

# **Dr. Samuel Alexander Beatson (Ph.D.)**

**Senior Economic and Financial Analyst (Public Sector & Commercial)**

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## **EXPERIENCE/WORK**

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- **December 2016 — August 2017** — Project manager / principal for the ‘Colour of Chinese Money’ project with Australia, UK, Taiwan and China (mainland) officials and academics investigating overseas investments into business: the economic and political impacts, intents, concerns and benefits—developed an original paper, fielded several further papers and organized two international roundtable workshops (with Professor Greg Austin, University of New South Wales, Canberra) in London and Canberra.
- **March, 2015 to March 2016 – Principal econometrician (senior consulting economist) to Analytical Finance at NHS England – forecasted Clinical Commissioning Groups financial needs for circa. £70 billion in resource allocations**
  - Merged, analyzed, managed, visualized and modelled hospital usage data using >10 billion cells of patient level hospital usage data at full consultant episode (FCE) level (all patients who had visited English NHS hospitals over several years).
  - Costed the usage data by writing algorithms to apply appropriate pricing to spells of hospital care based on complex inpatient, outpatient and A&E usage combinations concerning their attendance and care by way of procedure, diagnostic profile and additional treatments.
  - Wrote programs to link the data to GP practice lists of patients to develop aggregated age-sex cost profiles within GP practices and forecasted future costs using a variety of regression techniques and sensitivity/robustness checks.
  - Processes, reporting, graphs and regressions published here: <https://www.england.nhs.uk/wp-content/uploads/2016/04/3-rep-elland-all-sections.pdf>
  - Attended and presented at regular progress review and process/data/findings scrutiny meetings with other senior health economists of the government’s technical advisory group (TAG) and Advisory Committee for Resource Allocation (ACRA).
- **September 2015 Senior Economic Consultant to the government’s Marine Management Organization (MMO) for the South Offshore Marine Plans**
  - Provided guidance on the economic methodology, analysis and net present value model in a team of analysts’ business impact assessment for these plans.
  - Participated in triage assessments as independent senior economist and worked directly with the analysts involved on producing the final document for submission to senior government economists.
- **Jan. 2015 – July 2017 Senior Economist to the Lau Institute, King’s College London**
  - Designed and convening taught modules; published economics papers and research in journals and the media, including Telegraph, Financial Times, BBC News; arranged seminars with subject matter experts, government, policy, economic and intelligence officials; promoting these and other outputs via social media channels and email newsletters. Travelled extensively to present findings and build links with international organizations, including foreign government ministries, tech companies, House of Commons & Lords.
  - Wrote and published applied econometrics and economic research papers for peer-reviewed academic economics journals
  - Trained Masters (MSc) students in empirical econometric and financial analysis, corporate governance, macro- and micro- economics and applications.
  - Published post-doctoral book chapters and policy journal papers using data collection, analysis, visualization, interpretation/inference and report writing skills.
- **Oct. 2010 to Jan. 2015 –Research Centre for Applied Economics, University of Nottingham**
  - Worked in Excel and STATA on cleaning and managing big data sets, presenting descriptive statistics and quantifying the relationships between firm performance and around thirty explanatory variables using panel data econometric [regression] estimations, including fixed effects, random effects, system GMM and logistic regression for panel data.
  - 6 months spent in Hong Kong and mainland China performing microeconomic and applied econometrics research duties and discussing findings with:
    - Gen2Partners (now Adamas); Marco Polo Funds (hedge funds); Redwood Capital (private equity); Highway Holdings (NASDAQ: HiHo); Fidelity International (Fund management); Senior partners (PWC); Senior forensic accounting partners (KPMG)
    - Set up affiliation with the Faculty of Business & Economics, University of Hong Kong.
  - Senior economics mentor to entrepreneurship competition delegates in Kuala Lumpur, Malaysia.
  - Published and passed a seven chapter PhD thesis examined by tenured economics professors from Nottingham and London.
- **April 2010 to Sept. 2010: Preparation/Proposal period for PhD.**
- **March 2010-March 2015:** AXA Insurance. Covering claims for the Eastern Asia region, Taiwan, China, Hong Kong and Japan. Verifying the medical validity of the claims and treatments submitted from the region.
- **March 2009-March 10: Team Member of Phoenix Futures**
  - Team member duties in a tertiary treatment centre—including collection of and distribution of controlled medications to clients, guiding workshops and social skills development work with clients.
- **Sept. 2006- Sept. 2009: Investment consultant with ISACo Ltd—FCA regulated investment fund management advisory**
  - Responsible for bringing in new clients and working with the Chief Investment Officer on communications at events.
- **Sept. 2005- November. 2011:**
  - Created own start-up providing economic analysis of global markets, related courses/consulting & trainings, including generating 5000+ leads, prospects, sales and enquiries and a preparing subscribers’ daily global market update.
  - Organized, marketed and attended a live training event in the US for 20 delegates.

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## EDUCATION/ACADEMIC

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- **October 2010 to July 2015: University of Nottingham**– Ph.D.—doctoral research programme
  - Visiting Scholar to University of Hong Kong from 02/2011 to 04/11 (3 months) & from 08/2013 to 10/13 (2 months)
    - Purpose: Academic fieldwork scholarships as part of Nottingham PhD – meetings/interviews carried out with finance and accounting industry practitioners & academics.
- **Ph.D. Dissertation Status: Fully passed and graduated in 2015 (Economics & Finance supervised and examined thesis)**
  - Sourced, merged & managed big finance datasets in the analysis of accounting, corporate finance, governance and market performances of 1200+ listed businesses, working in STATA and Excel softwares for 4+ years
    - More than 6 million cells of data & 300+ variables utilized
    - Merged & analyzed irregular data from multiple sources
    - Generated of new variables research and findings
      - E.g. Used both STATA & Excel for advanced modelling and data management to discern the presence of foreign investors in top shareholdings of companies and analyze their preferences and effect
    - Used quarterly accounting datasets to describe the capital structure, remuneration and performance of industry sectors and individual companies and their ownership structures.
  - Designed & applied econometric models
    - To uncover the determinants of investments (investor preferences) & impacts of corporate governance indicators on company performance
    - Identified and test research hypotheses and interpreted the statistical findings
    - Robust models & statistical tests employed
      - E.g. Long time series & large cross-sectional regression, panel data econometric specifications
  - Achieved publication & reviews for publication in targeted Economics & Finance journals & presented at conferences
    - Peer-reviewed Publication in journals on economics, policy and business
    - Publication on Policy Institute websites and the public media, including Financial Times, Telegraph, China-US Focus
    - Papers presented at conferences in London, Nottingham, China, Hong Kong & Gothenburg, Sweden
    - Lectured to finance, accounting and economics students
- **Extensive advanced use of MS Excel/Macros/tables/formulae; STATA statistical software in:**
  - Solving problems with combining multiple financial and accounting datasets of heterogeneous periodicity
  - Extracting & creating key variables of potential interest (e.g. performance ratios, debt ratios, revenue and turnover ratios, market performance) & testing their significance in a wide number of equations/models
  - Derivation of advanced panel equations for econometrics where dependent variable is continuous, e.g. pooled OLS, cluster robust fixed effects, random effects, instrumental variables models
  - Derivation & application of binary signal generating predictive models, e.g. random & fixed effects logit models
  - Running off detailed statistical analysis, descriptive statistics, regression results tables & tests for significance, validity & robusticity of models
  - Expert in STATA and Excel for data management, problem solving, programming, graphing (visualization) & tabling functions for presentations, papers, descriptive statistics & results output and analysis
  - Able to communicate and visualize findings from in-depth quantitative & qualitative research in an intelligible way to a diverse audience, providing literature reviews, reporting, robust analysis, & interpretation, discussion & conclusion.
- **MBA/MSc Courses Taken/Sat During PhD**
  - (1) *Economic Data Analysis* (MSc): Econometric analysis of economic data & programming using two types of software
  - (2) *Financial Markets Analysis* (MSc): Financial & portfolio theory
  - (3) *Financial Management* (MSc): Corporate finance
  - (4) *MBA Corporate Finance* (University of Hong Kong): Intense mathematical finance course for executive MBA students
  - (7) *MBA Managing Social Networks for Business Success*: Analysis of networks & social media course
- **2006-2007: University of Sheffield:**

### Master (MSc) of Business & International Relations with Chinese language

– Economics, management & language heavy course. **2:1 equivalent (64% weighted average of marks).**

Modules: Economy & State; Business & Management; Language I & II (Mandarin); Culture & Society; Chinese for Research; Dissertation.

### Other Academic Highlights

**2001-2004 Bachelor of Medical Science in Clinical Science – courses:** clinical medicine, pharma, anatomy, physiology, biochemistry, public health, psychiatry, obstetrics placements etc. All paper and clinical exams passed (University of Sheffield).

**A levels:** Chemistry; Human Biology; Pure Maths (AS) & Statistics (AS); English; Music (A,A,BB,B,C)

**GCSEs:** 9As & 2 Bs, including As in Maths, Statistics, Languages (French, German, Latin), Chemistry, Physics & English.

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## SKILLS/TRAINING

- **Team work, project planning/management/execution**
  - During PhD set up links with Hong Kong University including all arrangements for exchange & collaboration from first approach to winning funding.
  - Oversaw all the steps and ensured timely delivery of the 2015 CCG formula for NHS England.
  - Project designed, researched and written papers for targeted economics and finance publications
- **Corporate Finance, Project Management & Business Savvy**
  - Sat executive MBA courses during PhD at Hong Kong University & Nottingham University.
  - Prestigious Teaching Award received in recognition of contributions to Masters student teaching (2012).
  - Run own business for a number of years.
  - Experienced user of GANNT planning and proprietary project management capability.
- **Experience of Public Sector contracting within team**
  - NHS England / DH for 12 months
  - Co-author and lead researcher in ‘Updating the Clinical Commissioning Formula for 2017/18 Allocations’
  - MMO for 1 month – South Offshore Marine Plans
  - Outstanding flexibility in new projects, ability to learn and apply knowledge and skills in new workplaces and on new data and policies in a variety of fields with high economic technical ability and commitment to excellence.
  - Understanding of Green Book concepts & frameworks

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## INTERESTS/DEVELOPMENT

- Certified NLP (neuro-linguistic programming Practitioner (American Union of NLP) & member of the American Association of Clinical Hypnotists
- **Sport – hiking in the Peak District, sprint triathlon, gym and boxing. Attended both Beijing (2008) and London (2012) Olympic Games and have assisted with media delegates attending World Snooker Championships.**
- Mentored previously by senior performance coach to the British Cycling Olympic Team (and Sky Cycling Team + Ronnie O’ Sullivan)
- **Personal Development & Peak Performance Enthusiast**
- Presenting at courses, conferences, universities (Training, client contact, workshops)
- **Author of books/courses on personal development**
- Charity volunteer accountant/treasurer (2012-13) – Sheffield CAP (Church Action on Poverty) – 2 years voluntary & Chairman of local RAF/Air cadet squadron Civilian Committee for Sqn 367, Hillsborough, Sheffield – working with the community & supporting officers/staff.
- **Intermediate Mandarin speaker/reader with knowledge of other languages, e.g. French, Italian**

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## Summary

Dr Sam Beatson is an senior applied economic and financial analyst with senior data scientist and econometrics capabilities. Sam undertook his Ph.D. at Nottingham University under Economics & Finance professors in 2010, including 6 months at the School of Business, Faculty of Economics at the University of Hong Kong. He has been working with big data financial economic datasets and modelling in the STATA and Excel softwares for more than six years, utilizing econometric methods & programming for the analysis of corporate and financial data, solving problems concerning the irregularity of different datasets, quantifying qualitative data and designing and testing hypotheses using econometric models for the analysis of a number of business performance measures. He has taught Masters Students in finance and economics in addition to empirical methodology, analysis & interpretation. Sam 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.

Sam is published in policy institute (think tank) publications, peer-reviewed periodicals and his research and expertise has been drawn upon in journalistic media including Financial Times, BBC Business News (TV), the Telegraph and others. Sam has presented his research at several international conferences and universities and has worked with the Department of Health, NHS England, MMO in addition to advising FCO colleagues on a variety of finance and economics-centred projects requiring both high level engagement and high levels of technical expertise and robust reporting standards to diverse audiences. He was the principal econometrician responsible for costing and modelling for the refresh of the Clinical Commissioning Groups (CCG) formula for the NHS executive and for costing for the Specialised Services Formula from March 2015 to March 2016, answerable to the Head of Analytical Finance, Advisory Committee on Resource Allocation (ACRA) and the Technical Advisory Group (TAG)—a project advising on the distribution of more than £70 billion in funding and requiring working on more than one billion cells of data.

He further assisted economic analysts in their proposal for the South of England offshore marine plans in 2016 as a senior economic peer reviewer and mentor— a project involving a business impact assessment and present value projections concerning the implementation of offshore marine plans. This was followed up by assisting with project design and development for the business impact assessment of government plans to recoup costs for MMO fisheries support. Sam was appointed a founding Leadership Fellow at St. George’s House, Windsor Castle in early 2017. The combination of his expertise in finance and economics, in addition to his public sector and commercial experience make him a strong Candidate for this position.

## **Selected publications and quotes**

- Sutherland, D, Luta, N. & Beatson, S. (2011). Productivity performance in Chinese business groups: the positive and negative impacts of business group affiliation. *Journal of Chinese Economic and Business Studies*, 9, 2: 163-180. <http://www.tandfonline.com/doi/abs/10.1080/14765284.2011.568685>
- Beatson, S. (2012). Normative response to requiring Chinese pronunciation from our [sports] commentators. For CPI: Analysis blog (13 July, 2012). <https://cpianalysis.org/2012/07/13/normative-response-to-requiring-chinese-pronunciation-from-our-commentators/>
- Chaplin, M., Beatson, S., Lau, Yiu-Shing, Davies, C., Smyth, C., Burrows, J., Weir, R., Tatarek-Gintowt, R. (2016). Refreshing the formulae 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*. <http://onlinelibrary.wiley.com/doi/10.1002/app5.152/full>
- Kyngé, J. et al. for Financial Times (January, 2017). How China Rules the Waves. <https://ig.ft.com/sites/china-ports/> —Extensive use of data, research and citation.
- BBC Business (Television interview). 10 April, 2017. First direct train from UK to Asia departs on 7500 Mile Journey. <http://www.sambeatson.com/media>
- Beatson, S., Chen, J. (2017). Foreign Investors, Corporate Governance & Performance in A Share Companies. *Journal of Chinese Economic and Business Studies* (August 2017). <http://www.tandfonline.com/doi/abs/10.1080/14765284.2017.1346931>