

Annotated revisions of UKRI Training Grant Guidance 2025

In January 2025 we published an annotated version of the Standard Terms and Conditions of Training Grant, setting out changes discussed in 'Policy Statement: Review of the UKRI Standard Terms and Conditions of Training Grant' ("the policy statement").

As set out in the policy statement, we also committed to publishing revised Training Grant Guidance in April 2025. In developing this document we have considered feedback from colleagues in the sector, notably the feedback from the panel we established to review the proposals, as well as questions we have received at webinars and other events. We welcome further feedback on this version of the guidance by 1 July and will publish a final version on 1 September 2025. Feedback should be sent to: talent@ukri.org

While we have sought to compile all the expected changes to this annotated training grant guidance, some further changes are expected later this year. In particular, amendments reflecting the transition from the Joint-electronic Submission (Je-S) system to the new studentship data system and The Funding Service (TFS). References to annual reports are also being reviewed. Some other changes may also be made. Any further changes will be incorporated into the version published on 1 September.

The changes to the Standard Terms and Conditions of Training Grant and this training grant guidance apply to all training grants, including existing grants. However, leave, extensions and other provisions that enable support for students should be provided under the rules which were in place at the time.

In the event of a discrepancy between this document and the 'Standard Terms and Conditions of Training Grant' the latter takes precedence.

In this document, existing language that is to be removed is red and strikethrough (~~example~~). New language is in green (example). Some language has been moved and is highlighted in purple (example). An alternative colour scheme is used in the 'Annotated revisions of UKRI Training Grant Guidance 2025 (accessible version for colourblind users)', available on the UKRI website.

If you require these changes in any other format, please email: talent@ukri.org.

Please note that the training grant conditions are subject to further changes.

| Version Number | Status | Revision Date | Summary of Changes |
|----------------|--------|---------------|---------------------|
| Version 1 | Live | April 2025 | Document published. |



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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~~ any of UK Research and Innovation's (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)
Research England
Innovate UK

The guidance should also be considered by organisations in receipt of funds from other institutions that refer to the UKRI Standard Terms and Conditions of Training Grant ("the TGCs").

This guidance is primarily for Project Leads and other staff who work on Training Grants. Students and their Supervisors may find this guidance helpful but should check against the provision at the organisation in which they are based as to how the entitlements are implemented for them. ~~Guidance on changes to terms and conditions due to COVID-19 pandemic included in Appendix A.~~



TGC 1 Variation to Terms and Conditions

The latest version of the ~~TGCs Terms and Conditions~~ apply to both new and existing Training Grants unless stated otherwise, however these do not supersede any Specific Training Grant Terms and Conditions. For auditing purposes, the ~~TGCs 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~~ TGCs 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 ~~TGCs Terms and Conditions~~.

TGC 2 Accountability & Responsibilities of the Research Organisation

Through our councils we fund ~~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 the UKRI website. ~~their individual websites.~~

It is a requirement that You and any Third Parties you collaborate with ensure that both your Students' research and the training they receive is delivered in a way that is compliant with all relevant legal, regulatory and ethical requirements.

The TGCs refer to a number of specific legal and regulatory requirements, however the conditions are not intended to be comprehensive list of all external requirements on You. You should also be aware that legal and regulatory requirements change from time to time and that You need to maintain your compliance. UKRI is not able to provide You with legal advice. Therefore, Project Leads and other staff working on a training grant are expected to draw on the expertise of professionals as necessary. Regulators and representative bodies may also provide advice or guidance on how to ensure compliance with certain requirements. You should also ensure staff working on a Training Grant (including Supervisors) have an appropriate level of awareness of the legal and policy context in which they are operating, including undertaking training provided by their employer.

We generally expect that Research Organisations and Third Parties will have policies or procedures that, so long as they are implemented appropriately for Your Students, will enable individual grants and or projects to operate in a compliant manner. However, it may be worth ensuring that Project Leads and other staff are familiar with the following:

- **Students generally have a right to be treated in a way that is clear, transparent and fair.** As well providing high quality training, this will ensure that You are compliant with consumer law (see **TGC 2.20**). The [Competition and Markets Authority \(CMA\) has guidance](#) on compliance with consumer law that, though initially written for undergraduate education, is also likely to apply to most doctoral students. Note that the requirements start with information provided to students before they apply for their course. Consumer law may not apply to some students; if you believe this applies to Your students we recommend you seek legal advice.
- **Complaint handling procedures and practices must be easy to locate, accessible, clear and fair to students.** The CMA states that this is a requirement of consumer law. We require that your complaints processes have regard to advice from the relevant ombudsman. These vary by nation:
 - The Office for the Independent Adjudicator for Higher Education (OIA) in England and Wales
 - The Scottish Public Services Ombudsman (SPSO)
 - The Northern Ireland Public Services Ombudsman (NIPSO)

The OIA in particular has a Good Practice Framework that is written for higher education providers and good advice on resolving issues before they manifest as formal complaints.



- **If You are employing students, ensure You don't give them an oral or implied contract.** In other words our expectation is that any employment is in writing. See: teaching and demonstration, below.
- Other protections are afforded to students as set out in the TGCs and elsewhere in this guidance.

Statement of Expectations

In addition to the legal, regulatory and ethical requirements, You are also expected to deliver training in a way that is consistent with the relevant UKRI statements of expectations. This is a requirement under **TGC 2.9**. For funding opportunities launched in or after 2024, this is the [Statement of Expectations for Doctoral Training](#). The statement covers:

- Support and student experience
- Research skills and methods
- Professional and career development

For grants made earlier, the 2018 Statement of Expectations for Postgraduate Training applies, which is available from the same link above.

You are expected to make adequate facilities and resources are available in order to deliver against the statement and your other obligations.

~~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. [See: Equality, Diversity and Inclusion]~~
- ~~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 [See: Health and Safety]~~
- ~~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. This includes but is not limited to:

- Their Research Organisation to disclose to **UKRI** ~~the Council~~ any information that ~~the Council~~ **UKRI** 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 UKRI's behalf to contact Students both during and beyond



the duration of their Studentship for evaluation purposes, regarding funded courses, or to invite Students to events or conferences that ~~We the Councils~~ fund.

- Their Research Organisation to provide data on equality and diversity to allow UKRI ~~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 and will be treated in confidence and in line with all relevant data protection legislation.
- Their Research Organisation to provide any such information requested on ~~UKRI's 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.

It is also helpful to remind students and staff members that students' names and summaries of their research projects are made available to the public, for example through UKRI's Gateway to Research. They should use of plain English to support accessibility. Project titles and summaries should be short, factual and easy to understand. They should avoid jargon and be written in the knowledge they are publicly accessible and searchable.

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 on our website:

~~<https://mrc.ukri.org/research/policies-and-guidance-for-researchers/managing-risks-of-research-misuse/>~~ [Managing risks of research misuse \[UKRI\]](#)



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 \[UKRI website\]](#).

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/~~ in our [policy on the governance of good research practice \[UKRI website\]](#)

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 \[NC3Rs website\]](#). 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 of Staff, Students and Research Participants

Appropriate care must be taken where Students and Supervisors are [studying or](#) working on and off-site. This includes [studying or](#) 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~~ [ensure](#) 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.~~ [Health and safety advice must not be ignored even to meet a grant related objective.](#)

Research Organisations ~~must~~ [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.

[We specifically require that an individual risk assessment is conducted when a student informs You \(or a Third Party where they are based\) that they are pregnant, breastfeeding, or have given birth in the last 6 months. This is likely to take a similar form to the health and safety assessment required for workers when pregnant, in a period of maternity or while breastfeeding.](#)

~~, including, where appropriate, to explore reasonable adjustments for disabled students.~~ [You should also provide health and safety assessment for students who are disabled, giving consideration to](#)



reasonable adjustments where appropriate (see also **Equality, Diversity and Inclusion**, below). [The Health and Safety Executive has guidance that may be applicable to your students \[HSE website\]](#). ~~For good practice that may be applicable to PGR students, see:~~

You should be mindful that, while health and safety is of paramount importance, actions You take should be proportionate, particularly if there is a risk that action puts a person at a substantial disadvantage because of a protected characteristic. You may need to consider additional steps to mitigate any disadvantage for a student.

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.

~~There must be effective and verifiable systems in place for managing research and training quality, progress, and~~ You must also consider the health, safety and well-being of patients and other research participants, in line with the [UK Policy Framework for Health and Social Care Research \[NHS website\]](#) (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 [UKRI website: Human participants in research \[UKRI website\]](#) ~~MRC website: <https://mrc.ukri.org/research/policies-and-guidance-for-researchers/>~~.

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. This 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.

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

Our training grant conditions state that You are expected to ensure that equality, diversity and inclusion is considered and supported at all stages throughout the lifetime of the Training Grant, in alignment with [Our policies and principles \[UKRI website\]](#).

You must ensure that the training and research is compliant with the provisions of [the Equality Act 2010 in England, Wales and Scotland \[legislation.gov.uk\]](#) and [equivalent legislation in Northern Ireland \[Equality Commission for Northern Ireland \(ECNI\)\]](#) (“the Acts”). There is advice on what this means for higher education providers in England, Wales and Scotland:

- The Equality and Human Rights Commission (EHRC) [Technical guidance on further and higher education \[EHRC, 2014\]](#) provides guidance on the law for higher education providers in England, Wales and Scotland, including on application of the Public Sector Equality Duty.
- EHRC’s [Advice note for the higher education sector from the legal case of University of Bristol vs Abrahart \[EHRC, 2024\]](#) contains updated advice on providing reasonable adjustments to disabled students.

Supporting disabled students, including the Disabled Students’ Allowance Framework

The Acts require You to provide reasonable adjustments to disabled people (including anticipatory adjustments), with some additional provisions for education providers. You should ensure that You comply with all such requirements. The responsibility for ensuring that You provide disabled students with reasonable adjustments lies with the education provider in which they are based, irrespective of whether these are funded by Us.

In the training grant conditions, we require You to inform persons who may become UKRI funded students that if they are disabled they can request reasonable adjustments at the earliest opportunity, for example in offer letters you send to students. You should ensure that students are able to follow up and get reasonable adjustments put in place for the start of their studentship where this is appropriate. You should also ensure that students can seek reasonable adjustments throughout the whole period they are a student.

TGC 3.4.3 requires that ROs and project partners have a policy on the provision of reasonable adjustments for disabled students. The policy is likely to apply across the whole of the organisation or all research students in the organisation, rather than an individual policy for a single UKRI grant, though this is not a requirement. Where the policy is not specifically for our training grants, it should still demonstrably account for the support available for UKRI funded students. Individual organisations should ensure all staff working on grants, including supervisors, adhere to the policy. The grant’s Project Lead should verify to their own satisfaction that all partners that host students funded by the grant have such a policy and take reasonable steps to address any significant compliance concerns (see **TGC 2.1**).

In the training grant conditions, disability has the same meaning as in the Acts. The Acts state that a person has a disability if they have a physical or mental impairment, and the impairment has a substantial and long-term adverse effect on the person’s ability to carry out normal day-to-day activities. A simple guide to the meaning of disability is available from the [Equalities Advisory and Support Service \(EASS website\)](#) while the [UK government has published more extensive guidance \[gov.uk\]](#), it is worth noting that the definition is broad and can cover impairments caused by a wide range of health conditions.

Because the definition tends to focus on the impairment, not the health condition from which the impairment arises, Your policy should reflect contemporary guidance on assessing disability. This should include what proportionate measures You require to verify what a student says about their health condition or requirements, or where You require expert evidence or recommendations to make well informed decisions. A degree of procedural formality will generally be appropriate. Where a student has a severe or urgent condition, You may need to make reasonable adjustments without a diagnosis or medical or expert evidence. Your policy is also likely to need to reflect Your organisation's view on assessing where an impairment puts a student at a substantial disadvantage, and how to consider whether an adjustment is reasonable.

UKRI training grants provide flexibility that may be helpful to you in supporting disabled students, including use of up to 52 weeks Medical Leave, Additional Leave (including disability leave), and additional funding where eligible under the UKRI Disabled Students' Allowance (DSA) Framework. We have no specific conditions on whether or what medical evidence we expect You to review to be eligible to claim the costs of this support from UKRI. Provided Your approach is consistent with Your policy, and Your policy is consistent with EHRC or ECNI (as appropriate) guidance, We are content to accept Your judgement.

As the Acts' requirements to make reasonable adjustments place a legal onus on You, **TGC 3.4.4** notes that there may be cases where You are obliged to make an adjustment for a student even though there is a tension with our requirements. If this is the case, You should make the adjustment, but note that UKRI is under no legal obligation to fund it. We require that You report any such instance to Us, as this will enable Us to consider our support. If contacting Us, You should already have made a judgement that the adjustment is reasonable (or is highly likely to be reasonable) under the terms of the Acts. Where an issue is raised with Us, we will seek to provide a response within 20 working days. If we are unable to provide You with a final response in that time, we will give details of the progress we have made, the reason for the delay, and a target date for when we are aiming to respond. Note we cannot determine whether it is or is not reasonable for You to provide additional adjustments in individual cases, as this is Your responsibility.

In the training grant conditions we note that failure to make reasonable adjustments for a disabled student in a timely fashion may result in the Studentship being extended at cost to the RO. This might happen where the student has raised a grievance or complaint (for instance through Your internal process, an ombudsman, or legal action) and is awarded additional time.

Disabled Students' Allowance Framework

The Disabled Students' Allowance (DSA) Framework is intended to help with additional expenditure for the costs of study-related requirements that may be incurred where a student's physical or mental impairment means additional support is needed to undertake a UKRI funded Studentship (for full eligibility criteria, see the UKRI DSA Framework). The allowances can cover the cost of non-medical personal assistance, items of specialist equipment, extra travel costs and general expenses.

Research Organisations should normally arrange for an impartial assessment of need. A new assessment may not be required if, for example, the RO has an existing assessment from a previous course that is satisfactory for the doctoral programme. Costs associated with DSA do not come out of the overall grant. Instead, DSA payments are added to the grant funding. 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 [the UKRI Disabled Students' Allowances Framework \[UKRI website\]](#).



Equality, Diversity and Inclusion Training

We require You to ensure staff and Students receive suitable training, information and support to ensure compliance with Your obligations. This should include making students aware of the [Equality Advisory Support Service \(EASS\)](#) which assists individuals on issues relating to equality in England, Scotland and Wales. ECNI provides a similar service in Northern Ireland. You have significant flexibility on how You deliver this information, provided that the training grant condition is adhered to. For example, it could be via an email. You should maintain a record to demonstrate that You have complied with the requirement if required to do so by our assurance processes.

The Public Sector Equality Duty

Governing bodies of higher education institutions are public bodies for the purposes of the Public Sector Equality Duty (PSED), as are some other research organisations. If PSED applies to You, You should ensure compliance. Guidance on PSED for decisions makers (and on whether PSED applies to You) is available from the [Government Equalities Office \[.gov.uk\]](#).

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 3.6.

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 policies.

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

You can change how many Studentships you intend to fund using the Training Grant without permission from Us (unless stated otherwise in the Training Grant Agreement), as long as you comply with the TGCs, any specific conditions in your Training Grant Agreement, and the relevant Statement of Expectations. All Studentships funded through the grant must be in support of Students who are studying for a postgraduate research qualification.



Stipend

TGC 2.10 sets out that the level of stipend awarded to eligible Students must be at least equal to Our minimum rates for the relevant academic year. [We publish our minimum stipend and indicative fee level on an annual basis on the UKRI website.](#)

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.

Where we change the rate of minimum stipend, the change should be applied from 1 October. The training grant condition gives You some flexibility, meaning that You can pay the new rate shortly before or after 1 October. This is to help with Your compliance efforts and administration of students. For example, if You normally pay student stipends on the 14th of each month, You could increase the rate from 14 October, without having to calculate different rates for part of the month.

Alternatively, You may implement the new minimum Stipend before 1 October. For example, if You would normally pay the stipend in advance on the 28th of each month, You can increase the stipend from 28th September. The flexibility may also be helpful if You have agreed that new students will start before 1st October and You need to pay them the rate as advertised to them.

You must not have a policy of increasing stipends for UKRI funded students on the anniversary of their start date. For example, we expect a student who starts on 1st January to receive any stipend uplift from around 1st October that year, and not 1st January the following year.

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 UKRI. The TGCs state that funding should only be drawn from one grant at one time. Funding of interdisciplinary Student research projects is encouraged where the Student's research project aligns with the aims of the Funding Opportunity. UKRI expects the full duration of the Studentship to be funding from a single Training Grant wherever possible. A studentship may be reallocated to another Training Grant providing that it is: (1) necessary for the continuation of the studentship AND (2) not prohibited by any Special conditions of either Training Grant AND (3) aligns to the investment objectives and aims of both Funding Opportunities.

Where less than 100% of the total cost of the studentship is being drawn from UKRI, the ~~the Training Grant or Training Account of a single Council. The~~ remaining costs ~~can~~ must 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.~~



A Student must not be expected to bear the cost of any shortfall in funding nor pay costs beyond the level paid by UKRI. This means that You cannot charge the student additional fees for their Studentship.

There is one exception allowed in the conditions. Where You have an international fee that is higher than the home fee, Our conditions allow you to charge the Student the difference between the two. You do not have to charge the student the difference and, while You cannot charge the difference to the UKRI grant (or any other UKRI funding), You are also able to waive the fee, or to claim the difference from other sources, for example an RO or a co-funder. Note that any fee charged directly to a Student is still likely to be subject to consumer law (see above).

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. 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~~ Your 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 in our [position statement \[UKRI website\]](#). ~~on the UKRI website and its position statement.~~

The costs of additional caring responsibilities, including childcare, ~~which are~~ BOTH:

- (1) beyond that required to meet the usual requirements of the Studentship, ~~AND~~
- (2) ~~which are~~ directly related to the project or broader 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~~ ~~studying pattern~~ 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.

Alcohol costs are not permitted and should not be sought as an eligible cost.

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 For example, when travel falls beyond~~



For example, costs for travel after the training grant period, ~~these costs~~ cannot be charged to the Training Grant even if the tickets ~~are etc can be~~ purchased in advance.

The only exception is for certain costs associated with UKRI's DSA Framework, where, in certain circumstances, we will reimburse costs incurred in advance of the studentship itself starting, or after the end of the funded period. You should check the DSA Framework for details. Where these costs are incurred before the grant start date, a DSA application should be made in the normal way and payments will be made in arrears. If the cost is incurred after the grant has ended (for example, because an existing adjustment needs to be funded after the end of the Studentship until the student completes their degree) we will need to consider what arrangements to put in place, as we would with an extension.

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 Supervisors' 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.

If You are employing Students to do additional work, we require that this is not an implied or oral contract meaning it needs to be written. We don't govern any employment relationship You have (we do not need to review contracts), but you should be aware that employment law applies and that HM Revenue and Customs (HMRC) audits higher education providers from time to time. Our conditions might support Your compliance with HMRC's guidance, but ultimately the responsibility for being compliant rests with You.

~~Disabled Students Allowance [moved]~~

~~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 the UKRI 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

You are required to comply with any relevant tax law. It is generally assumed that payments made as part of UKRI Studentships are ~~Payments made as part of a UKRI funded Studentship are training awards and are~~ not regarded as income for income tax purposes. However, You should seek professional advice should You undertake activity that may create a tax liability. 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 ~~own~~ 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.

TGC 5 Starting Procedures and Training Grant Arrangements

TGC 5.1 Starting procedures

Please refer to Training Grant Condition 5.1.

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.~~

You should support Students to complete their doctoral training, including wider training and submission of their doctoral thesis or equivalent, within their funded period by ensuring individual doctoral projects are designed to be achievable within that timeframe

Provision can be made to extend the funding period – see **extensions** (below).

Flexible study

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~~ should ensure Students are not working excessive hours or to the detriment of their wellbeing. It may sometimes be necessary for Students to adopt particular hours to complete an experiment or study (with reasonable adjustments made for disabled students if appropriate), but on the whole Students who wish to adopt a “normal” week should not be disadvantaged. ~~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>.~~

In some settings, Students may be expected to attend a laboratory or other facility for specific hours each day. In such circumstances we require that You consider requests for flexible study options. There is no specific requirement that You accept any such request, though we remind You of Your obligations under consumer and equality law (see above).

Mode of Study (full-time or part-time)

Students may be full-time or part-time and should be made aware that funding for part-time study is an option. You may decide on the period of support for individuals.

Our conditions state that You must offer the option of studying on both a part-time and full-time basis with a minimum of 50% of Full-Time Equivalent (FTE) required. You are encouraged to consider offering different levels within that range (for example, 60% or 80% FTE), particularly where this will benefit diversity or other objectives, though this is not a requirement. We do not restrict how many times a student may change their mode of study.

Note You may reject a Student's request to change their mode of study. In considering requests for changes in mode of study, and in the treatment for Students with different modes, We remind You of



Your obligations under both consumer and equality law (above). ~~Research Organisations and Supervisors should consider how~~ Consideration should be given to the extent to which accepting or refusing requests to different modes of study will impact the ability of the student to complete their doctoral study within the Studentship. In particular, 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. Requests to move a Student to a lower FTE in the final stages of their degree (for example, the final 6 months) should normally be rejected unless there are exceptional circumstances (for example, where it is necessary due to a Student's health).

You may offer less than 50% FTE where You judge that this is a reasonable adjustment for a disabled person. The judgement as to what is reasonable for an individual student rests with the RO. As part of Your considerations You will need to be satisfied that the student has a realistic prospect of completing their doctorate, for example, the QAA requirement that they are able, at the end of the Studentship, to demonstrate deep knowledge and understanding of the field of study and originality of thought, either in the creation of new knowledge or in the novel application of existing knowledge.

If You are considering a request for a lower FTE for a disabled student, You should first consider whether other support (such as leave) or other reasonable adjustments are more appropriate, whether instead of, or in combination with, the change to FTE. In general, other adjustments are expected to mitigate the need for a student to move to a lower FTE.

~~Research Organisations and Students should be realistic about such arrangements. It is expected that~~ The period of study ~~will~~ must reflect the percentage of time spent pursuing doctoral studies.

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

In all cases, a students' stipend and fee should only be drawn in line with the student's FTE, for example, a student on 50% FTE would receive 50% of the stipend and the RO 50% of the fee.

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, ~~or as a temporary reasonable adjustment for a disabled student.~~

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 \[UKRI website\]](#).

Placements

Students may undertake a placement or internship where this is either directly related to the Student's training and or provides valuable transferable skills, 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 ~~Studentship~~ ~~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 doctorate** 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 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
- Be an Irish National*

*Irish Nationals eligibility is derived from the [UK Ireland Common Travel Area Agreement \[gov.uk\]](https://www.gov.uk/government/news/uk-ireland-common-travel-area-agreement).

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 and Irish 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.

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, 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 also reminded of Your obligations under consumer law to provide certain information to prospective students (see above).~~

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 Code 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. ~~We have also published~~ [Good Practice Principles in Recruitment & Training at Doctoral Level \[UKRI website\]](#).

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

The TGCs set out extensions for leave or absences, however You should also check Your grant agreement for any specific conditions from your awarding council, for example on extensions for placements or language training. See also: **Placements** (above).

For guidance on extensions that reflect a leave of absence, see **“Extensions (leave of absence)”**, below.

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

Early Submission

In some cases, Students may submit their thesis **or equivalent** prior to the end of their award. Where the Student continues to undertake **work study** that is directly linked to their thesis **or equivalent**, it is permissible for the award to continue to the end of the quarter in which the thesis **or equivalent** is submitted. For example, a Student who submits their thesis **or equivalent** 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 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 **Opportunity's 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 **Graduate Outcomes survey**. ~~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.

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~~ Suspension of the studentship

Note there is an important difference between whether a *Student* is suspended and whether a *UKRI Studentship* is suspended. For the first, providers are likely to have their own regulations on whether a student is considered to be actively studying or if the *Student* is suspended. Those regulations are normally different from UKRI conditions which cover whether funding for a stipend and fee can be drawn from the UKRI grant: if they cannot, the *Studentship* must be suspended. For example, a



Student on medical leave might be suspended (as they are not actively studying) but their Studentship has not been suspended (as a stipend and fee is still being drawn for them).

Sympathetic consideration should be given to requests made by Students for abeyance due to personal or family reasons, with suspension of the Studentship ~~an award~~ limited to a maximum ~~cumulative~~ 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 7.3.

TGC 8 Absence

Students funded by UKRI are entitled to take leave. We have categorised leave into four categories: Annual, Family, Medical and Additional. We have summarised these below but You should check the TGCs for specific details.

You should also ensure that Students and members of staff are aware of what leave is available to Students and when leave could result in an extension to the Studentship, for example in a well-publicised policy on leave and extensions. It may be beneficial to have a single policy across all UKRI students at the provider. Such a policy can provide guidance to Students, Supervisors and individual Project Leads on when paid leave should be taken, if there are any evidence requirements, and when leave can or cannot contribute to an extension to the UKRI funded Studentship. It may also cover any additional regulations or provision from the provider and options for the student if they exhaust the provision for paid leave.

If a Student has a genuine need for leave for any of the specified reasons, then they should be encouraged to take it. However, leave must only be used for the specified reasons. In particular, a Student must not take leave and continue to study over that period.

You must keep records of what Family, Medical and Additional Leave Students take. If you extend a Studentship, you will be asked for this information. Appropriate recording may also help reduce the risk of discriminating against Students. We do not specify how leave should be recorded.

You can supplement Our provision for leave with Your own provision for paid leave (see **TGC 8.0.3**). If You do so, You may move the expected submission date recorded in the Student Portal beyond the Studentship end date.

Family Leave

Under Family Leave, We offer a range of support that, in many ways, closely mirrors that statutory regime for employees. However, there are some small differences. A stipend and fee can continue to be drawn in some, but not all, circumstances, and the Studentship extended. ROs should check the TGCs for specific details of what we will fund.

Family Leave includes:

- Maternity leave
- Partner's or paternity leave (for partners following the birth of a child)
- Adoption leave
- Neonatal care leave
- Parental leave (no stipend)
- Death during the period of maternity



Broadly speaking, as our support mirrors the statutory schemes, we expect the provider will require a similar level of evidence from a student as they would require of a staff member.

We cannot offer participation in the statutory Shared Parental Leave scheme, as the legislation for Shared Parental Leave excludes people who are not employed, including most students. A Student who wishes to take more leave can request unpaid parental leave. It may also be possible to suspend the Studentship.

There is no limit to the number of periods of Family Leave that can be taken during a Studentship. A period of Family Leave will result in an extension to the Studentship. Where this has no impact on the end date of the Training Grant within which the Studentship sits, You must amend the student record but our approval is not required; where it means the Studentship will extend beyond the end date of the Training Grant, You need to raise a grant maintenance request with Us so that We can help manage the grant(s) concerned.

The Research Organisation should have a policy in place (for example, as part of its policy on leave) ~~that requires it to make every effort to~~ on how and when it will 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.

Sadly, some pregnancies are complex and some students will be affected by miscarriage, the death of the baby or the death of the mother or other parent. Any of these cases must be considered with the utmost sensitivity. The conditions on family leave, additional leave and medical leave should be read together and, in combination, should provide support for students in all these circumstances. If you have any questions You should contact Us through the usual channels.

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.~~

~~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 Jo-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

TGC 8.2 Medical Leave

Within the TGCs, a stipend and fee can continue to be drawn from the grant during periods of Medical Leave. Extended periods of Medical Leave can result in an extension to the UKRI Studentship funding - see **Extensions (leave of absence)** (below).

The TGCs state that Medical Leave should be used for any circumstances by which a Student is deemed unfit to study. It may also be used to provide leave to attend medical appointments where flexible study is not possible. Examples of leave that can be supported under Medical Leave are:

- Sick leave (including both physical and mental health)
- Pregnancy-related illness
- Antenatal appointments
- Fertility treatment – a Student experiencing fertility issues and has been medically advised that they require leave, including (but not limited to) undergoing fertility treatment
- Disability-related illness (including chronic illness)
- Disability-related appointments (including for chronic illness) e.g. diagnosis, therapy or treatment
- Gender reassignment – a Student undertaking gender reassignment and has been medically advised that they require leave

It is worth noting that some of the above might be managed through flexible study – for example, most students will not use Medical Leave at all for antenatal appointments. However, there may be Students who have a medical need for a large number of appointments where it is appropriate to manage through Medical Leave.

Medical leave can be used for minor illnesses (some examples include colds, stomach bugs, short periods of influenza). Such illnesses may contribute to the overall limit of funded time a student can take-off but will not contribute to an extension to the Studentship.

Students with chronic or long-term conditions may need to take numerous, shorter periods of Medical Leave. For example, a student may require leave where each individual block of leave is no more than two days, but the cumulative total over the course of the Studentship is a number of months. Provided the relevant conditions on extensions are met, the Student should receive an extension to their Studentship for the Medical Leave taken as a result of that chronic condition.

TGC 8.2.3 requires that You are satisfied that the period of Medical Leave is necessary and reasonable. Having a provider-level policy on leave and extensions is likely to help you meet this requirement. Broadly speaking, the evidence requirements should be proportionate, so a student needing one or two days which does not result in an extension is unlikely to need to provide any additional evidence. In contrast, a student who requires a longer period resulting in an extension will require some evidence, which might be a certificate, letter or equivalent provided by a medical professional, or, if the provider has another process whereby it determines that the student required medical leave, this is also acceptable. We are broadly happy to accept Your judgement on what the appropriate level of evidence is provided you are mindful of the ECHR guidance on disability (see above), and the [Disabled Student Commitments](#)¹ recommendations on minimising requests to share information about a student's disability. Our intent is to give You flexibility to support students in a range of circumstances, including where medical evidence is not readily available or appropriate to request.

Medical Leave is limited to 28 weeks within a rolling 12 month period. For example, a Student (whether part-time or full-time) who starts Medical Leave on 1st January for 28 weeks would not be able to take any further UKRI-funded Medical Leave until 1st January the following year. If a Student is not fit to return to study after exhausting their Medical Leave, the Studentship could be suspended until the Student is fit.

A Student should not return from a suspended Studentship to Medical Leave. Instead, the Studentship should only resume once the Student is fit to resume study (using a phased return to study if appropriate – see below).

The total amount of Medical Leave is capped at 52 weeks across the Studentship. For example:

- A Student studying 100% FTE on a pattern of five days a week would effectively have a maximum of 260 days' medical leave over 4 years (5 years with a year's extension – see below).
- A Student studying 50% FTE on a pattern of five days a week would effectively have a maximum of 130 days' medical leave over 8 years (9 years with the extension – see below).

You can place further regulations on how Students access Medical Leave. For example, a provider may require further limits Medical Leave in the first years of the Studentship to ensure the student can still take Medical Leave in later years. If you do so You would need to ensure You are compliant with Your other obligations, including consumer and equality law.

~~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 13week maximum limit.~~

TGC 8.3 Annual Leave

A reasonable paid holiday period, 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.

Students undertaking work in collaboration with non-academic partners are expected to consider their obligations to those partners in planning leave.

We do not require You to record Annual Leave, but You should be mindful of the impact of failing to take time away from study on Students' welfare. Supervisors should be supportive of Students taking appropriate amounts of time away from study.

Studentships are not extended for periods taken as Annual Leave.

TGC 8.2.A.1 Additional leave

Within the TGCs, Additional Leave is a period where the Student is not studying but stipend and fee can continue to be drawn from the grant for them. Additional Leave may be provided to cover specific instances where a Student may be required to be absent from study that are not covered by other types of leave. These include:

- Special leave (including bereavement and pregnancy loss)
- Baby loss (including stillbirth and neonatal death)
- Carer's leave
- Additional disability leave associated with delayed adjustments
- Health and safety
- Public duties
- Regulation leave

ROs should check the TGCs for specific details of what We will fund. Students may need to check with their ROs to see if any additional support is available to them.

Special leave, as set out in the TGCs, can be used for a range of issues which could include compassionate leave, serious illness or injury of the student's dependant, dealing with domestic emergency (such as flooding). The list is not exhaustive. The condition states that it is typically restricted to five days pro rata, though at your discretion you can allow ten days.

In certain circumstances you must provide ten days pro rata special leave. These include in the event of a death of a parent, close relative or child of the student, or in the event of pregnancy loss (including where the student is the mother, partner, who was expecting the baby through surrogacy).

It may be that, having exhausted special leave, a student is not ready to return to study. You may consider whether other leave is appropriate in such circumstances, for example use of annual leave or, if the student is unable to return because of their physical or mental health, use of medical leave. A phased return to study (for example, using annual leave) might also assist the student, or the provider can provide further paid leave at its own expense, in line with **TGC 8.0.3**.

The TGCs on additional leave include additional information in the event of baby loss. The conditions on baby loss mean that a student should receive the equivalent (in terms of time off and extension) of taking both special leave and Family Leave

Additional leave (disability or health and safety)

It is permissible for a student to use additional leave if they cannot study for a period because:

- Reasonable adjustments have not been put in place for a disabled student (**TGC 8.2.A.5**) OR
- Mitigations have not been put in place for health and safety (**TGC 8.2.A.6**)

We expect that both of these leave types will be used rarely. While the Studentship can be extended, this may still have a cost to the student and on the whole it is preferable that You work with the Student on what study they can continue to undertake while the respective adjustments or mitigations are put in place. Notwithstanding whether the leave is used, You are reminded to observe Your legal obligations, for example, failure to provide a reasonable adjustment to a disabled student is considered by ECHR to be discrimination.

Additional leave (regulation leave)

Your institution may have a policy that allows students leave that is not included in Our TGCs. If You make this available to students funded by Us, You have the following options:

1. You may provide additional leave at your (or a third party's) expense. See **TGC 8.0.3**.
2. You may draw funding for a stipend and fee from the UKRI grant only if you have explicit written permission to do so, which may form part of your specific grant conditions, under **TGC 8.2.A.8**.

Requests to allow Additional Leave to be funded from our grant(s) will be considered on an organisation-by-organisation basis. The facility is designed to support organisations that have their own policies; requests to support individual students on an ad hoc basis will be rejected.

For more information on how to apply for Additional leave (Regulation Leave), see Annex D.

TGC 8.3.1 Other leave

~~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.~~

Return to study, including phased return.

Students should still receive some support while on a prolonged period of leave. For example, they should have access to key facilities as required, such as student services, disability services, email, the ability to return materials to libraries (and if appropriate arrange to borrow) and, where applicable, access to campus. A student must not study while on leave, and it is unlikely to be necessary that they retain access to technical facilities. Availability of fees and stipends is governed elsewhere in the TGCs. You are reminded of Your obligations under equality law if the students' leave is related to a protected characteristic.

Students returning from an ~~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 individual's fitness to work. 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.~~ A phased return should be arranged in a four week block, which is then reviewed (and if appropriate extended for a further four weeks) toward the end of that period.

In effect, a phased return to study is an agreement between the Student and their provider that the Student will study a certain number of hours each week, with the aim of returning them to their normal mode of study. The amount of time not studying is recorded as leave. Any eligible leave type might be used, for example a student who has been on 24 weeks of Medical Leave has an outstanding allocation of four weeks of Medical Leave. There is no requirement that the leave be taken as whole days. The leave type must be appropriate, for example, it is highly unlikely to be acceptable for a student returning from Medical Leave to use Additional Leave for a phased return.

Where permissible under the TGCs on leave and extensions, the Studentship can be extended for the combined period of leave used to facilitate the phased return. For example, if a Student uses ten days of Medical Leave over four weeks for a phased return, you are able to extend the Studentship by those ten days.

In the event that a Student has had a long absence and has no appropriate allocation of Medical, Additional or Family Leave, consideration should be given to using Annual Leave to support the phased return. Where no formal record of Annual Leave exists, We are content for You to assume that the Student would have accrued Annual Leave over the period of paid leave. For example, a full-time Student who normally has 40 days annual leave had been on Medical Leave for 28 weeks could have accrued 23 days Annual Leave over that period. The 23 days would be sufficient for the student to take four days leave in the first week, three days in the second week, two days in the third week and one day in the fourth week (ten days of leave in total), and to consider a second

period of phased return, if necessary, afterwards. Consistent with our conditions on annual leave, no extension would be given for this.

Note, Annual Leave can be accrued while a student is on Medical, Family or Additional leave, but more Annual Leave should not be accrued while the UKRI Studentship is suspended. For example, if the Student in the example above had their Studentship suspended for a further 12 months after their Medical Leave ended, they would still only have accrued 23 days of Annual Leave.

If a Student cannot return to their normal mode of study once options for a phased return have been exhausted, it is likely to be appropriate to consider changing the Student's mode of study or other appropriate options.

The Student must receive their usual stipend for the period of phased return (that is, a phased return is not a change to the student's mode of study).

~~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.~~

Extensions (leave of absence)

In considering extensions to the UKRI-funded Studentship period due to a leave of absence, You will need to consider **TGCs 8.0 to 8.3** on whether the absence is permissible and eligible for an extension, **TGC 6** on whether the extension is permissible, and **TGC 8.4** on absence costs.

You can extend for any amount of family leave (which includes, for example, maternity leave) permitted under **TGC 8.1**.

You may also extend for periods of eligible Medical and Additional leave which, combined, are over a period of one week, and You must do so if the combined total is over one month. The minimum extension You are willing to give is likely to be determined at a provider-level, but consideration should be given to approving extensions for periods of less than one month where this encourages students to take shorter periods of leave, rather than leaving health conditions to worsen.

The maximum extension of the combined Medical Leave and Additional Leave is one calendar year. For example, a student who had 52 weeks' Medical Leave and 2 weeks' Additional Leave would be limited to an extension of 52 weeks. The maximum extension should therefore be made clear to Students at appropriate times.

The phrase "eligible medical leave" is used because, on the whole, You should not extend the studentship for common short-term illnesses, such as colds, short periods of influenza or stomach bugs (this list is not exhaustive), as all students will sustain some of these at some point and it is impractical to extend all Studentships. Instead, the Student's research project should be planned on the basis that all Students are likely to sustain some minor illness for short periods during their studentship.

That said, the TGCs give grant holders a degree of flexibility. For students where the Medical Leave occurs at a crucial period of study it may be necessary to provide an extension that is slightly longer than the absence itself would determine. Whether this is necessary is likely to be influenced by a range of factors, including whether there is sufficient time in the Studentship to adjust the research project to mitigate the research lost during the absence.



For some Students with long-term or chronic conditions, it may not always be possible to determine what absence is due to a common short-term illness and what is related to, or exacerbated by, their chronic condition. For this reason, the TGCs give You flexibility to work with the Student to ensure that they have an appropriate amount of time to complete their studies and not be put at a substantial disadvantage compared to other students.

The extension to the funded period should be granted at the end of the period of absence or when the absence meets Your threshold for an extension, in order to give the student certainty and support financial planning, but, if this was not possible at the time, it is permissible for it to be granted at any point during the UKRI Studentship ~~funding period~~.

TGC 8.4 Absence Costs

~~Please refer to Training Grant condition.~~

Some Students will require leave which results in an extension; You are expected to make proportionate provision for this wherever possible in Your financial planning. Generally, We recognise that it is easier to make provision in training grants with more students and that recruit over a number of years than it is in grants with very few students and or only a single year of recruitment.

It may be necessary to transfer funds between fund headings (see TGC 4.10). We expect You to prioritise Student welfare; You must not use financial grounds to refuse a Student leave that they genuinely require and are entitled to under the TGCs.

If there is no flexibility within the grant cash limit, then We will consider options to support the student. This may include additional funding or moving the studentship to an alternative grant that allows them to continue at the same organisation.

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 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 start date.

Where appropriate, collaboration agreements should consider how complaints from students should be handled. The Office for the Independent Adjudicator's Good Practice Framework has a section on [delivering learning opportunities with others \[OIA website\]](#) that may be helpful. It is a requirement that all students are able to access an ombudsman service.

Where a student is co-funded, the collaboration or co-funding agreement should also contain arrangements for funding if the Studentship needs to be extended, for example, due to leave. This is a requirement for new agreements coming into effect from 1 October 2026.

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 on our website.](#)

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, for example, 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**

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



~~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 type work.~~

~~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 the award of a recognised postgraduate qualification.



Training Grant agreement / Grant agreement 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
- be an Irish National*

*Irish Nationals eligibility is derived from the UK Ireland Common Travel Area Agreement: <https://www.gov.uk/government/publications/common-travel-area-guidance/common-travel-area-guidance>

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 and Irish 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>

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

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.

Annex C: Version Control

| Version | Date Implemented | Changes |
|----------------|-------------------------|---|
| 1.0 | 05 April 2023 | <p>Terms and Conditions guidance reviewed; updates include:</p> <p>Guidance updated:</p> <ul style="list-style-type: none"> • TG4 Deployment for funds ○ Travel - amended to ensure consistency to UKRIs policy and the fEC Terms and Conditions. ○ Childcare Costs - amended to clarify when additional childcare cost can be charged to the grant. • TGC 4.2 Student Eligibility and Annex B - minor amendment to remove duplicate text. • TGC 8.2 Sick Leave - amended to clarify that the sick leave element of a phased return would be outside of the standard 13-week maximum limit. • TCG 11 - minor amendment to clarify research articles that are in scope of the UKRI Open Access policy. |
| 2.0 | 16 November 2023 | <p>Terms and Conditions guidance reviewed; updates include:</p> <p>Guidance updated:</p> <ul style="list-style-type: none"> • TGC 4 Deployment of Funds - minor amendment to clarify 'placements'. • The following guidance has been updated in response to Advance HEs review of the Terms and Conditions from an Equality, Diversity and Inclusion Perspective: <ul style="list-style-type: none"> i. TGC 3.3 ii. TGC 3.4 iii. TGC 4 iv. TGC 8.1 v. TGC 8.2 vi. TGC 8.3 |
| 3.0 | 02 April 2024 | <p>Terms and Conditions guidance reviewed; updates include:</p> <p>Guidance updated:</p> <ul style="list-style-type: none"> • TGC 4 Deployment of Funds – updated to included exclusion of reimbursement of alcohol costs. • TGC 5.2.5 – updated to include Irish National eligibility. • TGC 11 – updated to include open access requirements for long form publications. • Added Annex C: Version Control. |



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|-----|---------------|--|
| 4.0 | 01 April 2025 | Terms and Conditions guidance reviewed; updates include: Guidance updated: Terminology for grant roles and UKRI systems updated throughout. |
| N/A | N/A | The updates contained in this annotated version will be made on 1 October 2025. Please check this version against final guidance. In the event of any discrepancy, the Standard Terms and Conditions of Training Grant in place at the time take precedence. |

Annex D: Additional Leave (Regulation Leave)

Under **TGC 8.0.3** you may provide additional support to a student funded through other means without funding from UKRI. This enables you to provide a level playing field for UKRI funded students if you provide additional support for your students that is not within UKRI's TGCs.

The conditions reflects that there may be reasons that ROs need to offer additional types of leave, for example, because of local legislation or regulations. It also creates space for organisations that wish to innovate in how they support students.

In addition to TGC 8.0.3, **TGC 8.2.A.8** allows you to apply to UKRI seek permission to use funding from any UKRI training grant to support this funding type. The policy has two aims. First, to ensure that UKRI supports ROs in their support for students. Second, to ensure that

The following conditions will apply:

- Any leave type must be available to students who are funded by sources other than UKRI, for example, students who the provider funds from its own resources. This must be documented clearly, for example in your university regulations or other policy document(s). You will be required to supply a copy of your regulations or policy document(s) with the application. If you have not yet published your regulations or policy document(s), you will need to provide these in draft form, and permission may be rescinded if the final version differs from the version provided to us.
- It is normally expected that the application will apply at the institutional level, not at a grant level, though it must be submitted through a **grant change request**.
- You must submit one application for each leave type you are applying for.
- Leave must only be used (by students and their providers) for its stated, intended purpose and students must not be expected to study during a leave type. Leave cannot be used to provide general extensions to studentships. Failure by an organisation to adequately monitor the use of the leave type may result in UKRI withdrawing its support.
- If you subsequently amend your regulations or policy on the leave type, you must inform UKRI. UKRI reserves the right remove its support for the leave type if such a change makes or is expected to make a material impact on the cost of the leave type. If you change your regulations or policy and do not inform us of such a change we reserve the right to retrospectively remove our support to the date on which the change was made.
- We will seek to provide you with a decision within 40 working days of receipt.
- There is no guarantee that your application will be approved. UKRI's decision is final. A new application to support the leave may be submitted three years after the original submission. UKRI may allow earlier resubmission on an exceptional basis.
- UKRI may publish a summary of your application and our decision.

In considering applications, we will review:

- Whether, in our view, the offer of the leave type follows a genuine decision by the RO to provide support to all PGR students at the institution.
- The benefits to students.
- The benefits to the organisation(s) submitting the request.

- The cost of allowing funding for the leave type to be recovered by the organisation(s) submitting the application. We may base this on any information you provide as well as any other information available to Us.
- The potential cost of allowing funding for the leave type to be recovered by other organisations funded by UKRI in the future.

When applying to be able to draw funding for regulation leave, you will be required to provide:

1. Confirmation that the applicant has the authority from the organisation to submit the application.
2. Name of the leave type.
3. The specific regulations or policy on this leave type. These should be copied from your regulations or the relevant policy document(s)).
4. Please also attach a copy for the full university regulations or relevant policy document(s) under which the leave type is available.
5. If the leave type is currently available to PGR students, when was it introduced? While we prefer a specific date for more recent changes, if not known precisely, please provide a reasonable estimate, for example “over five years ago”. OR
6. If the leave type is not currently available to PGR students at your organisation, when do you intend to introduce it? Please provide a date and a reason for the date, if available. For Example “1 August 2030, to coincide with the start of our academic year.”
7. Briefly set out the benefits of providing this leave type, whether to students or your organisation(s). In doing so, consider making reference to the intent or aim of providing the leave type, any equivalent support you provide elsewhere, any considerations about regulatory requirements on you, and any considerations regarding equality, diversity and inclusion.
8. How many doctoral students in total do you estimate will benefit from the leave type in the next academic year? This figure may be a range.
9. How much of this leave type do you estimate students to use in the next academic year? Please indicate a range, where applicable, and estimates within that range. For example, 10 students expected to take 1 week, 2 students expected to take 8 weeks.
10. How many UKRI funded students do you estimate will benefit from the leave type in the next year?
11. Are there any additional costs arising out of the leave type (for example, because it will lead to an extension) and what is your best estimate of these costs?
12. Please outline how you arrived at all the above estimates. You may attach additional analysis or information where this is helpful. We may use this both to determine your case and also to inform any wider UKRI policy considerations. Please ensure that any evidence you supply does not contain personal information about students.
13. Why should UKRI funding be used for this leave type, rather than it being funded by the applicant organisation(s)?
14. UKRI may publish a summary of your application and our response. If there is any reason why we should not do so (for example, where it might be possible to identify personal data about individual students) please state.