

EPSRC Balancing Capability Strategic Advisory Network (SAN) Advisory Stream Meetings

EPSRC established a Strategic Advisory Network (SAN) work stream for Balancing Capability in 2016. The role of the advisory stream was to challenge and give cross-portfolio advice across research area trajectories for the Balancing Capability refresh. In particular, the group were tasked with ensuring the integration of research area trajectories across the EPSRC themes to ensure that the prioritisation of research areas within one theme did not have unintended impacts in another theme.

The overall purpose of seeking this advice was to provide assurance that the portfolio had been balanced appropriately in order to support our Delivery Plan aspirations and to protect world leading research for the benefit of the whole UK community.

First meeting: 28th July 2016

The purpose of this meeting was to brief the SAN advisory stream group on their role: to challenge and give cross-portfolio advice across research area trajectories in the Balancing Capability refresh.

Present

Bonnie Dean, Council Champion
Paul Beasley, Siemens Technology
Alison Etheridge, University of Oxford
Chris Linton, Loughborough University
Philip Sharman, Evenlode Associates
Mark Smith, Lancaster University
Tom Melham, University of Oxford
Andrew Bourne, EPSRC
Samantha Francis, EPSRC
Nicola Goldberg, EPSRC
Katharine Moore, EPSRC

Points of discussion were as follows:

- Members of the SAN advisory stream were given an update on the Delivery Plan and the history of Balancing Capability. The scope of the work stream was outlined
- The SAN group were advised of the focus of the next meeting in September: to provide input on the balance of the portfolio to ensure that this is aligned to Delivery Plan goals and ensure that the portfolio is where it needs to be in five years' time for the benefit of the UK
- The SAN advised against 'top slicing' all research areas and advised that we should aim to be strategic with constrained resources
- It was emphasised that Grow/Maintain/Reduce decisions will be *relative* to the whole portfolio, i.e. as a proportion of the EPSRC portfolio

- There were questions from SAN members around the structure of the research area rationales and how to convey the underpinning nature of a research area
- SAN members advised that the strategic focus in a rationale should help researchers to identify future research directions and where a particular research area could form new links
- The connections across research areas are extremely important to convey. This could be to express opportunities in related research areas or to justify a decision in the wider context. The SAN advised EPSRC to explore options to convey this, ideally as a visual representation
- The SAN advised EPSRC to ensure there is consistency across the rationales and that the rationales should be compelling and focus on the opportunities. The rationales should ideally represent the international perspective.
- With regard to Capacity, SAN members advised that there needs to be consistency across the rationales when discussing training.
- The SAN were asked to provide advice on conveying linkages across the portfolio and ensuring that research area rationales are coherent with overarching thematic strategies, e.g. advanced materials.
- The SAN felt it was vital to communicate that the rationales would be adapted during the Delivery Plan if circumstances change significantly
- The SAN advised that the research area links to the Prosperity Outcomes, Ambitions and strategic priorities of Themes should be made clearer.

Second meeting: 28th September 2016

The purpose of this meeting was to advise EPSRC on the balance of Grow, Maintain and Reduce areas across the portfolio, to examine integration across cross-cutting themes and to provide advice on areas of conflicting strategic focus.

Present

Bonnie Dean, Council Champion

Paul Beasley, Siemens Technology

Alison Etheridge, University of Oxford

Allan Matthew, University of Sheffield

Tom Melham, University of Oxford

Philip Sharman, Evenlode Associates

Mark Smith, Lancaster University

Neil Viner, EPSRC

Samantha Francis, EPSRC

Nicola Goldberg, EPSRC

Katharine Moore, EPSRC

Joanne Thompson, EPSRC

Points of discussion were as follows:

- Research area rationales related to cross-cutting themes, such as advanced materials and big data, were grouped and discussed. In general, the SAN group found that research areas within cross-cutting themes were coherent in how they were presented, and had cross-referenced appropriately. However, it was felt that the cross-referencing for the theme of advanced materials could be strengthened.
- The SAN group recognised the significance of a number of institutes being established in the EPS space. They advised that there needs to be consistent referencing of the Institutes within the rationale documents and in particular, on how EPSRC will engage with them over the Delivery Plan period.
- EPSRC should be more ambitious in describing how the research areas will contribute to the Prosperity Outcomes and Ambitions. The SAN were aware that there are varying timescales for different research areas and we should look to communicate future aspirations for each area.
- The links between the different research areas should be signalled to direct researchers towards priorities. The use of a visual representation for the website will be explored to show connections between research areas
- It should be made clear that the Grow, Maintain, Reduce trajectories are a proportional change not an absolute change
- An overview of the Communications plan for Balancing Capability was discussed. The SAN provided advice on further messages to communicate and methods of achieving this.
- The SAN advised EPSRC to be strategic regarding the balancing capability strategy, recognising that difficult decisions have to be made in order to protect world leading capability in the UK
- The Balancing Capability Strategy provides an excellent knowledge resource of the UK research base and provides a valuable tool for communicating the importance of the engineering and physical sciences portfolio as we move into UK Research and Innovation (UKRI)