



EPSRC Postdoctoral , Open and Open Plus Fellowships

Guidance Notes for Candidates

November 2023

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1. Introduction

This document provides information and guidance on the funding opportunities for fellowships available from the EPSRC. EPSRC fellowships currently comprise of Postdoctoral , Open and Open Plus fellowships. Other focussed opportunities may be open at any point throughout the year.

EPSRC fellowships are prestigious individual awards for candidates who wish to develop, expand or establish a programme of research or technical development alongside personal and professional development. Our fellowships present an accelerated pathway to progression and success on your career journey.

These fellowship schemes are designed to be flexible and enable candidates to design a programme around their individual needs, with freedom to design a package that fits their career ambitions, research needs and personal and professional development requirements.

Where this document references ‘research’, this is intended to be interpreted in a broad and inclusive sense, and includes the essential contribution of Research Technical Professionals, Research Software Engineers and similar roles. We do not place merit on the perceived status of the individual and Open and Open Plus Fellowships are available at all career stages after postdoctoral level. If you have the drive, vision and ambition to succeed in your field, you may be considered a Fellowship applicant.

Fellowships should focus on one or more of the following: -

- **discovery science** should lead to fundamental science furthering an existing, new or emerging field. They will advance the frontiers of knowledge and, longer term, contribute to increased economic/environmental impact and/or social prosperity.
- **innovation** should include collaboration/engagement with public, private or third sector organisations or focus on routes to IP capture and/or commercialisation. These proposals will be able to describe likely routes to contribute to current or future UK economic success and/or enable the future development of key emerging industries, but still be within the remit of EPSRC.
- **instrumentation/technique development** will look to support and expand technologies and techniques to further both academic and industrial research capability.
- **software engineering** will look to support and expand software-based technologies and techniques to further both academic and industrial research capability.

Applicants will be asked to identify which of these they are focussing on when they apply. Applications for instrument/technique development or software engineering must still fit into the EPSRC remit, both from a scientific and technological development perspective.

You can apply for up to five years for an Open Fellowship and up to three for a Postdoctoral Fellowship award. We expect most of our fellows to hold the fellowship for 100% of their time.

If you work part-time, you can hold your EPSRC fellowship part-time as well, at a minimal level of 50% full-time equivalent. In these circumstances, the duration of your fellowship can be extended proportionally to a maximum duration of 10 years.

If you do not work part-time, you may hold our fellowship for between 50% and 100% of your time. This must be clearly justified in your application. However, the total fellowship duration will be fixed at five years. Awards are made at 80% Full Economic Costs.

2. Eligibility – General

If you are thinking about applying for a Fellowship, you should consult with your colleagues and seek advice from your Research Office or equivalent. They will be able to help you formulate your ideas and answer any questions you may have about the process or the most appropriate scheme.

You can check the remit of your proposed research through our remit enquiry service:

<https://www.ukri.org/councils/epsrc/guidance-for-applicants/epsrc-remit/>

The table below compares Fellowship eligibility criteria.

Eligibility Criteria	Scheme		
	POSTDOCTORAL	OPEN	OPEN PLUS
Qualifications	You must have either: <ul style="list-style-type: none"> • a PhD or; • at least four years’ experience in a relevant field by the start of your fellowship.		
Career Stage	For those at postdoctoral level, this is an early career fellowship for those that have not already been in receipt of significant funding or been leading in an area	Open Fellowships are for those looking to further their academic career and who have already been in receipt of significant funding or have been leading in an area of technical	Like the Open Fellowship but for those who want to use this opportunity to design a package of work which meets your wider aspirations by championing a topic to

	<p>of technical development.</p> <p>Candidates who are or have been registered for a doctorate at any time may apply only if they are expecting to have completed their doctoral thesis examination by the date of the fellowship interview. Candidates must have passed their viva voce examination by the time of commencing the fellowship and therefore considered to hold a PhD.</p>	<p>development, or have equivalent experience.</p> <p>There are no eligibility rules about how many years of postdoctoral experience you need or whether you are currently in a permanent academic position for any of our fellowships (although applicants will need to be hosted by an eligible organisation as detailed below).</p> <p>We encourage applications from candidates who have taken a nonstandard career path after their first degree.</p> <p>We also welcome applications from candidates who want to move back into research after a career break or any other type of break from active research.</p>	<p>deliver improvements in research culture, such as:</p> <ul style="list-style-type: none"> • equality, diversity and inclusion • responsible research and innovation • public engagement • policy, regulatory, economic or social aspects. <p>It is expected that this will be at least 20% of the overall fellowship.</p>
<p>Host Organisation</p>	<p>UKRI research grants are open to UK Higher education providers, Research Council institutes, UKRI- approved independent research organisations and NHS bodies with research capacity. Eligible organisations can be found on the UKRI website Eligibility as an organisation – UKRI</p>		
<p>Part-time</p>	<p>You can apply for up to five years for an Open fellowship award. We expect most of our fellows to hold the fellowship for 100% of their time.</p> <p>If you work part-time, you can hold your EPSRC fellowship part-time as well, at a minimal level of 50% full-time equivalent. In these circumstances, the</p>		

	<p>duration of your fellowship can be extended proportionally to a maximum duration of 10 years.</p> <p>If you do not work part-time, you may hold your fellowship for between 50% and 100% of your time. This must be clearly justified in your application. However, the total fellowship duration will be fixed at five years.</p>
Nationality	<p>No restrictions – you just need to make sure you’re based at an eligible UK host organisation. You must be resident in the UK for the duration of your fellowship. See this link:</p> <p>https://www.ukri.org/what-we-offer/international-funding/get-funding-and-visas-to-do-research-in-the-uk/)</p>
Resubmissions	<p>We will not accept uninvited resubmissions of projects that have been submitted to UKRI.</p>

Eligibility is not based on the number of years postdoctoral experience for any of our fellowships. We acknowledge the diversity of career paths and backgrounds represented in the pool of potential applicants and we encourage applicants who have taken a non-standard career path. We also welcome applications from candidates who want to move back into research after a career break or any other type of break from active research. You should consult with colleagues and your research office to ascertain if your level of achievement would be appropriate for the type of fellowship you’re considering.

3. How to apply

You must apply to our fellowship schemes through The Funding Service.

4. How we will assess your application

Applications will be assessed by expert peer review followed by a prioritisation panel and panel and interview. The process is described in the specific fellowship opportunity and on our website.

This table shows how the assessment criteria of the Fellowships schemes under Je-S map to TFS section questions. This table is intended as a guide and you should place information where you feel it is most appropriate to your individual circumstances. Specific guidance is available within the TFS system.

You may expect that peer review will focus primarily on the ‘scientific/technical/operational’ aspects of your application, and the interview stage around the ‘person/skills-based’ aspects. However, please be aware that you may be reviewed on any aspect of your application at any peer review stage. Equal weighting is placed on each part of the TFS question set.

Je-S Fellowship Criteria	TFS Section and Question
Research Quality (Primary Criterion) National Importance (Secondary) Fellowship Vision (Primary)	Section: vision and approach Question: what are you hoping to achieve and how will you deliver your proposed work?
Applicant and Partnerships (Secondary Major) Project Delivery (Secondary)	Applicant and Team Capability to deliver (R4RI) Question: Why are you the right individual or team to successfully deliver the proposed work?
Fellowship Vision and Delivery (Primary) Continued Professional Development (Secondary Major)	Section: Personal aspirations and continued professional development Question: How will this fellowship develop you and your career?
Team Leadership (Secondary) Community Leadership (Secondary)	Section: team and community leadership Question: how will you develop and support teams and people around you and lead in the creation of a modern research environment?
Resources and Management (Secondary)	Resources and cost justification Question: What will you need to deliver your proposed work and how much will it cost? Research Organisation Support Question: What support is being provided from the research organisation in underpinning your fellowship?
Community Champion (Secondary) [OpenPlus only]	Section: creating a positive change in the research community by championing an identified topic Question: how will you champion your proposed open plus topic to create a positive change in the research community?

5. Fellowships vs Research Grants vs NIA

The table below outlines the differences between types of grant. You should consider carefully which is right for you.

Fellowships	Research Grants	NIA
Prestigious personal award	For a Project Lead with option for one or more Project co-lead	Generally, first application to EPSRC as Project Lead.
Can be applied for without holding an academic position	Project lead and project co-leads must be academic employees (lecturer or equivalent) of an eligible organisation.	As for research grant
Institutions are required to offer a high level of support to fellows (e.g. provision of additional staff for research group, enhanced training and support, reduction in other academic duties etc.)	Institutions may or may not offer additional support (e.g. additional staff or funding etc)	Support should be commensurate with the career stage of the candidate who is establishing research independence.
<p>Allows for personal development to expand current role and responsibilities and enhance leadership.</p> <p>Flexibility to undertake training.</p> <p>Fellows are expected to act as ambassadors and advocates of their research area.</p>	Normally focussed on research deliverables.	<p>Focused on research endeavour and pathway to research independence.</p> <p>Any additional activities should be modest in scope and directly relevant to the research programme.</p>
Flexibility to allocate time to drive research culture change in a research community or more widely.	Focus remains on research deliverables with some flexibility where directly relevant to the research programme.	Limited opportunity, but focus is on establishing research vision, independence and pathway to academic career.

Significant time commitment (50%+) and ideally held at 100%	Grant contributes to the project lead and project co-lead's salaries but it's not usually 100%	Low time commitment (20 – 30%)
Can reduce other responsibilities for fellow within their host institution (e.g. teaching and administration).	Project Leads named on research grants usually have other administrative loads within their institutions.	High personal commitment to the grant.

ANNEX 1 – OPEN FELLOWSHIP EXAMPLES

One purpose of the EPSRC Open Fellowship scheme is to accelerate career development and support our talented and ambitious researchers.

The personal aspirations and continued professional development section of the fellowship opportunity will ask reviewers to comment on how the award of the fellowship will progress the career of the applicant over and above their current trajectory, and why the applicant needs this award in order to achieve this career progression.

The career progression afforded by the Open Fellowship is likely to vary considerably across career stages and therefore some examples of how a fellowship could progress your career are provided within the illustrative examples below. EPSRC understands these are examples, but we expect real world situations may well incorporate an overlap of commonality with more than one of these, or even be quite distinct. These should not be taken as requirements of the scheme, but rather illustrations of the features of our Fellowships.

Example A (Open Plus Fellowship)

The candidate has already demonstrated research independence but has limited experience of managing people. The candidate would use the fellowship to start their own research group and broaden their networks and influence. The candidate has a clear vision of how the work undertaken within their research group would lead to further development or commercialisation and how this will aid their ambition as a leading expert in their field.

The candidate has been active in Responsible Research and Innovation activities and has plans to ensure that this issue is more actively considered, both within their institution and more widely within their specific field.

The candidate recognises that they have not held formal line management responsibilities before and has set up a network of support to guide them through this process as well as taking advantage of mentoring offered. The candidate has taken steps to identifying suitable courses offered by their host institution and external providers to ensure that they look after their staff and support their career development.

Example B (Open fellowship)

The candidate demonstrated research independence a number of years ago, and successfully completed a prestigious postdoctoral level fellowship. After completing their postdoctoral fellowships, the candidate has had a prolonged period of reduced output due to family responsibilities and part-time working patterns. The candidate wants to use their fellowship to pick

up their career and increase their research output to become competitive with their peers when applying for university promotion and other funding opportunities.

The candidate is aware that progress has been made in applying new techniques to problems in their field and think they could successfully apply the technique to problems they are trying to solve. They don't currently have the technical expertise to be able to do this but have identified visits to other research groups where they will be able to learn these new techniques, enabling them to be applied to their own research.

Example C (Open plus fellowship)

The candidate has exceptional technical expertise in their field and a broad knowledge of the research environment. The candidate would use the fellowship to deepen their expertise of a specific technique and apply their technical expertise to different scientific fields through close collaboration with identified subject matter experts from industry and academia.

The candidate has well defined plans for raising the profile and applicability of technique development to a wider audience including scientific experts and members of the general public.

The candidate recognises that they don't have much experience of managing people, although they have managed projects before. They have identified a range of development opportunities to enable them to successfully manage the wide network of collaborations envisaged within the proposal.

Example D (Open plus fellowship)

The candidate has had a successful career to date and currently manages a research group of 10 people in addition to undertaking a number of administrative duties within their university. The candidate wants to use the fellowship to take the knowledge they have gained from their discipline to start a new line of research in a related discipline, alongside the existing research activities being undertaken by their research group.

The candidate also wants to be able to use the fellowship to mentor more early career researchers outside of their own immediate line management responsibilities and act as a senior mentor to other mentors to improve the level of mentorship provided in academia.

In order to be able to transfer their knowledge from their discipline to the targeted discipline, the candidate aims to hire researchers to provide some of the knowledge but also needs to undertake some upskilling work themselves. Without the fellowship to enable this upskilling, it is likely that the knowledge transfer would not happen.

Example E (Open plus fellowship)

The candidate has had a successful career to date, and worked in both industry and academia, undertaking significant line management responsibilities. The candidate currently works in industry and would use the fellowship to move back into academia with their current employer acting as a project partner. The fellowship would enable the candidate to conduct study in an area of fundamental research which has been identified as a key area of knowledge acquisition to help with a number of upcoming challenges in the next 10+ years.

The candidate would use their industrial expertise, connections, networks and company links to promote industry – academia collaborations within their university with the ambition of achieving a significant increase in the number of research proposals submitted with academic-industrial placements.

The candidate is aware of a number of EDI challenges within their field but does not have much expertise in dealing with this topic beyond their immediate responsibilities. They will use the fellowship to acquire the skills to enable them to influence in this area more broadly.

Example F (Open plus fellowship)

The candidate has previously demonstrated research independence and wants to use the fellowship to move their fundamental research into an area which combines elements of different or multidisciplinary fields to develop new methodologies and avenues of research. The candidate feels that the proposal would be unlikely to be funded via other funding mechanisms due to the minimal research already undertaken in this area. The candidate intends to act as the community leader for the new research field and will work with the academic community to maximise collaborations. The candidate would like to become more involved with policy making to help make the case for increasing spending in fundamental science but has limited experience and so has identified a number of development opportunities to gain experience in the area.

Examples of applicants who are Research Technical Professionals (RTPS):

Example G (Open plus fellowship)

The candidate has high technical competence in one or more analytical techniques and thorough in-depth expertise of equipment and method development. The candidate does not hold a PhD but has a number of years of experience in their field. The candidate would use the fellowship to deepen their knowledge through dedicated time to further develop the specialism technology, develop their standing as an expert in analytical techniques, and use their leading status to promote the role of the RTP to the community. The candidate has well defined plans and a genuine interest in the role of the RTP in the community and the wider academic funding government system. They would use this platform to raise the profile of the RTP community, driving forward change and inspiring junior RTPs on the pathways that can be taken.

Whilst the candidate has managed projects before, they recognise they have not held any formal line management responsibilities or acted as a Project Lead or Principle Investigator on grants. The candidate has taken steps to identify networks and courses to develop this knowledge so they can appropriately support and develop the team around them.

Example H (Open fellowship)

The candidate has a strong understanding of cutting-edge technology, method development, equipment maintenance and undertakes in-depth training of users on the theory, operations and data interpretation aspects. The candidate does not hold a PhD but has 10 years of expertise in their field. They have previously been a Co-lead on an equipment grant and contributed directly to a number of research projects, lending their expertise and analytical techniques at crucial steps of the project development e.g., through (in)formally co-supervising PhD students or developing new methodology to progress the project. The candidate would use this fellowship to become a world leading expert in a particular field, method, or analytical and measurement technique(s), which helps place both them and their host institution at the forefront of technical developments in this field.

The candidate recognises that they have had limited formal line management responsibilities thus far and has set up a network of support to guide them through this process as well as taking advantage of mentoring offered. The candidate has taken steps to identifying suitable courses offered by their host institution and external providers to ensure that they look after the team around them and support their career development.

Example I

The candidate has a strong background of method development and understanding of the capabilities of analytical techniques or methods, and how these can be applied. The candidate has 8 years of experience working within a HEI and is currently working towards a PhD. They have contributed significantly to research projects e.g. through (in)formally co-supervising PhD students or developing new methodology to progress the project, but has not held any significant grant funding, either in their own right or as a project co-lead. This fellowship would enable the candidate to pursue their research interests, aiming to become a leader in their field with the stability of grant funding and protected time. Whilst pursuing their research interests the candidate would also use this fellowship to become a figurehead for the RTP community.

The candidate recognises they have not had much experience of leading a team before so has made sure to create a support network of mentors and networks to help with this. The candidate has also taken advantage of any training courses offered by their host institution and via collaborators.

ANNEX 2 – DAVID CLARKE FELLOWSHIPS

David Clarke Fellowship

The David Clarke Fellowship was launched in 2017 by the Engineering and Physical Sciences Research Council (EPSRC) and the Energy Technologies Institute (ETI). The Fellowship was created in honour of the late ETI CEO and Royal Academy of Engineering fellow, Dr David Clarke.

Each year, up to five of the most talented researchers to be awarded Postdoctoral fellowships which develop low carbon technologies are selected for the additional distinction of becoming a David Clarke Fellow. The allocation of these awards is decided by the David Clarke Fellowship Advisory Board.

David was a strong advocate for the role of research in informing policy and the fellowship programme continues to honour his dedication to advancing low carbon technology. He was also a committed supporter of partnerships between academia and industry, seeing the benefits that flowed in both directions from such relationships. Particularly close to his heart was helping younger engineers and scientists to progress in their careers with support from more experienced colleagues and it was this passion that led to the development of the David Clarke Postdoctoral Research Fellowships in his memory.

The David Clarke Fellowship is currently run through EPSRC with the support of an advisory board of David's former friends and colleagues.

All mentors participating in the scheme are carefully chosen to ensure the maximum benefit for the individual fellow.

Benefits of the scheme

- These prestigious fellowships are designed to encourage awardees to create active stakeholder engagement in their research, reflecting the passions of Dr David Clarke for encouraging others to work together towards the delivery of a low carbon energy system for the future.
- Fellows will be identified as a 'David Clarke Fellow'. These fellows will benefit from monitoring by an advisory group.
- Fellows will receive a high-profile mentor, whom they will meet throughout the duration of their fellowship; especially in their first and final year. Mentors will provide advice and introductions that will help fellows maximise the impact of their research.
- Where possible, yearly face-to-face meetings will enable networking with other DCF fellows, mentors, advisory board members and EPSRC staff.

How the David Clarke Fellowships works

Applicants applying to a postdoctoral stage Energy fellowship will be eligible to receive the David Clarke fellowship if the person specification, assessment criteria and the criteria below are met.

Applicants will undergo the same peer review process as standard postdoctoral fellowships. However, applicants will be notified if they are being considered for the David Clarke Fellowship soon after their fellowship is awarded.

Further information about fellowship assessment criteria, peer review and resources can be found in the Fellowship Application Guide or on the following webpage:

<https://www.ukri.org/what-we-offer/developing-people-and-skills/epsrc/fellowships>

Criteria:

The research focus of the fellowships must be interdisciplinary across the Energy theme.

The National Importance of the research within the fellowship must be clear.

The Impact the fellowship will have within the Energy Sector must be evidenced and must focus on a low carbon initiative.

Research should evidence how a low carbon energy system can be delivered in the UK and should be set within a whole systems context.

Applicants should engage with industry, end users and/or Government to align research with the needs of these and other stakeholders, who would ideally become active participants in the research.

The research questions to be addressed should be interdisciplinary, ensuring that the work doesn't just focus on technical solutions but sets these in a broader system, market and societal context.

Universities need to offer tangible support to applicants of this scheme.

FELLOWSHIPS FREQUENTLY ASKED QUESTIONS

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EPSRC Postdoctoral and Open Fellowships FAQs

Open Fellowships

Q. Are the Open Fellowships for all career stages?

Open Fellowships are for all career stages beyond postdoctoral level and include researchers from those who are on the cusp of their first academic appointment, to early- and mid-career, to those with vast amounts of experience or those applicants who are leading technical development.

Applicants will need to justify how the fellowship adds value to their career beyond other funding routes available. Applicants who have not acquired enough experience to be close to their first academic appointment nor led the development of technical skills may wish to consider applying for a Postdoctoral Fellowship.

Q. What counts as evidence of leadership in an area of technical development?

An example could be a research software engineer who is driving the development of high-quality research software and demonstrating leadership in embedding the vital role of software in disciplinary and institutional research cultures.

Q: I am an early career researcher; how could I be competitive against an established professor with an Open fellowship application?

Parts of the application are assessed with reference to the career stage of the applicant. For example, the assessment of leadership is carried out relative to the career stage of the applicant. Experienced researchers would be expected to have significant examples of how they have nurtured the development of staff whereas less experienced researchers might not have managed staff before so could reference occasions where they have supported colleagues in their learning and development or supervised Masters project/PhD student etc.

Applicants will need to justify how the fellowship adds value to their career beyond other funding routes available and this will be assessed relative to career stage at the interview panel. The application guide contains some diverse examples of career enhancement via the Open Fellowships mechanism with outline examples including:

- An early career researcher wishing to start their own research group
- A researcher with a sustained period of part time working patterns wishing to increase outputs to be competitive at applying for traditional funding
- A research technical professional who wants to collaborate with researchers from different scientific disciplines to apply their techniques

- Experienced researcher wishing to transfer knowledge to a different discipline
- Researcher moving from industry to academia

It is also worth noting that during our extensive consultation exercise, the community were divided on who the removal of careers stages would benefit – some thought it would benefit early career researchers, and some that it would favour more experienced applicants. The assessment of applicants at different career stages is being very closely monitored as time progresses.

Q: Are Open fellowships available for research that will also involve the remit of a different research council?

Yes, so long as the majority of the research proposed falls within EPSRC remit. If you are unsure, please submit a remit query via the EPSRC website, ahead of submitting your application.

Q: What counts as a ‘significant grant’ for Open Fellowships eligibility?

A significant grant is usually defined as those which included PDRA time, capital equipment or were in excess of £100,000 (FEC). Please note that this figure is indicative and is not a hard limit – it is intended as guidance to help applicants decide which scheme fits them best. A number of applicants may also be in a position to apply for the Open fellowships without ever having held a grant of over £100,000. This could include research technical professionals or applicants who have worked on their own research idea as part of a larger grant.

Q: I am applying for an Open Fellowship without the Plus Component. How much time do I need to spend on advocacy activities?

As a typical guide, around 5% of your time might be spent on advocacy work but this is flexible and not definitive or a fixed time allocation requirement.

Open Plus Fellowships

Q. What is the “Plus” component of the Open Plus fellowship?

An Open Plus fellowship allows the applicant to spend 20-50% of their time in the fellowship to create positive culture change in the research community beyond their proposed scientific project and research group. Some examples of the types of activities this might comprise are provided in the application guidance.

This fellowship opportunity has been developed by EPSRC to recognise there is a need to support research leaders within the community who are also equipped with the time and skills to develop understanding of significant research culture challenges, as well as raising awareness of the related issues and opportunities within the community. This will provide capacity to support the implementation of new ideas and initiatives to increase the pace of change. Applicants are encouraged to develop collaborations with other groups or bodies working in similar areas, such as learned societies, think tanks etc.

These Open Plus fellowships will be assessed at the same panel as Open fellowships but additional assessment criteria will be applied, so they will be included on a separate list for funding decisions.

Q: What are EPSRC's ambitions for the "Plus" model? What positive outcomes are envisaged for this strand within the scheme?

Our ambitions are to see genuine, positive step changes in research culture throughout the sector, with support and recognition for work relating to the advancement of Equality, Diversity and Inclusion, Responsible Research and Innovation, and Public Engagement (among other areas). A key indicator of success would be that university promotion criteria are broadened from the current focus on publications and funding record to look at the additional work undertaken by the individual to improve research culture, both within their own institution but also within their discipline, and in the research community more broadly.

Q. How should I address the Plus component? What level of detail is required in the application for the Plus component?

For the Open Plus fellowship, there is an additional question in the TFS system which asks you to describe and justify how you will create positive change in the research community. Your response may include the approaches and activities you will employ, and importantly how these activities, combined with your leadership role, will deliver positive research culture change on your chosen topic within your research community. You should demonstrate a clear understanding of the challenges you will face, identify the desired outcomes and your approach to achieving these, including outreach and engagement with appropriate stakeholders. The desired outcomes should be realistic, and appropriate time and resource should be allocated to address the challenge(s). You should ensure that your track record in the area you will be addressing is included within your answer to the Team and capability to deliver question.

<https://www.ukri.org/apply-for-funding/how-were-improving-your-funding-experience/introducing-a-better-way-for-you-to-evidence-your-contributions/>

Q: Does the Plus component allow extra time or is it still limited to 5 years?

The duration is limited to a maximum of 5 years (extended pro-rata if you are working part time) for Open Plus fellowships.

Q: Is there a separate budget for Open Plus fellowships?

No. Fellowships are funded through individual Theme budgets, which encompass all funding schemes. Themes manage their budgets taking advice from peer review and Strategic Advisory Teams, according to excellence and strategic need.

Postdoctoral Fellowships

Q: For researchers deciding between a postdoctoral and Open fellowship, particularly for those coming from outside the UK, what advice would you give to help decide which fellowship to apply for?

The advice for these applicants is the same as for applicants applying from within the UK. Applicants should liaise with their Research Office to help decide which scheme is most appropriate for their skills and experience. Postdoctoral fellowships are for those who have recently started formulating their own research ideas and want to demonstrate research independence. If the applicant is on the cusp of being able to apply for their first academic appoint and has already demonstrated research independence and been delivering elements of their own research ideas, then the Open Fellowship might be suitable. The emphasis is on the skills and experience the applicant has acquired rather than the amount of funding that they have already obtained. Some applicants for the open fellowship scheme may not have previously obtained funding directly, especially if they are a research technical professional.

Q: Can you indicate whether postdoctoral fellowships will be available beyond the limited advertised areas? How often do you expect open calls for postdoctoral fellowships in new themes?

Areas for postdoctoral fellowships will be published on the Funding Finder when a clear strategic need arises, and any decision to open an area will be evidence-led. Keep an eye out on the [UKRI Funding Finder](#) for current and upcoming opportunities.

Q: What are the eligibility requirements for applicants about to finish their PhD?

Candidates who are or have been registered for a doctorate at any time may apply only if they are expecting to have completed their doctoral thesis by the date of the fellowship interview. Candidates must have passed their viva voce examination by the time of commencing the fellowship and therefore considered to hold a PhD.

Q: Can a lecturer (without any significant funding but who has a small research group) be eligible for a postdoctoral fellowship?

If you already have a small research group and have been delivering research based on your own research ideas, it is likely that peer review would judge you to be too experienced for a postdoctoral fellowship and you would be better suited to the open fellowship scheme. The emphasis is on the skills and experience the applicant has acquired rather than the amount of funding that they have already obtained. Some applicants for the open fellowship scheme may not have previously obtained funding directly, especially if they are a research technical professional.

You cannot convert one fellowship type into another after submission, even if your professional circumstances change.

Q: Can a Research Software Engineer (RSE) apply for a postdoctoral fellowship?

If the RSE was working in an area that is open for postdoctoral fellowships, then yes. If you are a research software engineer who is driving the development of high-quality research software and demonstrating leadership in embedding the vital role of software in disciplinary and institutional research cultures, you could consider applying for an open fellowship.

Q: If an applicant had previously been a Researcher Co-lead (or equivalent) on a project, would this disqualify them from applying for a postdoctoral fellowship (due to the condition regarding not having had significant grant funding)?

If the applicant has already demonstrated research independence and has been conducting research based on their own research ideas, (which would be likely if they have been a researcher Co-lead) they would not be eligible for the postdoctoral scheme but could consider the Open fellowship scheme. Applicants should liaise with their Research Office to help decide which scheme is most appropriate for their skills and experience but should be aware that prioritisation panels will be able to reject proposals for postdoctoral fellowships if they deem the applicant has already demonstrated research independence.

General Questions Applicable to all Schemes

Q: As an early career researcher working in EPSRC's remit, what Fellowship options are available to me in UKRI?

All current open fellowship opportunities can be found on the [UKRI Funding Finder](#). Applicants should carefully consider the details of each funding opportunity and apply for whichever fits them best. We would advise applicants to consult with department colleagues and seek advice from the institution's Research Office or equivalent. They will be able to help formulate ideas and answer any questions about the process or the scheme.

Q. Does my proposal need to fit into a certain research area?

Open Fellowships are open across the whole of EPSRC's remit. Postdoctoral fellowships are open in specified areas.

Focus on Discovery Science, Innovation, Instrumentation/Technique development, Software Engineering

Q: What does a focus on discovery science, innovation, instrumentation/technique development or software engineering mean?

EPSRC is providing ongoing fellowship opportunities for people who want to focus on innovation, instrument/technique development or software engineering. Our current definition of research quality is very broad and could be equally applied to any of these areas of focus, hence the assessment criteria and process for each area of focus are the same.

There is no pre-defined target number for each potential area of fellowship focus and no ring-fencing of budgets. EPSRC is looking to support excellence and a balanced portfolio across all themes and all types of Fellowship. The scheme provides opportunities for different types of Fellowships to be undertaken, as relevant to the applicant's background, their career development needs, and research, innovation and/or technical interests.

To help ensure that your proposal is reviewed by members of our peer review college who have expertise in the identified area(s) of focus, we are asking applicants to identify in TFS the area(s) of focus of their fellowships application as outlined below:

Fellowships with a focus on **discovery science** should lead to fundamental science furthering an existing, new or emerging field. They will advance the frontiers of knowledge and, longer term, contribute to increased economic impact and/or social prosperity.

Fellowships with a focus on **innovation** should include collaboration/engagement with public, private or third sector organisations, or focus on routes to IP generation, capture and/or routes to commercialisation. These proposals will be able to describe likely routes to contribute to current or future UK economic success and/or enable the future development of key emerging industries, but still be within the remit of EPSRC.

Fellowships with a focus on **instrumentation/technique development or software engineering** will look to support and expand technologies and techniques to further both academic and industrial research capability. Applications for instrument/technique development or software engineering must still fit into the EPSRC remit, both from a scientific and technological

development perspective.

Q: Can you identify two areas of focus for an Open Fellowship proposal (e.g. discovery science with some instrument development), or is it a case of picking just one?

Yes, you can include more than one area of focus in an Open Fellowship proposal. You are asked to identify the areas to help ensure that your proposal is sent to suitable reviewers.

Q: What level of TRL would be acceptable in terms of 'software engineering and technique development'?

Instrumentation/technique development and software engineering proposals will need to be in EPSRC remit and therefore will typically be TRL 1-3.

Part Time Fellowships

Q: Can I apply for a part time fellowship?

Yes. You can apply for up to five years for an Open Fellowship and up to three for a Postdoctoral Fellowship award. We expect most of our fellows to hold the fellowship for 100% of their time.

If you work part-time, you can hold your EPSRC fellowship part-time as well, at a minimal level of 50% full-time equivalent. In these circumstances, the duration of your fellowship can be extended proportionally to a maximum duration of 10 years.

If you do not work part-time, you may hold our fellowship for between 50% and 100% of your time. This must be clearly justified in your application. However, the total fellowship duration will be fixed at five years. Awards are made at 80% Full Economic Costs.

Q: Can I switch from a full time to a part time fellowship if needed?

Yes, working hours can be changed but this will then mean the duration of your fellowship will need to be amended and the appropriate extension applied. It is recommended that you first contact either the Portfolio Manager (PM) who processed your grant or to email researchcareers@epsrc.ukri.org to discuss this. Do keep in mind that the maximum duration of a fellowship is 10 years and should be held at a minimum of 50% FTE, any less will be considered on an exceptional case-by-case basis.

It is helpful to provide confirmation from your host organisation of your change in work hours. EPSRC can then approve the change in duration of the fellowship and the grant will be extended by the relevant bodies (at no additional cost) and the payments will be re-profiled according to the

change in duration.

Applications

Q: Can I apply to the EPSRC fellowships scheme in parallel with other UKRI Fellowship schemes, e.g. the UKRI FLF scheme?

No. Applicants may only have one fellowship application under consideration by UKRI (which also encompasses schemes led by any of the Research Councils and/or Innovate UK) at any point, unless expressly permitted in the Research Council/Innovate UK scheme's call documentation.

You may only apply to EPSRC's fellowships once in any 12-month rolling period if unsuccessful, unless otherwise permitted by specific managed opportunities. The end of the 12-month period will be taken as the point at which the decision was communicated to you.

Q: Will there be institutional limits on the number of applications?

In the spirit of openness and flexibility, EPSRC will not initially be setting quotas for the number of proposals that can be submitted by an individual research organisation. However, EPSRC will be monitoring the number and quality of proposals received from institutions and reserves the right to discuss ongoing submission behaviour with individual institutions and enforce a quota if necessary.

Q: What are the differences between Future Leader Fellowships (FLFs) and Open Fellowships?

The UKRI FLF scheme awards are a minimum of 4 years (pro-rata) and up to 7 years in duration, with an expectation of increasing host organisation funding in the later years. EPSRC Open Fellowships are also flexible in duration (up to 5 years) and, optionally, allow applicants to spend a substantial proportion of time (up to 50%) on non-technical elements to create positive change in the research community (such as in equality, diversity and inclusion, or responsible research and innovation), or to hold the fellowship at less than 100% of their working time. Applications for EPSRC Open Fellowships must be made through a research organisation that is eligible to hold EPSRC funding.

UKRI FLFs may be held in a wider range of organisations, including business. Open Fellowships are for all career stages beyond postdoctoral level and include researchers from those who are on the cusp of their first academic appointment, to early- and mid-career, to those with vast amounts of experience or those applicants who are leading technical development.

Deadlines and submission times

Q: Will there be new deadlines for submission, or will previous deadlines apply?

Under the TFS system UKRI will publish opening and closing dates in advance of all of our Fellowship opportunities. This approach remains under review.

Your Application and Resources

Q: Can resources be requested for project partners, such as costs to cover travel?

Project partners can receive small amounts of funding from the grant, such as for travel and subsistence to attend project meetings. These will need to be requested by the PI and will need to be fully justified.

Q: Would EPSRC pay for staff acting as a supervisor or mentor?

No, we would not pay for staff resource acting in a supervisory or mentoring role.

Q: Can relocation costs be included?

Relocation costs (under Travel & Subsistence) are allowable for fellows (and other named staff on grants) as the relocation costs may be included for staff who are named in the proposal form. Relocation costs for un-named staff should be found from the Indirect Cost element of the grant.

It would be up to the applicant / host organisation to determine what reasonable cost is in this regard and justify accordingly.

Q: Can funds for PhD students be requested on a fellowship?

No. Fellowships operate on the same basis as responsive mode EPSRC proposals in this regard. Student allocations are determined from within host organisations, according to their local arrangements, with funding drawn from either UKRI or non-UKRI sources.

Q: Is there a maximum number of postdoctoral researchers / technicians I can request when applying for a fellowship?

There is no maximum number of postdoctoral researchers you can have on your proposal, but they must all be fully justified in terms of the scientific/technical requirements and the resource you are requesting.

Q: Is there a maximum amount I can apply for?

There is no upper limit to the amount you can apply for, but all resources must be fully justified. You can see details of funded fellowships in your area using the [Visualising our Portfolio](#) section of the EPSRC website.

Q: How much does the host institution need to contribute towards Equipment?

Our fellowships schemes conform to our standard mode guidance on equipment.

Peer Review and Panels

Q: Will the fellowships all be ranked/competing together? Will the applications with a Plus component be assessed alongside the applications without a Plus component?

Postdoctoral, Open and Open Plus fellowships will be assessed at the same panel meeting but, as they have different criteria, they will be ranked on separate lists.

Q: Will early career academics be competing alongside more established researchers?

The Open Fellowships are open to all career stages beyond postdoctoral level.

The career progression afforded by the Open Fellowship is likely to vary considerably across career stages and therefore some examples of how a fellowship could progress your career are provided in the application guidance.

Parts of the application are assessed with reference to the career stage of the applicant. For example, assessment line management/development of others is carried out relative to the career stage of the applicant. Experienced researchers would be expected to have significant examples of how they have nurtured the development of staff whereas less experienced researchers might not have managed staff before so could reference occasions where they have supported colleagues in their learning and development or supervised Masters project/PhD student etc.

Eligibility

Q: Can fellowships be held at Research Council Institutes?

Yes. An EPSRC fellowship can be hosted by any organisation that is eligible for EPSRC funding. To check your eligibility for the Research Institutes and other Independent Research Organisations (IROs), [visit the UK Research and Innovation website](#).

Q: Can a fellowship have more than one host organisation?

Fellowships must have one lead host organisation. You may work closely with other organisations as part of the project.

Q: Can I apply for a fellowship even though I am not a UK National citizen?

Yes. All successful EPSRC Fellowship applicants who require a visa to work in the UK will be eligible to be considered under the fast-track [Global Talent Visa](#) route. This visa route is designed for researchers/ innovators and gives the holder flexibility to pursue their research and collaborations.

The grant of any visa is always subject to the standard Home Office general grounds for refusal of a visa. Please contact globaltalentvisa@ukri.org for further details

Q: Can senior staff apply to the open fellowships from overseas?

There are no nationality restrictions imposed by EPSRC on who can apply for a fellowship. However, you will require the support of a UK University (host organisation) and must be resident in the UK (once the fellowship has commenced) in order to hold the Fellowship.

Q: I have been working in industry since obtaining my PhD; can I still apply for a fellowship?

Applications are welcomed from candidates who wish to re-establish themselves in academia after working in industry, after a career break or other period of absence from active research. Please see our application guidance.

Q: My fellowship application was rejected; when can I reapply?

You may only apply for one EPSRC or EPSRC-supported fellowship in any 12-month period, the date being taken from the date the original (first) proposal was submitted to EPSRC. EPSRC does not accept uninvited resubmissions so you would need to make sure a new proposal is substantially different from the original proposal. Please see our website page on resubmissions.

The end of the 12-month period will be taken as the point at which the decision was communicated to you.

Q: Can I submit a fellowship application to different funders at the same time?

Applicants may only have one fellowship application under consideration by UKRI in a 12-month rolling period (which encompasses all fellowship schemes led by UKRI, any of the Research Councils and/or Innovate UK), unless expressly permitted in the Research Council/Innovate UK opportunity documentation.

Applicants may apply simultaneously to other funders' fellowship schemes (those funders outside of UKRI) but cannot hold fellowships which fund their working time simultaneously.

Applicants may simultaneously seek grant support for other projects, from UKRI or other funders, while their EPSRC fellowship application is under consideration, however;

- A substantial part of the fellowship programme may not be under consideration as a proposal with an any of the constituent parts of UKRI, while under consideration for an EPSRC fellowship award.
- Any funding secured from UKRI or other funders must comply with the EPSRC Fellowship terms and conditions, including the time commitments.

Q: I have had a previously unsuccessful EPSRC fellowship application - can I resubmit to the UKRI Future Leaders Fellowship (FLF) scheme?

There is currently no restriction on resubmitting previously unsuccessful EPSRC fellowship applications to the UKRI FLF scheme. However, before submission, applicants should carefully consider previous feedback they have received on the proposal from reviewers and/or panel members and whether their original EPSRC proposal meets the criteria for the UKRI FLF scheme. It is likely that any unsuccessful proposal will need substantive changes/development from the original submission.

Please note that if you apply to the UKRI FLF scheme and you are unsuccessful this would be classed as a first submission under the EPSRC resubmissions policy and therefore you would not be able to subsequently submit **that same** fellowship proposal to the EPSRC Fellowship scheme.

Q: As EPSRC restricts the number of fellowship applications to one application within a 12-month period, if I apply to the UKRI FLF scheme prior to the EPSRC fellowship scheme, does this mean I cannot apply to EPSRC for 12 months after I submit an FLF application?

This 12-month period only applies to EPSRC fellowships. Therefore, if you submit to the UKRI Future Leaders Fellowship (FLF) scheme this would not count as your one fellowship application for the 12 month period from EPSRC’s point of view and conversely if you applied for an EPSRC Fellowship you would not be restricted to the 12 month wait to apply for an FLF. However please note that you cannot apply in parallel to UKRI FLF and any EPSRC Fellowship schemes so you would need to wait until the outcome of one application is known before submitting to the other scheme.





Q: If I apply for a fellowship, would I be eligible for a New Investigator Award (NIA)?

If you are an unsuccessful EPSRC fellowship applicant you can subsequently apply for a NIA, providing you meet the other NIA eligibility requirements. (Bear in mind the EPSRC resubmission policy; the same proposal cannot be submitted again albeit to a different scheme).

Current holders of early career level and above fellowships which include PDRA time are not eligible. Current holders of early career level and above fellowships not including PDRA time are eligible if they meet the other eligibility criteria, however the NIA must fall within the remaining duration of the fellowship and it is not possible to apply for over 100% of your time. See our NIA Guidance for further information.

Q: Can I apply for a New Investigator Award (NIA) as well as one of the Open fellowships simultaneously?

If you are intending to apply for a New Investigator Award in parallel with your EPSRC Fellowship application, please note that:

- A substantial part of the fellowship project may not be under consideration as a grant proposal with any organisation within UKRI, while under consideration for an EPSRC fellowship award.
- Any funding secured from EPSRC or other funders must comply with the EPSRC fellowship terms and conditions if awarded, including the time commitments. Therefore, if you were awarded both the NIA and EPSRC Fellowship and were not able to conduct the NIA within the time commitment conditions of the fellowship (no more than six hours/week on non- fellowship commitments) then you will need to decline one of the awards.
- Applicants must inform EPSRC if these submissions are subsequently funded and must withdraw their application from EPSRC consideration if the project has already been funded elsewhere.
- An NIA is not intended to be an alternative to a fellowship, standard mode grant or other similar funding mechanism.
- You must fulfil the eligibility requirements for the NIA at the point of application.

Q: Can international facility time count as the significant grant funding requirement for the Open fellowship?

The emphasis is on the skills and experience the applicant has acquired rather than the amount of funding that they have already obtained. Some applicants for the open fellowship scheme may not have previously obtained funding directly, especially if they are a research technical professional.

Postdoctoral fellowships are for those who have recently started formulating their own research ideas and want to demonstrate research independence. If the applicant is on the cusp of being able to apply for their first academic appoint and has already demonstrated research independence and been delivering elements of their own research ideas, then the Open Fellowship might be suitable.

Q: Is there any age limit for applying for a fellowship?

There are no limits regarding an applicant's age at the time of application. Age is not a barrier to holding a fellowship award. As with all fellowship applications, applicants need to be able to justify how the fellowship adds value to their career beyond other funding routes available and this will be assessed relative to career stage at the interview panel.

Further application guidance

Q: Am I allowed a Project Co-Lead on my fellowship?

Project Co-Leads are not permitted on postdoctoral fellowships as you are expected to demonstrate independence, however collaborators (project partners) are permitted.

Project Co-Leads are permitted on Open and Open Plus Fellowships only in exceptional circumstances, as the fellowship is primarily an individual award. Applicants may include Project Co-Leads where there is a defined requirement for additional expertise, or where a Project Co-Lead will add expertise which cannot be drawn from the Fellow alone. We would usually not expect the Project Co-Leads to be from the same department as the Fellow. Researcher Co-Leads (or equivalent) are not permitted on Open and Open Plus Fellowships.

Q: As a fellow can I be a Project Lead/Co-Lead on another grant?

If you are a Fellow under the open fellowship scheme you would be eligible to act as Project Lead on an EPSRC research grant, assuming you meet all of the other requirements. However, the required resource cannot be duplicated – salary should not be costed to the new proposal for any overlapping time period, and estates and indirect costs would need to be reduced accordingly.

You would need to be able to convince peer review that this would not adversely impact the delivery of your fellowship and that the research grant project is feasible whilst having a zero hours' time commitment. This is usually the case where the research grant project is heavily related to the fellowship, so the administrative time needed on the grant is able to be covered by the time on the fellowship. You must not commit over 100% of your total time.

Q: Can I go on long visits overseas?

You can spend up to 12 months of the fellowship elsewhere, although caution would need to be taken with costing (i.e. no estates costs for the period of absence). A visit longer than 12 months plus additional conferences may be considered but this could raise questions at peer review, for example, regarding supervision of the staff on the fellowship.

Q: Can named visiting researchers on a fellowship apply for their own EPSRC Fellowship?

Yes, subject to the other eligibility requirements being met, and they will need to make sure there is no salary duplication if there is an overlap of time spent on different projects. They will need to be supported and hosted by an eligible research organisation in the UK.

Q: How many hours of teaching can I do if I am a 100% FTE fellow?

Provided the teaching is related to the research project on which you are currently working, you may, during normal working hours, undertake teaching and demonstrating work, including associated training, preparatory, marking and examination duties, for up to an average of 6 hours a week (pro rata for part-time staff) calculated over the period that you are supported on the grant.

Where a fellow changes their conditions of employment with their host institution to work part time during the Fellowship, it can be converted to a part time award, at a minimum of 50% FTE during the course of the Fellowship.

Q: Can non-project partner letters of support be included in the application?

Letters of support should only come from named project partners. If you would like to reference third parties in your proposal without adding them as project partners, you can refer to them in the Research Organisation Support or Team and Capability to Deliver sections. In this case, they are not project partners and hence letters of support cannot be included.

Q: Can a project partner be from the same Research Organisation as an applicant?

No. Project partners cannot be from the same Research Organisation and any listed will be

removed if the application is successful. If you want to reference collaborators from the host organisation, then please refer to them in the Research Organisation Support section.

Version Log:

Version	Version Info
0.1	KR April 2023
0.2	EC May 2023
1.0	EC Aug 23
1.1	EC Sept 23
1.2	EC 9/10/23
1.3	EC 12.10.23 Appended FAQs.
1.4	EC 24/10/23 Minor updates for clarity.