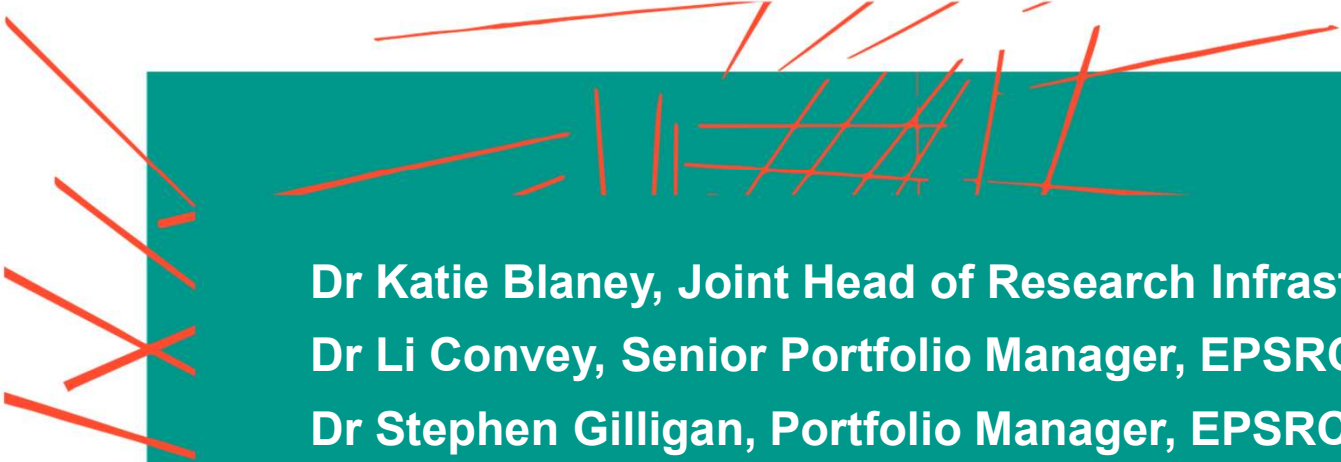




Engineering and
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EPSRC Strategic Infrastructure Full Opportunity Webinar

November 2023

A series of orange lines of varying lengths and orientations, some crossing each other, creating a dynamic, abstract pattern that frames the speaker information.

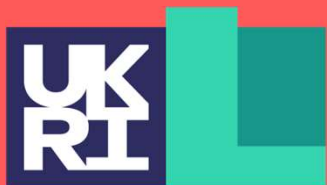
Dr Katie Blaney, Joint Head of Research Infrastructure, EPSRC
Dr Li Convey, Senior Portfolio Manager, EPSRC
Dr Stephen Gilligan, Portfolio Manager, EPSRC

Agenda

- Introduction
- Strategic Infrastructure Opportunity
- How to apply?
- How we assess your applications?
- Q&A

TFS Operation Contact Details

- TFS operational questions at platform level should be referred to the TFS IT Helpdesk.
 - Email support@funding-service.ukri.org
 - Telephone 01793 547490
- EPSRC policy related TFS questions should be referred to the business improvement team
 - Email epsrcpeerreviewpolicy@epsrc.ukri.org



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Introduction

EPSRC's Strategic Priorities

Core Disciplines

The Physical and Mathematical Sciences Powerhouse: curiosity driven discovery, with boundless potential

Frontiers in Engineering and Technology: unleashing our productivity potential

Digital Futures: the future of communications, computing and the internet

Mission-Inspired and Translational Research

Engineering Net Zero: decarbonising our economy and society, creating an alternative energy future and developing truly circular economies

AI, Digitalisation and Data – Driving Value and Security: powering transformative change and the next industrial revolution

Transforming Health and Healthcare: improving quality of life through innovative technological solutions

Quantum Technologies: realising the transformative impact of this technology across business, government and society

International

Talent and Skills

Place

World Class Infrastructure

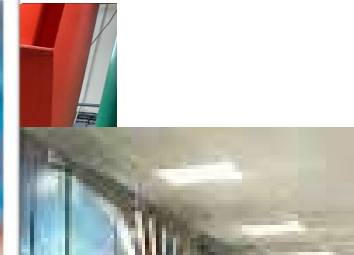
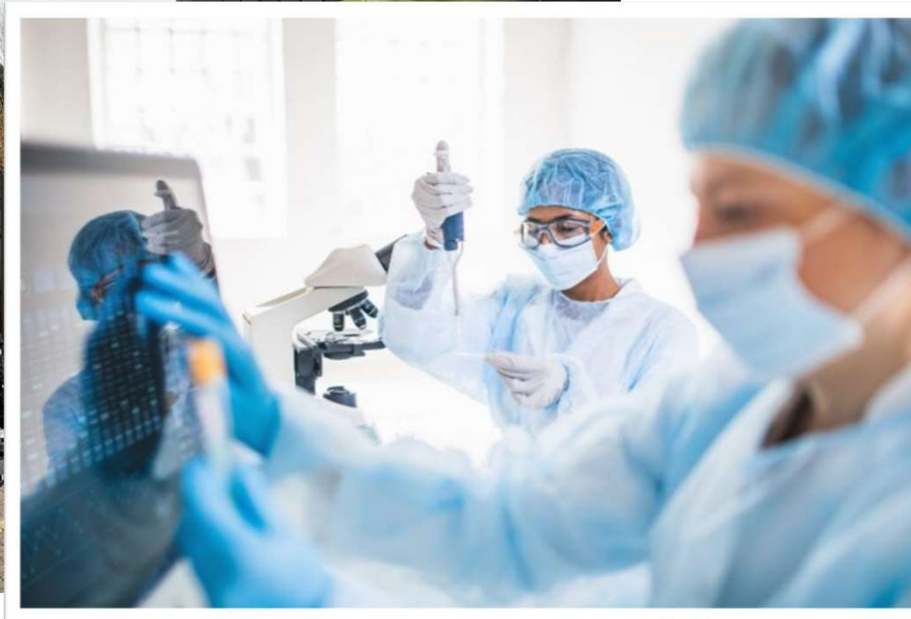
Impact

Business Engagement

An Effective Ecosystem for Engineering and Physical Sciences

What is Research Infrastructure?

Research Infrastructure in EPSRC covers capital equipment, facilities, high-performance computing (HPC) and hardware, access to facilities, software, and people. It is vitally important to every area of EPSRC.



Infrastructure Budget

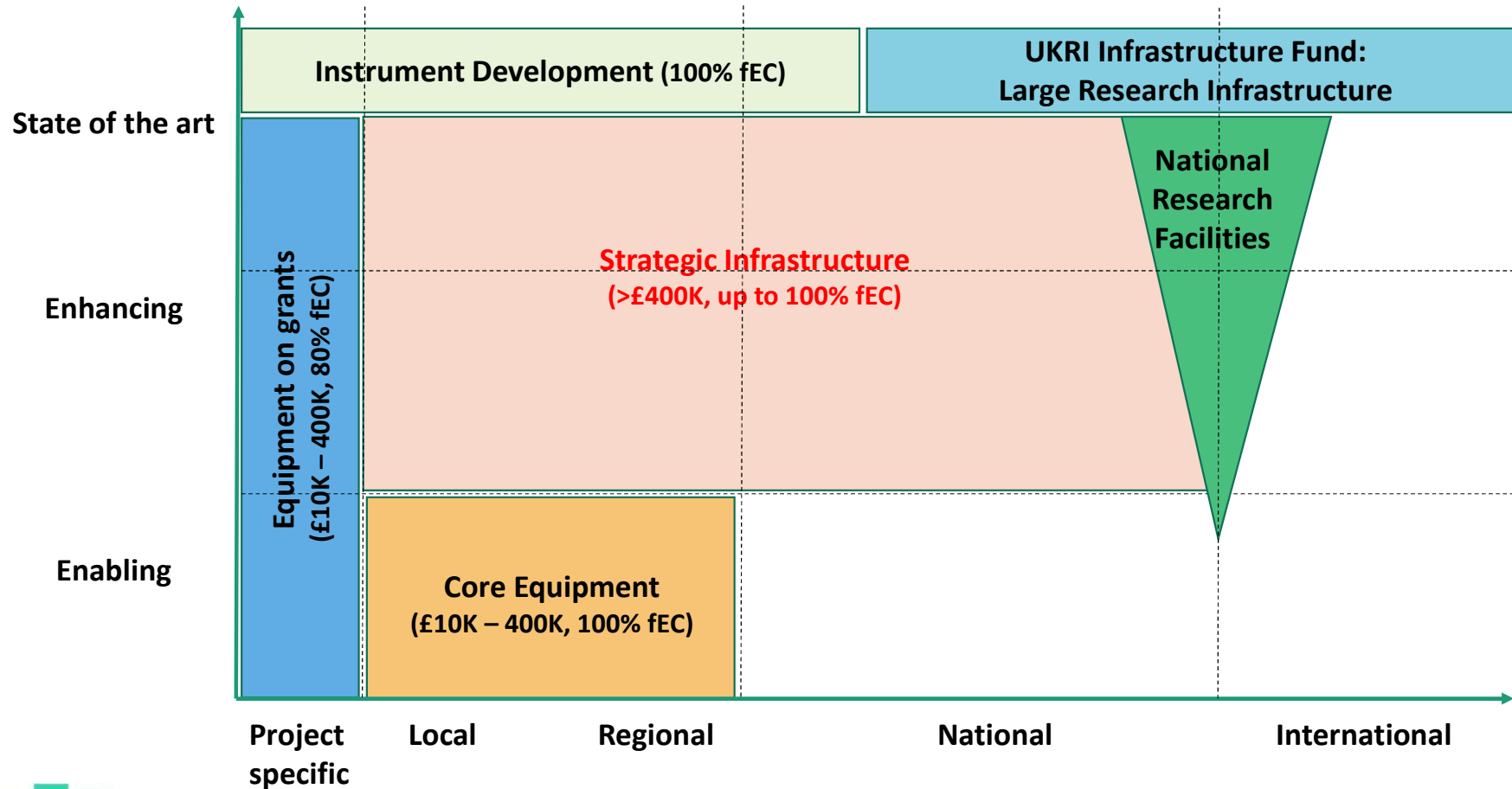
- In our last budget settlement, UKRI received a total budget of **£25.1bn** for three FY (22-23 – 24-25). Of this, the core EPSRC budget is **£1.9bn** (£620m - £660m per year)
- On top of this, across UKRI, there is a *total budget for Infrastructure* of £3.05bn over this period. Of this, **£1.07bn** is classed as **WORLD CLASS LABS**. This is the source of the EPSRC infrastructure core budget, which is approximately **£60m** per year. This is *our* budget, where we have the greatest degree of autonomy over spending. Other sources of funding include the UKRI Infrastructure Fund and short-notice funding.

Arts and Humanities Research Council £207m	Biotechnology and Biological Sciences Research Council £944m	Engineering and Physical Sciences Research Council £1,929m
Economic and Social Research Council £362m	Medical Research Council £1,750m	Natural Environment Research Council £925m
Science and Technology Facilities Council £1,651m	Research England £6,227m	Innovate UK £2,438m
Infrastructure £3,053m	Existing time limited commitments and Centrally Managed Funding* £3,674m	Collective Talent Funding and new cross-UKRI Strategic Programmes £2,805m



*includes existing cross-UKRI Strategic Programmes (and other time limited commitments such as COVID interventions), support for UKRI transformation, public engagement, and open access

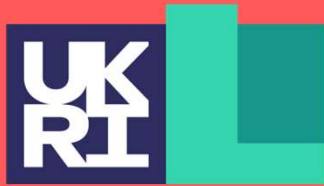
EPSRC Capital Framework



Strategic to whom?

An appropriate Strategic Infrastructure case can be made in a number of ways at a number of different levels. It does not *necessarily* have to have national significance or be unique if the strategic argument in support of it will lead to world leading science being enabled.





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Strategic Infrastructure Opportunity

Strategic Infrastructure Opportunity Details

- Intended to enhance UK scientific capability and support a portfolio of high-quality, cutting-edge research of high priority to EPSRC.
- The request should fit within the host institution strategy and enable research that predominantly falls within EPSRC's remit.
- Two routes:
 - Route 1: Strategic infrastructure
 - Route 2: Resources to support existing strategic infrastructure
- Infrastructure must be multi-user in nature and non-project specific.
- EPSRC wishes to encourage a culture of sharing with regards to strategic equipment in order to gain appropriate maximum usage.
- You must be based at a UK research organisation eligible for EPSRC funding.

Strategic Infrastructure Opportunity – Route 1

- Individual items of equipment over £400,000 or a suite of equipment intended to be combined in a single asset of total value over £400,000.
- Resource costs to cover procurement, installation and initial testing can be included (i.e. funding to undertake research is not a valid cost).
- Applicants need to demonstrate plans to ensure maximum usage and equipment sharing
 - This could include research across a number of Higher Education Institutions (HEI), or across a number of departments within a single HEI (provided a valid strategic case is presented)
 - Applicants should consider the quality of proposals and how this will be assessed as part of an access mechanism.
 - Long-term sustainability of funded equipment is an important consideration.

Strategic Infrastructure Opportunity – Route 2

Resources to support existing strategic infrastructure

- Only for invited applicants where strategic needs are identified.
- Intended to maximise utilisation of existing infrastructure that has already been procured, delivered and installed.
- This funding route supports improved access and approaches to enable a better sharing of existing infrastructure. We expect that funding will provide seed or invest-to-save funding to initiate increased use and sustainability of the existing infrastructure.
- We do not expect that you will need more funding through this funding route after the first application. You must articulate clear plans for sustainability in your application.

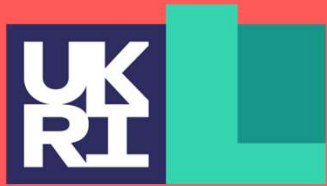
What we will not fund

Strategic Infrastructure:

- Costs associated with the support of individual research projects
- Underpinning infrastructure that we would expect to see in a well-found lab
- Software, research software development or cloud computing credits

Resources to support existing strategic infrastructure:

- Capital costs over £10,000
- Long-term research projects
- Replacement of existing support, maintenance, service contracts or capital costs



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How to apply?

How to apply

- All strategic infrastructure opportunity applications must be submitted from the UKRI new Funding Service
- When applying [Are you leading the project? - UKRI Funding Service](#)
 - Check that you have received an invitation to apply from EPSRC
 - Confirm you are the project lead
 - Sign in or create a UKRI Funding Service account
 - All questions and assessment criteria are listed in the How to apply section on [Strategic infrastructure for engineering and physical sciences: Oct 2023 – UKRI](#)
 - Send the completed application to your research office for checking
 - Your research office will submit the completed and checked application to UKRI
 - We must receive your application by **20 December 2023 at 4pm UK time.**

How to apply

▪ Summary

(550 words) – Succinctly describe your proposed infrastructure in terms of:

- context
- challenges
- aims and objectives
- potential applications and benefits
- **not assessed – the purpose is for EPSRC to identify assessors**
- **should be suitable for a variety of readers, including the public, wider community and policy makers**

How to apply

▪ Core team

List the key members of your team and assign them to one of the roles listed on the application page.

- You should only list 1 individual as **project lead**
- Information on UKRI's **new grant roles** can be found [on the UKRI website](#)
- Postdoctoral research assistants should be included as **research and innovation associate**
- **RTP** can be listed as project lead or co-lead (UK), providing requirements are met

Applicant questions

Applicant question

Purpose: Why is this infrastructure needed and why should EPSRC support it?

Vision: What research will be enabled by this infrastructure?

Approach: What are your plans to manage the proposed infrastructure?

Sustainability: what are your plans for sustainability of the proposed infrastructure beyond the end of the funding?

Applicant and team capability to deliver: Why are you the right individual, team and place to procure and manage this infrastructure?

Resources and cost justification: What will you need to procure and manage the infrastructure and how are these costs justified?

Your organisation's support: How are the contributions in line with the infrastructure requested?

How to apply

▪ **Purpose** (750 words)

Explain how the infrastructure sought will:

- meet national needs by establishing or maintaining a unique or world leading activity, or both
- enhance and complement the existing regional or national research capability
- evidence the strong demand and community need from a diverse and inclusive user base
- meet the strategic aims of EPSRC

How to apply

▪ **Purpose** (750 words)

Alternative plans:

- host organisation strategies for this infrastructure
- institutional commitment to the infrastructure landscape
- how the infrastructure sought is different from what is already available in the wider research landscape

How to apply

■ **Vision** (Attachment upload)

- is high quality, novel and transformative
- is timely, given current trends and context
- is relevant to identified stakeholders, including users
- will have a measurable impact beyond the immediate team, with an appropriate approach to achieving impact

How to apply

■ **Approach** (Attachment upload)

Explain your approach includes:

- a credible plan for managing the infrastructure, including a work plan with Gantt chart, associated risks, milestones and deliverables
- a plan for prioritising access to and maximising usage of the infrastructure. This should include any application and assessment processes and an estimate for the balance of users from the host institution, academics from external institutions and industrial users
- a plan for data management and accessibility

How to apply

▪ **Sustainability** (750 words)

Explain how your plans for sustainability include:

- an appropriate cost recovery model
- a plan for training and development of specialist technical staff
- a plan for the development or expansion of the user base after the initial period of funding and any “free-at-the point of access” period

How to apply

▪ **Applicant and team capability to deliver** (1,500 words)

Evidence of how you, and if relevant your team, have:

- the relevant experience, appropriate to career stage, to deliver the proposed infrastructure
- the right balance of skills and expertise to cover the proposed infrastructure, including the appropriate leadership and management skills to deliver the work and your approach to develop others
- contributed to developing a positive research environment and wider community

How to apply

▪ **Resource and cost justification** (1,500 words)

Provide justifications of:

- the cost of the proposed infrastructure
- any resources (for example staff or maintenance costs) associated with the infrastructure
- any resources requested for activities to expand the user base, increase impact, for public engagement or to support responsible innovation
- the nature and level of contributions from your partner organisations if applicable

How to apply

▪ **Resource and cost justification** (1,500 words)

For each of the above, demonstrate how the resources you anticipate needing:

- are comprehensive, appropriate and justified
- represent the optimal use of resources to achieve the intended outcomes
- maximise potential outcomes and impacts

Resource and cost justification

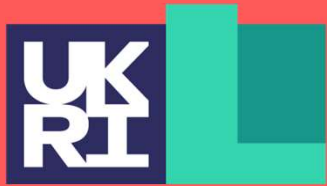
Directly incurred		Total applied for £:	0	—
Fund heading	Full economic cost (fEC)	% of fEC	Applied for	
Staff	-	80%	£0	
Equipment	£ <input type="text"/>	80%	£0	
Travel and subsistence	£ <input type="text"/>	80%	£0	
Other	£ <input type="text"/>	80%	£0	
Exceptions		Total applied for £:	0	—
Fund heading	Full economic cost (fEC)	% of fEC	Applied for	
Staff	-	100%	£0	
Equipment	£ <input type="text"/>	100%	£0	
Travel and subsistence	£ <input type="text"/>	100%	£0	
Other	£ <input type="text"/>	100%	£0	

How to apply

▪ **Your organisation's support** (1,000 words)

Include details of any host institution contributions that will be provided to support the infrastructure and any support that might add value to the work.

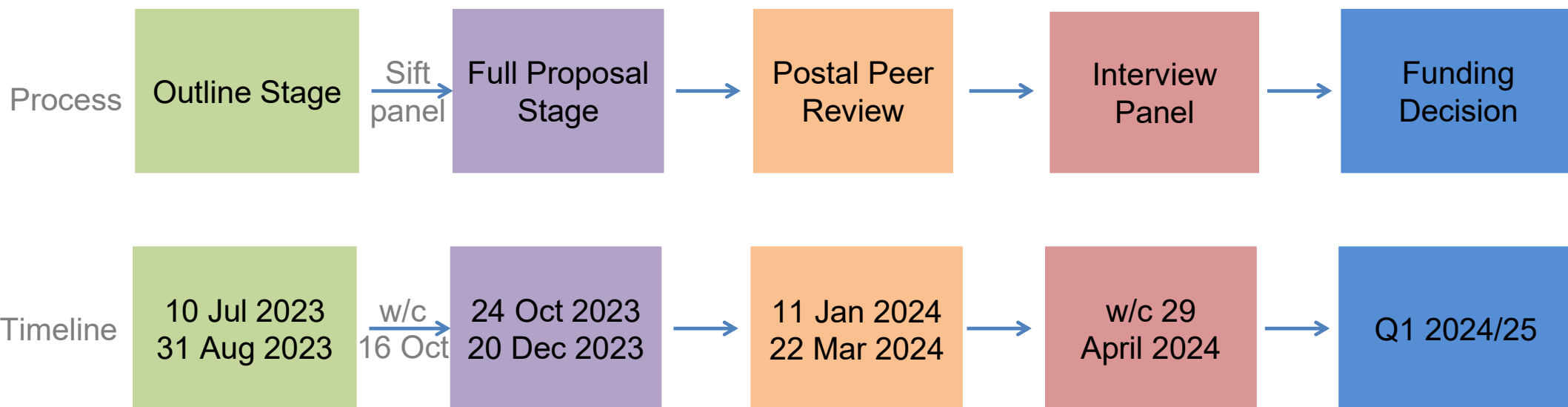
- how its contributions are in line with the scale of the proposed infrastructure, including evidencing the strategic importance of this infrastructure to the institution
- why your host institution is the most appropriate place for the proposed infrastructure
- how your host institution will use its existing inventory to best complement the proposed infrastructure
- how your host institution will support the team to meet the proposal objectives
- the plans to support sustainability and management of the proposed infrastructure



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How we assess your applications?

Strategic Infrastructure Process and Timeline



Assessment criteria

Purpose: national needs, regional/national capability, how it differentiates, user base demand

Vision: transformative, timely, impact

Approach: management, risk mitigations, access prioritisation, accessibility

Sustainability: financial, staffing, user base

Applicant and team capability to deliver: experiences, skills, expertise, research environment

Resources and cost justification: cost, contributions (partners), justifications

Your organisation's support: in line with requested infrastructure, place, complementary, support team and sustainability

Strategic Infrastructure Process

- Key messages:
 - EPSRC expects institutions to take a strategic approach to the submission of draft applications and to **prioritise the submissions** they make
 - Strategic infrastructure is a **recurring funding opportunity** and applicants should take time to prepare an application
 - Postal **peer review** and **interview panel** will be assessing on the same set of full proposal assessment criteria

How do we score your application?

TFS expert review scoring system

Score

You must give the application a score between 1 (poor) and 6 (exceptional).

[View the scoring range](#)

Score	Definition
6	Exceptional: The application is outstanding. It addresses all of the assessment criteria and meets them to an exceptional level.
5	Excellent: The application is very high quality. It addresses most of the assessment criteria and meets them to an excellent level. There are very minor weaknesses.
4	Very good: The application demonstrates considerable quality. It meets most of the assessment criteria to a high level. There are minor weaknesses.
3	Good: The application is of good quality. It meets most of the assessment criteria to an acceptable level, but not across all aspects of the proposed activities. There are weaknesses.
2	Weak: The application is not sufficiently competitive. It meets some of the assessment criteria to an adequate level. There are, however, significant weaknesses.
1	Poor: The application is flawed or unsuitable quality for funding. It does not meet the assessment criteria to an adequate level.

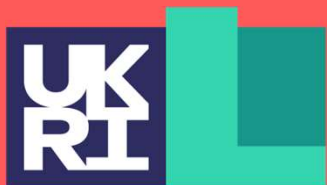
How do we score your application?

TFS panel scoring system

Score	Score definitions	Score	Score definitions
10	The application is exceptional ; it very strongly meets all of the assessment criteria to the highest standard.	5	The application is adequate ; it meets the assessment criteria but with clear weaknesses/limitations.
	The panel agrees that it is difficult to articulate how the application could be improved.	4	The application is weak ; it meets the assessment criteria but with significant weaknesses/limitations .
9	The application is outstanding ; it very strongly meets all of the assessment criteria.	3	The application is poor ; it meets the assessment criteria but has major weaknesses/limitations .
8	The application is excellent ; it strongly meets all of the assessment criteria.	2	The application is unsatisfactory ; it does not meet one or more of the assessment criteria .
7	The application is very good ; it meets the assessment criteria well but with some minor weaknesses/limitations .	1	The application is unsatisfactory ; it does not meet any of the assessment criteria.
6	The application is good ; it meets the assessment criteria well but with some clear weaknesses/limitations .		

Strategic Infrastructure Future Directions

- From FY 2024/25, we will be running the Strategic Infrastructure Opportunity on TFS twice a year. We expect the next outline call to open during 29 Jan – 7 Mar 2024
- We expect to provide greater clarity on the long-term timelines for Strategic Infrastructure calls in Q2-Q3 FY 2024/25
- The number of proposals funded will not change. The budget line for Strategic Infrastructure will not change



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Q&A

Contact us via:

Epsrcequipmentfunding@epsrc.ukri.org