

EXECUTIVE SUMMARY

A key feature of the consultations for the 2021 National Research Infrastructure (NRI) Roadmap was the 2021 NRI Roadmap Survey. Its primary objective was to develop an understanding of the needs, trends and challenges as perceived by a diverse range of stakeholders across disciplines, sectors, and roles.

Almost 3,000 people provided responses to the survey's 50+ questions. This document presents the highlights of the analysis of four areas of the survey.

NRI usage and value

- Around two thirds of respondents currently interact with NRI (69%). Of those that don't currently interact, most indicated that they 'did not know' about NRI (54%).
- Excluding respondents who identified as NRI staff, the majority of those currently using NRI indicated that it met all or most of their needs (55%).

The research landscape

- *Health research and therapeutics* emerged as the biggest trend for the research sector, particularly biological therapies and nuclear medicine. It was also identified as the area with the greatest potential for global research leadership by Australia.
- *Imaging technologies, human capital, and data storage* were most cited as needs and challenges.
- *Human necessity* (such as climate change and the needs of an ageing population), and *technological developments* (particularly in relation to data) were the two categories identified as driving these trends, needs and challenges.
- Technology, networks, systems, processes and people that can support the management of exponential increases in data are most required to maintain research excellence in the years ahead.

Collaboration

- Just over half (54%) of respondents said that they did not anticipate facing barriers to collaboration with Australian researchers, while 40% anticipate barriers.
- Just over half (52%) of respondents said that they did not anticipate facing barriers to collaboration with international researchers, while 34% anticipate barriers.
- *Limited time and resources, lack of networking and resources, perceived sense of competition, funding, lack of communication/clarity and COVID-related restrictions* were mentioned as challenges for collaboration in Australia and internationally.

Industry engagement

- Around two-thirds (62%) of respondents who identified as being from the Industry sector indicated that they currently use NRI. Of those that don't currently interact, most indicated that they 'did not know' about NRI (43%). Almost half (49%) said that NRI was meeting all or most of their needs, particularly regarding access to equipment, expertise and data.
- Almost two-thirds (60%) agreed that NRI had enabled outcomes that would not otherwise have been possible.