MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

Transition Research Fund 2027 Programmes Webinar - Summary of Questions and Answers

We received a range of questions during the 13 October 2026 webinar. This document groups the questions received by theme and provides responses about the Programmes mechanism, including questions that could not be addressed during the live session.

Pillar and opportunity alignment

Can proposals align to more than one pillar?

Applicants must select the one pillar that aligns with the majority of their proposal and clearly explain how the proposal aligns with that pillar and its relevant priority opportunities. Applicants may also describe genuine alignment with additional pillars or opportunities where relevant, but aligning with more than one pillar does not necessarily provide an advantage.

Can a proposal be aligned to more than one opportunity under a pillar?

Yes. A proposal must align with one primary pillar and at least one priority opportunity within that pillar. It may demonstrate alignment with more than one opportunity where this is genuine and clearly explained. Alignment with more than one opportunity does not confer advantage over demonstrating strong alignment with a single opportunity but may add to an overall picture of pillar alignment.

How do you select the opportunity to which you are aligning in the proposal? Is it only required in the written content of the proposal?

Applicants should identify the priority opportunity or opportunities that best match the proposed research and explain the alignment in the "How your Proposal Aligns to the Pillar" section of the registration and proposal templates. The proposal will be assessed primarily against its selected pillar.

How will MBIE be making decisions regarding pillar alignment for eligibility?

MBIE will complete an initial eligibility assessment against the gazetted eligibility criteria. RFNZ will then make the eligibility decision using the complete submitted proposal, including whether it aligns with the selected pillar and at least one priority opportunity.

Is it correct that only one proposal will be approved for the Healthy People and a Thriving Society pillar?

The anticipated number of contracts for Healthy People and a Thriving Society is one. This is an indicative portfolio target rather than a guaranteed number. RFNZ may adjust the portfolio after considering the proposals received, available funding and the investment signals.

Applicant eligibility

How is a New Zealand-based Research Organisation defined, and can small, independent research organisations or companies apply?

Organisation size or ownership does not determine eligibility. A small organisation, company or privately owned consultancy may apply if the submitting organisation meets the definition of a New Zealand-based Research Organisation in the Gazette Notice, or is a New Zealand-based legal entity representing one. The submitting organisation must demonstrate its own internal research capability and capacity to deliver substantive research, including appropriate systems and processes for managing public funding. MBIE cannot determine eligibility before submission. RFNZ makes eligibility decisions using the complete submitted proposal and the gazetted eligibility criteria.

Does a research unit that sits within a parent organisation meet the definition of a Research Organisation, with the parent organisation submitting the application?

Eligibility applies to the submitting organisation. If the parent organisation submits the application, the parent organisation must meet the relevant Gazette Notice criteria and demonstrate the capability and capacity to deliver the proposed research.

If an application includes multiple collaborators, with some better placed to manage but not in a position to apply (due to caps or internal limitations), how do you determine if an applying organisation is only a broker of research?

RFNZ will consider the complete proposal against the gazetted eligibility criteria. The submitting organisation must demonstrate credible internal research capability and capacity, rather than acting only as a vehicle to avoid another organisation's cap. The team as a whole must also have the appropriate skills and resources to deliver the Programme.

How many 'other' organisations are eligible to register and submit proposals?

There is no limit on the number of organisations that may apply under the "any other organisation" category. Each eligible organisation in this category may submit up to three Programmes proposals.

Under the eligibility criteria in the Gazette Notice, new knowledge must be broadly disseminated for public benefit. Does this requirement apply to the knowledge itself, rather than the benefits and impacts that may result from it?

The criterion specifically requires new knowledge to be broadly disseminated for public benefit. Applicants should explain how dissemination will enable public benefit beyond the applicant organisation and connect with the wider outcomes and impacts sought from the Programme.

Research team and collaboration

Is there an exclusion for how many proposals someone can be named as an Associate Investigator (AI)/Key Researcher on?

No. There is no specified limit on the number of Programmes or Projects proposals on which a person may be named as an Associate Investigator or Key Researcher. Applicants should ensure that each person's combined commitments are realistic. The separate restriction applies only to being Principal Investigator on more than one Talent Development proposal.

Science Excellence includes the quality of the team. What does it entail?

For Programmes, Excellence includes separate Science Excellence and Team Excellence criteria. Team quality is expected to be addressed in Team Excellence where consideration is made to whether the team has the complementary interdisciplinary skills, experience, relationships and resources needed to deliver the proposed research and its intended outcomes. Applicants should clearly demonstrate how the team meets the published assessment criteria.

An evaluation criterion for Programmes is collaboration. How many collaborating organisations are required? Is there a minimum?

There is no specified minimum number of collaborating organisations. The proposed collaboration should be fit for purpose, with an appropriate mix of skills, expertise, relationships and resources. The appropriate number and type of collaborators will depend on the Programme, assessed against the published criteria.

Is a track record of investigators having delivered previous MBIE/MSI funding projects be factored in for the Science Excellence assessment for Programmes?

Relevant track records may inform the assessment of whether the team has the capability to deliver the Programme, but previous MBIE or MSI funding is not a standalone requirement. Assessors will consider the team holistically, including relevant expertise, delivery experience, outputs, outcomes, relationships and the complementary skills and resources proposed as described in the assessment criteria.

Vision Mātauranga

Is Vision Mātauranga meant to contribute to the proposed outcomes or is the proposed research contributing to Māori benefits and Vision Mātauranga?

Vision Mātauranga is concerned with the contribution of Māori knowledge, people and resources to research. The starting point for applicants is therefore to consider the relevance of Vision Mātauranga to their proposed Programme, including whether and how the research connects with Māori knowledge, people, resources, interests or potential benefits.

The nature and level of that relevance will differ between proposals. Where Vision Mātauranga is relevant, it can be reflected at different levels of the Programme, including in its formation and design, research questions and methods, capability and participation, relationships and engagement, and intended outputs or outcomes. This could include Māori contributing as researchers, partners or knowledge holders, engagement with Māori end users, or research intended to deliver benefits for Māori.

Where Māori benefits are proposed as an outcome, applicants should demonstrate that the Programme has the knowledge, capability, relationships and resourcing needed to credibly deliver those benefits.

Industry involvement and co-funding

Can you provide more clarity around the terms 'invest' and 'co-invest' in the Primary Industries pillar priorities?

“Invest” refers to RFNZ investment in a Programme. “Co-invest” refers to support from another party, such as industry funding complementary research or providing cash or in-kind contributions. Where an opportunity signals strong industry involvement, the proposal should

demonstrate an industry-identified need and credible industry commitment. Co-investment is one way to show this, but it is not the only way.

How will co-funding, including cash and in-kind contributions, be taken into account, and can a proposal without co-funding still fit an opportunity that signals strong industry investment?

Co-funding is not required and is not assessed as a standalone requirement. A proposal without co-funding may still be a good fit where it demonstrates an industry-identified need and credible industry commitment. Cash or in-kind co-funding may strengthen the proposal's impact case where appropriate, but commitment can also be demonstrated through roles, governance, access to resources, adoption pathways or other evidence. Only cash co-funding should be entered in the application's co-funding table. Relevant in-kind contributions should be described in the proposal narrative.

By "Industry led" do you mean that the industry is the expected to be the applicant or simply that there is evidence that industry wants the work done (e.g. co-funding, team membership)

Industry is not required to be the applicant. Where an opportunity indicates industry-led research, the proposal should demonstrate that the work responds to an industry-identified need and that relevant industry stakeholders are meaningfully committed. Evidence may include co-funding, team or governance roles, access to data or facilities, or a clear role in adoption and implementation.

Can supporting letters from industry be included?

No. Supporting letters should not be included with the application. Applicants should clearly explain relevant stakeholder roles, commitments and contributions in the proposal itself.

Funding and budget

What budget limits apply, and what should applicants consider when determining the amount requested?

Programmes have a minimum value of $1 million per year and no fixed upper limit. Applicants should request the funding needed to deliver a credible five-year Programme, taking into account the scale and cost of the work, the value and credibility of the expected outcomes and impacts, the indicative funding available for the selected pillar, and the anticipated number of contracts. The request should be proportionate to what is needed to deliver the Programme. Applicants also should consider both the indicative amount of funding in the targeted pillar and the indicative number of programmes that RFNZ will aim to fund in that pillar.

The documents released so far said that the total funding amount for Programmes is set at registration and cannot be changed. Is that correct?

No. This was an error in the published documentation and has been corrected. The total funding requested for a Programmes proposal may be changed after registration.

Can a Programme include and allocate funding to international collaborators or an overseas private company?

Yes. International collaborators, including an overseas private company, may be included and reasonable costs may be allocated to them where their involvement is appropriate, adds value and supports delivery of the proposed research. Applicants should clearly justify these costs in the budget. The proposal must demonstrate that the primary benefits and capability developed

through the Programme will accrue to New Zealand. The majority of the research, science, technology or related activities must be undertaken in New Zealand unless RFNZ considers there are compelling reasons otherwise.

Programme design and impact

Could capability building be considered as part of Impact for Programmes, particularly for applications that emerge from University-led TEO entities?

Yes. Capability building may form part of the Impact case where it contributes credibly to the selected pillar opportunity and the Programme's pathway to benefits for New Zealand. For discovery-led research, knowledge and capability generation may be a significant part of the pathway. For later-stage research, assessors will generally expect a more tangible route to adoption and measurable benefit.

Can the Programme application be several connected projects or one large project?

A Programme may contain multiple complementary workstreams, but they must form one coherent research Programme with integrated objectives, delivery and outcomes. A collection of distinct projects would be better submitted as separate applications to the Projects mechanism.

Is there a standardised way to assess Impact?

Impact will be assessed against the published assessment criteria for Benefits to New Zealand and Implementation Pathways. Because Programmes span different research stages and outcome areas, relevant evidence will vary. Applicants should demonstrate the scale of potential benefits, a credible pathway to achieve them, relevant stakeholder involvement, and an understanding of key enablers and barriers.

Is there a guideline on the use of AI in preparing proposals?

Yes. Applicants may use artificial intelligence (AI) tools to improve their application, but they remain responsible for the content, the suitability and validity of cited sources, and the originality of the proposal. Proposals should be clear and understandable when submitted.

Assessment process

Will Impact and Excellence be assessed at the same time?

Yes. At Stage 1, four assessors will assess both Impact and Excellence. Each contributes 50% of the total score. RFNZ considers Impact particularly important and may use the Impact score to distinguish proposals with the same total weighted score. At Stage 2, the panel will review shortlisted proposals, agree consensus scores and comments, and take a portfolio approach within each pillar.

After stage 1 assessment how many proposals will be shortlisted?

There is no fixed number. Around 30 to 40 proposals may be shortlisted if approximately 15 contracts are ultimately funded, but RFNZ will decide the number after considering eligibility, the ranked proposals, assessor scores and comments, available funding and other relevant information specified in the Call for Proposals.

In stage 2 of the assessment process (panel review), how will panel members be selected?

MBIE will select panel members to provide an appropriate balance of expertise across the pillars and a mix of specialist and broad sector perspectives. Members may be drawn from the

College of Assessors, industry and academia. Panel member names will be published on the MBIE website.

Assessors

What training will be provided to Assessors and is it mandatory?

Assessors will receive assessment and scoring guidelines and video training modules covering the criteria and process, including the assessment of both Impact and Excellence. Assessors will be strongly encouraged to complete the training and must follow the published guidance and the requirements of their assessor contract.

The Marsden Fund had a great international peer-review process by subject experts for proposals that got to the full proposal stage. Why is TRF using the Endeavour Fund College of Assessors, which inevitably ended up being more like a "generalist" review rather than "expert" review due to potential/actual conflicts of interest in the small NZ and Australian pool in the College of Assessors?

The Transition Research Fund uses the College of Assessors to support assessment at the scale and across the breadth of the fund and had been expanded from the College established to assess the Endeavour fund. MBIE's assessor management team selects four assessors for each proposal based on relevant expertise, experience and conflicts of interest. The College includes domestic and international assessors. Applicants should select their Fields of Research and Socio-Economic Objective codes carefully because these help MBIE identify appropriately matched assessors.

How will suggested assessors be used, and can international assessors be selected?

Assessor nominations are provided at registration. Nominated assessors who pass MBIE's quality assurance requirements will be added to the College of Assessors, which includes both domestic and international assessors. Assessors are selected from the College for each proposal according to relevant expertise, experience and conflicts of interest. Being added to the College does not guarantee an assessment assignment, and there is no requirement for every proposal to be assigned an international assessor.

Will the College of Assessors spreadsheet be updated before the first deadline?

MBIE expects to publish the updated College of Assessors membership on its website in November 2026.

Will assessors be allowed to use Artificial Intelligence (AI) in their assessment?

Assessors cannot upload applicant information into AI tools or use AI to perform an assessment. Subject to their contract and confidentiality requirements, assessors may use AI tools to improve or proofread feedback they have written themselves.

Do proposals that get funded get feedback?

No. Feedback is primarily intended to help unsuccessful applicants understand how they could strengthen future applications. Applicants whose proposals progress to Stage 1 will receive assessor feedback, and those whose proposals progress to Stage 2 will receive panel feedback. Feedback will be provided after the final funding announcement. Funded applicants will receive learning and feedback during delivery of their contracted Programme.

Future funding arrangements

Will the number of funded proposals from the Programmes and Projects feed into caps in future rounds of the TRF or whatever mechanisms are coming next?

The Transition Research Fund is time limited and is planned to run once. Any future funding arrangements would include consideration of the approach to demand management, including organisational caps.