SETTING UP AN E4 DTP CASE OR COLLABORATIVE STUDENTSHIP

GUIDANCE FOR LEAD SUPERVISORS

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A - CASE STUDENTSHIPS BACKGROUND

Reference documents and webpages: NERC Doctoral training partnership 2 (DTP2) Guidance Document

NERC CASE Studentships webpage

1 - WHAT ARE CASE STUDENTSHIPS?

CASE studentships are studentships which benefit from the close association of an external non-academic partner (the CASE partner) which can be from the private, public and third/civil sectors. This provides added-value to the PhD project in terms of expertise (via the supervision of the student), access to lab and facilities or training not normally available in an academic setting, research impact and enhanced project budget (to which the partner contributes).

CASE studentships provide doctoral students with a first-rate, challenging research training experience within the context of a mutually beneficial research collaboration between academic and non-academic partner organisations.

The CASE partners benefit from self-motivated, highly capable PhD students undertaking cutting-edge research relevant to their organisation's priorities and objectives. Both parties are also able to build and strengthen business and research collaborations. CASE studentship projects must provide sound training in research methods, and a stimulating intellectual challenge for the student. The work's impetus and initial requirement should originate from the CASE partner. Both the research organisation and the CASE partner nominate supervisors responsible for overseeing the student's training.

Impact is one of the CASE scheme's main criteria. Studentships should demonstrate the potential for societal or economic impact through collaboration with the CASE partner and the provision of high-quality training in research skills.

2 - WHY ARE CASE STUDENTSHIPS IMPORTANT FOR THE E4 DTP?

NERC requires E4 to allocate at least 25% of its studentships to CASE projects across the DTP.

NERC requires E4 to allocate at least 25% of its studentships to CASE projects across the DTP. This means that E4 needs to allocate a minimum of 23 CASE studentships across the 5 cohorts it will recruit between 2019 and 2023 (i.e., 5 CASE studentships per year). At the moment, 20% of the E4 projects that are submitted by supervisors and advertised are CASE hence E4 is keen on increasing the number of CASE projects advertised so that the CASE quota does not affect candidate selection. Currently, E4 has to prioritise CASE projects while making decisions of offering studentships at the very late stage of its recruitment process. This means that, at the moment, CASE projects have a slightly higher chance of success.

3 - CASE PARTNER ELIGIBILITY

NERC has set out strict eligibility criteria for CASE partners:

- **The CASE partner can be any non-academic organisation**, from the private, public and third/civil sectors, preferably based in the UK.
- **Any organisation eligible to receive NERC research funding are no longer eligible** to act as a CASE partner (and are instead now classed as collaborative partners – see section 5). This includes Research

Council Institutes (e.g. BGS, BAS, SAMS) and Independent Research Organisations/IROs (e.g. BTO, HES, IOM, IIED, NMS, NOC, RBGE, RBGK, RSPB, The James Hutton Institute, CEH) as defined on the UKRI website.
As an exception to the above, Public Sector Research Establishments (PSREs) are eligible to act as CASE partners for NERC studentships (e.g. Forest Research, NPL, Met Office, SEPA, UK Space Agency).

- **International CASE partners are eligible** provided that they are a non-academic organisation, and that the DTP can evidence that the CASE criteria has been met and that the placement provides an opportunity for the student to gain skills that could not be provided by a UK-based partner. The student must be fully supported by the DTP and CASE partner throughout the placement period.

4 - CASE PARTNER REQUIREMENTS

The CASE partner will need to commit to the below requirements at the time of the project submission.

- **Financial contribution of min. £3,500 to the project's research costs:** the CASE partner must supplement the studentship by a minimum of £1,000 p.a. for the lifetime of the studentship (E4 DTP studentships are 3.5 years so total minimum contribution is £3,500). This payment should be made to the lead Research Organisation (the University of Edinburgh School where the student is registered) to supplement the student's Research & Training Support Grant (RTSG) and not paid directly to the student. Payment should follow the receipt of an annual invoice issued by the University, according to the invoicing schedule set out into the CASE studentship agreement, which will be signed within the first months of the PhD.

- **3-to-18-month on-site placement:** the CASE partner must host the student for between three and eighteen months during their PhD, during which time they will undertake work outside the academic environment. This placement does not need to occur in one single continuous period.

- **Extra expenses incurred by the student's visit to the CASE partner's facilities:** the CASE partner is expected to meet the extra expenses incurred by the student when visiting and working within their establishment (such as travel). These will generally be refunded directly to the student by the CASE Partner, as relevant.

- **The CASE partner is expected to contribute in cash or in kind towards necessary materials and/or facilities** not possessed by the Research Organisation concerned (i.e., the University of Edinburgh), that are required by the student to undertake research integral to their CASE studentship.

5 - COLLABORATIVE (NON-CASE) STUDENTSHIPS

In addition to CASE studentships, any number of DTP studentships may be 'collaborative'. A partner that does not meet the requirements for CASE, because they are eligible for NERC funding, but are external to the University, is considered a collaborative (non-CASE) partner. There are no formal partnership requirements for these projects.

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E4 actively promotes collaborative studentships and highly values collaborative projects, many of which stem from long standing partnerships. E4 is keen to continue with these even though they no longer formally count towards out CASE quota. These collaborative studentships are also monitored by NERC through reporting processes and should be formally recognised by NERC as a success metric as part of the ongoing monitoring of the DTP performance.

B - WHAT ARE THE ADVANTAGES OF A CASE STUDENTSHIP?

CASE studentships are highly beneficial for all parties involved: the student, the CASE partner and the academic supervisor. The below is based on testimonials from current CASE project stakeholders.

1 - THE STUDENT'S PERSPECTIVE[1]

95% of our CASE students say the CASE experience has been/is good or very good with 15% saying it is beyond expectations. 67% agreed that their CASE partner had been/was essential to the progress of their research. All the students surveyed felt that the CASE studentship brought added value to their PhD and would recommend a CASE studentship as a PhD. 68% said that the fact it was a CASE studentship had a positive weight on their decision to accept their PhD offer.

> "It has enriched my studies and provided me with extra supervision that has been really important to my project"
>
> *CASE Student's testimonial*

Here are some positive impacts that students have listed when asked what they gained from having a CASE partner associated to their PhD:

- Exposure to industry practise/experience of working out with academia
- Expertise of supervisors / non-academic input
- Access to data, resources and facilities
- Networking through events and conferences / introduction to new people in the field
- Additional funding for the project
- Placement and job opportunities (including post-PhD)
- Research impact and outreach

2 - THE CASE PARTNER'S PERSPECTIVE[2]

All of the surveyed CASE partners found the CASE experience very good with nearly a third saying it was beyond expectation. 85% would do it again.

When asked what they gained from the CASE studentship, CASE partners mainly mention access to high quality research and expertise which have brought new insights and analytical perspective, generated and addressed novel questions as well as raised the company's research profile. They also enjoyed the research input such as contributions to collaborative papers.

> "The mutual respect between academic supervisor and CASE partner provides a safe environment for creative discussions with the student"
>
> *CASE Partner's testimonial*

[1] The survey was conducted in August 2020 and received 21 replies from students on CASE studentships.

[2] The survey was conducted in August 2020 and received 7 replies from CASE partners

3 - THE ACADEMIC SUPERVISOR'S PERSPECTIVE[3]

> "It provided me with a perspective on different priorities and ways of working outside academia."
>
> *Academic supervisor's testimonial*

All the surveyed academic supervisors declared that their CASE studentship experience has been/is very good (1/4 said it was beyond expectations) and that the efforts they put in setting up the CASE project were definitely worth it.

Academic supervisors said that having a CASE partner on board meant that the supervision team greatly benefitted from an extra pair of eyes and ideas. The student was well cared for and was given access to data and sometimes facilities, which would not have been available within the academic setting alone.

From their own perspective, thanks to the CASE projects, academic supervisors said they:

- developed collaboration with industry/business or strengthened existing ties
- got additional expertise and opportunities of applying research to real-world problems
- were exposed to new ideas and perspectives for future research
- widened their networking and made new contacts
- increased respect for and understanding of scientists and stakeholders working outside academia

C - TIPS AND HELP IN SETTING UP A CASE PROJECT

1 - FINDING A CASE PARTNER

Academic supervisors who have set up successful CASE projects have commented on the need to involve the CASE partner from the outset. In fact, a successful CASE project is a project in which the CASE partner plays a major role and stays actively involved throughout the PhD. This can only happen if the CASE partner contributes to the project design itself so that they can give their input and state their expected outcome as much as the academic lead supervisor. Therefore, finding a CASE partner must come at the very early stages of the project design if not before. If a new CASE partner needs to be found, we recommend that contacts be made no less than a year before the E4 project submission deadline, which is mid-October.

Below are some tips to help with finding a CASE partner:

- Start with your current network of colleagues within and out with the University, in and outside the UK;
- Look at the list of past, present and potential E4 CASE partners[4]
- Look at the list of E4 official partners[5] and collection of introductory slides from the E4 partners which contain more contact details – Some of them are not CASE-eligible because they receive NERC funding (see above the CASE eligibility criteria) but they might know potential CASE partners within their own network of collaborators. As E4 partners, they will be familiar with the CASE requirements and can act as an intermediary.

[3] The survey was conducted in August 2020 and received 8 replies from academic supervisors.

[4] [5] An Ease login is required to view those webpages but non-UoE supervisors can access those documents via the Partner Shared folder

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- Attend our Partner Meet-up event, usually mid-May to meet some of our partners and potential CASE partners (invitations to attend are sent widely through email in April).
- Contact the E4 DTP Deputy Director for End-users, Emma Cunningham, e.cunningham@ed.ac.uk, who can help finding a CASE partner and put you in touch with current partners as relevant.
- Attend industry fairs and networking events
- Join networks such as:
  - The KTN https://ktn-uk.org/about/ - The KTN helps academics understands their potential end user community. Its network spans a range of diverse connections across business, government, funders, research and the third sector. Each KTN hosts events throughout the year, ranging from competition briefing events to networking and showcase events.
- Contact your school business developer with some ideas of industry/business sectors. They can help identify potential CASE partner and might be able to introduce you to them if there are existing relationships.
  - School of GeoSciences Business Development Executive: Stuart Simmons, stuart.simmons@ed.ac.uk
  - School of Biological Sciences Business Development Manager: Emma Elliott, Emma.Elliott@ei.ed.ac.uk
  - Edinburgh Innovations has a team of Business Development Managers who each have a specific school in their portfolio: EI list of contacts

To help attracting CASE partners, you can use the below E4 DTP resources:

- The E4 DTP Presentation by E4 Director Richard Essery[6], recorded at the latest Partner Meet-up on 13 May 2021. It is 20-minute long and offers a good overview of E4 for those who will not be familiar with the DTP. You/they are also welcome to attend the next E4 DTP Partner Meet-up event (usually mid-May) to be introduced to the DTP and meet some of the E4 partners.
- The guidance document for CASE partners[7] which includes everything a CASE partner needs to know about CASE partner requirements, commitments, procedures and timeline. You can send this document to potential CASE partners. They should find all the information they need but you can contact us with any questions that may arise at e4dtp.info@ed.ac.uk.

2 - DESIGNING A CASE PROJECT

E4 has a wide variety of projects submitted and advertised each year and this contributes to attracting a high number of very good applicants coming from a wide range of disciplines and backgrounds. No CASE project will be the same, however, below are some advice to design an attractive and successful CASE project.

> Most of the times, a successful CASE project is one that involves the CASE partner throughout and not only at one stage of the

As mentioned earlier, make sure that the CASE partner is involved into designing the project right from the start so that they give their input and so that their expectations are factored in the project outcomes. The more a CASE partner is included and consulted in this stage, the more they will feel part of the project itself and the better the students' experience (and yours) will be.

[6] [7] An Ease login is required to view those webpages but non-UoE supervisors can access those documents via the Partner Shared folder

It is also important to start the project design early (about a year before the submission deadline). CASE partners are generally very busy and some have internal deadlines for submitting projects within their own organisation first or for submitting requests of funding for the year ahead.

Below are some topics and related questions which will help your reflections in setting up a CASE project:

- **The Project: Quality and Suitability**
    - Is the proposed project aligned to NERC's remit?
    - Is the project feasible in the timeframe (3.5 years of funding)?
    - Does the project proposal demonstrate a robust partnership?
- **Non-academic research environment and training programme**
    - Is the proposed project relevant to the non-academic sector involved? Does the non-academic partner have a suitable track record?
    - What facilities does the non-academic environment provide for research training? How does the proposed project relate to the facilities available?
    - What opportunities are there for gaining experience not available in an academic setting alone?
- **Management and supervision**
    - Are there clear day-to-day arrangements in place for supervision of the student at both the academic and non-academic partner?
    - Do the project supervisors have the specialist capabilities necessary to support the student's advanced research and generic skills training?
    - Are there suitable provisions for monitoring progress?
    - Do all supervisors have a good track record in supervising students?
    - In the case of new supervisors, have appropriate provisions been made, for e.g. with co-supervision?
- **The collaboration**
    - A placement at the non-academic partner is an essential feature of a CASE studentship; can they offer a suitable placement with added value?
    - What are the opportunities to be made available by the company to the student for business-related training?
    - Could the project be done without the collaboration? Due to the truly collaborative and integrated nature of CASE, the studentship cannot be considered a true CASE studentship if, upon removal of input from the non-academic partner, the training and project could still continue.
    - Should the non-academic partners' circumstances change, are the arrangements for safeguarding the student's PhD progress clear and acceptable.

You should also make sure you discuss the below points with the CASE partner before submitting the project:

- **CASE requirements:** ensure that the CASE partner requirements are clear for both parties from the outset. In particular, it is important to anticipate the 3-to-18-month placement that the CASE partner must host: when will the placement happen during the PhD? What the student will be doing? The financial contribution against the overall project budget (contribution to the research costs and also travel expenses to and from the premises) and the in-kind contribution from the CASE partner (such as access to facilities and labs, a desk to sit the student when relevant and the supervision arrangements) should also be clarified with the CASE partner.

- **Recruitment:** ensure that the CASE partner is aware of the recruitment timeline and procedure. E4 receives a lot of applications and has a competitive selection process with chances of success for home applicants of 6% (and 1.7% for international applicants due to the 25% NERC cap). Even though CASE projects have slightly higher chances of being allocated, chances to get a student are still slim and it is possible that no student is appointed at all.
- **PhD timeline**: ensure that the CASE partner is aware of the PhD timeline. Our studentships generally start in September/October and last for 4 years (with minimum funding to cover 3.5 years). Our studentships must be suitable for part-time study as well (which takes the PhD length to 7 years). The research itself must be done over the 3 first years of study (or 6 years for part-time), the final year being dedicated to the thesis writing and submission.
- **Time involvement**: ensure that the CASE partner agrees on the amount of time they will involve into their supervisor role. CASE partners should be part of the supervision team and will be added as external supervisors on our UoE system. This will involve annual reviews' approval as a minimum. Time involvement can vary across the project and it is important to anticipate and identify the different phases in which the CASE partner will be more or less needed.
- **Communication**: you should agree on how to keep each other up-to-date during the PhD and set up regular meetings e.g. Ensure the CASE partner is kept in the loop of the project even at the times when they are less involved due to the project activities.

3 - SUBMITTING A CASE PROJECT

The CASE project needs to be submitted through the E4 DTP online submission form, in the same way as for non-CASE projects and by the same deadline (usually early October). You can follow the E4 DTP Project submission guidance document[8].

At this stage, the online form will only ask you to provide the name of the CASE partner.

It is important that the CASE partner be identified on the project submission form as this will reflect on the final project proposal drawn from the form and which will be visible to applicants.

If the CASE partnership is still under negotiations at the time of the project submission, it is advised not to include the name of the CASE partner on the form and not to tick the CASE project box. The proposal can however be updated any time after submission (please email the DTP Manager to notify them). See below *Late addition of a CASE partner* for more information.

It is important that the CASE partner is identified on the project submission form (CASE project box ticked and CASE Partner name completed) as this will reflect on the final project proposal drawn from the form and which will be visible to applicants. The CASE partner can also be mentioned within the text of the proposal, as relevant.

When submitting a CASE project, the supervisor from the CASE partner will need to be entered as a new external supervisor if they are not already in the system. To do that, go to the left-hand side menu and choose: "Enter new external supervisor". External supervisors without Ease account will not be able to access the online project submission platform as this is an UoE internal database only. Once the project is approved and published, the project proposal will be published on the E4 DTP website and the CASE partner will be able to see it then.

[8] An Ease login is required to view this document but non-UoE supervisors can access it via the Partner Shared folder

An official confirmation of the CASE partner (in the form of a signed support letter – see the CASE Partner Information and Form[9]) will only be required at a later stage of the selection process (see next point) if a candidate is interviewed on the project. However, the CASE partner form can be passed on to the CASE partner and returned to the DTP Manager anytime if desired.

If you submit a CASE project to E4, you are allowed to submit a second E4 project (not necessarily another CASE).

4 - THE CASE PROJECT THROUGHOUT THE E4 RECRUITMENT PROCESS

After the submission of the CASE project and its approval by our DTP panel, the project proposal will be published on the E4 DTP website and applications will open. There is no difference to the application process between a CASE project and a non-CASE project. Applicants must follow the application instructions published on the E4 DTP webpages (instructions are only visible during the application window, from early November to early January).

Supervisors should read the E4 DTP Recruitment procedure[10] (requires Ease login) to find out about each step of the E4 DTP recruitment process and its selection criteria.

ADDITIONAL NOMINATION FOR CASE PROJECTS

Supervisors who have submitted a CASE project can nominate up to 3 applicants (instead of 2) providing that at least one of these applicants has applied to their CASE project.

INTERVIEWED APPLICANTS AND CASE PARTNERSHIP CONFIRMATION

If at least one of the nominated applicants is shortlisted and invited to interview, the DTP Manager will ask to see a written proof of the CASE partnership before the interview takes place. Invitations to interview are generally sent on the first week of February and interviews take place on the last week of February. The CASE partner can either write a support letter including all the CASE commitments described above or date and sign the official CASE Partner form available at the end of the CASE Partner Information and Form[11].

We will ask to see a written proof of the CASE partnership before the interview takes place.

If the DTP does not receive confirmation of the CASE partnership before the end of the interviews, this might delay decisions at offer stage (which starts immediately after the interviews) and the CASE element might not be considered as a balancing factor.

5 - LATE ADDITION OF A CASE PARTNER TO A PROJECT

Although the earlier the better, a CASE partner can be added to a project any time after the submission stage (and until the project starts if a student has been appointed). However, there are 2 stages before which it can be important to know if a CASE partner is going to be associated to the project:

[9] [10] [11] An Ease login is required to view this document but non-UoE supervisors can access it via the Partner Shared folder

1. **Before the applications close (early January)**: the CASE partner will be mentioned on the project proposal and the project tagged as "CASE project" on the project advert, which might attract more applicants. It is also better for the applicants to know before they apply what the project involves rather than finding out later on that the project they apply for is now a CASE project, implying a placement at the CASE partner etc.
2. **Before the interview stage (end of February):** if any student is interviewed for the project, the fact that a CASE partner is known by the end of the interviews means that this can be factored in when making decision at offer stage. (CASE projects might have to be prioritised at that stage to reach the 25% NERC quota.)

After then, a PhD project which has been allocated can still be turned into a CASE project until the student starts their PhD (usually September/October) providing all the parties (CASE partner, student and academic supervisor) agree.

D - SUPERVISING A CASE PROJECT

Once the PhD project starts, most of the supervisors will find that there is little difference between supervising a CASE project compared to a non-CASE project (63.5% of the surveyed supervisors thought it was "not really" or "not at all" different[12]). However, there are a few additional steps that need to be dealt with at the beginning of the project or things that need kept in mind throughout the project.

Please note that the processes described below are true for the School of GeoSciences. Although they are likely similar in most of the other UoE schools, there might be differences in local processes. It is the responsibility of the school where the student is registered to set up the CASE studentships once a student is appointed. Please refer to the processes which are in use in the relevant school if the student is not registered in GeoSciences.

1 - THE LEGAL AGREEMENTS

THE CASE STUDENTSHIP AGREEMENT

A CASE studentship needs a CASE studentship agreement to be set up to regulate the partnership and clarify the requirements and commitments from all three parties involved (the student, the CASE partner and the University). The supervisor, being the main contact with the CASE partner, has an important role in ensuring the agreement is set up and making sure the commitments are respected throughout the project.

A CASE studentship agreement is usually kept simple and as brief as possible, it includes the following elements:

- Projects details (title, dates, supervisor and student contact details, objective)
- Funding sources (including the CASE partner financial contribution)
- Other contributions from the partner (travel and subsistence costs, placement)
- Confidentiality of research and findings (including publications and thesis access)
- Intellectual Property and commercialisation
- In appendix: any extraordinary items (such as major in-kind contribution from the partner) and the full project proposal as advertised.

[12] The survey was conducted in August 2020 and received 8 replies from academic supervisors.

A template of the CASE studentship agreement is available to view here[13].

In most cases, the CASE template can be adjusted to the partner's expectations (especially in terms of IP) and any comments or requests from the partner will be taken into account and suitable arrangements sought.

Below are the steps to set up CASE studentships agreement. Although the process of setting up CASE studentship agreements is managed by the school where the student is registered and can therefore vary from a school to another, it will be broadly similar to the below.

[1] CASE studentship agreement request form

- Prior to the student's start (June), the DTP Manager sends a CASE studentship agreement request form to the lead supervisor to collect formation about the project and the CASE partner (including invoicing details and schedule, IP terms etc.).
- The DTP Manager sends the completed form to the relevant university legal team (Research Contracts Office or the Edinburgh Innovation team depending on the type of CASE partner: charity/research or business/industry).

[2] Agreement draft & signature by the partner and the University

- The legal team drafts the agreement and forwards to the CASE partner (copying the supervisor and E4 DTP Manager) to receive their comments/approval. Amendments are made accordingly if necessary.
- Once the CASE partner gives approval, the legal team arrange for signature of the final agreement by the University and by the CASE partner (via AdobeSign).

[3] Student's signature

- The legal team gets in touch with the student to discuss the studentship agreement and the Student Assignation and Confidentiality agreement (see below) with the student to answer any questions they may have before they sign the agreements.
- The legal team forwards the final and fully signed agreement to all parties.

THE STUDENT ASSIGNATION AND CONFIDENTIALITY AGREEMENT

The terms of the CASE studentship agreement include an assignation of Intellectual Property (IP) by the student to the University. This is necessary to ensure that the IP arising from the research they undertake as part of the project belongs to the University, to allow the University to grant the CASE partner appropriate IP Rights to the arising IP. This measure is taken to the aim of protecting the student in case of any conflicts with the CASE partner during or after the PhD.

In the context of a CASE studentship, the University requests transfer of the Intellectual Property rights of the project from the student to them to protect the student in case of conflicts with the CASE partner.

The CASE student is therefore asked to assign ownership of any IP they may create while working on the project to the University via

[13] An Ease login is required to view those webpages but non-UoE supervisors can access those documents via the Partner Shared folder

the signature of an Assignation and Confidentiality agreement with the University (in addition to the CASE studentship agreement). In turn, the University agrees that if any revenue is generated from the commercial exploitation of that IP which they have invented, then they will be entitled to a share of that revenue via the University's current revenue sharing policy. This will be explained in detail to them the legal team who will be available to reply to any questions or concerns from the student. The student is also able to take independent legal advice before they sign the legal agreement.

A template of the Students Assignation and Confidentiality agreement is available to view here[14].

2 - THE CASE MONEY TO COVER RESEARCH COSTS

Once the CASE studentship agreement is fully signed, the information is passed onto the school research team so that they can set up a grant research account to receive payments from the partner. This is then passed on to Central Finance who deals with the invoicing according to the schedule agreed in the agreement.

Because the CASE money is kept in a separate account from the students' RTSG, it is essential that the student keep a record of all the expenses they claim for from that CASE money pot and have their own monitoring system

The money paid by the CASE partner following each invoice from the University is stored in a research grant account, whose codes are communicated to the student so that they can claim from this account, using the usual expenses claim system, at school level (note that this process can slightly vary from a school to another). Because the CASE money is kept in a separate account from the student's RTSG pot, it is essential that the student keeps a record of all the expenses they claim for from that CASE money pot and have their own monitoring system.

It is the responsibility of the school where the student is registered to communicate the CASE grant account codes to the student when the grant is set up and chargeable.

Contrary to the RTSG which is provided by NERC and thus restricted in time (only available until the stipend ends), the CASE money is provided by the CASE partner and can be used until graduation providing the CASE partner agrees. In general, when there is CASE money left at the end of the project, the CASE partner must be consulted on the possibility to continue using the money and two elements should be checked with them: 1) if there is a limit in time by which the money needs to be used and 2) if there are restrictions on the nature of expenses (e.g. they might want the money to be used exclusively for publications in relation to the PhD project or for expenses related to further collaboration with the CASE partner).

3 – THE PLACEMENT AT THE CASE PARTNER

A placement between 3 and 18 months hosted by the CASE partner needs to be integrated to the PhD project. This placement does not result in any extra time for the PhD, therefore it needs to be planned carefully, from the outset of the project. During this placement the student keeps their stipend and their PhD clock does not stop. The required placement period can be accrued through a number of shorter placements, if appropriate. The placement should ideally be the occasion of a self-contained project, directly related or not to the PhD research.

The CASE placement is fully integrated to the PhD, it does not pause the PhD clock and does not give extra time to

[14] An Ease login is required to view those webpages but non-UoE supervisors can access those documents via the Partner Shared folder

Frequent visits to the CASE partner during the project do not normally replace a CASE placement however there is flexibility if all the parties (student, supervisor, CASE partner) are happy with the arrangement.

The CASE partner should cover reasonable travel and subsistence costs incurred to the student when visiting them or when coming over or staying for the placement. It can be the refund of transport costs (flights, bus, train, private car usage e.g.) or contribution to the living costs when the PhD stipend is deemed not enough (e.g., accommodation in a foreign country). These refunds must be arranged between the student and the CASE partner directly (the E4 DTP does not have to be informed).

4 – THE CASE PARTNER'S IN-KIND CONTRIBUTIONS

In some cases, the CASE partner can provide in-kind support which might or might not be included in the CASE agreement. This can be access to data, facilities and labs for the student and/or funding of fieldwork campaigns to which the student participates. This must be arranged with the CASE partner directly and it is not necessary to let the DTP Manager know about the details.

We hope this document is useful but if any questions remain of if you would like to suggest any addition, please get in touch via e4dtp.support@ed.ac.uk