**Samuel Alexander Beatson, Ph.D.**

Board Member, Lecturer, Consultant, Director

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**PROFILE**

Dr Sam Beatson is a senior specialist advisor with financial, data scientist, policy evaluation and econometrics capabilities. He is a lecturer in finance, risk and banking at University of London, held a former lecturing post at King’s College London, and has held senior positions on boards, operational and analytical teams across government in several high impact and business-critical national policy projects. He has also been Chairman of the Civilian Committee for RAF Air Cadet Sqn 367 (Hillsborough, Sheffield) and Treasurer for Church Action on Poverty (Sheffield).

Sam was the principal econometrician responsible for costing admitted patient care, A&E visits, outpatient care and economic modelling for the refresh of the Clinical Commissioning Groups (CCG) formula for 2017/18 allocations for the NHS executive, answerable to the Chief Economist, Head of Analytical Finance, sitting regularly on the Advisory Committee on Resource Allocation (ACRA) and the Technical Advisory Group (TAG). He led economic analysts in their proposal for the south of England offshore marine plans in 2016 as a senior peer reviewer and mentor, a project to assess the business impact of current offshore marine plans.

Sam is published internationally in policy institute publications, peer-reviewed periodicals and journalistic media such as Financial Times, the Telegraph, the Diplomat and others. Sam was recently featured on BBC Business News Live. Sam has presented to diverse audiences at several international conferences, symposia, roundtables and discovery workshops and has consulted the department of health, NHS England, MMO and advised FCO colleagues on a number of finance and economics-centred projects, in addition to his work with KPMG, PWC, Deloitte and hedge funds and private equity firms.

He undertook his Ph.D. at Nottingham University where he was the recipient of a number of awards and scholarships. His these was entitled ‘Foreign Investors in the Chinese Stock Market’. Sam has been working with big data in the corporate finance, investments and healthcare modelling space for more than ten years, utilizing econometric methods & programming for analysis of corporate and financial data, solving problems concerning the irregularity of different datasets, quantifying qualitative data and designing and testing econometric models for the analysis of business performances.

He has taught Masters Students in finance and economics in addition to empirical methodology, risk analysis & research methods. He has previously been awarded a medical-related degree from the University of Sheffield & was the recipient of a prestigious award for his teaching at Nottingham.

Most recently Sam has been commended for his performance during Covid-recovery in service to HMCTS (MoJ) prior to and during Covid-19 recovery and for his consultancy work delivered at pace in the UK Government Data Task Force and Building Digital UK team in DCMS where he received an award for the evaluation of this UK-wide government-commercial collaboration programme.

**CAREER**

**Mar 2019 – Dec 2020 Her Majesty’s Courts & Tribunals Service (HMCTS)**

**Position: Evaluation Researcher**

* + Managing the design and delivery of economic, social research and cost-benefit analysis for two UK business change and reform projects for the court services.
  + Leading the evaluation and offering technical advice to the project and service teams, writing and preparing data-driven reports and developing the statistical techniques, models and research approaches in-house, while managing IFF Research and Frontier Economics external consultancy teams.
  + Specialist board member for the project Steering Group and stakeholder Evaluation Advisory Group, providing briefings and managing stakeholder expectations and concerns.
  + Developing Covid-19 recovery response analytics for the Crown Court recovery pilots ensuring timely information flow to operations team, Ministers and No. 10 for rapid decision-making and publication.

**Sep 2018 to present Nottingham University Business School**

**Position: Assistant Professor in Finance, Risk and Banking**

* + Lecturing and tutoring in 4 taught modules to MSc/MSci students.
  + Convenor of Executive MBA Corporate Finance**;** Convenor & Module Lecturer for Chartered Banker Institute accredited MSc in Banking and Finance module Consumers, Ethics and Regulation in Financial Services**;** Convenor and Module; Lecturer of Corporate Risk module for MSc in Risk Management
  + Lecturer in Research Methods and Investments / Financial Strategy
  + MBA Extenuating Circumstances Officer

**Oct 2018 – Dec 2018 UK Central Government Operations**

**Position: Risk & Preparedness Data Task Force team leader**

* + leading a team of analysts to develop applied data science to provide a risk and preparedness workbook, collecting, mapping and visualizing new data on cross-government customer/supplier data relationships, e.g. from Government Digital procurement frameworks, to inform senior board members and Ministers of departmental data risks in a Brexit context.

**October 2017 – October 2018 Department for Digital, Culture, Media and Sport**

**Position: Lead Economist for Building Digital UK (BDUK)**

* + In-house consultancy evaluating the business, labour market and consumer impact covering whole of UK geography for the superfast broadband programme at Broadband Delivery UK, Department for Digital, Culture, Media and Sport.
  + Managed the contract of Ipsos-MORI and Simetrica consultancies and informed and critiqued their work. Developed trainings for the in-house team and presented to stakeholder leaders
  + Prepared technical and user-friendly papers for Ministers and the public
  + Led on evaluation and facilitated presentations during Steering Group and BDUK board meetings, making key decisions and implementing updates in cost-benefit models for the unit
  + Ensured quality, credibility, timely publication and ministerial approval for two submissions and 4 published, HMT Green Book compliant econometrics papers
    - Mapping, measuring and modelling:
      * productivity gains for businesses,
      * wellbeing gains,
      * sales and business improvement (e.g. new starts, employment, safeguarding other areas)
      * delivery of the infrastructure for the project

**Mar 2015 – Mar 2016 NHS England**

**Position: Principal econometrician/finance consultant lead to Analytical Finance**

* Using Data Science forecasted Clinical Commissioning Groups financial needs for circa. £70 billion in resource allocations, managing >10 billion cells of data.
* Linked, provided managerially useful statistical tables, charts and graphs and modelled cost-profiles of individuals and clusters using 3 years of complex datasets for all English users of the National Health Service

o Seconded to Deloitte Economic Consulting team to program and implement a pricing algorithm for [hospital] Specialized Services

# Sept 2015 MARINE MANAGEMENT ORGANIZATION (MMO)

**Position: Senior Economic Consultant to the government’s**

* Senior Economic Consultant to the government’s Marine Management Organization (MMO) for the South Offshore Marine Plan
* Provided guidance on the methodology and net present value model in a team of analysts’ business impact assessment.

# Jan 2015 – Jul 2017 LAU CHINA INSTITUTE, KING’S COLLEGE

**Position: Business Development Manager and Economist (Lecturer)**

* Designing and convening taught modules; publishing economics papers and research in journals and the media, including Financial Times; arranging seminars with experts, government, policy and intelligence officials; promoting these and other outputs via social media channels and email newsletters; meeting government officials in China and the UK.
* Developed a 6 paper policy research series engaging academics from around the world.
* Attended as a VIP events in Taiwan and China, presenting at conferencing and publishing in books and media including Financial Times, the Diplomat and China Daily (Hong Kong edition)

# Oct 2010 – Jan 2015 APPLIED ECONOMICS, FINANCE & BANKING, UNIVERSITY OF NOTTINGHAM

**Position: Research Centre PhD Candidate**

* 6 months spent in Hong Kong and mainland China performing microeconomic and applied econometrics research and primary research duties with, e.g.:
  + Gen2Partners (now Adamas); Marco Polo Funds (hedge fund); Redwood Capital (private equity)
  + Highway Holdings (NASDAQ: HiHo)
  + Fidelity International (Fund management); PWC Senior partners; Senior forensic accounting partners (KPMG)
  + School of Business (Faculty of Business & Economics). University of Hong Kong.
* Senior business (finance) mentor to entrepreneurship competition delegates in KL, Malaysia.
* PhD thesis completed entitled “Foreign Investors in the Chinese Stock Market”

# Apr 2010 – Sept 2010 Preparation/Proposal period for PhD.

**Mar 2010 – Mar 2015 AXA INSURANCE**

* Covering claims for the Eastern Asia region, Taiwan, China, Hong Kong and Japan.

Mar 2009 – Mar 2010 Team Member of Phoenix Futures.

# Sept 2006 – Sept 2009 ISACO LTD

**Position: Investment consultant**

* FCA regulated investment fund management advisory

# Sept 2005 – Nov 2011

* Created own start-up providing economic analysis of financial markets, related courses/consulting & trainings, including generating 5000+ leads, prospects, sales and enquiries and a preparing subscribers’ daily global market update

# EDUCATION

**Oct 2010 – Jan 2015** University of Nottingham-doctoral research under economics & finance professors in Hong Kong & Nottingham.

Sourced, merged & managed big data sets for accounting, corporate finance, governance and market performances of 1200+ listed businesses, programming in STATA and Excel software.

More than 6 million cells of data & 300+ variables utilized from multiple datasets Generated of new variables research and findings Identified and applied panel data econometric models Including ordinary least squares, panel fixed effects, random effects, panel logit fixed effects Instrumental variables, difference and system generalized method of moments Achieved publication & reviews for publication in targeted Economics & Finance journals Presented at conferences in London, Nottingham, China, Hong Kong & Gothenburg, Sweden Lectured to finance, accounting and economics students

MBA/ MSc Courses Taken/Sat During PhD

(1) Economic Data Analysis (Eviews & STATA) (MSc);

(2) Financial Markets Analysis (MSc)

(3) Financial Management (MSc);

(4) MBA Corporate Finance;

(5) MBA Managing Social Networks for Business Success: Analysis of networks & social media course.

**2006 – 2007** Master (MSc) of Business & International Relations with Chinese language University of Sheffield: Economics, management & language heavy course. 2:1 equivalent. Modules: Economy & State; Business & Management; Language I & II (Mandarin); Culture & Society; Chinese for Research; Dissertation. Sept 2001 – Sept 2005

**Early career.** Clinical Science (Bachelor’s degree) Sheffield Medical School & various other P/T roles.

# SKILLS / TRAINING

• Respected specialist member of governance and operations boards

* Evaluation of corporate and government policy
* Diverse stakeholder management

• Corporate Finance and investments

• Able to work with big, complex datasets from a diverse product/sector background.

• Professional project and time management capabilities

• Articulate communicator in small group and large audience presentations certified in neurolinguistic programming (NLP).

• Public Sector and Commercial contracting teamwork and consulting

• Advanced Excel and STATA us

**SELECT PUBLICATIONS**

* Chaplin, M., Beatson, S., Lau, Yiu-Shing, Davies, C., Smyth, C., Burrows, J., Weir, R., Tatarek-Gintowt, R. (2016). Refreshing the formuale for CCG allocations. For allocations to Clinical Commissioning Groups from 2016-2017: Report on the methods and modelling. NHS England, Analytical Services (Finance). <https://www.england.nhs.uk/wp-content/uploads/2016/04/3-rep-elland-all-sections.pdf>
* Brown, K. & Beatson, S. (2016) The European Union and China: The Need for a More Politicised Relationship. *Asia & the Pacific Policy Studies*
* Beatson S. (2018). Era of Realignments. The Relationship between the UK and China Post-Brexit. Chapter 4 In Reilly, M. and Huang, D. (editors). Implications of Brexit and the Asia-Pacific, Palgrave-Macmillan. <https://www.palgrave.com/gp/book/9789811301841>
* Beatson, S., Chen, J. (2018). Foreign Investors, Corporate Governance & Performance in A Share Companies. Journal of Chinese Economic and Business Studies
* Beatson, S. (2019). Flexible operating hours evaluation plan summary. <https://www.gov.uk/government/publications/flexible-operating-hours-evaluation-plan-and-summaryhttps://www.gov.uk/government/publications/flexible-operating-hours-evaluation-plan-and-summary>
* Kuo, Mercy for The Diplomat (7 March, 2017). Insights from Sam Beatson. The Power of Ports: China’s Maritime March. 82nd in the Trans-Pacific View Insight Series. Link: <http://thediplomat.com/2017/03/thepower-of-ports-chinas-maritime-march/>
* Kynge, J. et al. for Financial Times (January, 2017). How China Rules the Waves. Link: <https://ig.ft.com/sites/china-ports/> —Extensive use of data, research and citation. • Josephs, Jonathan (18 January, 2017).

**VERIFIABLE COMMENTS FROM BUSINESS & GOVERNMENT LEADERS:**

“Sam produced high quality outputs in a very complex, technical project. The outputs were robust, accurate and timely. This is especially commendable in a field that was new to him. At the start he quickly worked through the previous work in this area. He demonstrated a flexible approach, willingly taking on whatever work areas were needed to progress the overall project, often on his own initiative. A lot of the work was necessarily personally delivered, but Sam demonstrated good team work, bringing in the specialist knowledge and contributions of colleagues in NHS England.”

**Michael Chaplin. Senior Lead, Analytical Finance – Department for Health – NHS England**

“Sam's strengths include clear analytical sense and a good grasp of policy needs, likely key issues and the 'bigger picture'. Sam's ability to quickly secure a consistent mechanism to capture key messages from a wide range of external leads - through structured interviews and by email - and lead subsequent analyses, made it very straightforward for the taskforce to assess, collate and summarise issues for Ministers and senior decision makers and prioritise necessary resulting actions.

Sam was a vital member of the wider team, bringing skills, experience and styles of working which set the taskforce's work on a very secure footing and was a major contributor to our being able to complete a very complex and wide ranging and high-profile assessment in just two and a half months.”

**David Knight – Senior Leadership Team – UK Government No Deal Data Task Force**

“It was a great pleasure working with Sam on a recent DCMS project! As well as keen analytical acumen and excellent spreadsheet skills, Sam brought his great sense of humour and philosophical skills to bear. The latter were particularly helpful given the fast pace and change involved in the project, memorably and very helpfully contributing to wider team-building.

The former were helpful to keep spirits up in an otherwise stressful environment. Sam was promoted early on during the project, when subject experts left the team, and he quickly took this in his stride despite no handover.

Sam worked well to achieve consensus working towards solving challenging technical and methodological issues. A successful outcome was achieved, thanks to Sam's resilience under pressure and not least due to Sam going the extra mile and burning the midnight oil to achieve critical deadlines.”

# Richard Palfery, 5G Head of Knowledge Management and Benefits at Department for Digital, Culture, Media and Sport (DCMS)

“I worked with Sam on a fast-paced project to look at data in the public sector. Sam quickly drew up a questionnaire and then delivered excellent, intuitive analysis. His attention to the need of the audience and his ability to contribute to design and thinking was exemplary.

I really enjoyed working with Sam, he is a great team player and colleague.”

**Erika Lewis, Deputy Director, National Data Strategy (Central Government)**

“Sam is a wonderfully talented economist, his drive and determination are unique and are a valuable asset and he delivers solutions to the most complex problems raising the bar in terms of quality and hard work - I strongly recommend working with him to everyone a great example to us all!”

# Robert Aitchison, International Executive Search Consultant at Guided Solutions - Executive Search in Medical Devices

“Dr Beatson provided strategic executive coaching to me which had a significantly beneficial impact on my business. He coached me in leadership, negotiation and strategy. Sam was able to identify areas of improvement and his incisive advice enabled me to drive the business to new levels.”

**Damian Rhodes, CEO FocusCore - Recruiting Senior Executives & Accountants for Consumer & Retail Businesses in Hong Kong**

“Over the course of my 30-year career, beginning as an MTV producer and VJ, then moving into executive roles in media and more recently as a journalist and editor in Asia, I have met numerous extraordinary people and gained a wealth of knowledge. Meeting Sam Beatson five years ago in Hong Kong, however, was a real eye-opener. His leadership skills, executive coaching abilities and ability to understand the contradictions and complexities of the business world are truly without parallel - not to mention his extensive list of heavy-hitting contacts who feel the same way about him. I would recommend him without hesitation for any high-performance position that demands energy, integrity, insight and great communications skills.”

**Dave Kendall, Radio and Television Personality & Asia Media Mogul**

“I have come to rely on Sam for advice and counsel in many areas…to his great credit, Sam crosses boundaries…Dr Beatson is no slouch at intensive analysis, but he is also able to use and integrate his wide skills and knowledge in immensely creative and impressive ways, without loss of that depth…this makes him highly interesting and productive, and also a great colleague for others.”

**Professor G Withers, PhD (Harvard).**

“…It is a great pleasure – and privilege – for me to recommend him…His contributions [to the Society of Leadership Fellows inaugural stay at Windsor Castle] were easily among the most memorable, because of the way he combined powerful ambition in the way he offered his ideas and proposals with a real sense of personal humility that enabled him to achieve a powerful connection with colleagues in the group…[he has] the ability to command the wholehearted support and backing of others…[I asked] asked whether the other leaders present would purchase “Beatson shares” if they were available at the door. A sea of hands went up without hesitation!”

**Pete Ashby – Leadership Director, St George’s House, Windsor Castle**

“Sam is a high performer. He has delivered high quality products, typically on time and to a high standard. He has been a stalwart on the team, stepping in to cover for the team leader role for approx. 6-8 weeks before the new team leader took up post and providing essential analytical support for BDUK and for me personally during this period. He is agile, flexible and very willing to apply knowledge to deal with a diversity of challenges. Using his high level of competence, Sam solved very challenging problems with vast data sets.

Sam demonstrates strong communication and stakeholder engagement skills, applying these skills in a variety of ways from drafting complex and difficult submissions to ministers to managing tricky stakeholders in a collaborative and effective way. He has also quickly won the support of the senior leadership team in BDUK who recognise his credibility in the application of skills and results.”

**Sue Dookun, Deputy Director, Broadband Delivery UK (Directorate of Central Gov. Dept.)**

“I have spent the past 35 years in Hong Kong as an asset management professional, and our first meeting was most illuminating regarding Sam’s economic knowledge.…I am impressed by Sam’s commitment to government work at senior levels and the application of his financial knowledge to the business and corporate world… Given Sam Beatson’s knowledge base, broad global network, public policy consulting skills and econometric background, I can think of no-one better suited for the program you offer.”

**David Nesbitt, Licensed Asset Manager, Hong Kong**