BERA

BERA EXPERT PANEL ON EDUCATIONAL RESEARCH FUNDING WORKING PAPER

The volume, value & composition of investment in education research

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ABOUT BERA

The British Educational Research Association (BERA) is the leading authority on educational research in the UK, supporting and representing the community of scholars, practitioners and everyone engaged in and with educational research both nationally and internationally. BERA is a membership association and learned society committed to advancing research quality, building research capacity and fostering research engagement. We aim to inform the development of policy and practice by promoting the best quality evidence produced by educational research.

Our vision is for educational research to have a profound and positive influence on society. We support this by promoting and sustaining the work of educational researchers. Our membership, which is more than 2,500 strong, includes educational researchers, practitioners and doctoral students from the UK and around the globe.

Founded in 1974, BERA has since expanded into an internationally renowned association. We strive to be inclusive of the diversity of education research and scholarship, and welcome members from a wide range of disciplinary backgrounds, theoretical orientations, methodological approaches, sectoral interests and institutional affiliations. We encourage the development of productive relationships with other associations within and beyond the UK.

We run a major international conference each year alongside a diverse and engaging series of events, and publish high-quality research in our peer-reviewed journals, reports, book series and the groundbreaking BERA Blog. We recognise excellence through our awards and fellowships, provide grants for research, support the career development of our members, and nurture an active peer community organised around networks, forums and special interest groups.

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ABOUT THE BERA EXPERT PANEL ON EDUCATIONAL RESEARCH FUNDING

In 2024 BERA Council established an expert panel to investigate the situation regarding funding for educational research in the UK. Chaired by David James (Cardiff University and chair of the REF 2021 Education sub-panel), the panel was a continuation of BERA's *Education: The State of the Discipline* initiative, which identified funding for educational research as a priority area for BERA to develop work in. The expert panel was commissioned to clarify the changing landscape of funding for educational research and to help BERA to understand the research environment and act to support educational researchers.

The aims of the expert panel were to:

- Present a map of the nature and volume of funding for educational research, highlighting notable trends over time and how this compares to other social science disciplines.
- Give an informed analysis of the elements of infrastructure and current relationships between research, policy and practice in the UK, including key variations across the four jurisdictions.
- Consider and articulate a view on the extent to which these current arrangements: (a) serve goals such as enabling research capacity building or fostering imaginative and creative responses to educational challenges; (b) serve the common good and a selection of stakeholders such as children, learners, citizens, educators, researchers, institutions.
- Present recommendations that are forward-looking, and which may lead to improvements, where possible drawing on exemplars of interesting practice.

This report was commissioned during the presidency of Vivienne Baumfield and brought to completion under the presidency of Marlon Lee Moncrieffe. It reflects BERA's ongoing commitment to advancing education research for the common good.

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1. Introduction

The overarching goal of the BERA Expert Panel on Educational Research Funding is to develop a clearer understanding of the elements of the landscape of educational research and how they are related to each other. This is to provide a view of how best to support educational research in the interests of the public good.

The panel's work is framed by four aims.[1] The first of these is 'to map the nature and volume of funding for educational research, highlighting notable trends over time and how this compares to other social science disciplines'.

This working paper draws on two key sources: a recent report published by the Academy of Social Sciences (AcSS, 2024), and data on research income shown in submissions to the UK Research Excellence Framework (REF) in 2014 and 2021.

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1 The aims of the panel's work are as follows.

1. To map the nature and volume of funding for educational research, highlighting notable trends over time and how this compares to other social science disciplines.
2. To provide an overview of the elements of infrastructure and current relationships between research, policy and practice in the UK, including key variations across the four jurisdictions.
3. To provide an informed analysis of the extent to which these current arrangements serve:
   a. the public good
   b. the interests of stakeholders such as children, learners, citizens, educators, researchers, institutions
   c. the fostering of research capacity building
   d. the generation of imaginative and creative responses to educational challenges.
4. To present recommendations that are forward-looking and may lead to improvements.

2. Volume & value

REAL-TERMS DECLINE IN EDUCATION RESEARCH FUNDING

Drawing on an analysis of data from the Higher Education Statistics Agency[2] (HESA) over nine academic years, AcSS recently noted:

The UK is a world leader in social science research and in the impact of that research, as evidenced in the 2021 Research Excellence exercise: 80% of social science research was world leading (37%) or internationally excellent (43%). Recent reports by the Academy of Social Sciences and the British Academy further exemplify value for money and impact: social science is fundamental to understanding and helping mitigate many of the economic, social, place-based and environmental challenges we face in the UK, and in contributing to multi-disciplinary 'missions'.

AcSS, 2024, p. 1

The report notes that, despite this, the differences in funding between the social sciences and other major areas of research have widened during the past decade, such that the differential 'has grown ever wider at the same time as social science research and impact has performed better than ever and the need for it is greater than ever. This is a supply constraint not a demand constraint' (AcSS, 2024, pp. 1–2).

Furthermore, within and among the social sciences there are marked differences between disciplines in the profile and trajectory of research funding. Over the past decade, four discipline areas (psychology; geography and environmental studies; business and management; sport science and leisure) have all seen substantial increases. More modest increases can be seen in almost all the other social science disciplines, except for two:

Two social science areas stand out as markedly different: education and social aspects of health science. Unlike all the other disciplines, both have seen a decrease in total research income p.a. in real terms over the nine years, the prime cause being a fall in research funding directly from UK Government... Both are areas of considerable public expenditure, policy challenge and public concern... Further investigation is recommended in both cases to understand what lies behind these research funding changes.

AcSS, 2024, pp. 3 and 24

The AcSS analysis shows that education research funding 'has seen a decline in real terms of approximately 10%' (AcSS, 2024, p. 23). This conclusion is triangulated in a separate study based on data published in the Main Panel C overview reports of the REF, comparing the research income recorded in submissions to education in the past two cycles (REF 2014 and REF 2021) (James, 2023). For each unit of assessment in REF, submissions include details of research income, broken down by broad category and by year. This figure has high veracity and there are strong inbuilt incentives to achieve accuracy.

The REF-based analysis confirms the patterns identified by AcSS in the variability in funding trajectories among social science disciplines, and that education is an outlier. For the period covered by the most recent REF, all education submissions combined had an annual average of £56.8 million in research income. The equivalent figure for the earlier (REF 2014) period was £60.7 million.

2 The HESA dataset 'is inclusive of all research funding received in an institution, from the UK and internationally and from competitively won grants and awards to research consultancy services. It does not include QR [quality-related research] funding to institutions arising from the research excellence assessments. All data is adjusted to 2021/22 prices using HMG Treasury GDP indices.' (AcSS, 2024, foreword).

Crudely speaking, this is a decline of around £4 million per year. In real terms it is of course much more, at around £12 million per year (a decline of 17.4 per cent).[3] This is despite increases in quality,[4] the number of submissions and the number of institutions and staff represented. Further insights on the profile of research in education between REF 2014 and 2021 can be seen in *Education: The State of the Discipline* (Munoz-Chereau & Wyse, 2023).

The difference between the two analyses of real-terms decline is likely to reflect differences in the rules and practices surrounding the data collection in each case. For example, higher education institutions (HEIs) making submissions to REF have some flexibility when it comes to the staff and research income included in each specific unit of assessment. In other words, some research income that is categorised as 'education' in institutional HESA returns may appear in a unit of assessment other than education in REF, and vice-versa.

Referring to the social sciences as a whole, the AcSS report executive summary states:

...the new UK Government needs to consider whether it is getting as much benefit as it might out of our world-leading social science research base. This is particularly important when so much of its policy agenda – reducing inequalities, improving access to services, boosting regional economic growth – is dependent on social science insights and evidence to inform decision-making. Because of this, and arising from the data analysis and contextual changes over the past nine years, we recommend the UK Government and UK Research and Innovation (UKRI):

- ***Review urgently the adequacy of the research funding levels for the social sciences sector, including their involvement in multi-disciplinary, challenge-led research.***
- ***Give additional consideration to the funding of education research and that in the social aspects of health sciences.***
- ***Secure the UK's involvement in the EU Horizon programme for the next round.***

AcSS, 2024, p. 3 [emphasis added]

The BERA Expert Panel endorses this view and is contributing to the further investigation of these matters.[5]

3 Calculated from REF Main Panel C data using the Bank of England inflation calculator. We used mean annual research income across all submissions combined and took the middle years of each REF period as the reference-point (2011 for REF 2014; 2018 for REF 2021). The inflation calculator shows that £60.7 million in 2011 would equate to £68.8 million in 2018. Clearly, £68.8 million per year is around £12 million more than the actual annual average of £56.8 million shown in REF 2021. This represents a decline of 17.4 per cent.

4 A comparison between the outcomes of REF 2014 and REF 2021 offers strong evidence for a rise in the quality of educational research. This is especially visible in the proportion of outputs assessed to be four-star ('quality that is world-leading in terms of originality, significance and rigour') which rose from 21.7 per cent to 29.8 per cent between the two exercises, and in the proportion of impact assessed as four-star ('impact that is outstanding in terms of significance and reach') which rose from 42.9 per cent to 51.1 per cent. Education research had exactly the social sciences average proportion of overall four-star quality and was significantly ahead of the social sciences average in terms of four-star research impact.

5 Both the REF data and the HESA data present clear evidence of a reduction in the value of funding for educational research. However, the *Landscape* report dated 2021 (published 2024) of work jointly commissioned by the British Academy and the Royal Society suggests that 'Total annual funding for the period 2010–2020 increased, with some year-to-year fluctuation, from £18m in 2010 to £58m in 2020' (Oancea et al., 2021, p. 7). Our discussions with members of the research team for that work have clarified that (a) the team used a specific and intentionally narrow definition of research projects which will have excluded some sources and research activities, and (b) that no account was taken of inflation across the 10-year period. In addition, we note that the quoted figure of £18 million for 2010 is less than a third of the education research income that is recorded in REF submissions. Using 2012-13 as a base year, the REF Main Panel C report states that total education research income for the six years covered by REF 2014 was £303,665,000 (REF, 2015, p. 23, table 9) and notes that '(a)verage external research income for each year of the REF period was over £58 million' (p. 103). We are, therefore, confident that the *Landscape* report does not challenge our own analysis in this respect.

3. The changing composition of education research funding

There was dramatic change in the composition of income for education[6] research between 2013 and 2021. As shown in figure 3.1, the highest income source in 2013 was the UK government. After 2013, income from the UK government steadily declined, with the most substantial drop occurring between 2018 and 2019. By 2019, UK government funding for educational research had fallen by 42 per cent. Although income from the UK government began to increase again after 2019, by 2021 it was still around 36 per cent below its 2013 level.

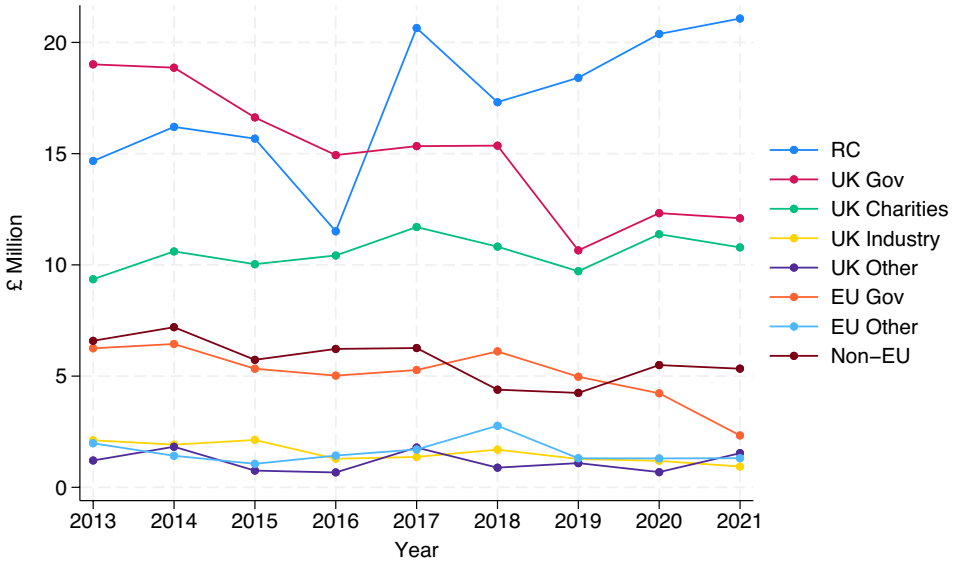
Research council funding shows a different pattern over the same period. It increased slightly from 2013 to 2014, fell slightly in 2015, then saw a marked 25 per cent decline between 2015 and 2016. Following a sharp 75 per cent increase between 2016 and 2017 and a smaller drop between 2017 and 2018, research council funding then increased steadily each year. By 2021, income from this source was 44 per cent higher than the amount received in 2013, and it had become the largest source of income for education research in the UK, approaching double the value of UK government funding.

Additionally, funding from European Union (EU) governments increased slightly from 2013 to 2014 but steadily declined between 2014 and 2017, resulting in a 16 per cent decrease by 2017 compared with 2013. Despite a slight increase in 2018, by 2021 income from the EU was 63 per cent less than in 2013.

Income from all other sources (UK charities, industries and others) remained relatively unchanged during the 2013–2021 period, with only slight fluctuations. As of 2021, income from these sources was not significantly different from 2013 levels.

6 Combining both 'education' and 'continuing education' categories in HESA data.

Figure 3.1
Education research grant income 2013 to 2021



Note. Source: Academy of Social Sciences (AcSS) – Higher Education Statistics Agency. Adjusted to 2021–2022 prices using HM Treasury GDP indices. EU = European Community; RC = research council; UK Gov = UK Government.

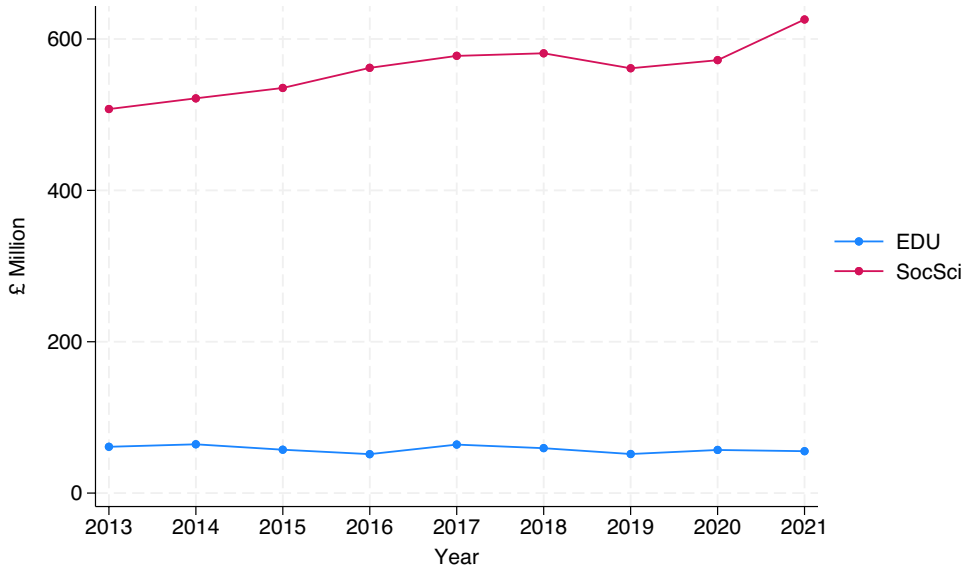
4. Education research in relation to total social science research funding

The combined total grants for research across all twelve social science[7] disciplines have risen over time. Between 2013 and 2021, social science research funding income increased by 23 per cent. As shown in figures 4.1 and 4.2, growth was steady from 2013 to 2018, with an average increase of about three per cent per year. Funding for social science research then fell slightly in 2019 and increased again in 2020 and 2021.

In comparison, education research funding increased slightly between 2013 and 2014, then declined markedly in 2015 and 2016. By 2016, it was 16 per cent lower than in 2013. It rose sharply by 24 per cent in 2017 but declined again in 2018 and further in 2019. Funding picked up again in 2020 and fell slightly in 2021. However, as of 2021, education research funding was nine per cent below its 2013 level.

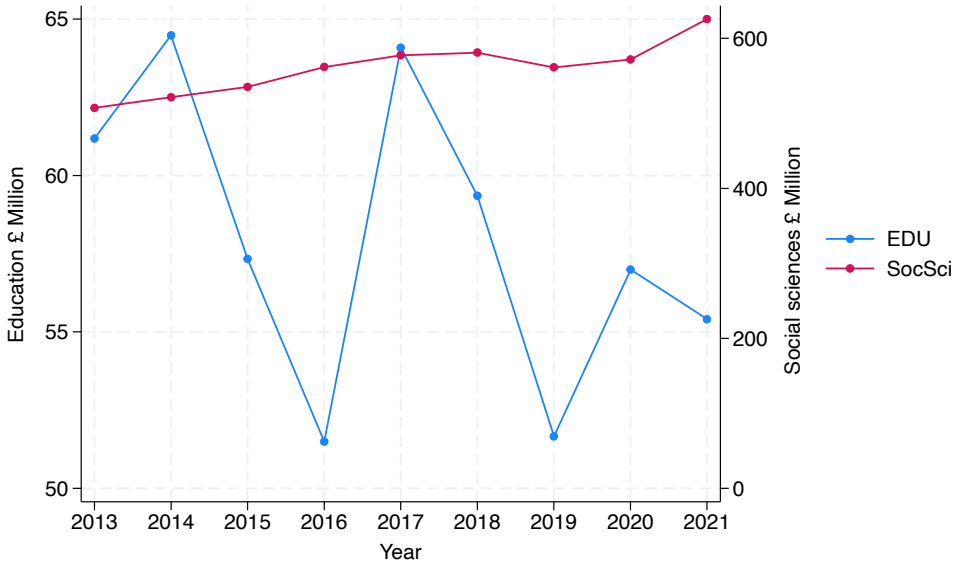
7 The twelve social science disciplines within REF 2021 Main Panel C were: architecture, built environment & planning; geography & environmental studies; archaeology; economics & econometrics; business & management studies; law; politics & international studies; social work & social policy; sociology; anthropology & development studies; education; sport & exercise sciences, leisure and tourism. These align quite closely to HESA categories, though the latter shows separate figures for 'education' and 'continuing education'.

Figure 4.1
All social sciences and education total research grant income 2013–2021



Note. Source: Academy of Social Sciences (AcSS) – Higher Education Statistics Agency. Adjusted to 2021–2022 prices using HM Treasury GDP indices. EU = European Community; RC = research council; UK Gov = UK Government.

Figure 4.2
All social sciences and education total research grant income 2013–2021 (different axes)



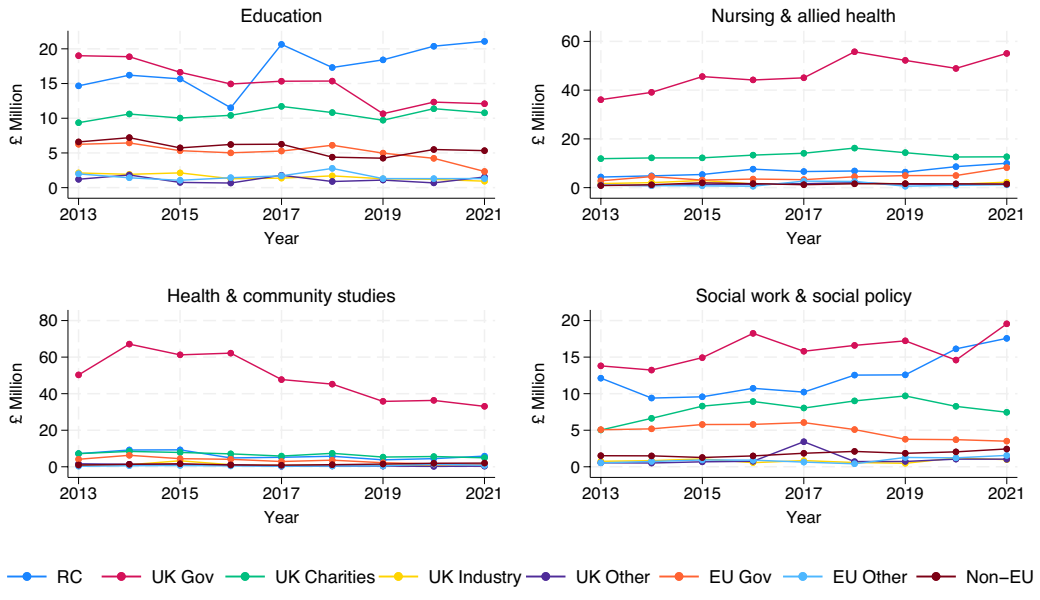
Note. Source: Academy of Social Sciences (AcSS) – Higher Education Statistics Agency. Adjusted to 2021–2022 prices using HM Treasury GDP indices. Separate axes are used for education (left y axis) and total social science (right y axis) to visualise the marked changes in education research grant income over the 2013 to 2021 period. EU = European Community; RC = research council; UK Gov = UK Government.

5. Funding for education research compared with three other disciplines

Education research includes a variety of concepts and methods that connect it to other disciplines, and which often make it interdisciplinary. It also has a close relationship to policy, provision and practice across a large and varied array of institutions and purposes which, collectively, amounts to one of the largest areas of UK public expenditure. While it is distinctive, there are some areas of similarity with other fields in which research has an important relationship to policy, provision and practice.

For this reason, it is instructive to compare research grant income sources across four disciplines: education; nursing & allied health; health & community studies; and social work & social policy. Figure 5.1 shows that, across all four disciplines, the UK government was the highest source of research funding in 2013. However, the trends from 2013 to 2021 varied. Education and health & community studies experienced steady declines in UK government funding, with reductions of over 36 per cent for education and 34 per cent for health & community studies between 2013 and 2021. In contrast, nursing & allied health and social work & social policy saw overall increases in UK government funding, notwithstanding some fluctuations during the period. By 2021, UK government funding was 42 per cent higher for social work & social policy and 53 per cent higher for nursing & allied health compared with 2013 levels.

Figure 5.1
Selected disciplines research grant income sources 2013–2021



Note. Source: Academy of Social Sciences (AcSS) – Higher Education Statistics Agency. Adjusted to 2021–2022 prices using HM Treasury GDP indices. EU = European Community; RC = research council; UK Gov = UK Government.

Both education and social work & social policy saw increases in funding from research councils. Although funding fluctuated between 2013 and 2021, by 2021 research council funding for education was 44 per cent higher than 2013 levels, while for social work & social policy it was 45 per cent higher. Additionally, social work & social policy experienced a steady increase in income from UK charities for much of the period: despite several fluctuations, 2021 income from UK charities was 48 per cent higher than 2013 income. All other income sources remained similar across the period under study.

6. Education research investment in relation to public spending on all educational activity

As noted above, across all education submissions to REF 2021 combined, there was an average annual collective research income of £56.8 million. This may be conceived as most of what the UK invests in education research, and perhaps an indication of the 'UK PLC' research and development investment in education. Education is the second largest area of UK public spending, and in the last year before the pandemic was £104 billion, or around 4.4 per cent of national income (IFS, 2021). £56.8 million amounts to 0.054 per cent (about a twentieth of one per cent) of £104 billion. The REF sub-panel's view was that this is a '...very small amount in the context of annual public spending on education' (REF, 2022, para. 6.3).

Arguably, education accounts for such a large portion of public spending because it is so important. It is a large field of institutions, organisations and activity that fundamentally shapes the life-chances and prospects of everyone. This includes how economically productive people are, how healthy they are, how law-abiding they are and the values and capacities they develop (including how they live with and alongside their fellow citizens and contribute to communities). This begs the question of why the level of investment in education research is so small in relation to both the costs of educational activity and their significance.

7. What might account for the general decline in education research funding?

It is one thing to describe the decline in the resources associated with research in education, but quite another to try to discern what may have given rise to it. The REF 2021 sub-panel report notes that there had been:

> ***...a decline in major national programmes of educational research compared to the period considered in REF 2014. Together with specific reductions (e.g., in Official Development Assistance funding) and uncertainties following Brexit, the current level of investment in educational research along with reduced potential for international collaborations and impact presents considerable risks to the discipline.***
>
> REF, 2022, p. 169

Three observations might be helpful here.

The first concerns the origins of the downward trend. As we have seen above, the decline in UK government funding for education research over the past nine years is clearly visible in the AcSS analysis of HESA data. Although the most recent REF Main Panel C overview report is less informative on this point, that from the previous exercise (see REF, 2015) shows that UK government funding reached a peak in 2004–05, then declined quite rapidly up to 2012–13. This suggests a longer trend, pre-dating the nine years shown in the AcSS analysis. Education research is very likely to have been affected by a decline in this particular source.

Second, as noted in Gardner et al. (2022), Lenihan & Witherspoon (2016) showed that a period of declining UK government investment was the backdrop for a steady rise in the securing of European Research Council funding for social sciences up to 2014. Education reflects this rise in its proportion of EU funding year-on-year from 2008 to 2014 (Hantrais & Lenihan, 2016) but is likely to have suffered particularly (perhaps even disproportionately) in the wider decline in share of EU Horizon 2020 funding that occurred between 2016 and 2019 (Else & Gibney, 2020).

Third, research in education is also likely to have been seriously impacted by the cuts in UK ODA funding for research (and the effect on the Global Challenges Research Fund [GCRF], Newton Fund and so on) (Gardner et al., 2022), though these changes will have been felt most keenly after the reporting period for REF 2021 had closed.

8. Further considerations

1. We are examining the nature and frequency of mentions of funding sources in the 'environment' components of the 83 submissions to REF 2021.
2. We are using the UKRI Gateway to Publicly Funded Research and Innovation web-based tool to refine our understanding of types and sizes of research grants that are (or include) education research.
3. As suggested by some of our interviewees, it is possible that, in England particularly, expenditure on education research is increasingly understood within government as being that which is channelled through the Education Endowment Foundation (EEF). A high proportion of this is spent in organisations other than universities, and so it is not always recorded in data such as those collected by the HESA or by REF.
4. Also highly pertinent here is the recent study of social science research impact by the Leverhulme Centre for Demographic Science at Oxford. This shows that there were 66 impact case studies that focused on education and inequality in REF 2021. A large proportion of these show that underpinning research was funded by UKRI sources. Just two cases named EEF as a funding source, despite the theme of education and inequality being the central characteristic of EEF's mission.

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