes which

specific dimensions of diversity will be actively considered for future activities. Many manifestations of social diversity appear to be structurally neutral because they do not systematically grant individuals advantages or disadvantages with respect to their social participation. However, other forms of diversity, such as gender and ethnic origin, often imply structural inequalities and both implicit and explicit discrimination

The foundation actively promotes Open Science.³⁵ The organisation encourages Open Access publications, data availability and transparent methodological practices. Applicants are asked to reflect on how their project will contribute to open and reproducible research, and Volkswagen Stiftung's emphasis on open knowledge exchange is a defining feature of several programme lines – and the foundation has developed its own open science taxonomy.³⁶

A professional secretariat manages programme design and review coordination, external experts conduct reviews, thematic panels deliberate recommendations, and the board makes final decisions. The governance model aims to balance independence, diversity, openness, disciplinary breadth and strategic oversight, including evaluation of the foundation's inhouse programmes.

Volkswagen Stiftung focuses on qualitative, hybrid and narrative-based assessment and open practices. This focus aligns with international and emerging responsible research assessment principles. The foundation's emphasis on responsible knowledge production situates it close to international reform trends. Besides its own funding programme, the Volkswagen Stiftung is a vivid proponent of metascience (research on research). With its initiative "Researching research", the Foundation promotes interdisciplinary, multi-method and internationally oriented research projects with the aim to support not only the development of new knowledge but also reflection on the strategic application of the generated findings in the context of science funding and policy.³⁷

Volkswagen demonstrates consistent attention to qualitative assessment, interdisciplinarity and openness. Its programmes frequently promote innovative research cultures, and several aspects of its practice align with responsible assessment principles.

11. RIKSBANKENS JUBILEUMSFOND

Riksbankens Jubileumsfond (RJ) is an independent Swedish foundation supporting research in the humanities and social sciences. It plays an influential role in shaping these fields nationally through long-term project funding, infrastructure support and thematic programmes aimed at strengthening research environments and promoting internationalisation.

Through its funding, the foundation promotes fundamental research of the highest scientific quality in the humanities and social sciences. RJ has a unique position with its relationship to the Riksdag. The board's composition of parliamentarians and researchers gives the foundation significant and unique characteristics.³⁸

RJ's policies are aligned with responsible research assessment norms, such as the recognition of diverse research outputs, the importance of research environments and the value of interdisciplinary collaboration. Although RJ is not a formal CoARA member, the foundation engages with discussions on responsible metrics and supports flexible approaches to scholarly contribution and open science. RJ uses regularly references to DORA in its evaluation schemes and assessment policy.³⁹

The assessment process typically includes an administrative screening, external peer review by subject-matter experts, panel deliberation, and final approval by RJ's board. Criteria emphasise scholarly originality, methodological quality, interdisciplinary engagement, feasibility and future-oriented research; RJ encourages collaboration across institutions and countries.

Assessment relies primarily on qualitative evaluation. Review guidelines downplay journal-based metrics and encourage reviewers to consider the applicant's contributions in context. Applicants may describe books, monographs, exhibitions, outreach work and other humanities-specific outputs, reflecting a broad view of impact.⁴⁰

RJ's mission is to fund research of the highest scholarly quality. Applications are assessed objectively and only in terms of this quality. Gender quotas are not applied. Each year, RJ tracks the gender distribution of applicants and the recipients of grants to determine if the gender balance changes significantly over time. According to the policy statement, at least 40% of the members in review and decision-making bodies must consist of either gender.⁴¹

RJ supports Open Access publishing and requires that funded research outputs be made openly available where possible. Researchers funded by RJ must publish their research results open access. RJ encourages transparent data management and dissemination practices appropriate to humanities and social sciences, acknowledging that openness may take varied forms in these fields.

RJ also encourages open publication of monographs and book chapters and provides support through peer-review platforms such as *Kriterium*. Publications should carry the most permissive license possible (preferably CC BY). Monographs or articles may be parallel-

published in open repositories with a maximum embargo period of 12 months. Publication costs may be included in grant applications. RJ monitors compliance with open publishing requirements through project reporting.⁴²

RJ's governance includes a foundation board and advisory committees composed of scholars and external experts. External reviewers provide written assessments, and panels synthesise these into recommendations. Governance aims to preserve scholarly independence while ensuring accountability and transparency. RJ's emphasis on qualitative review, broader recognition of humanities outputs and attention to diversity and openness aligns with international responsible research assessment principles. RJ's practices are broadly consistent with responsible assessment approaches.

12. WELLCOME TRUST

Wellcome is a large global charitable foundation supporting biomedical research, public health, mental health and research ecosystems. Its role extends beyond funding; it actively shapes international research cultures through policy leadership, major research programmes and advocacy for open, equitable and healthy research environments.

Wellcome is widely recognised as a leader in responsible research assessment. It is a public signatory of the Declaration on Research Assessment (DORA) in 2013 and the Agreement for Reforming Research Assessment in 2023.

Wellcome-funded projects, programmes and organisations are encouraged to commit, as a minimum, to assess diverse research outputs and research contributions based on their intrinsic merit, and discourage the inappropriate use of proxies or metrics – such as the journal impact factor.⁴³ The foundation works actively to implement the core principles of responsible research assessment as part of a broader approach to promoting fair and responsible evaluation. This is in line with DORA and other equivalent declarations, such as the Leiden Manifesto, the Hong Kong Principles or the Agreement for Reforming Research Assessment (CoARA).

Wellcome-funded research organisations should include a statement of commitment to implementing the CoARA and DORA principles, and should have a plan for implementing the principles or a transparent process in place for developing a plan (with a specified delivery date). Wellcome recognises that organisations will take different approaches to practice these principles, reflecting their values, cultures, and ways of working. The Foundation encourages organisations to consider other activities where they feel they could add value and to try new ideas and approaches generated by their staff.

Areas of interest for Wellcome's future policy alignment with the CoORA agreement commitments include introduction of the narrative CV, enhancing the transparency of peer review, investing in bespoke teams for research culture, open research, bioethics, and engagement, as well as improving grant funding data, and providing grant committee members with equity, diversity and inclusion training.⁴⁴

Assessment proceeds through secretariat checks, external expert review, panel or committee assessment, and final strategic decisions. For some funding schemes or calls (for example, the Discovery Research schemes), Wellcome sends shortlisted applications for an additional written review by external experts. An external advisory committee conducts a final review of applications and other inputs to the decision. At this stage, applicants may be invited for an in-person interview with the external advisory committee.⁴⁵

In recent years, Wellcome has redesigned core elements of its assessment to reduce reliance on e.g. publication metrics, strengthen attention to research culture, and consider contributions such as mentoring, teamwork, open science and leadership.

Wellcome places strong emphasis on qualitative indicators. The Foundations experiments with Narrative CV templates and encourages applicants to describe diverse contributions,

roles in teams, openness practices and broader impacts. The use of journal-level metrics is explicitly discouraged, and reviewers are trained to assess diverse achievements and non-traditional outputs.

Diversity, equity and inclusion is a central component of Wellcome's mission. It publishes regular diversity targets and action plans, requires internal diversity and inclusion considerations in major grants, monitors diversity across panels and awardees, and supports programmes that address structural inequities in global health research. The Foundation is committed to the principle that "diversity is fundamental to maximising the outcomes of research, enriching perspectives and enabling equality of health outcomes".⁴⁶

Wellcome has long required Open Access to research outputs and supports data sharing, FAIR data principles and transparent methodological practices. Grant holders must publish outputs under open licences, and Wellcome funds platforms and infrastructures that promote openness.

From January 2025, Wellcome will only fund the cost of article processing charges for research articles published in fully open access journals or platforms indexed in the Directory of Open Access Journals. Wellcome's Open Access policy applies to all original research publications that have been supported, in whole or in part, by Wellcome (it does not apply to PhD theses). All research publications must acknowledge Wellcome's support and list the grant reference number which funded the research reported.⁴⁷

Committees composed of international experts evaluate proposals, while Wellcome's executive and board oversee larger strategic decisions. Governance includes strong emphasis on openness and diversity, structured reviewer guidance and explicit expectations for transparent deliberation. In addition to assessing quality of research, Wellcome is committed to "building a more supportive and progressive culture for researchers".

Wellcome wants research careers to be open to anyone with a great idea; promote the development of positive and inclusive research cultures that support personal development, good management and leadership; and recognise that the outputs of research are varied and often include original research articles and monographs, data, reagents, software, intellectual property, and policy changes etc.⁴⁸

Wellcome is strongly aligned with international movements towards responsible research assessment, serving as a model for other funders through its emphasis on research culture and proactive stance on open science, diversity and inclusion. Wellcome provides one of the most comprehensive examples of responsible assessment practice among large international foundations, integrating responsible research assessment principles into both policy and implementation.

13. THE HEALTH FOUNDATION (UK)

The Health Foundation is an independent charitable foundation based in United Kingdom. The Foundation focuses on improving health and healthcare systems. The organisation works to “improve people’s health and reduce inequalities” by “increasing understanding about the economic and societal benefits of good health.” The foundation focuses on the key role of economic, social and environmental factors in shaping health and driving inequalities. Activities of the Foundation include funding research, evaluation, innovation, data infrastructure and policy analysis, and it occupies a unique position between academic research, public policy and health service improvement.⁴⁹

There is no public record of Health Foundation’s signature on the Coalition for Advancing Research Assessment (CoARA) agreement. Although not a formal CoARA or DORA signatory, the Foundation emphasises the societal relevance, usability and practical impact of research. Its focus on evidence quality, rigorous evaluation and public value places it adjacent to responsible research assessment discussions, albeit with a more applied orientation.

Assessment of research proposals is primarily based on their potential for impact, with a focus on whether the findings can inform policy and practice. This involves evaluating the significance of the research and its potential for implementation, the merit of the dissemination plan, and the strength of the research design and methods used. Applicants must also demonstrate a clear link to health and care services, a strong theoretical underpinning, and robust research methods, with proposals that are policy-relevant and actionable being prioritized.⁵⁰

Proposals are assessed on the strength and rigor of their research methods, which can include both quantitative and qualitative approaches. The Health Foundation often emphasizes the importance of robust evaluation and analysis to determine the true impact of interventions. The research should be relevant to current and emerging policy priorities, particularly in the context of health and social care services. The ability of the research team to engage with and influence policymakers is a key part of this assessment. The research needs to be feasible in terms of its design, implementation, and the ability to produce actionable findings. Outputs may include policy reports, data tools, evaluations and implementation studies, which are assessed qualitatively. Applicants must clearly define the problem and provide a justification for why the proposed interventions can generate a feasible solution.⁵¹

The foundation integrates diversity, equity and inclusion considerations into its research programmes, particularly regarding health inequalities and equitable participation. Panel composition and applicant diversity are considered, though requirements are less formalised. The Health Foundation assesses research diversity primarily through its Inclusion Panel, which advises on equity and inclusion issues in research, and by incorporating equity and diversity (ED&I) into its funding decisions.⁵²

The Foundation promotes the collection and analysis of demographic data and encourages researchers to consider factors like age, sex, gender, ethnicity, and socioeconomic status in their research design, participant recruitment, and data analysis. It supports the collection

and analysis of data to better understand the experiences of different groups, including ethnic inequalities.⁵³

The Health Foundation encourages the open sharing of findings, data and evaluation methods, particularly for work aimed at public health systems. Publications should be made publicly available, and grantees are expected to support transparency, though formal open-science mandates are less detailed. The Foundation expects grant holders to publish their work in academic journals and to present their work at meetings and conferences. The Health Foundation does not have an explicit policy for supporting Open Access publication fees for publications. These are decided on an individual basis and as such, the Foundation asks that applicants do not include the cost of Open Access publishing in their proposals.⁵⁴

Governance involves advisory committees, external peer reviewers and internal programme leads. Decision-making balances scholarly expertise with policy and service relevance, which is central to the foundation's mission. The Health Foundation's focus on societal impact, evaluation and evidence quality aligns with aspects of responsible research assessment, though its applied orientation distinguishes it from other international basic science funders. Its practices support transparency and inclusivity but are not explicitly framed through international reform agendas.

The Health Foundation applies rigorous assessment tailored to applied health research and interventions including screening of societal impact. Its emphasis on policy relevance and methodological robustness differentiates it from basic research funders while still reflecting responsible and context-sensitive assessment practices.

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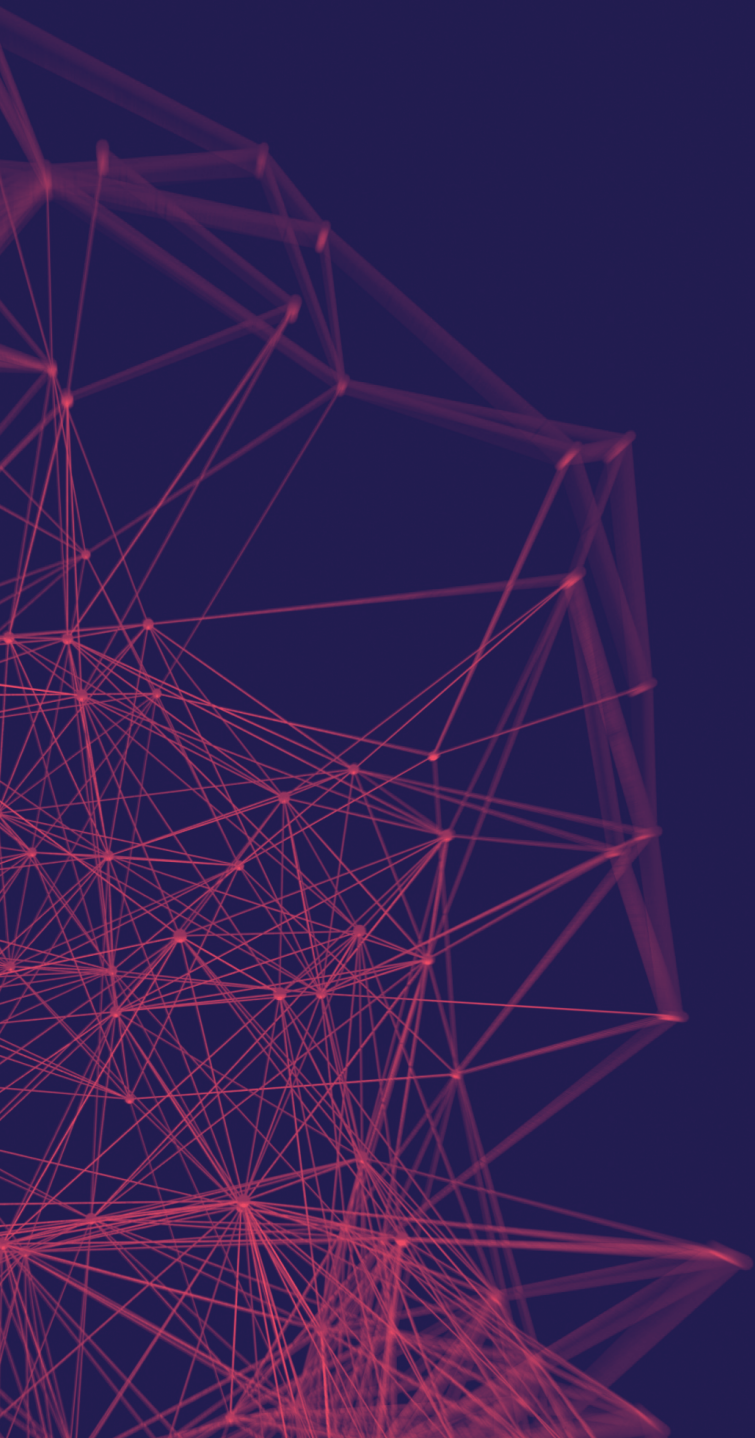
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Get in touch at **cerra@id.aau.dk** and read more about the EU Presidency High-Level Conference on Reforming Research Assessment December 3-4, 2025: <https://www.cerra.aau.dk>

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