2014
Policy Community Survey Report

Prepared for
The Think Tank Initiative

For more information, please contact:
Femke de Man, Director
GlobeScan®
email: femke.deman@globescan.com

Salim Binbrek, Research Analyst
GlobeScan®
email: salim.binbrek@globescan.com

145 Front St. East, suite 102
Toronto, ON Canada M5A 1E3
www.globescan.com

THE GLOBAL COMPACT
WE SUPPORT

ESOMAR WORLD RESEARCH
ESOMAR
MEMBER

GLOBESCAN

evidence and ideas. applied

GlobeScan Incorporated subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

GlobeScan is an international opinion research consultancy. For twenty-five years, GlobeScan has helped clients measure, understand and build valuable relationships with their stakeholders, and to work collaboratively in delivering a sustainable and equitable future.

Uniquely placed at the nexus of reputation, brand and sustainability, GlobeScan partners with clients to build trust, drive engagement and inspire innovation within, around and beyond their organizations.

For more information, visit www.GlobeScan.com

TABLE OF CONTENTS

EXECUTIVE SUMMARY

Background. In 2010, IDRC engaged GlobeScan to conduct its first policy community survey in several countries in Africa, Latin America, and South Asia in support of its Think Tank Initiative. In 2013, IDRC commissioned GlobeScan to repeat this survey in order to track changes in the policy context and to understand the way in which the information needs of different policy stakeholders develop over time. In 2013, a total of 989 stakeholders of the policy-making community participated in the research between April and December 2013. This research aims to develop a better understanding of policy communities in specific countries, and to provide strategic direction to think tanks on how they can best contribute to the quality of policy making in countries where they operate.

Information on economic/fiscal issues and poverty alleviation remain critical. Despite the differences by region and by stakeholder type, respondents across the three regions consistently point to economic/fiscal and poverty alleviation as most important for supporting them in their work related to public policy. This consistency in terms of information needs was noted in 2011 as well.

The ease of obtaining policy information remains modest at best. While access to information has improved in South Asia across a number of topics, respondents in Africa and Latin America continue to report modest success in accessing the information they need to support their policy work. Indeed, poverty alleviation information is perceived to be more difficult to access in Latin American countries

since 2011, and environmental information appears to be particularly challenging to access across all regions – a problem considering the perceived importance of these types of information. Understanding the information needs of their stakeholders and improving access to critical information should remain a key goal for think tanks.

There is a preference for electronic formats when it comes to receiving information. Websites are by far selected as the favoured format by a majority of stakeholders across the three regions, followed by print. Email is a popular choice for receiving information in Latin America, suggesting an openness to receiving information as well as actively looking for it on their own. Social media has different levels of traction depending on the country surveyed.

The profile of think tanks is strong in South Asia and Latin America, where they are the most frequently used source of information, along with government ministries and international agencies. Think tanks are used less often in Africa and although familiarity with and use of think tanks has improved since 2011, some continue to cite a lack of familiarity as the reason why they do not use think tanks more often. Overall, usage levels suggest there is still room for improvement, particularly in Africa, where think tanks are not top of mind. Word-of-mouth, engagement with staff, and media exposure are said by respondents to improve familiarity.

Both national and international think tanks are seen as high quality sources of information, with quality staff and a good knowledge of the

policy-making process. Across all regions, think tanks are among the top-rated organizations for providing quality research, along with international agencies and international university-based research institutes. Quality is an important driving force behind think tank use in South Asia and Latin America. In Africa, however, respondents are more concerned about the relevance of the research to the respondent's needs. This may explain why think tanks, which are highly rated in terms of delivering quality outputs, are used much less frequently by stakeholders in Africa than elsewhere. It would also explain why national think tanks are used more often than international ones in all three regions.

Government sources remain heavily relied upon despite concerns about quality. In all regions, government sources of information (e.g., government agencies, government-owned research institutes) are among the most frequently used by stakeholders to support their policy work, even though a majority of stakeholders express concerns about their quality. The frequent use of public sector sources, especially among government stakeholders, is likely related to convenience and ease of access, and may also reflect a current lack of awareness of other sources of information to support policy-making work. Clearly, quality is not the only driving force behind think tank use: accessibility and awareness, and a focus on issues of relevance to the target audience, are some important considerations to encourage stakeholders to use think tank information more frequently.

Across all regions, there is high demand among stakeholders for primary data, via publications and reports and access to statistical databanks.

Policy briefs (defined as a short, targeted analysis of policy) are used far less than publications and reports in Africa and Latin America, although they are still used by over half of respondents. Further investigation is required to determine if this is an issue of quality, accessibility or relevance, but it is clear that there is room to broaden the readership of policy briefs. Stakeholders in South Asia report that they use nearly all information sources listed – including policy briefs – fairly frequently to understand national policy development. This suggests that think tanks in South Asia may have more flexibility in deciding which channels and formats they should use to communicate their findings. Respondents are scanning a variety of sources to inform their understanding.

Consistent advice to think tanks in all regions is to make reports more understandable and audience-friendly. It may be that current think tank offerings lack clarity, causing stakeholders to want access to reliable and trusted data to review and analyze in detail for themselves.

The primary advice from stakeholders on how think tanks can most improve is: 1) to improve the communication and dissemination of findings (this includes making reports more understandable and more accessible through a variety of channels, and using collaboration with other partners to get the messages out); 2) remaining independent and immune from political influence, while still working with government to ensure think tank research findings lead to action – partnership with policy makers and policy actors outside of government is noted as an area requiring improvement; 3) improving transparency (on sources, on methodologies); and 4) improving the local

relevance of the research itself by more deeply understanding the local context on a wider range of issues (this includes focusing on social issues and marginalized communities, capturing the views of a wider audience, partnering with local actors, etc.).

Implications and Opportunities

Raise awareness and ensure local relevance. Despite quality concerns, stakeholders, especially those working in government, currently rely heavily on public sector sources. This suggests a strong need for think tanks to improve public sector stakeholders' awareness of other sources of information available to support their work (this is especially true in African countries). It also suggests that think tanks may need to consider focusing more attention on issues of local relevance, to speak more directly to the needs and concerns of stakeholders who may feel think tank research is perhaps slightly more removed from the local context than what is available from public sector sources. Understanding the information needs of their stakeholders and improving access to critical information must be a key goal for think tanks.

Consider a consultative and capacity-building role with government, while projecting an image of political neutrality. Given that public sector sources are among the most frequently used sources in most countries, think tanks may wish to consider acting in a consultative and capacity-building role to government, to help improve the overall quality of research and information coming from these quarters. The challenge will be to do this in a way that does not imply a lack of political independence on the part of think tanks – this neutrality is highly valued and encouraged by stakeholders.

Disseminate results more widely. As a highly trusted source of research-based information in many countries, think tanks have earned credibility with most stakeholders. Heeding stakeholders' advice, think tanks now need to focus on getting their research into more hands, by varying dissemination channels and by offering research that is understandable and audience-friendly. Doing so can help improve the overall quality of policy dialogue.

Build relationships and partner more effectively. Given the large number of organizations involved in the policy-making process, the varying levels of perceived usefulness and quality of these organizations, and the differing role these organizations have in policy making (research vs. advocacy), think tanks should work to identify potential strategic relationships with different types of organizations. Partnering more effectively will help improve the relevance of think tank research, stimulate more public debate around the issues, and ensure that think tank research is being more actively considered in the policy-making process.

Explore potential opportunities to provide consultative services. Given stakeholders' high demand for primary data, think tanks may have an opportunity to offer more specific and customized analytic services to deliver on the information needs of stakeholders. Results suggest that think tanks should work toward finding innovative ways to share primary data with stakeholders who require it for their work in policy making.

INTRODUCTION

The 2013 policy community survey was undertaken as part of the Think Tank Initiative and as a follow-up to research initially conducted in 2010/11. The Think Tank Initiative is a multi-donor program implemented by IDRC, dedicated to strengthening independent policy research institutions (aka "think tanks") in developing countries, enabling them to better provide sound research that both informs and influences policy.

The survey was conducted with policy stakeholders in Africa, Latin America, and South Asia. The purpose of the survey was to understand the policy community in specific countries identified by the Think Tank Initiative and to track changes over time in perceptions of think tanks. Stakeholders were asked general questions about the policy-making context in their countries, the types of information needed for their work, as well as questions about

sources of information and information formats. They were also asked specific questions about think tanks generally, and how they can be improved. The results related to these topics are contained in this report.

A parallel objective of the survey was to understand strengths and weaknesses of specific think tanks, and to understand what activities are associated with the success of think tanks, in order to help design and implement support strategies. These findings are not included in this report, but are being used as a rich source of reflection both by individual think tanks as they identify their own priorities for organizational strengthening and capacity building, and by the Think Tank Initiative as it develops its approach to supporting its grantee organizations in their progress toward sustainability.

APPROACH

This study was designed to gather views of senior level policy actors within national policy communities on their needs for research, perceptions of research quality, and impressions of think tank performance.

The study was not intended to gather perceptions of a larger, representative subset of the policy community which could generate statistically significant findings on the demand for research. This more qualitative approach was chosen deliberately, recognizing its limitations, but acknowledging the value of understanding perceptions of individuals in senior positions within each national policy community who often are very difficult to reach.

The majority of the sample in 2010/2011 and 2013 are not identical in terms of individual respondents. However, the make up of the sample in terms of the stakeholder audiences it reflects is similar.

In each region, a target of 40 respondents was set with a balanced quota of responses across different stakeholder categories. The exception was India, where the total number of interviews was increased to 80 to reflect the difference in the size of the policy community, while maintaining consistency with the sample sizes in other countries.

Balanced quotas in each country were achieved, with varying degrees of difficulty in the data collection process. It is important to note that the online response in Bolivia was far higher than expected. In order to maintain a balance between the countries, the number of completes for Bolivia was weighted down to 40.

METHODOLOGY

The policy community survey was conducted in three regions throughout 2013. The exact dates are listed below. The countries involved in the study were all part of the Think Tank Initiative at the time of the survey.

List of countries included in the policy community survey

Latin America
Bolivia
Ecuador
El Salvador
Guatemala
Honduras
Paraguay
Peru

Africa
West Africa
Benin
Burkina Faso
Ghana
Nigeria
Senegal

East Africa
Ethiopia
Kenya
Rwanda
Tanzania
Uganda

South Asia
Bangladesh
India
Nepal
Pakistan
Sri Lanka

IDRC_g_countries

Fieldwork Dates
By Region

Region	Dates
Africa	April 4th, 2013 – July 25th, 2013
Latin America	September 20th, 2013 – December 17th, 2013
South Asia	September 19th, 2013 – November 18th, 2013

Respondents were identified for the study by both the Think Tank Initiative and GlobeScan. Stakeholders were selected based on their role as active members of the national policy community, meaning that they develop or influence national government policy. Respondents were grouped into the following stakeholder categories:

- **Government[1]:** Senior officials (both elected and non-elected) who are directly involved in or influence policy making.

- **Non-governmental organization:** Senior staff (local or international) whose mission is related to economic development, environmental issues, and/or poverty alleviation.

- **Media:** Editors or journalists who report on public policy, finance, economics, international affairs and/or development, and who are knowledgeable about national policy issues.

- **Multilateral/bilateral organization:** Senior staff from organizations run by foreign governments either individually (bilateral e.g., DFID, USAID, etc.), or as a group (multilateral e.g., UN agencies, World Bank, etc.).

- **Private sector:** Senior staff working at national and multinational companies.

- **Research/Academia:** Senior staff at universities, colleges, research institutes, and/or think tanks.

- **Trade unions[2]:** Senior representatives of national trade unions.

The survey was conducted using online, telephone, and face-to-face interviews. In all regions, stakeholders were invited to participate online via an email invitation. Shortly thereafter, follow-ups were made to schedule telephone or face-to-face interviews where necessary for respondents who did not complete the survey online. The table below outlines the number of interviews completed within each region through both online and offline methodologies.

Stakeholder Group Sample Size
Number of Interviews, by Region, 2013

	Africa	Latin America	South Asia
Elected government	41	40	22
Non-elected government	71	36	30
Media	55	36	38
Multilateral/bilateral	42	31	30
NGO	62	52	49
Private Sector	61	44	29
Research/academia	77	66	44
Trade Union	N/A	33	N/A

Methodology
Number of Interviews, by Region, 2013

	Total	Africa	Latin America	South Asia
Total	989	409	338	242
Online	329	118	146	65
Offline	660	291	192	177

[1] Throughout the report government officials are referred to as Government–elected and Government–non-elected. Which category government stakeholders belong to is determined by their answer to a question within the survey.

[2] The trade union stakeholder group only applies to Latin America.

NOTES TO READERS

Throughout the questionnaire, select definitions were given to respondents in order to guide their interpretation of a question's wording.

Quality of research is defined as being evidence-based, robust and rigorous; relevant and up-to-date; reputable and credible; and situated in relation to existing research literature and findings, nationally and internationally.

Research-based evidence is defined as findings or results from research that can help inform decision making.

All figures in the charts and tables in this report are expressed as percentages, unless otherwise stated. Total percentages may not add up to 100 because of rounding. Likewise, because of rounding, results expressed as aggregates (e.g., excellent + good) may differ slightly from a simple addition of data points shown in charts.

Throughout this report we refer to the regions as Africa, Latin America, and South Asia. These region names are used as a short-hand, and findings should not be extended to the full region, but rather the region as defined by the countries involved with the Think Tank Initiative Policy Community Survey.

Question numbers and letters found under each chart or table indicate which question was used in the questionnaire to build the chart or table. The full questionnaire can be found at the end of the report.
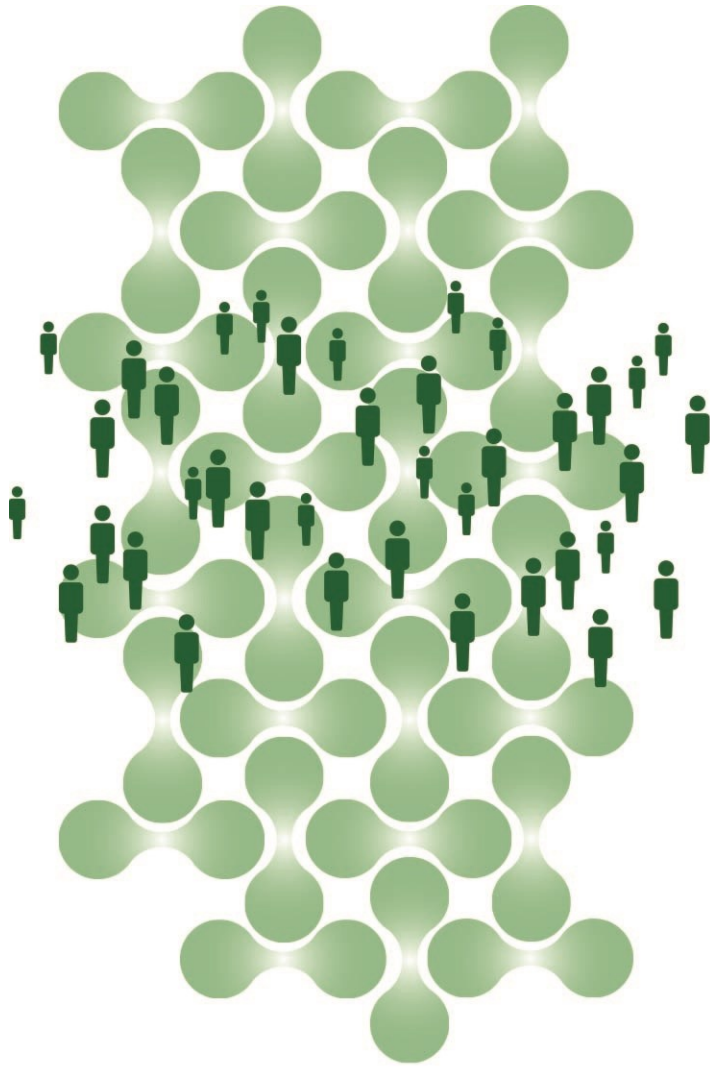
Main Findings

PART I: INFORMATION REQUIRED FOR POLICY-MAKING

This section focuses on the informational needs of stakeholders with regards to policy development. It also details the perceived ease of obtaining information relevant for policy-making, as well as preferred formats for receiving information.

Information Needs

When stakeholders are asked what information they most need to support their work related to public policy, information on economic/fiscal issues and poverty alleviation are mentioned as most important in all three regions, as was the case in 2011. It is possible that these two topic areas are in high demand because they are broad, cross-cutting topics that could potentially cover many other areas such as gender, education, and health. Such strong interest in economic and fiscal issues across all regions might reflect the current global economic context (i.e., sluggish economic growth in some countries, the ongoing recovery associated with the global financial crisis, etc.).The consistent low demand for information on foreign affairs across all three regions suggests these policy-oriented stakeholders are focused more on their country's internal issues than on relationships with other countries.

In South Asia, it is notable that majorities of respondents say they require virtually all prompted types of information, whereas in Latin America, only one-quarter of the prompted areas are required by majorities of stakeholders. It may be that Latin American stakeholders are taking a more focused and subject-specific view in their policy work, while those in South Asia are taking a broader view, looking across different subject areas to support their work. Or, topic areas may be more broadly interpreted among South Asian respondents compared to Latin America.

Across all regions, media respondents once again report above average interest in nearly all information topics, likely reflecting the broad scope of their reporting needs. Elected government stakeholders surveyed have the most wide ranging information interests, probably requiring information on many topics for their work in national policy. NGOs are far more focused in their areas of interest (e.g., human rights, poverty alleviation).

Interest in many topics has risen since 2011 among African respondents, suggesting a thirst for external information.

Information Required for Your Work in Public Policy
% of Respondents, Combined Mentions, by Region, 2011-2013

	Africa		Latin America		South Asia	
Economic/fiscal issues	69	▲	66	▼	78	
Poverty alleviation	65		63	▼	83	
Agriculture / food security	61	▲	44	▼	66	▼
Education	61		60		69	
Environment*	57		48		69	
Health care	52	▲	42	▼	64	
Trade/industry	52		45	▼	61	▼
Human rights	49	▲	48		62	
Gender issues	48		43		76	
Natural resources*	46		46		65	
Energy*	44		41		62	
Foreign affairs	33	▲	35		43	▼

▲ Increase of 10% or more from 2011 to 2013
▼ Decrease of 10% or less from 2011 to 2013

* "Environment", "natural resources", and "energy" were combined in one response option in 2011, but were segmented in 2013.
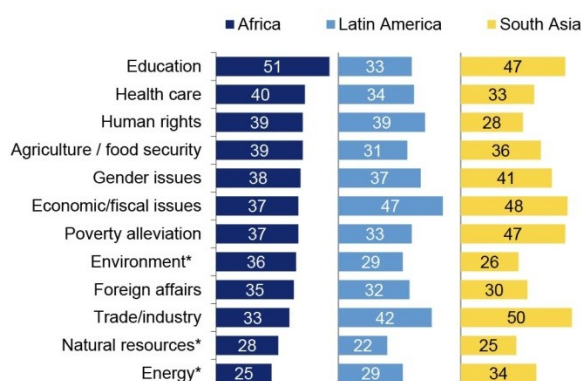
Q. A2

Access to Information

The ease of obtaining policy information is generally moderate at best: overall, around one-third of stakeholders report easy access to the information needed for their policy work.

The perceived ease of obtaining information has improved somewhat since 2011 in South Asia across a number of topics. However, results remain relatively unchanged in Africa and Latin America. Only on poverty alleviation are respondents in Latin America more likely than in 2011 to say that this information is difficult to obtain.

Looking at the topics of greatest importance, information on economic/fiscal issues is reported as being much easier to obtain by respondents in Latin America and South Asia than in Africa (this represents a large improvement in South Asia from 2011). For poverty alleviation, information is seen as harder to obtain by African and Latin American respondents than South Asian (representing a decline in Latin America and an improvement in South Asia since 2011). In Africa and South Asia, respondents report significantly easier access to information on education than Latin American stakeholders.

Information on environment, natural resources, and energy are reported as being relatively difficult to obtain in all three regions. This is consistent with 2011.

Ease of Obtaining Information to Support Policy Development
% of Total Respondents Selecting "Very Easy" (4+5), by Region, 2013

	Africa	Latin America	South Asia
Education	51	33	47
Health care	40	34	33
Human rights	39	39	28
Agriculture / food security	39	31	36
Gender issues	38	37	41
Economic/fiscal issues	37	47	48
Poverty alleviation	37	33	47
Environment*	36	29	26
Foreign affairs	35	32	30
Trade/industry	33	42	50
Natural resources*	28	22	25
Energy*	25	29	34

Subsample: Those who say they require information about this particular issue for their work; Africa, *n* = 133-281; Latin America, *n* = 105–196; South Asia, *n* =104-202

* "Environment", "natural resources", and "energy" were combined in one response option in 2011, but were segmented in 2013

Q. A3

Importance vs Ease of Access

Thankfully for respondents, the information that they are more likely to require for their work in national policy tends to be the information that they feel is more easily obtained.

The accompanying matrix charts show the importance of each topic area compared to how easy stakeholders say it is to access this information. Topic areas falling in the top-right green quadrant are considered important to stakeholders and are relatively easy to access. Topics in the top-left red quadrant are particularly noteworthy, as stakeholders say these are highly important to their work but report difficulty in accessing this information. The bottom-left blue quadrant contains topic areas that are of lower importance and that are considered difficult to access. And topics in the bottom-right yellow quadrant are of low importance and considered easier to access.

The matrices for South Asia and Africa suggest that stakeholders' information access is in a good position: Most of their highly important information needs are easy to access, while harder to access information (e.g., foreign affairs) is generally considered less important to their policy work. Accessibility to environmental information is highlighted as an issue in both regions.
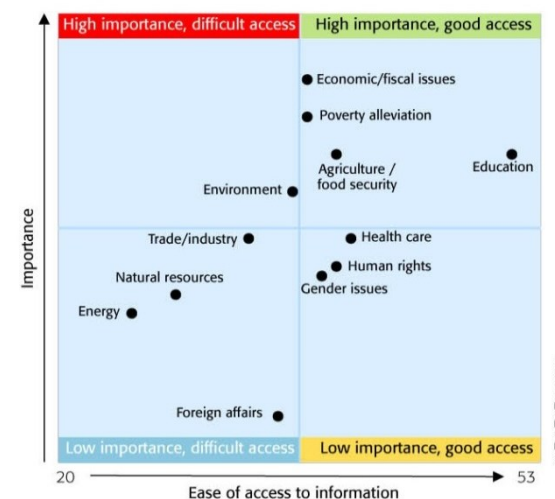
Importance vs access to information
% of total respondents, combined mentions vs respondents selecting "Easy" (4+5), South Asia
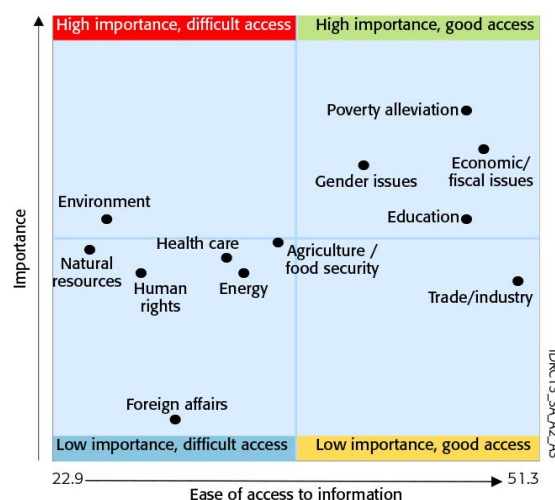
Importance vs access to information
% of total respondents, combined mentions vs respondents selecting "Easy" (4+5), Africa

In the Latin America matrix, (see chart on the right) stakeholders' information access is less ideal. Information on poverty alleviation and education is considered highly important, but they are reportedly more difficult to access. Going forward, it will be important to better understand stakeholders' challenges in accessing this kind of information, to help improve both their access to it and their concerns about the quality of this information (e.g., is it that not enough information is currently available? Is it not available in an appropriate medium? Is it not up to date? Is it addressing the wrong issues? etc.).

The table below summarizes the information context across the three regions. The placement of each topic area in the quadrants on the preceding matrices determines the colour of each cell in this table, allowing for comparison across regions. The cells that are coloured with two colours indicate that the specific topic area falls directly between two quadrants. The table illustrates the nuanced picture of what stakeholders say is important to support their policy work, as well as the regional challenges stakeholders face in accessing information in some areas.

Importance vs access to information
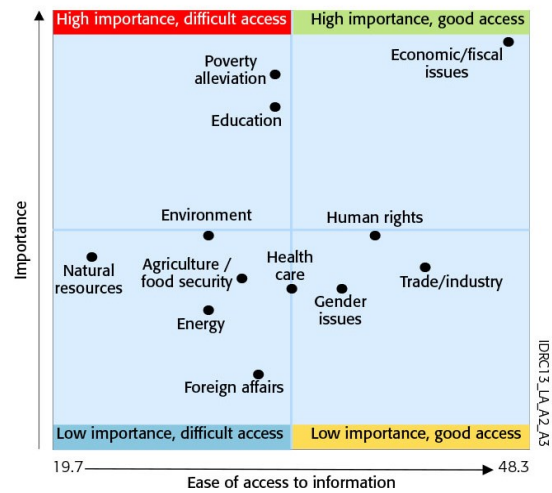% of total respondents, combined mentions vs respondents selecting "Easy" (4+5), Latin America

Summary: Importance vs Access to Information
By Region, 2013

Q. A2, A3

Preferred Format for Receiving Information

When stakeholders were asked which format they find most useful for receiving information for national policy development, strong majorities point to websites in all three regions. Over half of the stakeholders in all regions mentioned print formats and roughly half or more preferred email. Receiving information by email was selected significantly more often as the preferred format in Latin America than in the other two regions.

Blogs and radio are seen as useful by only very small minorities of respondents, and social media has different levels of traction depending on the country surveyed. Social media is considerably less preferred in Africa compared to Latin America and Asia.

Most Useful Format for Receiving Information for National Policy Development
% of Total Respondents, Combined Mentions (Could Select up to Three), by Region, 2013

	Africa	Latin America	South Asia
Websites	82	75	75
Print	58	59	60
Email	50	79	47
In person	30	23	38
Television	24	13	28
Radio	15	5	8
Social media	9	20	25
Blogs	5	7	5
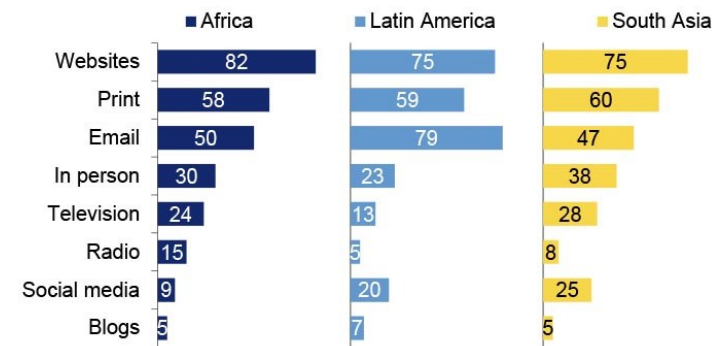
Q. A5

PART 2: SUPPORTING EFFECTIVE POLICY DEVELOPMENT

This section reports on the types of organizations that respondents say they rely upon for research-based evidence related to social and economic policy, and their assessment of the quality of information provided by each. The frequency of use of policy briefs is also assessed in the context of other information sources.

These findings highlight the overall credibility of national and international independent policy research institutes (hereafter referred to as "think tanks") as an information source and, more generally, shed light on the context in which think tanks are operating across the three regions.

Sources of Information

Stakeholders were asked about the types of organizations they turn to when they need information on social and economic policy. 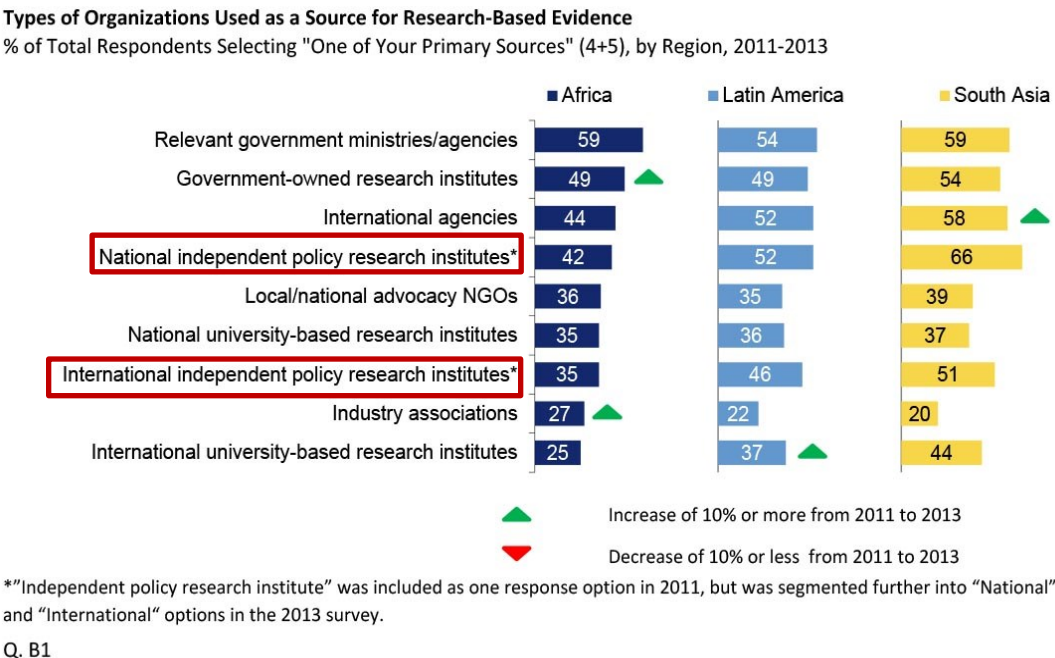In South Asia, the profile of national think tanks is strong and they are the most frequently used source of information. National think tanks are also among the most frequently used sources in Latin America. International thinks tanks have an average to high frequency of use in Latin America and South Asia, but – as with national think tanks – are less used in Africa. A lack of familiarity is the most common reason cited by African respondents for not using think tanks.

Compared to 2011, think tank use has declined somewhat in Latin America, but has increased slightly in Africa. Government organizations are a key source of research-based evidence in all three regions and use of government-owned research institutes has increased in Africa since 2011. International agencies are also a common source of information in all regions. There is a lower tendency across all regions to draw upon information from industry associations.

Types of Organizations Used as a Source for Research-Based Evidence
% of Total Respondents Selecting "One of Your Primary Sources" (4+5), by Region, 2011-2013

	Africa	Latin America	South Asia
Relevant government ministries/agencies	59	54	59
Government-owned research institutes	49 ▲	49	54
International agencies	44	52	58 ▲
National independent policy research institutes*	42	52	66
Local/national advocacy NGOs	36	35	39
National university-based research institutes	35	36	37
International independent policy research institutes*	35	46	51
Industry associations	27 ▲	22	20
International university-based research institutes	25	37 ▲	44

▲ Increase of 10% or more from 2011 to 2013

▼ Decrease of 10% or less from 2011 to 2013

*"Independent policy research institute" was included as one response option in 2011, but was segmented further into "National" and "International" options in the 2013 survey.

Q. B1

The accompanying table shows the usage of national thinks tanks by stakeholder type. In Latin America and South Asia, majorities among nearly all stakeholder types use national think tanks as a primary source for research-based evidence. In Africa, however, use is less common except among academia.

Overall, usage levels suggest there is still room for improvement, particularly in Africa, where think tanks are not top of mind for those most closely involved with policy making.

National Independent Policy Research Institutes Used as a Source for Research-Based Evidence
% of Total Respondents Selecting "One of Your Primary Sources" (4+5), by Stakeholder Type
By Region, 2013

	Africa	Latin America	South Asia
Elected government	39	41	68
Non-elected government	39	58	63
Media	45	63	68
Multilateral/bilateral	40	73	57
NGO	40	61	71
Private Sector	34	42	48
Research/academia	51	53	80
Trade Union	N/A	33	N/A

Q. B1

Stakeholder type using think tanks most often as a primary source

Use of Government Sources

Elected and non-elected government stakeholders in all three regions tend to turn to their own government ministries/agencies and government-owned research institutes as primary sources of information before turning to other external sources such as think tanks or international agencies. Yet, at the same time, they express concerns over the quality of the research provided by these groups. This tendency of government respondents to rely on internal sources despite quality concerns suggests that convenience and/or accessibility may be an important factor in their choice, or it may signal a lack of awareness about the availability and quality of information produced by other sources. When reviewing their external engagement strategy, think tanks should consider how to improve their visibility and the use of their research by these important and influential stakeholders.
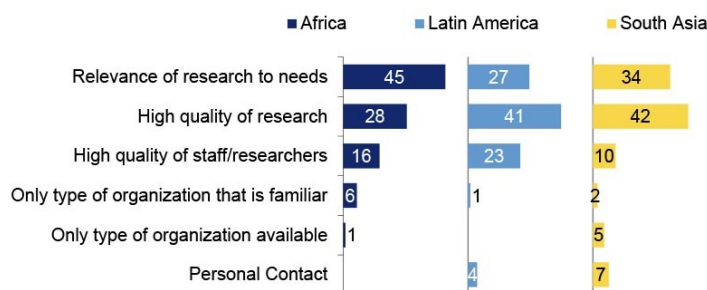
Reasons for Turning to Think Tanks

Stakeholders who say they use national think tanks as a primary source of research-based evidence were then asked why they do so. For respondents in Latin America, there has been a considerable increase since 2011 in those who say that high quality research is the primary reason they turn to think tanks. In South Asia, high quality of research is also the primary reason, as it was in 2011. In Africa, respondents are more concerned about the relevance of the research to the respondent's needs. A notable amount of respondents in Latin America also place importance on the quality of national think tanks' personnel.

Very few respondents say they turn to a national think tank because it is the only organization that is familiar or available to them, suggesting stakeholders have a choice in information sources. Only a small percentage of respondents, if any, turn to national think tanks because of personal contact.

The reasoning behind the use of international think tanks is quite similar to that of national think tanks across Latin America and South Asia, namely high quality research and relevance. In Africa, however, international think tanks are rated far higher on research quality (52%) than on research relevance (20%) – a reverse of the pattern witnessed with national think tanks in this region.

Reasons for Turning to National Independent Policy Research Institutes, as a Source of Research-Based Evidence

% of Respondents, by Region, 2013

■ Africa   ■ Latin America   ■ South Asia

	Africa	Latin America	South Asia
Relevance of research to needs	45	27	34
High quality of research	28	41	42
High quality of staff/researchers	16	23	10
Only type of organization that is familiar	6	1	2
Only type of organization available	1		5
Personal Contact		4	7

Subsample: Those who say they use national independent policy research institutes as a primary source. Africa, *n* =79; Latin America, *n* =66; South Asia, *n* =59

Q. B1b

Quality of Information

Respondents were asked to rate different information sources in terms of the quality of policy-related research each one provides. The accompanying chart shows that international think tanks receive the highest or second highest quality ratings in all three regions. National think tanks are also seen as having high quality research, especially in South Asia, where they rank first. In all regions, national think tanks are seen as the best of all "in-country" sources of information for research quality.
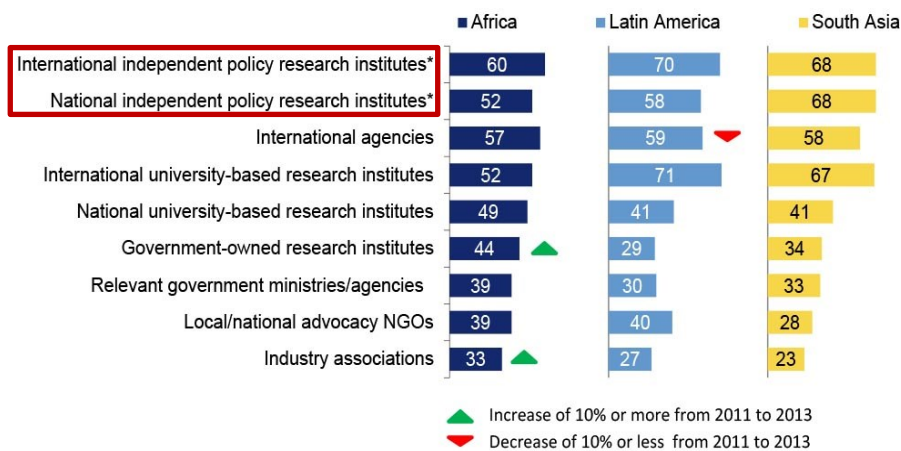
Industry associations are seen as having the lowest quality in all three regions although their perceived quality has improved in Africa since 2011. Local/national advocacy NGOs and government-related groups also have lower quality ratings.

Generally, local/national organizations do not rate as highly as international ones when it comes to perceived research quality.

The table on the following page highlights which stakeholder groups in each region give national think tanks the highest ratings in terms of quality. In Africa, respondents from NGOs or academia have the most positive perceptions of the quality of research produced by national think tanks; government ratings are also strong. In Latin America, media, NGO and elected government respondents are the most positive, while in South Asia strong majorities among all groups – except the private sector – give high quality ratings.

Quality Ratings of Research Provided by...
% of Respondents Selecting "Excellent" (4+5), by Region, 2011-2013

	■ Africa	■ Latin America	■ South Asia
International independent policy research institutes*	60	70	68
National independent policy research institutes*	52	58	68
International agencies	57	59 ▼	58
International university-based research institutes	52	71	67
National university-based research institutes	49	41	41
Government-owned research institutes	44 ▲	29	34
Relevant government ministries/agencies	39	30	33
Local/national advocacy NGOs	39	40	28
Industry associations	33 ▲	27	23

▲ Increase of 10% or more from 2011 to 2013
▼ Decrease of 10% or less from 2011 to 2013

Subsample: Those who say they use type of institute as a primary source of policy information. Africa, n=273-380; Latin America, n=205-276; South Asia, n=203-234

*"Independent policy research institute" was included as one response option in 2011, but was segmented further into "National" and "International " options in the 2013 survey.
Q. B2

Quality Ratings of Research Provided by National Independent Policy Research Institutes

% of Respondents Selecting "Excellent" (4+5), by Stakeholder Type
By Region, 2013

	Africa	Latin America	South Asia
Elected government	55	60	71
Non-elected government	49	53	64
Media	44	72	76
Multilateral/bilateral	41	57	55
NGO	58	64	79
Private Sector	51	45	48
Research/academia	58	57	69
Trade Union	N/A	51	N/A

Stakeholder type rating quality of think tank research highest

Q. B2

When it comes to international think tanks, quality ratings are higher than national think tanks among nearly all stakeholder groups in Africa and Latin America. In South Asia, however, national and international think tanks jockey for position as the highest quality provider, with national think tanks actually outranking international among elected government, media and NGO respondents.

Quality vs Usage

The table on the following page summarizes respondents' perceptions of the quality of information from each source organization and how frequently stakeholders turn to that source for information. Green reflects an ideal position, as these organizations are perceived to deliver high quality research and are used frequently by stakeholders. Red indicates that stakeholders think the organization produces high quality outputs, but rely on them less frequently than other sources. There are many reasons why an organization could be in the "red" zone, including stakeholders' lack of awareness of the organization, challenges in accessing information, or an infrequent supply of new or updated information, among others.

Blue indicates a lower-use organization that gets lower than average quality ratings. Yellow reflects a higher-use organization that gets lower than average quality ratings, which could reflect convenience in accessing the information.

The accompanying table illustrates the similarities between Latin America and South Asia in terms of the relationship between perceived quality and frequency of use of information sources. High quality organizations like international and national think tanks, as well as international agencies, are often used. The exception is international university-based research institutes, which are highly rated for quality, but used less extensively than would be expected.

In Africa, there are more organizations that are highly rated for quality but that are used less frequently: international think tanks, and international and national university-based research institutes. As in South Asia and Latin America, national think tanks and international agencies have high quality ratings and are frequently used.

Government-owned research institutes and relevant government ministries/agencies are frequently used in all regions despite their perceived low quality. As mentioned earlier, this may simply be a result of government sources being easier to access compared to other sources.

All in all, we may surmise that respondents who are more likely to see think tanks as providing high quality research are more likely to use them as a source of information. However, as seen with government-based research, quality is not the only driving force behind use: accessibility and awareness, and a focus on issues of relevance to the target audience, are some important considerations to encourage stakeholders to use think tank information more frequently.

Summary: Quality vs Frequency of Use of Organizations
% of Total Respondents Selecting "Excellent" (4+5) vs "Primary Source" (4+5), by Region, 2013

	Africa	Latin America	South Asia		
Government-owned research institutes	🟨	🟨	🟨	🟥	High importance, infrequent use
Relevant government ministries/agencies	🟨	🟨	🟨	🟨	Low importance, frequent use
International Independent policy research institutes	🟥	🟩	🟩	🟦	Low importance, infrequent use
National Independent policy research institutes	🟩	🟩	🟩	🟩	High importance, frequent use
International agencies	🟩	🟩	🟩		
International university-based research institutes	🟥	🟥	🟥		
National university-based research institutes	🟥	🟦	🟦		
Industry associations	🟦	🟦	🟦		
Local/national advocacy NGOs	🟦	🟦	🟦		

Q. B1, B2

Forms of Information Exchange

Overall, stakeholders appear to use a variety of sources of information to increase their understanding of national policy development.

When provided with nine different types of information sources, respondents across all three regions say that they most often use publications and reports to increase their understanding for national policy development. This is closely followed by databases and statistical data banks. These top two information sources are more user-driven and self-directed than other response options and may suggest a thirst among respondents for more primary data and detailed policy information.

Interactive forms of information exchange, such as conferences/events, discussion with colleagues or peers or consulting with experts, are used by at least two-thirds of respondents in all regions.

Policy briefs (defined as a short, targeted analysis of policy) are used far less than publications and reports in Africa and Latin America, although they are still used by over half of respondents. Further investigation is required to determine if this is an issue of quality, accessibility or relevance.

Stakeholders in South Asia report that they use nearly all information sources listed – including policy briefs – fairly frequently to understand national policy development. This suggests that think tanks in South Asia may have more flexibility in deciding which channels and formats they should use to communicate their findings. This is in contrast to Latin America and Africa, were there are clearer preferences among respondents.

Information Source Used to Increase Understanding for National Policy Development
% of Total Respondents, Combined Mentions, by Region, 2013

Information Source	Africa	Latin America	South Asia
Publications/reports	86	82	95
Databases / statistical data banks	73	76	83
Conferences/events	69	61	83
Discussion with colleagues/peers	67	73	83
Information received via the news (newspaper, TV, radio, etc.)	59	67	82
Consulting with experts	59	70	82
Policy briefs (i.e., short, targeted analysis of policy)	56	57	82
Books	50	50	79
Newsletters/bulletins	46	51	72

Q. A4

PART 3: PERFORMANCE IMPROVEMENT

This section offers insights from stakeholders on how think tanks can improve their overall performance in terms of delivering useful and relevant outputs to support policy development.
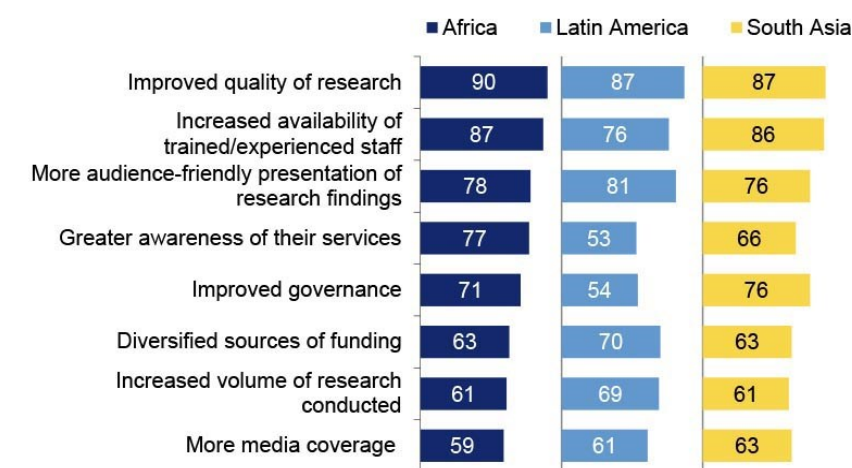
Improving the Performance of Think Tanks

When asked to rate the importance of a number of factors that could help improve the overall performance of think tanks, improved quality of research ranks as most important for all regions. This, combined with the fact that research quality is one of the key reasons why stakeholders turn to think tanks, emphasizes how important quality research – both in terms of content and methodology – is for the continued perceived relevance and use of think tanks. Making the presentation of findings more audience-friendly is also cited.

As in 2011, stakeholders believe an increase in the availability of trained and experienced staff is another important area across all regions where think tanks can improve performance. Clearly, building up the internal capacity of think tanks continues to be a top priority and it is likely that improvement here will also contribute to an increase in perceived research quality. Some respondents in Africa further elaborate on this point by mentioning that there is far too much of a reliance on international consultants and not enough locally trained staff.

Greater awareness of services has increased in importance since 2011 for both Africa and Latin America. Improved governance continues to be more of an important issue in Africa and South Asia than in Latin America; diversified sources of funding and increasing the volume of research conducted are seen as more important factors in the latter region.

Importance of Factors for Improving Performance of Think Tanks
% of Total Respondents Selecting "Important" (4+5), by Region, 2013

Legend: ■ Africa ■ Latin America ■ South Asia

Factor	Africa	Latin America	South Asia
Improved quality of research	90	87	87
Increased availability of trained/experienced staff	87	76	86
More audience-friendly presentation of research findings	78	81	76
Greater awareness of their services	77	53	66
Improved governance	71	54	76
Diversified sources of funding	63	70	63
Increased volume of research conducted	61	69	61
More media coverage	59	61	63

Q. C2

In a separate question asking respondents to rate the performance of specific think tanks in their country on a series of measures, many think tanks received relatively lower ratings when it came to the formation of effective partnerships – many believe think tanks could be more effective at engaging with policy makers and partnering with public policy actors outside of government. Many also believe think tanks could improve upon their transparency and openness, and in the dissemination of their research and recommendations.

Advice to National Think Tanks

Stakeholders were given the opportunity to give unprompted advice to think tanks on how they can better assist stakeholders in their work. On the whole, responses were quite similar between regions.

As in 2011, across all regions, improving the communication of findings was often mentioned. Unlike 2011, improving the overall quality of research was not frequently mentioned which is a good sign. Instead, think tanks were urged to make their reports more understandable, with less technical jargon, and more accessible through a variety of channels. To improve communication and dissemination, stakeholders recommended more collaboration with other institutions, especially the media, to ensure that their research reaches a greater audience and benefits society at large. Seeking feedback and active debate on findings was also seen as critical to continued improvement.

Similar to 2011, being independent and immune from government and political influence were frequently mentioned by stakeholders, particularly in Africa and South Asia. In particular, stakeholders in Africa would

like think tanks to be less reliant on government, but they also want them to set up a clear relationship with government so both parties can benefit from improved access to policy-relevant information. Having information lead to action was seen as a key objective by respondents in South Asia.

Improving transparency is a recurring issue in both Latin America and South Asia. In Latin America, stakeholders believe that the credibility of think tanks will be improved if think tanks are more transparent about the sources that they use and consult with, while respondents in South Asia believe think tanks should be more transparent about the research methodologies that they use.

Finally, understanding the local context is key and can further bolster the strength of national think tanks with regards to delivering relevant research. In both 2011 and 2013 respondents across all regions encouraged greater collaboration with non-government stakeholders. In South Asia, respondents stress that community collaboration, while remaining independent, is the best way to understand local conditions and address issues of people who are often marginalized. Some express concern that databases used by stakeholders are too limited and that the views of a wider audience need to be captured. Among stakeholders in Africa, there is a belief that local issues on gender and youth are often neglected in favour of research focused on economic analysis. African think tanks are also encouraged to increase the involvement of local actors who are directly affected by the research or policies. Similarly, in Latin America, stakeholders encourage think tanks to have less

of a market-focus and instead cover more local and social issues.

In sum, stakeholders' desire for improved access to think tanks' research is indicative of the value they place on this work. While stakeholders want think tanks to be more collaborative with both government and non-government stakeholders, they also recognize the importance of sustaining their objective and independent voice in the policy-making context. A successful think tank will therefore balance its social capital and networking with its independence. Below are a few select verbatim responses from stakeholders in the various regions that illustrate the range of responses on a variety of issues:

"At the moment, some of our think tanks do not share their publications online. Print copies are few and hard to obtain. They simply must improve dissemination and accessibility to their products." Sri Lanka, Media

"Being as objective and fact-based as possible. Ensuring research is evidence based." Bangladesh, Non-Elected Government

"To collaborate with Universities and inspire them to take up research on issues that are of importance arising out of national compulsions and not necessarily to toe the line of what is seen as 'important' by their peers in academia." India, Research/Academia

There should be grassroots integration and participation of policies. Local people should be deeply involved in research in order to encourage unbiased results and recommendations. Nigeria, Private sector

"Take on a public policy perspective with a social interest, further away from a market interest. Be more rigorous and objective when carrying out the analysis." Paraguay, Research/Academia

"Before conducting the research, try to know about the culture and the way of living in the country. In addition, it would be great if the research institute focused on qualitative research." Ethiopia, NGO

"To be objective in the results and not just try to justify their own work." Ecuador, Private sector

"For all research it is necessary to communicate the results with the same quality but on a level that the social organizations can understand." Bolivia, NGO

"Do communicate on results, provide a better data analysis according to socio-cultural context rather than on econometric analysis. Also increase [size] research teams." Benin, Research/Academia

"They should not do research to please government. i.e.,they should be able to go to lower levels and find out the exact facts instead of concentrating on us the higher honorables and MPs." Uganda, Elected Government

Appendix I

Questionnaire

Sc5t. Which of the following best describes your type of organization or sector:
- 01 Government, Elected
- 02 Government, Non-Elected
- 03 Media
- 04 Multilateral/Bilateral
- 05 NGO
- 06 Private Sector/industry association
- 07 Research/Academia
- 08 Trade Union (LATIN AMERICA ONLY)
- 09 Other WRITE IN _____

A. Information and Policy Making

A2t. In your current direct or indirect involvement with national policy making processes, what types of information do you require? Information relating to….
Please select all that apply.

- 01 Agriculture / food security
- 02 Economic/fiscal/monetary issues
- 03 Education
- 04 Environment
- 05 Foreign affairs
- 06 Gender issues
- 07 Health care
- 08 Human rights
- 09 Poverty alleviation
- 10 Trade/industry
- 11 Natural resources
- 12 Energy
- 13 Other, please specify:_____
- 99 NONE

A3t. How easy or difficult is it to obtain information to support policy development in each of the following areas currently? If you don't use a particular type of information, please let us know.
Please use a scale from 1 to 5 where 1 is "very difficult" and 5 is "very easy." Select "I do not use this type of information" where applicable.

	1 Very difficult	2	3	4	5 Very easy	Don't know
a. Agriculture food security	01	02	03	04	05	99
b. Economic/fiscal/monetary issues	01	02	03	04	05	99
c. Education	01	02	03	04	05	99
d. Environment	01	02	03	04	05	99
e. Foreign affairs	01	02	03	04	05	99
f. Gender issues	01	02	03	04	05	99
g. Health care	01	02	03	04	05	99
h. Human rights	01	02	03	04	05	99
i. Poverty alleviation	01	02	03	04	05	99
j. Trade industry	01	02	03	04	05	99
k. Natural resources	01	02	03	04	05	99
l. Energy	01	02	03	04	05	99
m. Other [RESPONSE from A2]	01	02	03	04	05	99

A4 (new). Which of the following information sources do you use to increase your understanding for national policy development? *Please select all that apply.*

01 Databases / statistical data banks
02 Publications/reports
03 Books
04 Newsletters/bulletins
05 Conferences/events
06 Consulting with experts
07 Policy briefs (i.e., short, targeted analysis of policy)
08 Discussion with colleagues/peers
09 Information received via the news (newspaper, TV, radio, etc.)
10 Other, please specify:_____

A5 (new). What format do you find most useful for receiving information for national policy development? *Please select up to three.*

01 Websites
02 Blogs
03 Social media (e.g., Facebook, Twitter, etc.)
04 Email
05 Print
06 In person (either face to face or by telephone)
07 Television
08 Radio
09 Other, please specify:_____

B. Availability and use of research-based evidence in the national policy context

The next few questions are about "research-based evidence." Research-based evidence refers to findings or results from research that can help inform decision making.

B1. When you require information related to social and economic policies, what types of organizations do you typically turn to for research-based evidence?
Please rate each of the following sources on a scale from 1 to 5 where 1 is "never use" and 5 is "one of your primary sources."

Source	1 Never use	2	3	4	5 One of your primary sources
at. Government-owned research institutes	01	02	03	04	05
bt. National university-based research institutes	01	02	03	04	05
ct. International university-based research institutes	01	02	03	04	05
d. National independent policy research institutes (think tanks)	01	02	03	04	05
e. International independent policy research institutes (think tanks)	01	02	03	04	05
ft. Relevant government ministries/agencies	01	02	03	04	05
gt. International agencies	01	02	03	04	05
ht. Local/national advocacy NGOs	01	02	03	04	05
it. Industry associations	01	02	03	04	05
jt. Other, please specify:_____	01	02	03	04	05

ASK FOR EACH SOURCE MARKED"5" in B1

B1b. *Why* do you turn to this particular organization most often?

Note: In several of the following questions, we refer to *quality of research,* which is understood here as being evidence-based, robust and rigorous; relevant and up-to-date; reputable and credible; and situated in relation to existing research literature and findings, nationally and internationally.

Source	Only type of organization available to you	Only type of organization you're familiar with	High quality of research	Relevance of research to your needs	High quality of staff/ researchers	Personal contact there
at. Government-owned research institutes	01	02	03	04	05	06
bt. National university-based research institutes	01	02	03	04	05	06
ct. International university -based research institutes	01	02	03	04	05	06
d. National independent policy research institutes (think tanks)	01	02	03	04	05	06
e. International independent policy research institutes (think tanks)	01	02	03	04	05	06
ft. Relevant government ministries/agencies	01	02	03	04	05	06
gt. International agencies	01	02	03	04	05	06
ht. Local/national advocacy NGOs	01	02	03	04	05	06
it. Industry associations	01	02	03	04	05	06
jt. Other, please specify:_____	01	02	03	04	05	06

ASK IF "NEVER USE" FOR "NATIONAL INDEPENDENT POLICY RESEARCH INSTITUTES" in B1

B1ct. Why is it that you **never** use national independent policy research institutes (think tanks) when you are looking for research-based evidence?

   01 Not familiar enough with any such institutes
   02 Research recommendations not relevant enough to your needs
   03 Quality of research does not meet your needs
   04 Meet your needs through other sources
   05 Research findings presented in ways that are not useful for your needs
   97 Other, please specify:_____

B2t. How would you rate each of these sources in terms of the quality of research provided to work on policy issues in [YOUR COUNTRY]?
Please use a scale from 1 to 5 where 1 is "poor" quality and 5 is "excellent" quality.

		1 Poor	2	3	4	5 Excellent	Don't Know
a.	Government-owned research institutes	01	02	03	04	05	99
b.	National university-based research institutes	01	02	03	04	05	99
c.	International university-based research institutes	01	02	03	04	05	99
d.	National independent policy research institutes (think tanks)	01	02	03	04	05	99
e.	International independent policy research institutes (think tanks)	01	02	03	04	05	99
f.	Relevant government ministries/agencies	01	02	03	04	05	99
g.	International agencies	01	02	03	04	05	99
h.	Local/national advocacy NGOs	01	02	03	04	05	99
i.	Industry associations	01	02	03	04	05	99
j.	[OTHER response from B1]	**01**	**02**	**03**	**04**	**05**	99

C. The role and contribution of think tanks in the national policy context

C2t. How important are each of the following factors for improving the performance of independent policy research institutes (think tanks) in [YOUR COUNTRY]?
Please use a scale from 1 to 5 where 1 is "not at all important" and 5 is "highly important."

	1 Not at all important	2	3	4	5 Highly important	Don't know
a. Increased availability of trained/experienced staff	01	02	03	04	05	99
b. Greater awareness of their services	01	02	03	04	05	99
c. Increased volume of research conducted	01	02	03	04	05	99
d. More media coverage	01	02	03	04	05	99
e. Improved governance	01	02	03	04	05	99
f. Diversified sources of funding	01	02	03	04	05	99
g. Improved quality of research	01	02	03	04	05	99
h. More audience-friendly presentation of research findings	01	02	03	04	05	99
i. Other, please specify:_____	01	02	03	04	05	99

C3t. What advice would you have for independent policy research institutes (think tanks) in [YOUR COUNTRY] so that they might better assist you in your work?

E. Respondent Profile

E1t. How long have you worked in your current position?

01 Less than 1 year
02 1 to less than 2 years
03 2 to less than 3 years
04 3 to less than 5 years
05 5 to less than 10 years
06 10 to less than 15 years
07 15 to less than 20 years
08 20 years or more