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**UK Research
and Innovation**

UKRI TRAINING GRANT GUIDANCE

To be read with:

UKRI Training Grant Terms and Conditions

UK Quality Code for Higher Education – Advice and Guidance: Research Degrees

Our Statement of Expectations for Doctoral Training

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Introduction

This guidance is primarily for use by Research Organisations (universities, research institutes and other bodies), in receipt of Training Grants awarded by the following seven UK Research and Innovation (UKRI) Councils:

Arts and Humanities Research Council (AHRC)
Biotechnology and Biological Sciences Research Council (BBSRC)
Economic and Social Research Council (ESRC)
Engineering and Physical Sciences Research Council (EPSRC)
Medical Research Council (MRC)
Natural Environment Research Council (NERC)
Science and Technology Facilities Council (STFC)

Guidance on changes to terms and conditions due to COVID-19 pandemic included in Appendix A.

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TGC 1 Variation to Terms and Conditions

The latest version of the Terms and Conditions apply to both new and existing Training Grants unless states otherwise, however these do not supersede any Specific Training Grant Terms and Conditions. For auditing purposes, the Terms and Conditions applicable at the time of the activity or purchase resulting in a subsequent charge to the Training Grant will apply. Where a change to Our Terms and Conditions requires a new policy and or process, We expect You to implement this within a reasonable timescale and as an interim We will expect You to take steps to mitigate against any risks that have arisen as a result of non-compliance due to changes to Our Terms and Conditions.

TGC 2 Accountability & Responsibilities of the Research Organisation Research Training Provision

Each Council funds research training within a broad set of subject disciplines and in collaboration with other Councils and partners. Detailed information about the areas of research each Council supports can be found on their individual websites.

The Research Organisation must ensure:

- Diversity and equality must be promoted in all aspects of the recruitment and career management of Students, in particular Research Organisations must ensure that Supervisors are trained and supported in this area. We collect and analyse data on areas including the gender, ethnic origin and age of supported Students to monitor the effectiveness of our policies and initiatives.
- Adequate facilities and resources are made available for the research training
- Research supported by the training grant must comply with all relevant legislation and Government regulation, including that introduced while work is in progress.
- A safe working environment is provided, meeting the requirements of health and safety legislation, and any other legislation concerning the health, welfare and rights of Students, including all relevant data protection legislation
- The research undertaken by a Student as part of a Studentship must fall within the remit of the Council(s) funding that Studentship.
- Research Training Programmes contain good training in generic and transferable skills. Further information is available from the UK Quality Code for Higher Education – Advice and Guidance: Research Degrees.

Use of Training Grant Information

Research Organisation's must ensure that Students, Supervisors and project partners are made aware of what information, including personal data, is provided to UKRI, and how that information about the Studentship will be used by both UKRI and the Research Organisation, including but not limited to:

- Their Research Organisation to disclose to the Council any information that the Council requests regarding the progress of their studies, the submission of their thesis (where appropriate), and the completion of their studies.
- Their Research Organisation to disclose Student contact details to UKRI. This is to allow UKRI or Third Parties acting on the UKRI's behalf to contact Students both during and beyond the duration of their Studentship for evaluation purposes, or regarding funded courses or to invite Students to events or conferences that the Councils fund.
- Their Research Organisation to provide data on equality and diversity to allow the Councils to help assess how effective policies and procedures are in eliminating unlawful discrimination and promoting equal opportunities, this information may be used anonymously for statistical purposes. This information will be treated in confidence and in line with all relevant data protection legislation.
- Their Research Organisation to provide any such information requested on the Council's behalf to the Higher Education Statistics Agency (HESA) or any other organisation or agency empowered to act on UKRI's behalf, including UK Shared Business Services (SBS) Ltd.

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Modern Slavery Act 2015

Any Research Organisation carrying out business in the UK is required to comply with the Modern Slavery Act 2015. You must take steps to ensure that operations and supply chains are trafficking- and slavery-free, including imposing substantially similar obligations to those in this guidance where You are permitted under the Standard Terms and Conditions of Training Grant and any Specific Terms and Conditions of Training Grant to subcontract your obligations, so that multi-level supply chains are addressed.

You must ensure that neither Yourself, Your officers, employees, nor so far as You are aware any subcontractor or other persons associated with You, have been convicted of any offence involving slavery and human trafficking.

You acknowledge and agree that failure to comply with the Modern Slavery Act 2015 will constitute a breach of the Terms and Conditions of funding, and that a continuing breach of these Terms and Conditions of the Training Grant will entitle Us to suspend pending remediation, or terminate Grant payments.

When requested by Us, You must supply a copy of Your annual modern slavery and human trafficking statement.

Any Organisation in receipt of UKRI training grant funding must have a security management plan and hold relevant certification to provide an appropriate level of assurance. A robust set of controls, based on a cyber security risk assessment, must be implemented. A positive cyber-security culture should be achieved through a cyber security training programme for all staff and students and in line with UKRI's Trusted Research and Innovation Principles.

TGC 3 Research Governance

TGC 3.1 Research Ethics, Misconduct and Conflicts of Interest

Ethical issues should be interpreted broadly and may encompass, amongst other things, the involvement of human participants or remains, tissue or data in research, the use of animals, research that may result in damage to the environment, "dual use" research of concern and the use of sensitive economic, social or personal data. Relevant professional codes of practice and ethical guidance provided by professional bodies should be followed. Further guidance on managing the risks of research misuse can be found at: <https://mrc.ukri.org/research/policies-and-guidance-for-researchers/managing-risks-of-research-misuse/>

Research involving human participants or data within the social sciences that falls outside the UK Policy Framework for Health and Social Care Research, such as research which poses no clinical risk or harm to the research subjects, must meet the provisions and guidelines of the ESRC's Research Ethics Framework at: <https://esrc.ukri.org/funding/guidance-for-applicants/research-ethics/>

Misconduct

You must report to us any investigations and their outcomes into research misconduct associated with the Training Grant within one month of deciding to undertake any formal investigation, and subsequently notify us of the findings and actions taken. You must provide information on Your management of research integrity and ethics as described at: www.ukri.org/publications/ukri-policy-on-the-governance-of-good-research-practice/.

TGC 3.2 Use of Animals in Research

You must comply with the provisions of the Animals (Scientific Procedures) Act 1986, and any amendments, where applicable and ensure that all necessary licences are in place before any work requiring approval takes place.

The expectations of researchers are set out in “Responsibility in the use of animals in bioscience research”: <https://www.nc3rs.org.uk/responsibility-use-animals-bioscience-research>. Wherever possible, researchers must adopt procedures and techniques that avoid the use of animals. Where this is not possible, the research should be designed so that;

- The least sentient species with the appropriate physiology is used.
- The number of animals used is the minimum sufficient to provide adequate statistical power to provide a robust and reliable answer to the questions posed.
- The severity of procedures performed on animals is kept to a minimum. Appropriate anaesthesia, analgesia and humane endpoints should be used to minimise any pain and suffering.

TGC 3.3 Health and Safety

Staff and Research Participants

Appropriate care must be taken where Students and Supervisors are working on and off-site. This includes working internationally where there may be insufficient protection. You must be satisfied that all reasonable health and safety factors are addressed. This includes reasonable adjustments to secure the health and safety of individuals who have pre-existing conditions as well as those whose circumstances change. Responsibility for completing suitable and sufficient risk assessment lies with the research organisation, UKRI expects that risk assessments will be completed by competent people but has no expectation that an individual should ignore this advice in order that the grant related objective can be met.

Research Organisations should have Health and Safety policies in place to assess the research environment for pregnant and disabled students. Health and safety risk assessments should be carried out where necessary, and in a proportionate way, to consider the requirements of all doctoral students, including, where appropriate, to explore reasonable adjustments. For good practice that may be applicable to PGR students, see:

<https://www.hse.gov.uk/disability/overview.htm>

There must be effective and verifiable systems in place for managing research and training quality, progress, and the safety and well-being of patients and other research participants, in line with the UK Policy Framework for Health and Social Care Research (or equivalent). These systems must promote and maintain the relevant codes of practice and all relevant statutory review, authorisation and reporting requirements. Further guidance on the conduct of medical research can be found on the MRC website: <https://mrc.ukri.org/research/policies-and-guidance-for-researchers/>. Research Organisations should also have policies in place for students to raise health and safety concerns; and to ensure that these are dealt with proportionately and quickly.

Any significant developments that affect safety and well-being of research participants must be assessed and mitigated as appropriate in a timely manner as the research proceeds (this may include suspending or terminating the research) and should be reported to the appropriate authorities and to Us. In the event of a serious incident we require that you inform us of this for risk purposes, and which should include but not be limited to:

- Death
- Serious injury
- Notifiable diseases
- Dangerous occurrences

Public Health and Safety

You are responsible for complying fully with the requirements of all regulatory authorities for the storage, use and transfer of all potentially harmful materials, including pathogenic organisms, and any additional provisions to safeguard security that may be specified by such authorities.

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You are also fully responsible for the management, monitoring and control of all research work funded by Us.

You should have clear policies and processes for considering dual use risks wherever and whenever they emerge, providing advice and guidance to Students, Supervisors and staff and actively monitoring the progress of research where potential risks are identified. This may entail, for example, having mechanisms to call on expert advice or to convene expert groups (this might include individuals with scientific, biosafety, security and ethics expertise) to assess risks and benefits associated with projects of potential concern. You should also include provision of appropriate training and education to students, supervisors and staff working in areas where dual use issues could emerge and have policies in place to ensure staff and students can safely raise legitimate concerns.

TGC 3.4 Equality, Diversity and Inclusion

As per the Training Grant condition, you are expected to proactively engage with equality, diversity and inclusion. Your approach to supporting equality, diversity and inclusion is expected to at a minimum meet all relevant legal obligations, including but not limited to those of the Equality Act 2010 in England, Scotland and Wales, and equivalent legislation in Northern Ireland.

The Equality Act 2010 legally protects people from discrimination in the workplace and in wider society, including education settings. In an educational context, it applies to studentship applicants as well as to doctoral students. The protected characteristics (section 4) under the Act are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief (including lack of belief), sex and sexual orientation. Disability may include physical or mental impairment where the impairment has a substantial and long-term adverse effect on the Student's ability to carry out normal day-to-day activities. These characteristics are the grounds upon which discrimination may arise.

The Equality Act 2010 can be found at: <https://www.legislation.gov.uk/ukpga/2010/15/contents>

TGC 3.5 Safeguarding

Safeguarding is defined as taking all reasonable means to prevent harm, particularly sexual exploitation, abuse and harassment from occurring; to protect children and vulnerable adults from harm and to respond appropriately when harm does occur.

TGC 3.6 Bullying and Harassment

Please refer to Training Grant condition.

TGC 3.7 Whistleblowing

You must have clear, well-publicised policies and processes in place that are consistent with good practice, which at a minimum must cover:

- The organisation's commitment to investigate the whistleblowing report and how it will protect the individual reporting the issue
- Reporting steps
- Internal and external reporting contact points

The National Audit Office Assessment Criteria for Whistleblowing policies provides useful guidance on how to both write Whistleblowing policies and assess the effectiveness of these.

TGC 4 Use of Training Grant

Inflation

Training Grants funds include a provision for inflation based on the GDP Deflators published by HM Government.

Number of Students

Subject to the Standard Terms and Conditions of Training Grant and any Specific Terms and Conditions of Training Grant, Training Grant funds may be used, without reference to Us, in such a

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manner as to best undertake the provision of training leading to the award of a postgraduate degree.

Stipend

The level of stipend awarded to eligible Students must be at least equal to Our minimum rates for the relevant academic year. If You wish You may pay a higher level of stipend, where this results in total spend exceeding the value of the Training Grant, You must meet these costs from elsewhere. Stipends must be paid to Students in advance, with instalments paid in line with Your policy.

We publish our national minimum doctoral stipend and indicative fee level on an annual basis, which can be found on the UKRI website at: www.ukri.org/our-work/developing-people-and-skills/find-studentships-and-doctoral-training/

Deployment of Funds

We expect You to use the flexibility of the Training Grant funding for maximum strategic effect, and to think strategically about how best to maximise the impact of UKRI's investment. This might include using the flexibility of part-funding to leverage funding from other sources or offering enhanced stipends to attract the strongest candidates in areas of research in which You may have been experiencing recruitment difficulties.

Where a Student is eligible for a full award, at least 50% of the total cost of the Studentship must be drawn from the Training Grant or Training Account of a single Council. The remaining costs can be funded from other sources, such as the research organisation's funds or from research partners. Joint Council funding of multidisciplinary awards is possible on the basis of 50:50 funding from two Councils' Training Grant/Training Accounts across the period of award; in that case, one of the Councils must be designated as the majority funder for monitoring and information purposes. A Home Student must not be expected to bear the cost of any shortfall in funding. For International Students, You are able to claim the difference between home and International fees from other sources, but these must not be taken from the Training Grant or other UKRI funding.

These sources may include an HEI contribution, co-funder contribution or from the student directly. Institutions can also choose to waive the additional fees.

Funds may be used for Student stipends, fees, project costs and the incidental costs of research training, such as travel and conference attendance, internships and to support small, local, cohort-specific conferences as well as general conferences, fieldwork, broadening training and placements. The complexity of the Student's project should be taken into consideration when allocating funds for these costs. The Training Grant includes a Research Training Support Grant (RTSG) component. This is a contribution towards costs incurred in training research Students e.g. the provision of consumables, equipment, travel, etc. The RTSG is not intended to relieve You of any part of Your normal expenditure.

We require public funds to be deployed with due consideration to value for money, environmental impact, welfare and business needs across all activities. All travel claims should evidence value for money as the primary consideration. Consequently, these should only include travel by standard class by train and economy class by air for flights. Exceptions to this would be permitted where there is a justifiable health and wellbeing need and approved by the Research Organisation prior to purchase and evidence of this should be available. Consideration to the environmental impact of travel should be in line with the institutional policy.

Carbon offsets are not considered to be a direct research cost and will not therefore be funded on grants; further information can be found on the UKRI website and its position statement, <https://www.ukri.org/about-us/policies-standards-and-data/corporate-policies-and-standards/environmental-sustainability/ukri-position-statement-on-carbon-offsetting/>

The costs of additional caring responsibilities, including childcare, beyond that required to meet the usual requirements of the studentship and which are directly related to the project or broader

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doctoral training experience, may be claimed against the training grant where this is required in order for the student to participate. For example, this may include placements and internships. However, costs associated with the student's normal working patterns may not be sought.

Any such costs would need to be met within the Training Grant cash limit. If You hold a very small Training Grant and no expectation of future funding from Us, You may request additional funding above the cash-limit. You will need to show that payment for caring responsibilities cannot be made from the Training Grant and that there is no other contingency funding or Training Grants to draw on.

Spend Timeframes

Training Grant funds cannot be used to meet the costs of an activity that will fall outside of an individual Student's funded period or the Training Grant Period itself, such as when a Student's support goes beyond the end date of the Training Grant, to support time spent by a Student writing up their thesis once their funding end date has passed or when travel falls beyond the training grant period, these costs cannot be charged to the Training Grant even if the tickets etc can be purchased in advance.

Teaching and Demonstration Work

Students may undertake teaching or demonstrating work when this is compatible with their training and provided that this is approved by their Supervisors. The total time spent (including preparation and marking) should not interfere with the progress of the doctorate. The amount of time is at Your and the Supervisor's discretion, but it is recommended that this is no more than six hours in any week. It must not be compulsory and must be paid for at Your usual rate and supported by appropriate training. Costs for demonstrating or teaching must not be taken from the Training Grant.

Disabled Students Allowance

Disabled Students' Allowances (DSA) are intended to help with additional expenditure for the costs of study-related requirements that may be incurred as a result of disability, a mental health problem or a specific learning difficulty that means additional support is needed to undertake a UKRI funded Studentship. The allowances can cover the cost of non-medical personal assistance, items of specialist equipment, extra travel costs and general expenses.

Research Organisations should undertake the assessment of need and provide costs for the Student when they are required. The costs of Disabled Students' Allowances do not come out of the overall grant. Instead, DSA payments are added to the grant funding and dealt with in addition to this. Research Organisations will be able to claim back eligible costs at the end of the academic year by submitting a completed DSA claim form to Us by 31st October or, if the Training Grant is in its final year, including costs in the Final Expenditure Statement. Further information can be found in Our Disabled Students' Allowances Framework Document and associated information at: www.ukri.org/our-work/developing-people-and-skills/find-studentships-and-doctoral-training/

Tax and National Insurance

Payments made as part of a UKRI funded Studentship are training awards and not regarded as income for income tax purposes. You should ensure that Students are aware that earnings received from sources such as teaching and demonstrating may be taxable and should be aggregated with income from any employment when assessing income tax liability in any tax year – this is particularly relevant for the tax year in which the award ends. It is the Student's responsibility to ensure they understand their tax liabilities throughout their award. We are not able to provide advice on tax, national insurance, pensions or on benefits issues.

No additional payments will be made for Students' National Insurance contributions. You should ensure that Students are aware that they can, if they wish, pay contributions as non-employed persons. They should consult their local office of the Department for Work and Pensions about their position to determine the impact of non-payment of contributions on any future claims for benefit including the basic State Pension. Students may become liable for contributions in connection with any paid teaching or demonstrating which they undertake.

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TGC 5 Starting Procedures and Training Grant Arrangements TGC 5.1 Starting Procedures

Please refer to Training Grant Condition.

Mode and Duration of Studentship

Students may be full or part time. You may decide on the period of support for individuals. Subject to any Specific Conditions, the duration of Doctoral Studentships must be within any parameters specified by the awarding Council. Councils expect doctoral projects to be designed and supervised in such a way that Students are able to submit their thesis within the funded period, as defined at the outset of the project. Provision can be made to extend the funding period in specific cases e.g. parental leave.

Research Organisations should recognise that research is often done through “flexible” working, often on an ad hoc basis. However, some Students may wish to make more permanent changes to their working arrangements without changing their mode of study from full time to part time.

Research Organisations and Supervisors should consider how accepting or refusing such requests will impact the ability of the student to complete their doctoral study within the funded period.

Research can involve periods of long study, out-of-hours working and shift-work. This may vary between disciplines and even projects. Some researchers will want to work longer hours, but this should not be set as an expectation. Research Organisations and Supervisors have a duty of care to ensure students are not working excessive hours, to the detriment of their wellbeing.

Researcher students who wish to work a more “normal” working week should not be disadvantaged. For further guidance on working hours, please see the government guidelines and working time directive: <https://www.gov.uk/maximum-weekly-working-hours>.

Place of Tenure

Students are required to be resident in the UK for the majority of their studies.

The Student must live within a reasonable travel time of their Research Organisation or collaborative organisation to ensure that they are able to maintain regular contact with their department and their Supervisor. This is to ensure that the Student is not isolated and receives the full support, mentoring, training and access to facilities required to complete their research successfully and to a high standard. The only exceptions to these requirements are to cover periods of absence that are an essential part of their study e.g. fieldwork, study visits or conference attendance.

Overseas Study

There should be appropriate flexibility within the training grant to support periods of study overseas subject to adhering to Our due diligence guidance.

Placements

Students may undertake a placement or internship where this is either directly related to the Student’s training, or provides valuable transferable skills and, provided this is well justified and approved in advance by their Supervisor and Research Organisation.

The placement may be an integral part of the award, in which case a suspension or an extension of the Student’s funded period is not required. In other cases, there may be a case for the award to be extended. However if a placement is not directly part of their doctorate programme or the Student is receiving a payment for the placement, then the Studentship should be suspended.

Collaboration

We expect You to encourage doctoral Students to collaborate with partner organisations in the private, public and civil society sectors, to enhance their research training experience; these collaborations do not necessarily require the PhD to be a fully collaborative award (e.g. CASE). All collaborations should be reported in the Je-S Student Details.

Post Award Decisions

You have the authority to make many decisions about post-award matters without the need to have

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them confirmed or signed-off by the Us, unless specified otherwise in the awarding Council's guidance. Where You require additional clarification to make a decision on a post-award matter, appropriate registry or finance office staff should contact UK SBS directly. We cannot handle enquiries from Students about post-award decisions; Students should be advised to direct all queries to the relevant authority at their Research Organisation.

TGC 5.2 Student Eligibility

UKRI do not fund Students directly, but fund Research Organisations through Training Grants for the provision of postgraduate study.

Eligibility criteria:

To be classed as a Home student, candidates must meet the following criteria and the associated residency requirements:

- Be a UK National, or
- Have settled status, or
- Have pre-settled status, or
- Have indefinite leave to remain or enter

UK National

The UK includes the United Kingdom and Islands (i.e. the Channel Islands and the Isle of Man). In terms of residency requirements for UK nationals, for courses starting from 1 August 2021, candidates will continue to be eligible for home fee status as long as:

- they were living in the EEA or Switzerland on 31 December 2020, and have lived in the EEA, Switzerland, the UK or Gibraltar for at least the last 3 years before starting a course in the UK
- have lived continuously in the EEA, Switzerland, the UK or Gibraltar between 31 December 2020 and the start of the course
- the course starts before 1 January 2028

Eligibility on these grounds will only be available for courses starting up to seven years from the last day of the transition period (i.e. on 31 December 2027 at the latest).

Children of UK nationals will also be eligible for support on the same terms, even if they are not themselves UK nationals, as long as both the UK national and the child meet the conditions listed above.

This will not apply to Irish nationals living in the UK and Ireland whose right to study and to access benefits and services will be preserved on a reciprocal basis for UK and Irish nationals under the Common Travel Area arrangement.

EU Settlement Scheme

EU, EEA or Swiss citizens can apply to the EU Settlement Scheme to continue living in the UK after 30 June 2021. If successful, applicants will get either settled or pre-settled status. Those with pre-settled status will qualify as a home student if they have 3 years residency in the UK/EEA/Gibraltar/Switzerland immediately before the start of their course.

Indefinite leave to remain (ILR) or Indefinite leave to enter (ILE)

Candidates with ILR or ILE can continue to live in the UK without applying to the EU Settlement Scheme.

International Student

If a candidate does not meet the criteria above, they would be classed as an International student.

It is the responsibility of the research organisation to determine eligibility using the guidance in this document and the UKRI Training Grant terms and conditions and Guidance documents.

With the exception of European students with pre-settled and settled status, all pre-existing rules around the status of a student e.g. status of refugees, those with indefinite leave to remain or enter,

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remain unchanged. Research Organisations should determine the status of a student by reviewing the Education (Fees and Awards) (England) regulations 2007 in the usual way, noting that UKRI determine eligibility based on the first day of the studentship, rather than the first day of the academic year. Only where you determine someone has international status do you need to consider the new UKRI policy on international student support.

Please see Annex B for the full eligibility guidelines.

Recruitment of Candidates

Research Organisations and Supervisors advertise, award and manage Studentships funded by Us. You must ensure that International students are made aware of which costs will be met by the UKRI contribution to the studentship and which costs will need to be met from alternative sources of funding. You are responsible for checking Students' eligibility against the relevant residency, academic, subject and scheme eligibility criteria, all queries from Students should be directed to the Research Organisation hosting the Studentship. You must be able to provide evidence to support this decision if required by the awarding Council. The recruitment processes must be fair, open and transparent. Financial considerations must not be part of the recruitment decision. Heads of Department, prospective Supervisors and potential Students who require advice on eligibility should contact the Research Organisation Registrar's Office or the postgraduate admissions office (or equivalent). Final decisions on eligibility are made by You.

Qualification Requirements

Minimum qualifications and experience to undertake a research degree are detailed in the QAA UK Quality for Higher Education. For some subject areas, there is also an expectation that an individual will have undertaken a Masters qualification before beginning a doctoral programme. However, You can use Your discretion in deciding whether candidates are suitable for research training, making reference to any Council-specific expectations.

General

Useful sources of information on postgraduate study in the UK include:

- Education UK: the British Council's official website for international Students
- UK Council for International Student Affairs (UKCISA): the website includes advice and illustrations of how the Fees and Awards regulations may apply to particular circumstances as well as some case law.

TGC 5.3 Part Time Study

Studentships are available for Students who wish to study on a part time basis. For example, those who wish to combine their research training with work or personal responsibilities.

Students should be made aware that funding for part time study is an option. Research Organisations and Students should be realistic, however, about such arrangements. It is expected that the period of study will reflect the percentage of time spent pursuing doctoral studies, and a minimum of 50% of full time equivalent is required. Supervisors will wish to ensure that arrangements are made to incorporate any new research or research developments that are likely to emerge within the extended period of study.

Part-time students should be able to fully participate in the training and cohort development opportunities, where applicable, provided through the training grant.

TGC 6 Extensions and Early Submission

Individual Councils may allow extensions of the Student's funded period for other activities e.g. for language training.

In some cases, Students may submit their thesis prior to the end of their award. Where the Student continues to undertake work that is directly linked to their thesis, it is permissible for the award to continue to the end of the quarter in which the thesis is submitted. For example, a Student who submits their thesis on 31 January can retain the payment made for the 1 Jan – 31 March quarter but their doctoral award would end on 31 March.

TGC 7 Monitoring

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TGC 7.1 Changes to Study and Location Changes to Study

As their research plans are developed and refined, a Student may need to make some modifications to the original programme of research and/or project title. You should enter changes into Je-S Student Details as soon as possible.

Major change of topic or direction should only be approved in exceptional circumstances. Research Organisations must not agree a change to a course or programme of study that falls outside the funding Council's remit.

Transfer of Student/Training Grant

Where Students transfer from one Research Organisation to another, the receiving Research Organisation will be required to accept all the terms and conditions relating to the Studentship as it was offered to the Student, including its start date and duration, registration requirements and submission date.

Where there are multiple Students on the Training Grant, the respective Research Organisations will need to arrange any transfer of funding themselves. The Training Grant will remain with the original Research Organisation.

If a transferring Student is the only Student on a particular grant, the entire grant and any remaining funds must be transferred to the receiving Research Organisation. In this situation, both Research Organisations should submit a grant transfer request through the Je-S Grant Maintenance facility to arrange for a transfer of the grant to the receiving Research Organisation.

TGC 7.2 Information Requirements HESA

We receive first-destination data on the employment of Students once they have been awarded their degrees from the HESA survey of Destinations of Leavers from Higher Education (DLHE). You should ensure that Students are made aware of the importance of completing the HESA questionnaire, which they will receive in due course. This information is vital for Us to be able to report on the impact of Our funding.

Je-S Student Details

Research Organisations must use the Je-S Student Details to update information about their Students throughout the duration of the Training Grant. New records must be created within a month of the Student commencing their study. Amendments to records should be made in accordance with Council guidance and within a month of the change being formally agreed by the Research Organisation.

When creating a new Student record, the "Studentship Details" option should be selected from the menu. When updating an existing record, there is the option to use "Studentship Details" where all details of the record can be amended, or "Batch Update" where multiple records can be amended, but where only some parts of the record can be altered. We expect Research Organisations to update the Je-S Student Details for their Students on an ongoing basis, e.g. to reflect any change in status or Student circumstances, and to undertake an annual check by 31 October each year.

PhD Submission Survey

Councils collect submission data from Research Organisations on an annual basis via the Je-S PhD Submissions Survey. If a Studentship is terminated before the end of the first year of doctoral funding, the Student will be excluded from the submission rate surveys. Students, who have been recorded as deceased on the Je-S Student Details, are omitted from calculations of submission rates.

For any questions relating to Je-S, Research Organisations should contact the Je-S Helpdesk on 01793 444164 or JeSHelp@je-s.ukri.org.

Submission Rates

We will continue to monitor submission rates and may apply sanctions, or consider introducing sanctions, in light of achieved submission rates. Please refer to Council specific guidance for further detail.

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Termination of Studentship

You should ensure that the appropriate termination and grievance procedures have been followed, if relevant, before terminating a Studentship. You are expected to take reasonable steps to recover monies that have already been paid to Students for the period following the date of leaving or termination. We will not supplement Training Grants, but the remaining Training Grant funds could be used to fund/part-fund another Student. Termination details must be submitted via the Je-S Student Details.

Suspensions

Sympathetic consideration should be given to requests made by Students for abeyance due to personal or family reasons, with suspension of an award limited to a maximum of 12 months unless exceptional circumstances prevail. Where a suspension has been granted, the Studentship end dates, and expected submission dates should be amended on the Je-S Student Details to reflect periods of abeyance.

TGC 7.3 Disclosure and Inspection

Please refer to Training Grant Condition.

TGC 8 Absence

TGC 8.1 Parental Leave

Although individuals employed under these terms and conditions do not have a statutory entitlement to maternity, paternity or adoption leave, UKRI will provide leave entitlements which mirror the statutory schemes in force from at the time.

UKRI also operates a system of unpaid parental leave in lieu of the statutory shared parental leave scheme. This is available to students (other than those who have chosen to take a period of maternity or adoption-equivalent leave, for up to a maximum of 50 weeks).

Students are entitled to Maternity, Paternity, Parental and Adoption leave if the expected week of childbirth (or placement of the child) will occur during the period of their award.

We expect You to meet the costs of Maternity, Ordinary Paternity Leave and Adoption Leave from within the cash-limit of Your Training Grants/Accounts. If You hold a very small Training Grant and no expectation of future funding from Us, You may request additional funding above the cash-limit. You will need to show that payment for Maternity, Ordinary Paternity Leave or Adoption Leave cannot be made from the Training Grant and that there is no other contingency funding or Training Grants to draw on.

There is no limit to the number of periods of Maternity, Ordinary Paternity Leave or Adoption Leave that can be taken during a Studentship.

Partners are entitled to up to two weeks paid Ordinary Paternity Leave on full stipend. This leave must be taken in one go. A week is the same amount of days that a student would normally study in a week - for example, a week is 2 days if they only studied on Mondays and Tuesdays. Ordinary Paternity Leave cannot start before the birth and must end within 56 days of the birth.

Partners are also entitled to an extended period of unpaid parental leave, up to a maximum of 50 weeks, with their studentship extended accordingly. Unpaid parental leave must be completed within 12 months of the birth of the child. This leave may be taken in up to three blocks of leave or all at once.

We expect You to have policies in place to support Students and to advise the Student of the terms and conditions under which Maternity, Ordinary Paternity Leave, unpaid parental leave or Adoption leave and stipend will be available. In addition, what duration of study is required on return to study after such leave in order for the Student to keep the whole value of funding paid during the period of leave. This may be calculated on a sliding scale. It is acceptable for a Student to return to study on a part time basis as long as it is at least 50% FTE.

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The Research Organisation should have in place a policy that requires it to make every effort to recover the value of maternity, ordinary paternity leave or adoption funding from Students who decide not to return to study after maternity, ordinary paternity or adoption leave.

The Research Organisation must ensure a consideration of how Keeping in Touch (KiT)-like days could be provided for students, e.g. to participate in activities related to their research project during their leave. Such instances should be agreed in advance by the student and their supervisor and not add up to more than 10 days across the leave period. Payment for KiT days should be made at the students basic daily rate (regardless of the actual hours worked) less appropriate Maternity, Adoptive/Maternity Support Pay they are receiving.

The Studentship end dates, and expected submission dates should be amended on the Je- S Student Details to reflect periods of Maternity, Ordinary Paternity Leave, unpaid parental leave, Adoption leave or changes in study patterns.

TGC 8.2 Sick Leave

Award payments must continue during absences covered by medical certificates for up to 13 weeks within a rolling 12-month period, additionally the Studentship must be extended by a commensurate period.

The extension to the funded period should be granted at the end of the period of absence but, if this was not possible at the time, it is permissible for it to be granted at any point during the students funding period. It is not permissible to provide further funding once the funding end date of the student award has passed. We do not require medical certificates to be sent to us, however Research Organisations may wish to retain copies for audit purposes. Beyond 13 weeks, Studentships should be put into abeyance. Medical absences beyond the 13 weeks are not funded by Us.

We expect You to meet the costs of medical absences from within the cash-limit of Your Training Grants/Accounts. If You hold a very small Training Grant and no expectation of future funding from Us, You may request additional funding above the cash-limit. You will need to show that payment for costs resulting from Medical Absences cannot be made from the Training Grant and that there is no other contingency funding or Training Grants to draw on.

If a Studentship is put into abeyance then You must ensure that the Je-S Student Details has been updated with the new funding end date and expected submission date (based on the period of absence, any period of abeyance and, if applicable, any subsequent part time study).

Students returning from a long-term sickness absence may require a phased return to their studies. This must be approved by the Research Organisation and a fit note should be provided, confirming the individuals fitness to work. The student can receive a full stipend for this period. This arrangement is limited to a maximum of four weeks and must be part of a written plan to return to working their full hours. While the responsibility for providing a written plan lies with the research organisation, it should be developed in consultation with and with the agreement of the student.

If this arrangement is used, then the student's funding end date and submission due date would only be extended for the period of sick leave taken during the phased return. This should not be used where there is a clear need for the student to move to part-time on a longer- term basis.

Please note that the sick leave element of a phased return would be outside of the standard 13-week maximum limit.

TGC 8.3 Annual Leave

Reasonable paid holidays, a minimum of 30 days to a maximum of eight weeks per year to include public holidays is recommended and should be allowed for by Supervisors (pro rata for part time Students). Students undertaking work in collaboration with non-academic partners are expected to consider their obligations to those partners in planning leave.

TGC 8.3.1 Other leave

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Research Organisations are expected to have a policy in place to support students requiring short-term time off for emergencies and/or compassionate leave, giving due consideration of requests in such circumstances. This should provide for paid and unpaid leave, dependent on the individual circumstances. At a minimum, bereaved parents should be entitled to two weeks paid leave in the event of the death of a child under 18 years of age. For other emergencies and/or compassionate leave the exact number of paid days will depend on the individual circumstances but would not usually be more than 5 days.

Below is a list of examples for which paid leave should normally be provided. It is not exhaustive, and discretion is given to the training grant holder to determine whether the nature of the circumstance warrants paid leave.

- death of a dependant and/or close relative or close friend, including attending the funeral,
- stillbirths after 24 weeks
- serious illness/injury involving a student's dependant, which requires immediate emergency medical attention or serious illness/injury, requiring immediate short-term care at home when the student is the only person who can provide such care,
- dealing with any emergency situation reasonably necessitating the student's presence at home.

The RO must extend the funding end date to offset a period of emergency/compassionate leave where the student requests this.

TGC 8.4 Absence Costs

Please refer to Training Grant condition.

TGC 9 Financial Reporting

When completing the Final Expenditure Statement (FES), all costs must reflect the actual expenditure incurred.

If there are exceptional reasons that will prevent submission of the Expenditure Statement by the due date, a written request may be made via the Grant Maintenance facility in Je-S for the submission period to be extended. This must be submitted before the due date passes.

If an Annual Statement has been issued, the Research Organisation must confirm by returning the Statement that:

- Expenditure has been incurred in accordance with the grant conditions
- That grants showing as 'current' are continuing.

No further payments will be made until the Annual Statement has been received and accepted by Us.

TGC 10 Sanctions

Please refer to Training Grant Condition.

TGC 11 Exploitation, Impact and Acknowledgement Ownership of Intellectual Property

In individual cases, We reserve the right to retain ownership of intellectual assets, including intellectual property (or assign it to a third party under an exploitation agreement) and to arrange for it to be exploited for the national benefit and that of the Research Organisation involved.

Should this right be exercised, further details may be set out in an additional grant condition if the intellectual property or asset is foreseen before the grant is awarded.

Collaboration Agreements

Where the research is associated with more than one Research Organisation and/or other project partners, the basis of collaboration between the organisations including ownership of intellectual property and rights to exploitation, is expected to be set out in a formal collaboration agreement in a way that is proportionate to and appropriately reflects the exact nature of the collaboration. It is the responsibility of the Research Organisation to put such an agreement in place. The expectation

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is that collaboration agreements (CA) are in place within six months of the grant start date. Where a project may be at risk without a formal CA in place before the project begins, additional grant specific conditions of for the individual award will specify it that a CA must be in place either before the project begins or within a specified timeframe, in the additional T&Cs. A signed CA can be requested by UKRI Funding Assurance at any point in time after six months of the grant startdate.

Exploitation

Every reasonable effort should be made to ensure that intellectual assets obtained in the course of the research, whether protected by intellectual property rights or not, are used to the benefit of society and the economy. Research outcomes should be disseminated to both research and more widespread audiences, for example to inform potential users and beneficiaries of the research.

Arrangements for collaboration and/or exploitation must not prevent the future progression of research and the dissemination of research results in accordance with academic custom and practice. A temporary delay in publication of research findings is acceptable in order to allow commercial and collaborative arrangements to be established.

Acknowledgement and Recognition

There should be suitable recognition and reward to all parties who undertake activities that deliver benefit through the application of research outcomes. The Research Organisation must ensure that all those associated with the research are aware of, and accept, these arrangements.

Research publications must acknowledge funding received from UKRI Research Councils. This includes, but is not limited to, research articles published in journals, conference proceedings and publication platforms, and monographs, book chapters and edited collections, and includes versions of outputs deposited institutional or subject repositories. Please see details on how to acknowledge funding at <https://www.ukri.org/manage-your-award/publishing-your-research-findings/acknowledging-your-funding/#contents-list>.

In the case of doctoral theses funded by the Councils, metadata describing the thesis should be lodged in the institution's repository as soon as possible after award and a full text version should be available within a maximum of 12 months following award. It is expected that metadata in institutional repositories will be compatible with the metadata core set recommended by the ETHOS e-thesis online service.

When the thesis is lodged, You should ensure that the sponsor name and the name of the funding Council(s) are included in thesis repositories, e.g. Arts and Humanities Research Council, Biotechnology and Biological Sciences Research Council etc.

Publication Costs

If use of UKRI Open Access Block Grant funding is not possible then the flexibility within the Training Grant should be used to cover open access publishing costs for research articles that are in-scope of the UKRI Open Access policy.

TGC 12 Disclaimer

Please refer to Training Grant Condition.

TGC 13 Status

For clarity, all sub-contracts that sit under a UKRI Grant must be subject to the exact same terms and conditions of the UKRI Grant. This includes jurisdiction and applicable law, meaning that any changes to the UKRI Grant resulting from a change in government policies will also apply to any sub-contracts.

Appendix A - Changes to terms and conditions related to COVID-19 Pandemic Extensions

Where an extension is applied to a student's funded period due to disruption caused by the COVID-19 pandemic, this may be done so in addition to any extensions covered by **TGC 6.1.1**, even if this would exceed the maximum extension allowed as detailed in section **TGC 6.1.1**.

Sick Leave

TGC 8.2 normally requires a medical certificate and provides for costed extensions for sick leave up to 13 weeks in a 12-month period. Recognising the exceptional circumstances of the COVID-19 pandemic this condition will not be applied to COVID-19, or new or exacerbated conditions linked to the pandemic and the government response to it.

The sickness period of students who are ill with COVID-19 or a COVID-related condition (for example increased mental health issues due to lockdown) can be considered separately from **TGC 8.2**. For cases related to COVID-19, sick leave can be claimed for up to 28 weeks within a 12-month period. Where students have both a covid related and another illness in a 12-month period, they can receive a maximum of 28 weeks paid sick leave across both illnesses but, in line with the standard terms and conditions, no more than a maximum of 13 weeks for the non- COVID related illness within that 28-week limit.

Universities are asked to satisfy themselves that there is enough evidence that the student has had a period of sick leave without putting an undue burden of proof on the student (it may not be possible for the student to obtain a medical certificate during that time). For example, in line with government guidance provided in relation to statutory sick pay, the following evidence may also be used:

- An isolation note from NHS111
- Notification from the NHS or Public Health Authorities that they need to self-isolate
- A shielding note from their doctor or Public Health Authority advising them to shield
- A letter from their doctor or healthcare professional confirming the date of their procedure if they've been advised to self-isolate before going into hospital for surgery

If a student is shielding, and are not able to work from home, they can use their shielding letter to claim sick pay. They should receive sick pay for the period detailed in their shielding letter. Students can claim for more than one period of shielding. We consider sick leave for shielding separately to other sick leave. This means time off for shielding does not come out of the student's normal sick leave allowance.

Changes to mode of study

We fully recognise that some students would be unable to work their usual hours during the crisis. The purpose of the additional extensions process is, in part, to ensure that these students can complete their studies and they do not need to move to part-time modes of study. However, there may be circumstances in which a student wanted to change their mode of study in response to the pandemic, for example where it has resulted in changes to personal or household circumstances (such as a partner no longer working), or as part of redeployment activity. In such cases a change in the mode of study is permitted, whether from full to part-time or vice versa.

UKRI will allow the number of mode changes to exceed the maximum set out in **TGC 7.1.1** where the additional mode changes are directly related to the pandemic.

Costs for short term events and activities

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Recognising the exceptional circumstances due to the COVID-19 pandemic, UKRI will allow the cost of attending postponed events and/or activities to be drawn from the training grant even if beyond the student's funded period, providing it takes place before their thesis submission.

Activities/events organised by the UKRI training grant holders for the wider cohort will be considered as exceptional circumstances, with those students who have submitted their thesis allowed to attend and draw the cost of attending the activity from the grant.

UKRI will not cover any other costs outside the funded period as per condition **TGC 4.8. Costs for home working by students.**

The purchase of equipment to support students' homeworking may be considered by the training grant holder and the costs drawn from the grant should they wish to allow such support.

We would not expect equipment specifically intended for research purposes to be purchased (e.g. high-power computing equipment), nor would we expect the grant to cover office equipment (e.g. computer) if the university normally provides these for students. Principles for agreeing equipment purchases should be determined to ensure all students supported by the training grant are treated fairly.

As an example, UKRI's approach to supporting its own staff is that:

- Total purchases must not exceed £500 and should enable office-typework.
- Equipment may only be purchased where the individual does not have existing equipment (such as their own monitors) that can be utilised.
- All equipment purchases must be agreed in advance with the line manager. In the first instance, the individual is required to purchase the equipment and then claim this cost back, but alternative arrangements can be explored for staff unable to do so.
- Any equipment purchased remains the property of UKRI.

The costs specifically related to facilitating the studies of those with a disability should be requested through the **Disabled Student Allowance** scheme.

Additional costs permitted to be charged to the Training Grant

Travel costs

All National and International rules must be adhered to with regard to non-essential travel. Where travel needs meet regulations and is deemed absolutely necessary in delivering the work for which the studentship funding has been awarded, UKRI will allow costs to be charged to the grant. These include costs for quarantine hotels and other COVID related costs.

Annex A

Definitions

Council: Any of the bodies listed under the Introduction.

Fees: The funds required by a University for a Student to register for a higher degree.

Fees Only Award: The term used for a Studentship, which excludes funds for a stipend.

Funding Assurance Programme (FAP): A programme of visits and office-based tests to seek assurance that grant funds are used for the purpose for which they are given and that grants are managed in accordance with the terms and conditions under which they are awarded.

Je-S Student Details (Je-S SD): Our web-based data collection system, which Research Organisations use to return details of the Students and Student research projects, funded from the Training Grant.

Offer Acceptance: A document to be completed and returned by the Research Organisation either accepting or declining the Training Grant.

Official Start Date: The official start date of the Training Grant, as set out in the Start Confirmation.

Research Organisation (RO)/Grant Awardee: The organisation to which the Training Grant is awarded and which takes responsibility for the management of the research training programme and the accountability of funds provided.

Specific Terms and Conditions of Training Grant/Specific Conditions: The specific conditions of Training Grant required in addition to the Standard Conditions on a Training Grant by an individual Council of UKRI.

Standard Terms and Conditions of Training Grant/Standard Conditions: The Standard Terms and Conditions of Training Grant published on UKRI's website at: www.ukri.org/apply-for-funding/before-you-apply/your-responsibilities-if-you-get-funding/meeting-ukri-terms-and-conditions-for-funding/

Start Confirmation: A document to be completed and returned to UKRI by the Research Organisation, confirming the Official Start Date on which the Training Grant commences.

Stipend: The funds awarded by the Research Organisation to Students to cover their maintenance while undertaking postgraduate training leading to the award of a postgraduate degree.

Students: The term used to identify postgraduates who are funded through the Training Grant.

Studentship: The term used for the funding award made by a research organisation to a Student for the purpose of undertaking postgraduate training leading to the award of a postgraduate degree.

Supervisor: An individual with formal responsibility for providing support and guidance to a Student during their Studentship.

Third Party: any person/organisation to which the award holding RO passes on any of the Training Grant funds awarded by the Council.

Training Account: The term used to refer to the multiple Training Grants held by a Research Organisation from the same Council.

Training Grant: A grant providing funds for the training of Students where the training leads to

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the award of a recognised postgraduate qualification.

Training Grant Offer Letter / Offer Letter: An official document setting out specific details of the Training Grant, including the start and end date, Training Grant value and any Specific Conditions of the Training Grant as required by the relevant Council.

Training Grant Period: The duration of time between the Training Grant start and end date.

Training Grant Holder: The Research Organisation to which the Grant is awarded, and which takes responsibility for the management of the Project and accountability for funds provided.

Training Grant Terms and Conditions: The Standard Terms and Conditions of Training Grant together with the Specific Terms and Conditions of Training Grant that together comprise the basis on which the Training Grant is awarded to the Research Organisation.

Annex B

International Eligibility criteria for UKRI funded studentships

Please note that this guidance is for students who will be recruited to start from the 2021/22 academic year.

To be classed as a Home student, candidates must meet the following criteria and the associated residency requirements:

- Be a UK National, or
- Have settled status, or
- Have pre-settled status, or
- Have indefinite leave to remain or enter

UK National

The UK includes the United Kingdom and Islands (i.e. the Channel Islands and the Isle of Man). In terms of residency requirements for UK nationals, for courses starting from 1 August 2021, candidates will continue to be eligible for home fee status as long as:

- they were living in the EEA or Switzerland on 31 December 2020, and have lived in the EEA, Switzerland, the UK or Gibraltar for at least the last 3 years before starting a course in the UK
- have lived continuously in the EEA, Switzerland, the UK or Gibraltar between 31 December 2020 and the start of the course
- the course starts before 1 January 2028

Eligibility on these grounds will only be available for courses starting up to seven years from the last day of the transition period (i.e. on 31 December 2027 at the latest).

Children of UK nationals will also be eligible for support on the same terms, even if they are not themselves UK nationals, as long as both the UK national and the child meet the conditions listed above.

This is following the announcement made by <https://www.gov.uk/guidance/uk-nationals-in-the-eea-and-switzerland-access-to-higher-education-and-19-further-education>

This will not apply to Irish nationals living in the UK and Ireland whose right to study and to access benefits and services will be preserved on a reciprocal basis for UK and Irish nationals under the Common Travel Area arrangement.

EU Settlement Scheme

EU, EEA or Swiss citizens can apply to the EU Settlement Scheme to continue living in the UK after 30 June 2021. If successful, applicants will get either settled or pre-settled status.

Settled status

Applicants will usually get settled status if they:

- started living in the UK by 31 December 2020
- lived in the UK for a continuous 5-year period (known as 'continuous residence')

Five years' continuous residence means that for 5 years in a row they have been in the UK, the Channel Islands or the Isle of Man for at least 6 months in any 12-month period. The exceptions are:

- one period of up to 12 months for an important reason (for example, childbirth, serious illness, study, vocational training or an overseas work posting)
- compulsory military service of any length
- time spent abroad as a Crown servant, or as the family member of a Crown servant
- time spent abroad in the armed forces, or as the family member of someone in the armed forces

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If they have settled status, they can spend up to 5 years in a row outside the UK without losing that status. If they are a Swiss citizen, they and their family members can spend up to 4 years in a row outside the UK without losing their settled status.

Pre-settled status

If they do not have 5 years' continuous residence when they apply, they will usually get pre-settled status. They must have started living in the UK by 31 December 2020.

Those with pre-settled status will qualify as a home student if they have 3 years residency in the UK/EEA/Gibraltar/Switzerland immediately before the start of their course.

It is then possible to apply to change this to settled status once they have got 5 years' continuous residence. They must do this before the pre-settled status expires. They can stay in the UK for a further 5 years from the date they get pre-settled status.

If they have pre-settled status, they can spend up to 2 years in a row outside the UK without losing their status. They will need to maintain their continuous residence if they want to qualify for settled status.

Indefinite leave to remain (ILR) or Indefinite leave to enter (ILE) Indefinite leave to enter or remain (ILR) are types of immigration status.

It is possible to continue to live in the UK without applying to the EU Settlement Scheme if they have indefinite leave to enter or remain in the UK. However, if they choose to apply (and meet all the other conditions), they will get 'indefinite leave to remain under the EU Settlement Scheme' - also known as settled status.

They can spend up to 2 years in a row outside the UK without losing their indefinite leave to enter or remain status.

Those with Indefinite leave to enter or remain (ILR) will qualify as a home student if they have 3 years residency in the UK/EEA/Gibraltar/Switzerland immediately before the start of their course.

International Student

If a candidate does not meet the criteria above, they would be classed as an International student.

Temporary absence

A UK national may have spent an extended period living outside the UK, either for study or employment and still be eligible for home fee status. Candidates in these circumstances are required to show that they have maintained a relevant connection with their home country and therefore claim that the absence was temporary. 'Temporary' does not depend solely on the length of absence.

If a candidate has been prevented from returning to the UK prior to the start of the course due to the Covid-19 pandemic then this can be considered as a temporary absence and the three year residency immediately before the start of their course rule will not be impacted. Candidates in these circumstances are required to show that they have maintained a relevant connection with the UK during their absence.