

Samuel Alexander Beatson, Ph.D.

Consultant Economic and Social Researcher, Lecturer (Asst. Professor)

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Clearance: SC on file through Cabinet Office Location: LONDON

EXPERIENCE/WORK

- **September 2018 to present –Assistant professor in finance, risk and banking. Convenor and/or lecturer for Research Methods for Finance and Business, MBA Corporate Finance; Corporate Risk; Consumer ethics and regulation; MBA Personal and Professional Development - Business School, University of Nottingham, UK - January 2018 to present** – convening 3 taught modules to MSc students, including how to produce and interpret descriptive statistics, correlation matrices, and develop and understand intuitively advanced econometric models from the ground up.
 - **Present - Economist** – DEFRA and DfE – developed economic modelling for a science-led national data collection and publishing programme, building a data science analysis project for hedgerow carbon sequestration estimates involving circa. 1.5 million cells of machine learning derived data; for DfE managing various statistical and economic briefs according to data received across the Turing international exchange programme.
 - **May 2019 to January 2021 (FT) – Social Researcher for Her Majesty’s Courts and Tribunals Service FoH Team, Ministry of Justice, United Kingdom.** Managing the design and delivery of data collection, cleaning, research, analysis and report development for two UK Government reform projects, including covid crown court interventions and their assessment.
 - **October 2018 – December 2018 – Data analytics team leader, DCMS** – leading a small team to provide a workbook and manage and visualize statistical data on X-Gov customer/supplier data relationships from Gov Digital procurement frameworks and cross government workbook results and QA. Working alongside GSS statistician and GES economists
 - **October 2017 to October 2018 – Lead Economist** for the evaluation of the business, labour market and consumer impact of covering whole of UK geography for the superfast broadband programme at Broadband Delivery UK, Department for Digital, Culture, Media and Sport, training and mentoring GSS statistician and working in collaboration with GES grade 7s and 6s.
 - Panel data models and difference-in-difference / propensity score matching models deployed to understand the impact on turnover of increased broadband provision.
 - Managed external company contractors, critiqued and improved their approaches and replicated the study in-house.
 - **March, 2015 to March 2016 , NHS England – Principal econometrician to Analytical Finance for clinical commissioning 17-19.** – programmed the code to develop the management, cleaning, costing, modeling, tabling and graphing in C (STATA) to forecast financial needs for circa. £70 billion in resource allocations, managing >10 billion cells of data, including diagnostic and procedural profiling. Designed project and its delivery from standing start.
 - **September 2015, and January 2018, Marine Management Organization (MMO) Senior Business Analyst to the government’s for the South Offshore Marine Plans**
 - Developed quantitative guidance on the methodology and net present value model in a team of analysts’ business impact assessment and contributed to the assessment.
 - **Jan. 2015 – August 2017 (PT/FT) Political Economist & Lecturer in the Lau China Institute, King’s College London**
 - Designing and convening taught modules; publishing 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.
 - **Oct. 2010 to Jan. 2015 –PhD Candidate (FT) -Research Centre for Applied Economics, University of Nottingham**
 - 5 months spent in Hong Kong and mainland China performing microeconomic and applied econometrics research duties with:
 - Gen2Partners (now Adamas); Marco Polo Funds (hedge funds); Redwood Capital (private equity)
 - Fidelity International (Fund management); Senior partners (PWC); 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.
 - Winner of several scholarships, including the Research Centre for Finance and Banking full PhD scholarship.
 - **April 2010 to Sept. 2010: Preparation/Proposal period for PhD.**
- Earlier roles: March 2010-March 2015:** AXA Insurance. Covering claims for the Eastern Asia region, Taiwan, China, Hong Kong & Japan. **March 2009-March 10:** Team Member of Phoenix Futures. **Sept. 2006- Sept. 2009:** Investment consultant with ISACo Ltd—FCA regulated investment fund management advisory; **Sept. 2005- present:** Created own start-up providing macro-economic and technical analysis of

financial markets, related courses/consulting & trainings, generating 5000+ leads, enquiries and a preparing subscribers' daily market update.

EDUCATION/ACADEMIC

- **October 2010 to July 2015: University of Nottingham** - Ph.D.—doctoral research programme and 7 chapter Ph.D. dissertation.
 - **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 business, consultancy and fund management industry practitioners & academics.
- **Ph.D. Dissertation Status: Fully passed & graduated in 2015 (economics and finance supervised & examined thesis)**
- **Title: “Foreign Investors in the Chinese Stock Market”**
 - **Located, merged & managed big datasets in the analysis of statistics in 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 for univariate and multivariate regression analysis**
 - **Generated new variables for descriptive statistical analysis and econometric modelling research**
 - 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 (panel logistic regression models using fixed effects)
 - Identified and tested research hypotheses and interpreted the statistical findings
 - Robust models & statistical tests employed, e.g. long time series & large cross-sectional regressions, e.g. fixed and random effects)
 - **Sourced and managed the interviewing of 25 practitioners for semi-structured template analysis, developing themes, distilling codes, qualitative process models and reporting on findings**
 - Including senior managers at KPMG, PwC, Marco Polo Funds and Fidelity International
 - Applied social research methods to large quantities of the interview research data to generate new theory
 - Developed a working paper and model for reporting and presentations
 - **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 and R statistical software in:**
 - Solving problems with **combining multiple research datasets** of heterogeneous periodicity
 - Extracting & **creating key variables** of potential policy interest & 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 and Supplementary Courses Taken/Sat During PhD**
 - (1) *MBA Managing Social Networks for Business Success*; (2) *MBA Corporate Finance* (University of Hong Kong); (3) *Economic Data Analysis* (MSc); (4) *Financial Markets Analysis* (MSc); (5) *Financial Management* (MSc); (6) Corporate finance; (7) Mind Mapping; (8) Philosophy of the Social Sciences; (9) Social Research Methodologies
- **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

Bachelor of Medical Science in Clinical Science: medicine, pharma, anatomy, physiology, biochem, public health, psychi, obstetrics placements etc.

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.

SKILLS/TRAINING

- Post-doctoral applied econometrician / quant researcher with publications / interviews in UK Government, Business & Economic Journals, Asia-Pacific Journal of Policy, the Diplomat, comments in Telegraph, BBC, research utilized in special investigation for Financial Times
- Engagement with stakeholders and colleagues at all levels
- Fluent in dealing with big data projects for statistical insight and modeling
- Business school lecturer for several years to MSc, MBA and PhD levels.
- Articulate communicator in small group and large audience presentations certified in neurolinguistic programming (NLP), including intuitive explanations of complex topics.
- Long-term in-house contracting teamwork and consulting experience, including developing and mentoring junior colleagues.
- Ability to understand and present from big, complex datasets and apply advanced model development and data management econometrics using, e.g. STATS, Excel and equivalents.
- Professional project and time management capabilities, including autonomous self-start, and resilience in delivering under pressure.

INTERESTS/DEVELOPMENT

- Sport – hiking, gym, boxing.
- Personal Development & Peak Performance Enthusiast
- Executive coaching
- Intermediate Mandarin speaker/reader with knowledge and fast acquisition capabilities for other languages.
- My two daughters.

Selected Statistical and Economic Research Publications

- Beatson, S. with HMCTS Analysis and Insight Team (2020) [COVID operating hours assessment report.pdf \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)
- Ipsos-Mori (2018) Evaluation of the Economic Impact and Public Value of the Superfast Broadband Programme <https://www.gov.uk/government/publications/evaluation-of-the-economic-impact-and-public-value-of-the-superfast-broadband-programme> [BDUK lead economist & manager of the Ipsos contract]
- 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. (2017). Foreign Investors, Corporate Governance & Performance in the Chinese Listed A Share Companies. Journal of Chinese Economic and Business Studies (August, 2017). <https://www.tandfonline.com/doi/abs/10.1080/14765284.2017.1346931>
- Beatson, S. (13 April, 2017) Tigers of the East and Bulls of the West—US Shares Have Peaked, Will China Follow? China-US Focus Online in English and Mandarin. Link: <http://www.chinausfocus.com/finance-economy/tigers-of-the-east-and-bulls-of-the-west-us-shares-have-peaked-will-china-follow>
- Kyngé, 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 and research cited.
- Beatson, S. 23 August, 2016. Mainland firms can exploit HK's advantages for overseas acquisitions. In China Daily Asia (Print Edition, Hong Kong) and online. Link: http://www.chinadaily.com.cn/hkedition/2016-08/24/content_26576534.htm
- Beatson, S., Burrows, J., Chaplin, M., Davies, C., Lau, Yiu-Shing, Smyth, C., Tatarek-Gintowt, R. Weir, R. (2016). Refreshing the formulae for Clinical Commissioning Group allocations. For allocations to Clinical Commissioning Groups from 2016-2017: Report on the methods and modelling. NHS England, Analytical Services (Finance). Link: <https://www.england.nhs.uk/wp-content/uploads/2016/04/3-rep-elland-all-sections.pdf>

Summary

Dr Sam Beatson is an experienced manager and leader in econometrics research design, analysis and reporting whose research has been featured in economics and business journals and other media, including Financial Times and BBC Live Business News. He has advanced (post-doctoral) capabilities in data analytics, statistical and econometric modelling and productive project management. He has been working for over ten years on solving problems concerning data collection, the irregularity and quality of different datasets, quantifying qualitative data, building and interpreting econometric and data mining models, visualizing descriptive statistical data and designing and testing models for the analysis of a number of high impact national policy programmes and global corporate and financial market insight projects.

Sam undertook his Ph.D. at Nottingham, entitled 'Foreign Investors in the Chinese Stock Market'. He has taught Masters Students, including MBA students in empirical methods, corporate governance, quantitative approaches to statistics and finance, in addition to personal and professional development, corporate risk and consumer ethics at Russell Group business schools and international institutions and mentored PhD candidates and MSc dissertations for many years. He was previously awarded a business and international relations degree with Chinese language at Sheffield and was the recipient of a prestigious award for his teaching at Nottingham. He was complimented on many occasions for his contribution to teaching on International Investments and Corporate Governance in the China and Globalisation programme at King's College London.

For the UK Government, Sam has been the principal econometrician responsible for costing and modelling for the refresh of the Clinical Commissioning Groups (CCG) formula for 2017/18 allocations for NHS England, answerable to the Chief Economist, Head of Analytical Finance, 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. In 2017 and 2018 he has been project leader and statistical modeller in the economic evaluation of the impact of the UK's superfast broadband programme and more recently produced the collection and analysis of cross-government statistical and qualitative data team leader for DCMS' Data Task Force. He has been delivering on economics and statistical analysis commissions for DfE's Turing Programme and developing a novel program involving financial and spatial metrics to inform HMG, businesses and policymakers on carbon sequestration statistics for DEFRA over the last six months approximately.

Sam has presented to diverse audiences at several international conferences, symposia, roundtables and discovery workshops, has won numerous scholarships and has consulted for the Department of Health, NHS England, Marine Management Organization, Department for Digital, Culture, Media and Sport and the Ministry of Justice on projects lasting between 2 weeks and 2 years, with a track record of contract extensions in all main contracts.

VERIFIABLE COMMENTS FROM FINANCIAL & BUSINESS LEADERS:

“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

“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

“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

Emails / Telephone numbers available on request. Full set of references held on file and with agency.