P5 Updates

Hitoshi Murayama

US-Japan Meeting, Honolulu, May 22, 2023

Background

- HEPAP (High-Energy Physics Advisory Panel) advises DOE OHEP and NSF PHY
  - Current chair: JoAnne Hewett
  - Sunshine law requires such advisory panels are open
  - Impossible to discuss sensitive issues such as prioritization!
- But HEPAP can create a “subpanel” whose meetings can be closed
  - HEPAP subpanels existed for a long time, discussed “big things”
- Individual projects used to be purview of lab PACs
- Around that time, it was becoming increasingly clear that “projects” have become too big to be handled by lab PACs
- Natalie Roe: “national PAC”
  - A standing committee that handles decisions of mid-size and big projects in particle physics

HEPA subpanel 2001

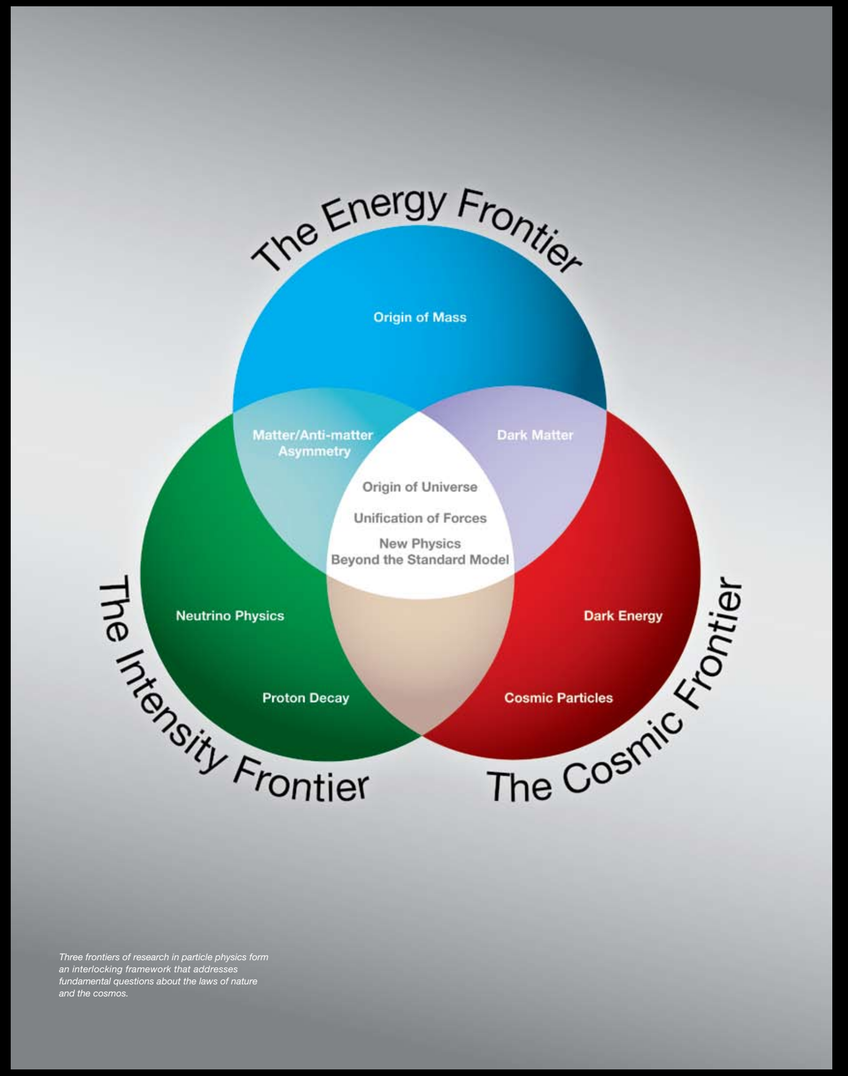
- Bagger & Barish HEPAP subpanel followed Snowmass
  - It came out big on e^+e^- LC
  - Led to technology choice, GDE, too expensive for a US project
  - I was on it as a “young” member
- Persis Drell proposed P5 = Particle Physics Projects Prioritization Panel
  - Became part of the recommendation
- “*The Science Ahead, The Way to Discovery*” Jan 2002
- “*Quantum Universe*” outreach document

2003-2007 P5 (Abe Seiden)

- 2003 P5 reviewed
  - CDF/D0 Run II upgrades
  - CKM
  - BTeV
  - Killed CKM
- 2004 P5 reviewed
  - BTeV
  - Recommended staging of BTeV
- 2007 P5
  - Tevatron beyond FY09?
  - Deferred decision

2008 P5

- 2008 P5 (Charles Baltay)
  - First “modern” P5 with budget scenarios
  - Tevatron for one to two more years
  - World-class neutrino program
  - Dark matter & dark energy, LSST
- *US Particle Physics: Scientific Opportunities A Strategic Plan for the Next Ten Years*
- Followed by specific 2010 P5 on Tevatron that recommended additional 2-3 years



2014 P5

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  - Use the Higgs boson as a new tool for discovery
  - Pursue the physics associated with neutrino mass
  - Identify the new physics of dark matter
  - Understand cosmic acceleration: dark energy and inflation
  - Explore the unknown: new particles, interactions, and physical principles.
- Finally “got it right”
  - Well received in Washington
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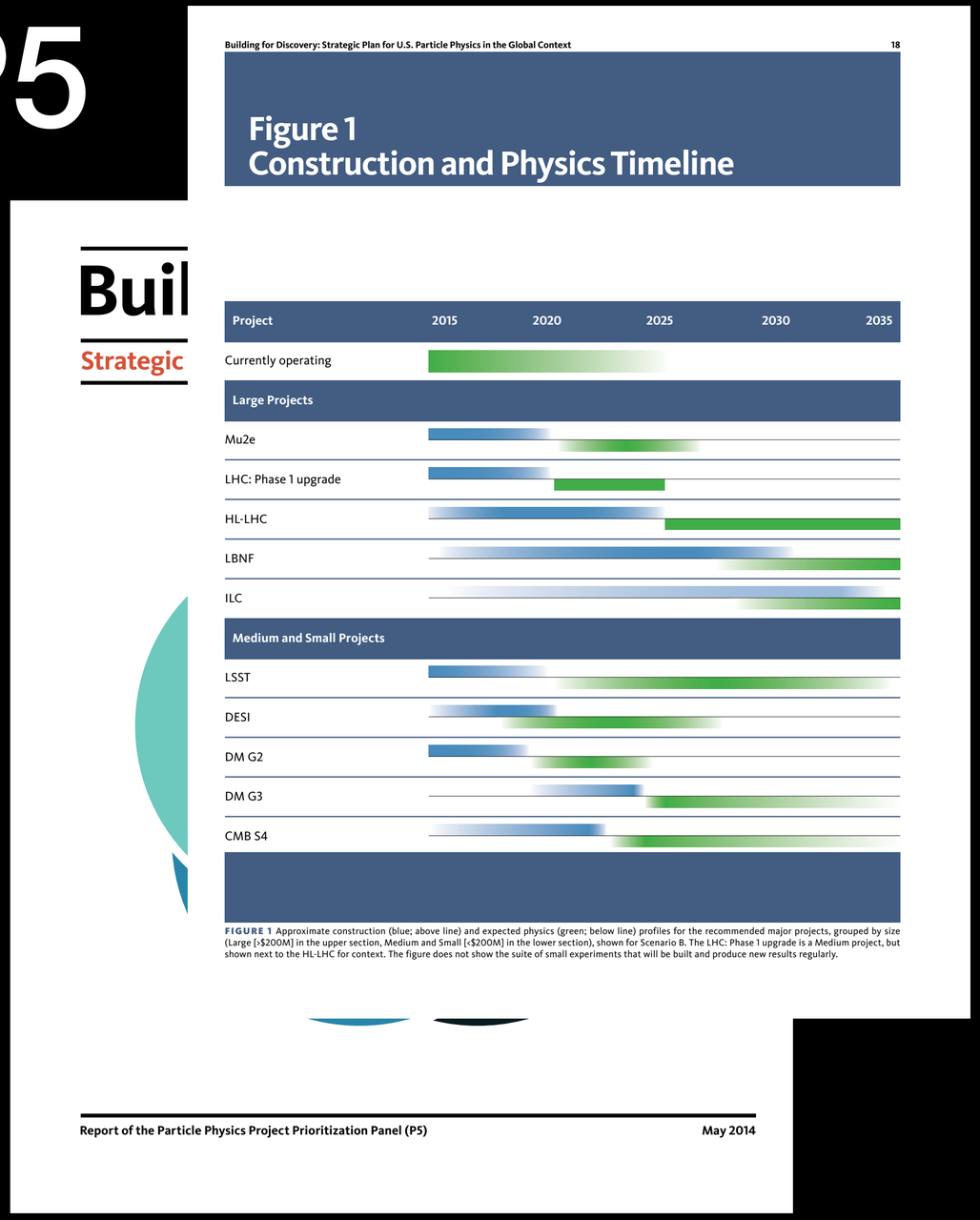

Building for Discovery: Strategic Plan for U.S. Particle Physics in the Global Context 18

Figure 1
Construction and Physics Timeline

Buil

Strategic

Project	2015	2020	2025	2030	2035
Currently operating					
Large Projects					
Mu2e					
LHC: Phase 1 upgrade					
HL-LHC					
LBNF					
ILC					
Medium and Small Projects					
LSST					
DESI					
DM G2					
DM G3					
CMB S4					

FIGURE 1 Approximate construction (blue; above line) and expected physics (green; below line) profiles for the recommended major projects, grouped by size (Large [>$200M] in the upper section, Medium and Small [<$200M] in the lower section), shown for Scenario B. The LHC: Phase 1 upgrade is a Medium project, but shown next to the HL-LHC for context. The figure does not show the suite of small experiments that will be built and produce new results regularly.

Report of the Particle Physics Project Prioritization Panel (P5) May 2014

US Process for Future Planning

Community

US Process for Future Planning

Community

"Snowmass"
Community Study

Organized by
APS / DPF

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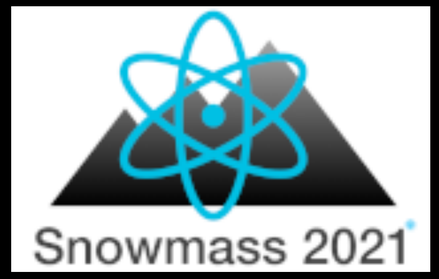

Charge
Budget scenario

DOE HEP
NSF PHYS

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Snowmass 2021

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DOE HEP
NSF PHYS

DOE HEP
NSF PHYS

OMB
OSTP
Congress

Key Elements of a Successful P5

- Well informed by the science community
- Set a grand long-range vision for U.S. particle physics
- Faced budget constraints realistically
  - "Community made tough choices."
- Balanced portfolio
  - Domestic and international
  - Small, mid-scale, and large projects
- Community engagement critical to success
  - "Bickering scientists get nothing."

Harriet Kung, Snowmass in Seattle

Changing landscape

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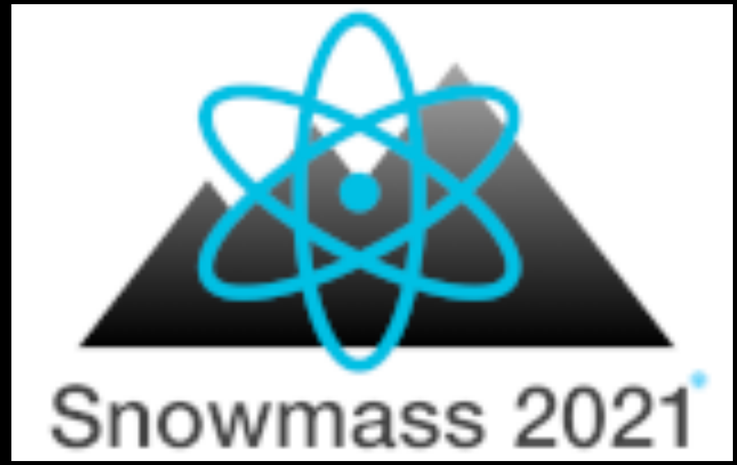
  - Previous P5: “Higgs as a new tool for discovery”



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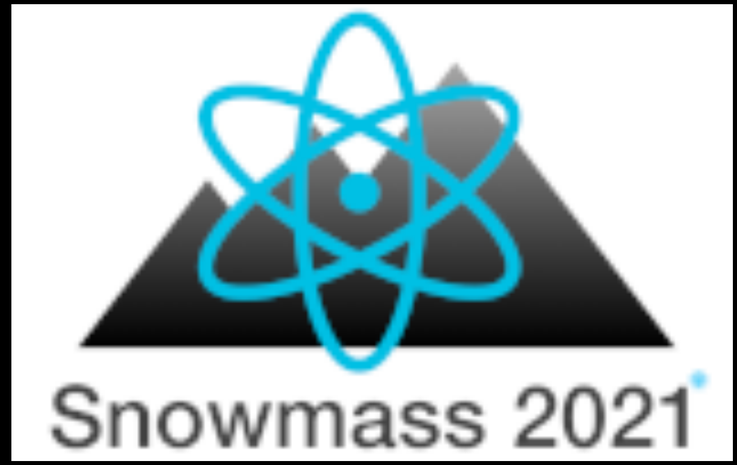

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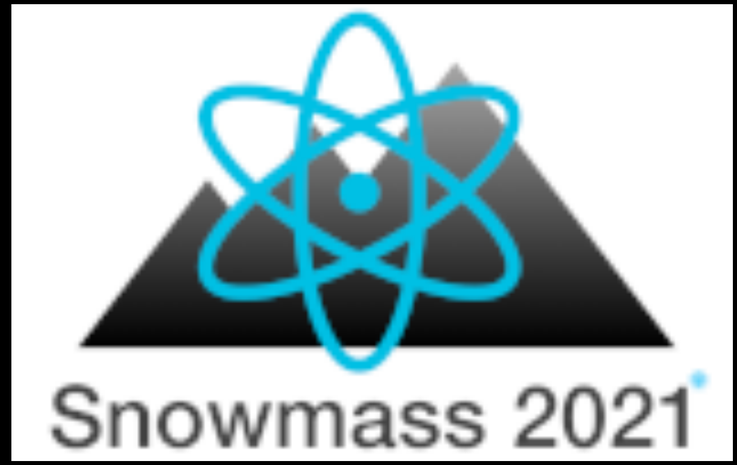

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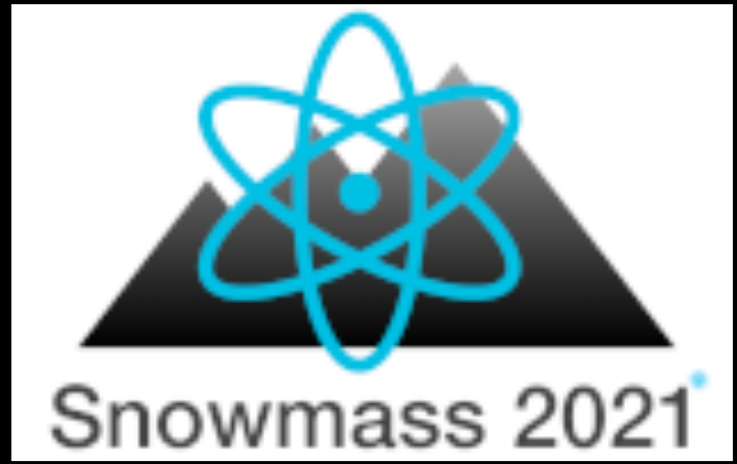

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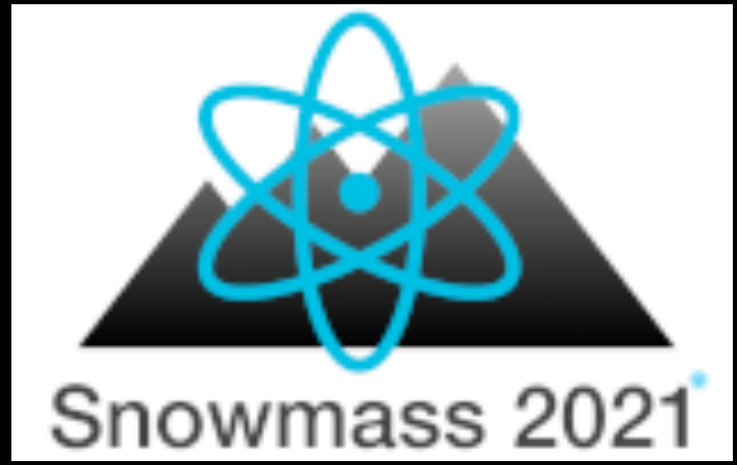

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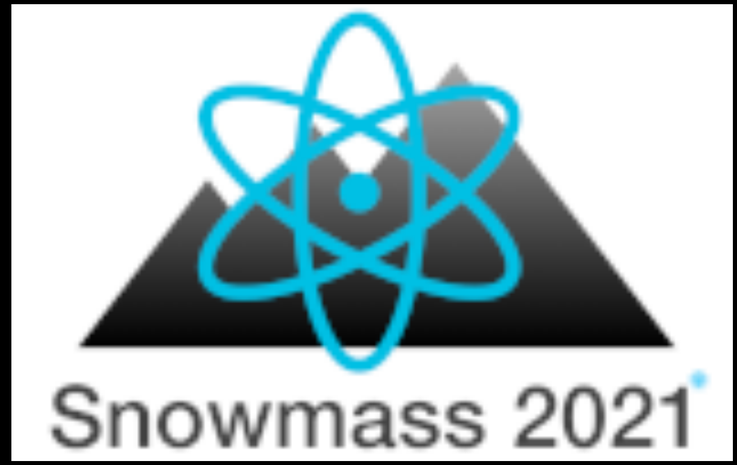

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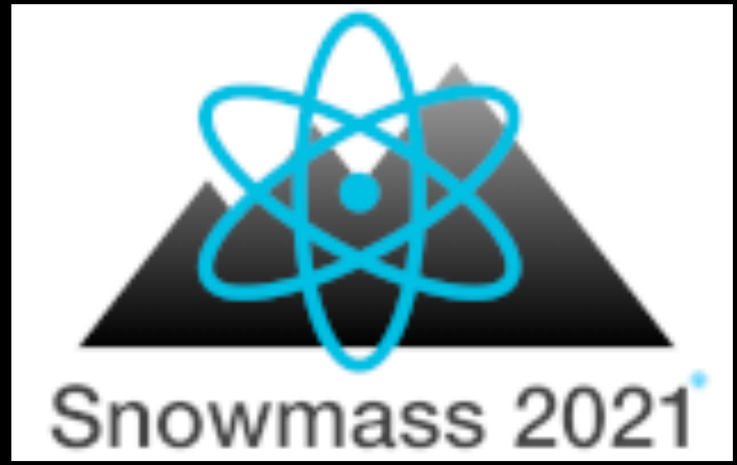

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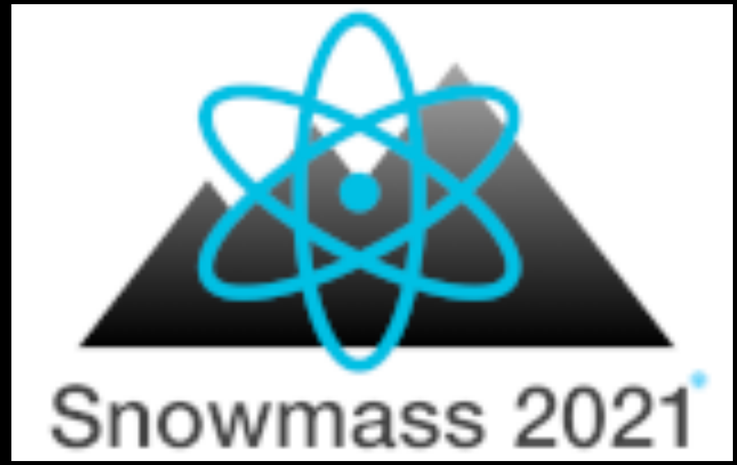

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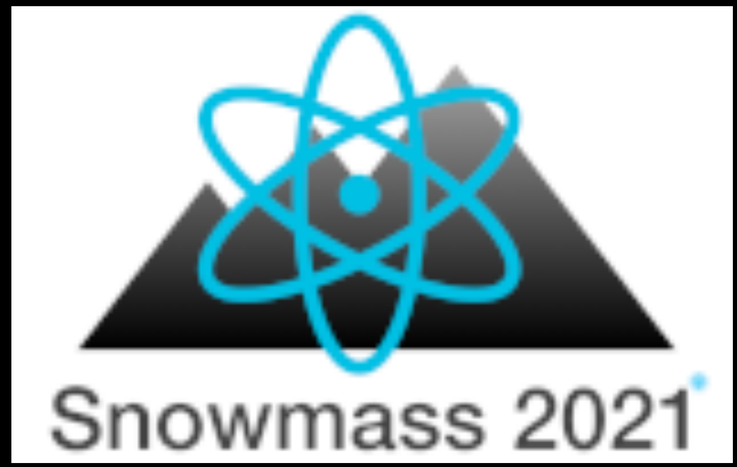

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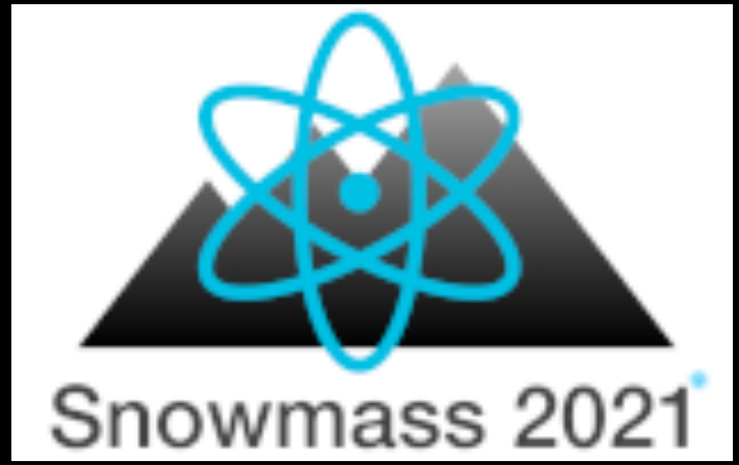
- Field is more global than ever, yet geopolitical challenges, climate change



My take away from Snowmass

- We have an exciting program lined up
  - Thanks to Steve Ritz, previous P5, agencies!
- We are broader than the current program energy, intensity, cosmic
  - Where is the boundary of our field?
- We are a forward-looking community
  - We need program beyond what the previous P5 outlined
  - We also need more freedom
  - better balance big, medium, small; projects vs research
- We deeply care about our community
  - Diversity, equity, inclusion, outreach, engagement
- Visited both DOE & NSF in early September
  - I'm still scared of the tasks ahead.
  - Reading Snowmass reports!

<table>
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Balance

- Project vs research
- Large (>$200M), medium ($50-200M), small (<$50M) (previous P5)
  - Collection of small may be medium
- Science vs R&D
  - Instrumentation, computing, theory
- National initiatives
  - AI/ML, microelectronics, QIS
  - How do we capitalize on it? How do we contribute to justify it?
- DEI
  - What can agencies do?
  - Mentoring statement in grant proposals (done!)

P5 Charge (dated November 2, 2022)  1/8

Dear Dr. Hewett:

The 2014 report of the Particle Physics Project Prioritization Panel (P5), developed under the auspices of the High Energy Physics Advisory Panel (HEPAP), successfully laid out a compelling scientific program that recommended world-leading facilities with exciting new capabilities, as well as a robust scientific research program. That report was well received by the community, the U.S. Department of Energy (DOE) and the National Science Foundation (NSF), and Congress as a well-thought-out and strategic plan that could be successfully implemented. HEPAP's 2019 review of the implementation of this plan demonstrated that many of the report's recommendations are being realized, and the community has made excellent progress on the P5 science drivers.

- The 2014 report was successful
- 2019 implementation review by HEPAP showed progress on the plan

As the landscape of high-energy physics continues to evolve and the decadal timeframe addressed in the 2014 P5 report nears its end, we believe it is timely to initiate the next long-range planning guidance to the DOE and NSF. To that end, we ask that you constitute a new P5 panel to develop an updated strategic plan for U.S. high-energy physics that can be executed over a 10-year timeframe in the context of a 20-year, globally aware strategy for the field.

- 2023 P5 to update strategic plan over 10-yr timeframe in 20-yr context

P5 Charge  2/8

A critical element of this charge is to assess the continued importance of the science drivers identified by the 2014 P5 report and, if necessary, to identify new science drivers that have the potential to enable compelling new avenues of pursuit for particle physics. Specifically, we request that HEPAP 1) evaluate ongoing projects and identify potential new projects to address these science drivers; 2) make the science case for new facilities and capabilities that will advance the field and enhance U.S. leadership and global partnership roles; and 3) recommend a program portfolio that the agencies should pursue in this timeframe, along with any other strategic actions needed to ensure the broad success of the program in the coming decades.

In developing the plan, we would like the panel to take into consideration several particularly relevant aspects of constructing a compelling and well-balanced portfolio:

- Re-evaluate the 2014 science drivers
- Evaluate ongoing projects
- Identify new projects
- Make science case for new facilities and capabilities
- Recommend program portfolio

P5 Charge  3/8

- A core tenet of the 2014 P5 Report is that particle physics is fundamentally a global enterprise. Thus far, the U.S. program has achieved high impact through U.S. researchers participating in the programs at world-class facilities outside the U.S. and international researchers working at world-class U.S. facilities. The recommendations developed for this report should carefully consider the current and future international landscape for particle physics. The panel's report should include an explicit discussion of the choices made in this context, including the extent to which it is necessary to construct, maintain, and/or upgrade leading U.S.hosted high-energy physics facilities so that our leadership position in the global scientific arena continues, while at the same time preserving the essential roles of, and contributions by, the National Laboratories and universities to global collaboration on large-scale initiatives.

- Remember HEP is a global field
- Support decisions to retain US leadership as a global parter
- Preserve essential roles of Universities and National Labs

- A number of the projects recommended by the 2014 P5 report are still being built, and the agencies take their commitments to complete them very seriously. Understanding the continued strength of the science case for these projects is quite valuable, and the panel should provide its assessment of these projects in this context.

- Assess science case for on-going projects

P5 Charge  4/8

- A successful plan should maintain a balance of large, medium, and small projects that can deliver scientific results throughout the decadal timeframe. We do not expect the panel to consider the large number of possible small-scale projects individually, but advice on research areas where focused investments in smallscale projects can have a significant impact is welcome.
- There are elements of DOE HEP-operated infrastructure that are a stewardship responsibility for HEP. Investments to maintain that infrastructure in a safe and reliable condition are an HEP responsibility and are outside the scope of the panel. Major infrastructure upgrades that create new science capabilities are within the scope of the charge and should be considered by the panel.
- Successfully exploiting a newly built project requires funding for the commissioning and operation of the project and to support the researchers who will use these new capabilities to do world-leading science. Funding is also needed for research and development (R&D) that develops new technologies for future projects. Scientists and technical personnel working in experimental particle physics often contribute to all these project phases, while theoretical physics provides both the framework to evolve our fundamental understanding of the known universe as well as the innovative concepts that will expand our knowledge into new frontiers. The panel should deliver a research portfolio that will balance all these factors and consider related issues such as training and workforce development.

- Maintain balance of large, medium & small projects
- Advise on science topics to focus small projects

- Assess infrastructure upgrades that create new science capabilities

- Remember costs of R&D, commissioning, and operations for future projects
- Remember that a balanced core research budget is paramount to producing science from current projects and developing ideas for new ones

P5 Charge  5/8

- Both NSF and DOE are deeply committed to diversity, equity, inclusion, and accessibility principles in all the scientific communities they support. Creating a more diverse and inclusive workforce in particle physics will be necessary to implement the plan that this panel recommends, and the panel may further recommend strategic actions that could be taken to address or mitigate barriers to achieving these goals.
- Broad national initiatives relevant to the science and technology of particle physics have been developed by the administration and are being implemented by the funding agencies. These include, but are not limited to, investments in advanced electronics and instrumentation, artificial intelligence and machine learning, and quantum information science. Potential synergies between these initiatives and elements of the recommended portfolio should be considered.

- Remember that a diverse workforce results in improved science

- Address synergies with broad national initiatives

P5 Charge - budget scenarios  6/8

We request that the panel include these considerations in their deliberations and discuss how they affect their recommendations in the report narrative.

The panel's report should identify priorities and make recommendations for an optimized particle physics program over 10 years, FY 2024–FY 2033, under the following budget scenarios:

1) Increases of 2.0 percent per year during fiscal years 2024 to 2033 with the FY 2024 level calculated from the FY 2023 President's Budget Request for HEP.
2) Budget levels for HEP for fiscal years 2023 to 2027 specified in the Creating Helpful Incentives to Produce Semiconductors and Science Act of 2022, followed by increases of 3.0 percent per year from fiscal years 2028 to 2033.

The recommended projects and initiatives should be implementable under reasonable assumptions and be based on generally accepted estimates of science reach and capability. Estimated costs for future projects and facility operations should be given particular scrutiny and may be adjusted if the panel finds it prudent to do so. Given the long timescales for realizing these initiatives, we expect the funding required to enable the priorities the panel identifies may extend well past the 10-year budget profile, but any recommendation should be technically and fiscally plausible to execute in a 20-year timeframe.

- Scenario A: 2% increase per year
- Scenario B: Budgets in Chips and Science Act, followed by 3% increase per year

- Evaluate projected project costs
- Plan should be executable in 20-yr timeframe

P5 Charge  7/8

In addition to articulating the scientific opportunities that can and cannot be pursued in the various scenarios, the panel may provide their opinions on the approximate overall level of support that is needed for core particle physics research and advanced technology R&D programs to be successful in the context of the science goals of the recommended plan.

We expect the "Snowmass" community planning reports and HEPAP's 2022 study on international benchmarking of scientific resources and capabilities will be useful inputs and that the panel will make efforts to maximize community input and participation in the overall process. Coordination and congruence with the National Academies of Sciences, Engineering, and Medicine's recent and ongoing decadal studies in astronomy, astrophysics, and particle physics are also important considerations.

- Evaluate level of core research budget and technology R&D programs

- Include Snowmass report and Benchmarking subpanel report in deliberations
- Strive towards coordination and congruence with EPP2024

P5 Charge 8/8

Finally, effective communication about the excitement, impact, and vitality of particle physics that can be shared with a general audience and other disciplines continues to be critical when advocating the strategic plan. It would be particularly valuable if the panel could re-state the key scientific questions that drive the field so that they are accessible to non-specialists and crisply articulate the value of basic research and the broader benefits of particle physics on other sciences and society.

We would appreciate the panel's preliminary comments by August 2023 and a final report by October 2023. We recognize that this is a challenging task; nevertheless, your assessments will be an essential input to planning at both the DOE and NSF.

Sincerely,

Asmeret Asefaw Berhe
Director, Office of Science
U.S. Department of Energy

Sean L. Jones
Assistant Director
Directorate for Mathematical and Physical Sciences
National Science Foundation

- Effectively communicate the 2023 P5 plan once it's finished
- Preliminary comments in August 2023
- Report due by October 2023

Leadership team

JoAnne Hewett
HEPAP chair, ex officio

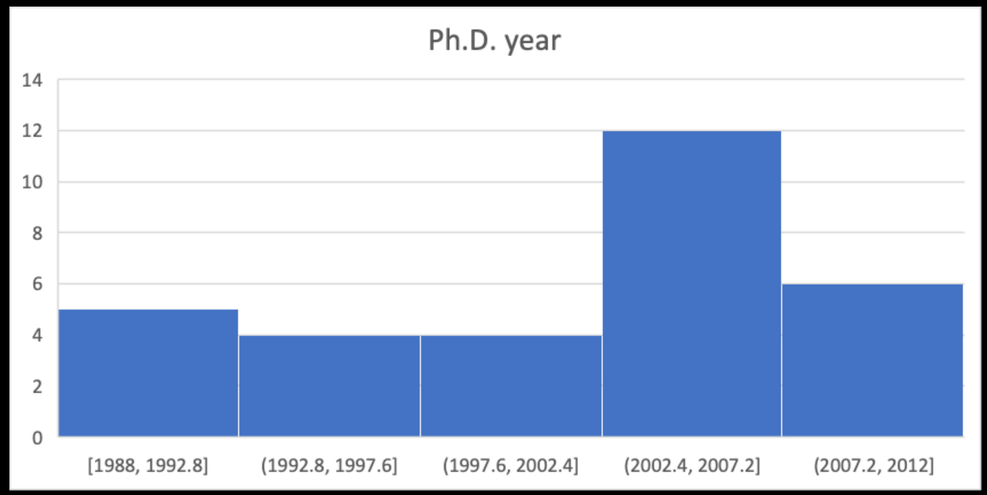
Hitoshi Murayama
P5 chair

Karsten Heeger
P5 Deputy chair


It is a great panel!

Shoji Asai	Tokyo
Amalia Ballarino	CERN
Tulika Bose	Wisconsin
Kyle Cranmer	Wisconsin
Francis-Yan Cyr-Racine	New Mexico
Sarah Demers	Yale
Cameron Geddes	LBNL
Patrick Huber	Virginia Tech
Kendall Mahn	Michigan State
Rachel Mandelbaum	Carnegie Mellon
Jelena Maricic	Hawaii
Petra Merkel	Fermilab
Christopher Monahan	William-Mary Coll.
Yuri Gershtein	Rutgers
Peter Onyisi	Texas Austin
Mark Palmer	Brookhaven
Tor Raubenheimer	SLAC
Mayly Sanchez	Florida State
Richard Schnee	South Dakota School of Mines and Technology
Sunny Seo	IBS Center for Underground Physics
Jesse Thaler	MIT
Abigail Vieregg	Chicago
Amanda Weinstein	Iowa State
Lindley Winslow	MIT
Tien-Tien Yu	Oregon
Bob Zwaska	Fermilab
Beate Heinemann	DESY
Christos Touramanis	Liverpool
Karsten Heeger	Yale, Deputy Chair
JoAnne Hewett	SLAC (ex officio)
Hitoshi Murayama	UC Berkeley/LBNL, Chair

5 EPSCOR states
R2, RUI institutions
8 labs, 22 universities, 1 both
Both DOE & NSF support
Nobody “older” than HM & JLH
Average Ph.D. year 2002



Costs/Risks/Schedule Committee

- One lesson from the previous P5 was some of the costs were off by a factor of ~π
- Need to understand maturity of cost estimates better
- Jay Marx (Caltech), Chair
- Gil Gilchriese, Matthaeus Leitner (LBNL)
- Giorgio Apollinari, Doug Glenzinski (Fermilab)
- Norbert Holtkamp, Mark Reichanandter, Nadine Kurita (SLAC)
- Jon Kotcher, Srini Rajagopalan (BNL)
- Allison Lung (JLab)
- Harry Weerts (Argonne)

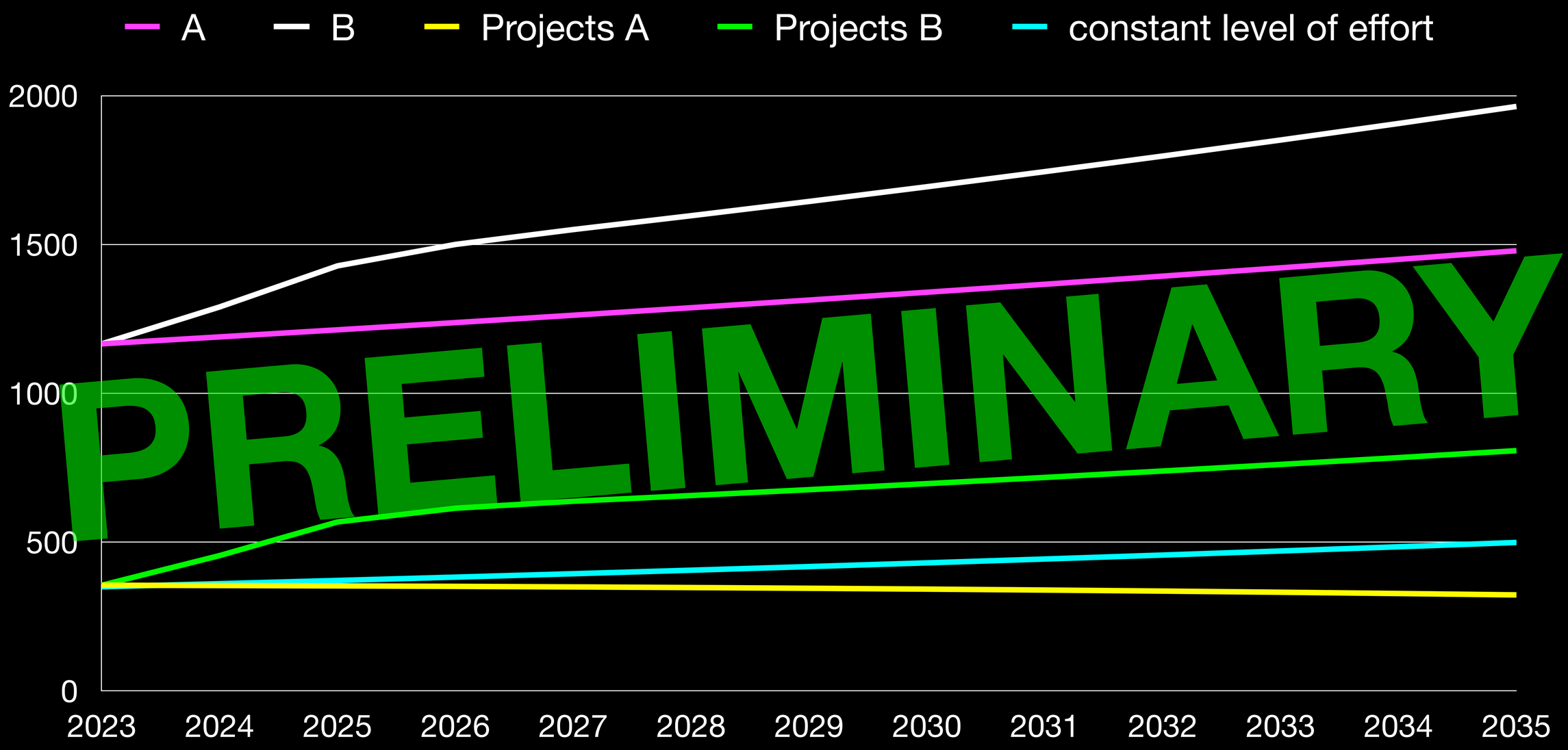
Jay Marx

Charge to P5 cost committee (Draft - 3/1/2023)

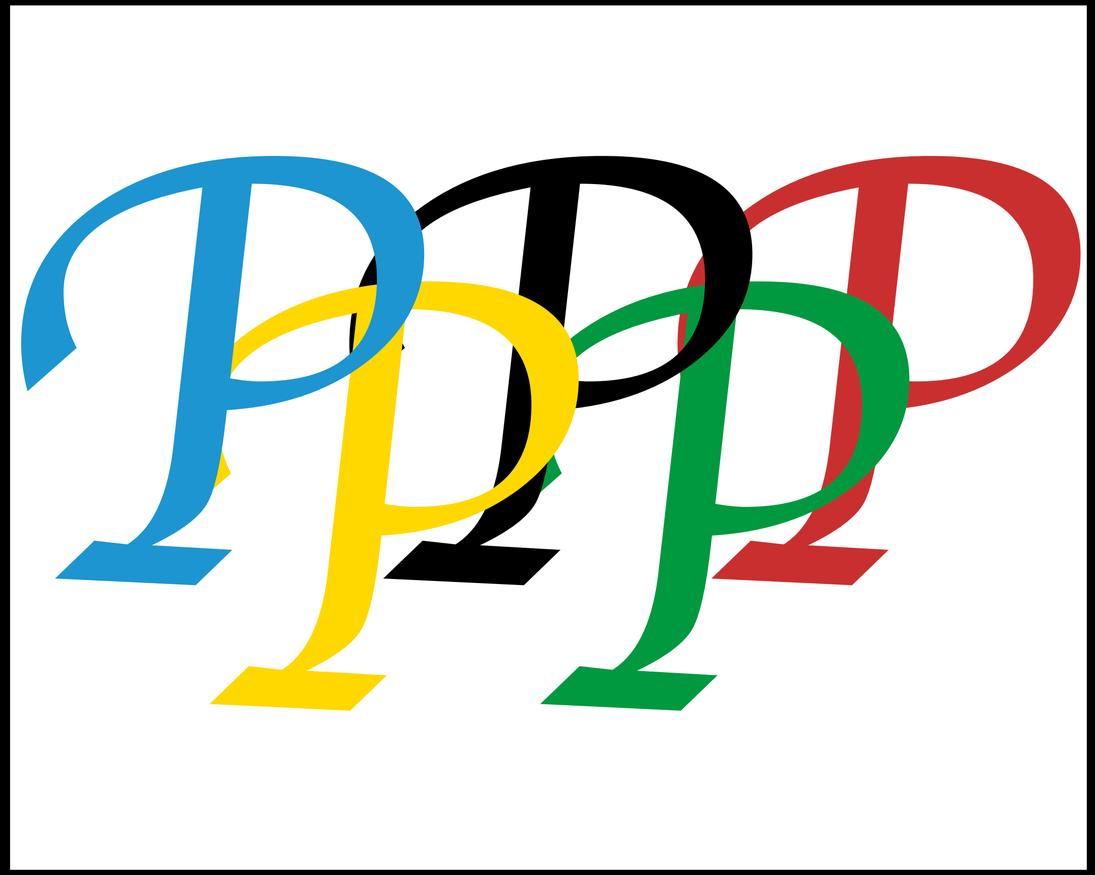
The cost/schedule/risk subcommittee to P5 is asked to obtain and clarify the cost/schedule/risk information from the proponents of high cost (>250M FY23$) HEP projects funded or being considered for funding by the DOE and/or NSF. The subcommittee will not prepare its own estimates. The committee should assess this information at a high level, noting key assumptions, risks and cost and schedule uncertainties including the risk from non-DOE/NSF funding sources, international partners making in-kind contributions and collaborations and missing costly items, if any. The committee is also asked to comment on the operation costs for projects for during commissioning and when the resulting facilities are in steady-state operation. This committee will provide P5 with the expert opinions on the uncertainty ranges for the projects that P5 needs to develop a strategy for the field within assumed budgetary constraints. The subcommittee will submit their preliminary report to P5 in early summer.

Iterating with “big” projects
Will also ask for information from medium and small

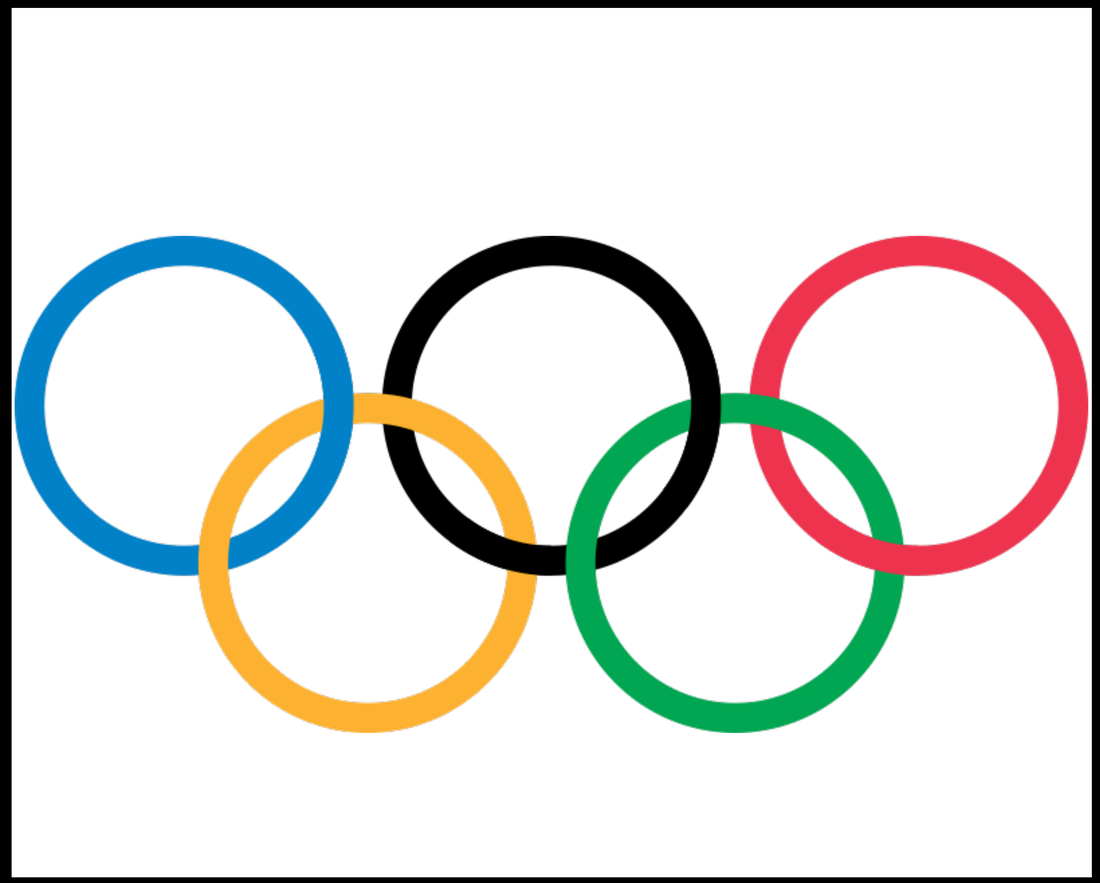
Budget Scenarios

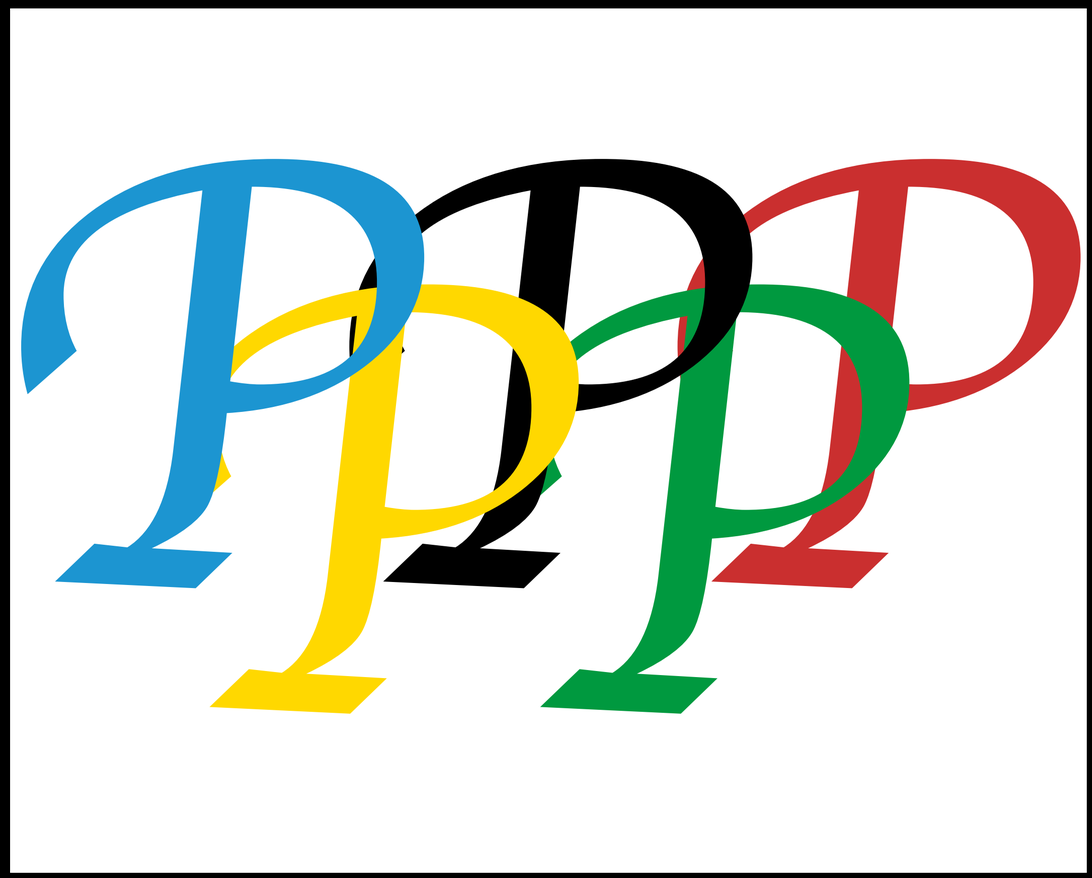


P5 tentative logo

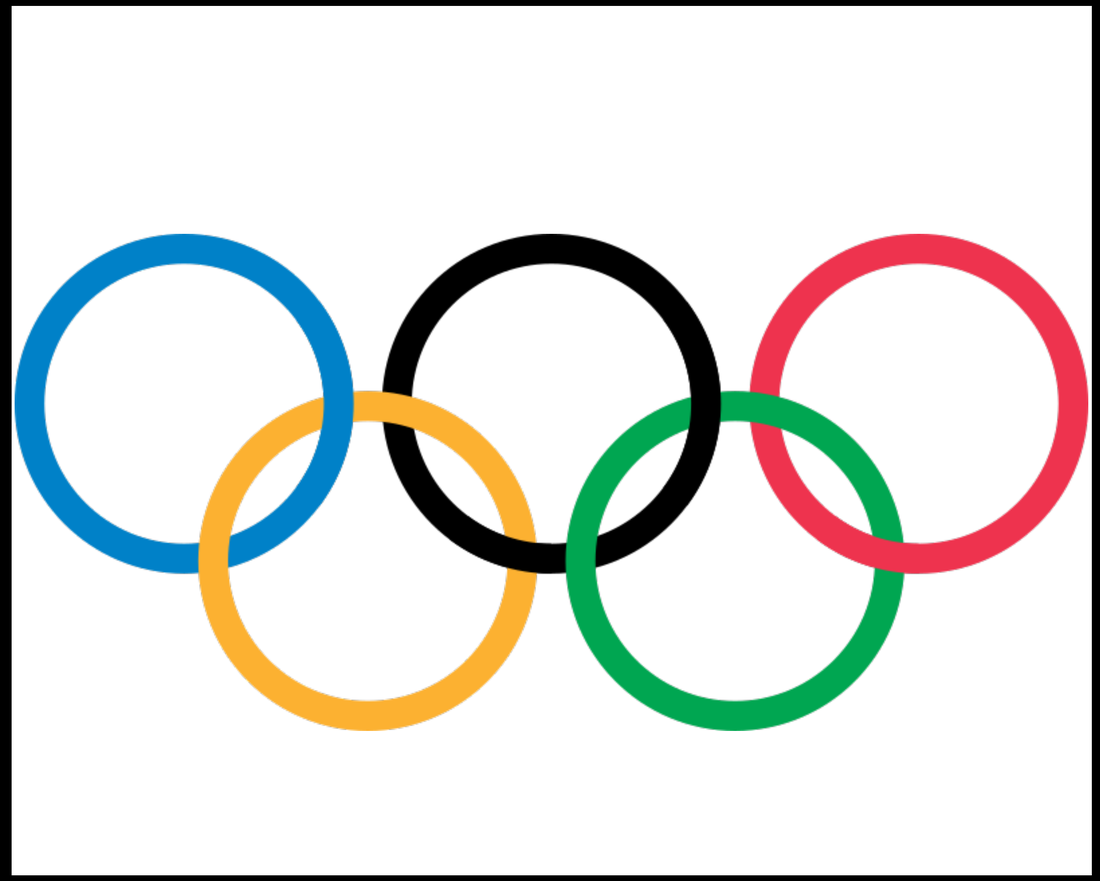


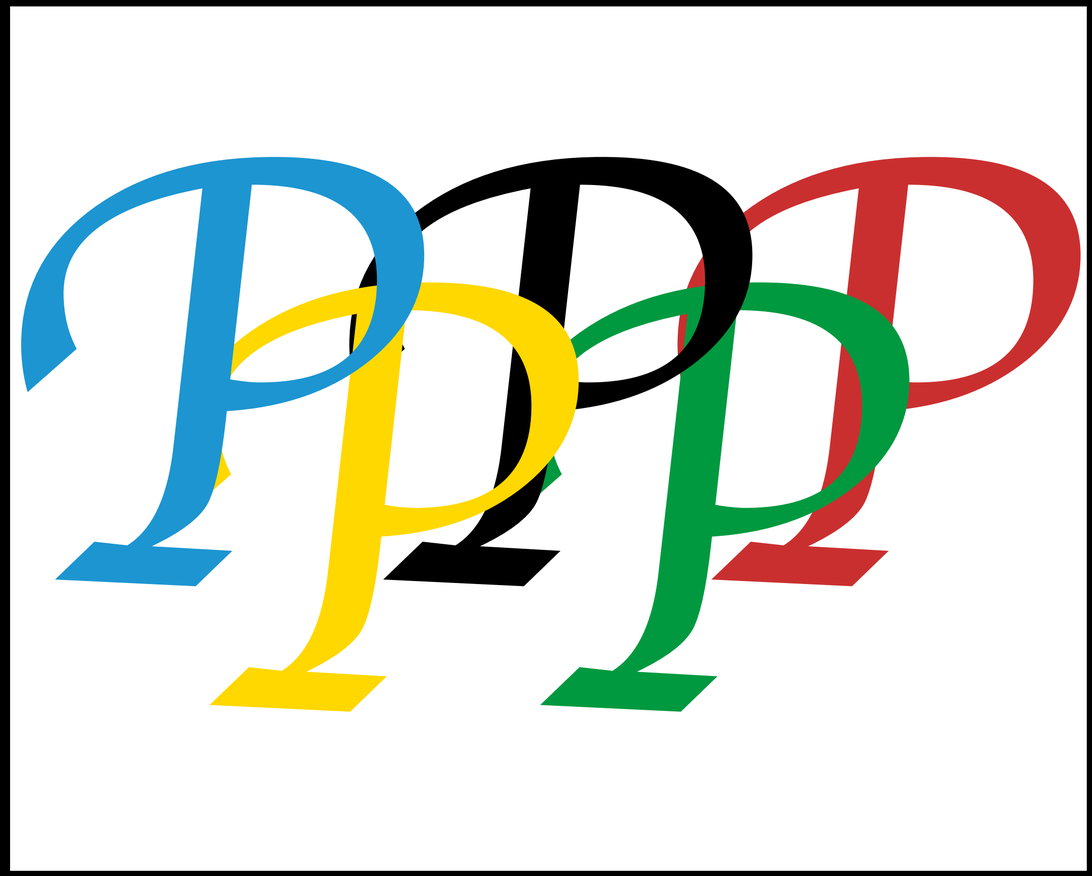
P5 tentative logo





P5 tentative logo

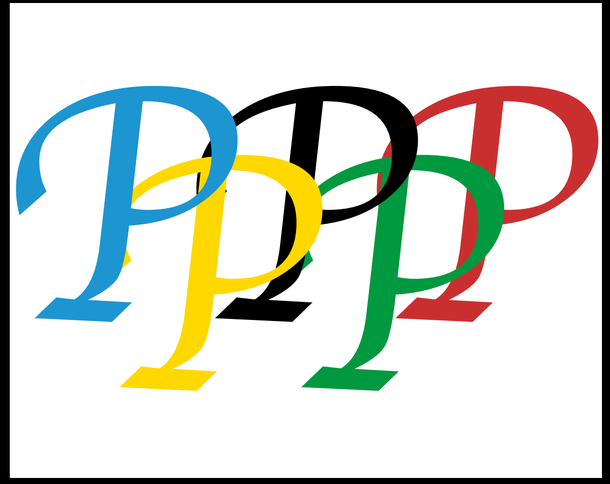




Apologies to Antarctica! CMB and IceCube

Time Table

- Information Gathering mode
  - Open Town Halls (finished)
    - LBNL: Feb 22, 23. 513 participants
    - Fermilab/Argonne: March 21, 22, 23. 797 participants
    - Brookhaven: April 12, 13. 666 participants
    - SLAC: May 3, 4. 512 participants
    - All with short remarks (x3 oversubscription)
  - DPF session on P5 (April 15)
  - Virtual Town Halls: June 5 (UT Austin), June 27 (Virginia Tech)
- Deliberation Phase
  - Four closed meetings from May to July
  - Preliminary recommendations to agencies August
- Final report due October



Maximize science!