A Study of Policy Influence:  
The G-24 Technical Support Service  
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February 2003

I. Tombstone Data

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| 1. | Project Name  
|    | G-24 Technical Support |
| 2. | Project Number  
|    | 880121, 000336, 002881, 100381 |
| 3. | Dollar Value  
|    | CAN$ 953,890 |
| 4. | Project Start Date  
|    | Nov 1, 1988 |
| 5. | Project Duration  
|    | On-going |
| 6. | Name of Recipient Institution  
|    | UNCTAD |
| 7. | CAP/RAP Break |
| 8. | Intent of Policy Influence  
|    | Global public policy making |
| 9. | Type of Project Recipient  
|    | UNCTAD |
| 10. | Type of beneficiary identified  
|    | Other multilateral agency |
| 11. | Type of use identified for the research  
|    | Enlightenment, knowledge generation, problem solving, political |
| 12. | Policy area (what area of policy is intended to (or is) influenced  
|    | International monetary and financial issues |
II. Executive Summary

As part of a strategic evaluation, Canada’s International Development Research Centre (IDRC) has commissioned external studies of various IDRC funded projects to review the influence of research on public policy. The Centre’s Evaluation Unit aims to gain greater understanding on what IDRC sponsored research has accomplished thus far, and provide insight on policy processes that will serve in supporting future initiatives.

As one of these commissioned papers, this study reviews of the Technical Support Service project set up to support the Intergovernmental Group of 24 (G-24) in negotiations with developed country counterparts. Although research support to the G-24 existed previous to 1988, the study focuses on its development since IDRC’s involvement, which commenced in that year. Information has been collected through personal interviews with various people involved in the project, as well as from a variety of project related documents from IDRC files such as proposals, project completion reports, trip reports by IDRC project officers, and project publications.

Before getting into issues of policy influence, brief snapshots of the various project phases are provided as a backdrop to the project in general, and as a point of reference for concepts and factors developed further in. Policy observations are divided into three sections. The first looks at the policy community in which the G-24 and the research programme exist. The second reviews two concepts representing policy processes: a more direct or linear direct approach to policy influence and an indirect approach that trickled into common knowledge and informed policy through “enlightenment”. The third section identifies types of policy influence in which “expanding policy capacities”, “broadening policy horizons”, and “affecting policy regimes” are addressed.

While the concepts developed in each of these sections lend to greater understanding of policy influence, they are most valuable when reviewed in context with the internal and external factors that can both enhance or limit opportunities for policy influence. Some of the factors that were seen to have an impact include perceptions and personalities, outreach strategies, political issues, structural mechanisms, budget and gender.

The conclusions summarise how each of these concepts, mechanisms, and factors together contribute to a broader understanding of policy influence. The study is not reserved in highlighting project strengths in terms of policy influence, yet readers can easily draw their own conclusions and even identify aspects that serve as recommendations for future efforts.
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III. Introduction

The International Development and Research Centre (IDRC) has been concerned with the impact that Centre funded projects have had on public policy. Seeking to complement previous IDRC work, the Evaluation Unit has commissioned external studies of various IDRC funded projects to review the influence of research on public policy. The studies are intended to provide the Centre with information on the types of policy influence, as well as the policy process in general. In their own words, the Centre’s Evaluation Unit aims to:

“develop a clearer understanding not only of what we mean by “policy influence” but what IDRC and Centre-supported research has accomplished thus far. This will inform thinking and planning at the project level – how to improve the Centre’s project support to enhance policy influence opportunities and deepen the Centre’s understanding of how ideas enter policy processes; and at the corporate level – what has IDRC done as a corporation and what strategic adjustments does the Centre need to make.”

As one in the series of studies, this paper focuses on the research program of the Intergovernmental Group of Twenty-Four (G-24) set up to provide analytical work to support the negotiations of developing countries in international monetary and financial issues. The research program is referred to interchangeably as the research project, or less frequently by IDRC’s more formal project title, the Technical Support Service (TSS).

Based on a variety of IDRC internal documents and personal interviews conducted with various stakeholders, this study aims to identify the policy influence and relevance influence in relation to the G-24 research program. After reviewing the research methodology, the paper looks at how the project began from the creation of the G-24 and the inclusion of the Technical Support Service in pre-IDRC times. Serving as contextual background, the study then provides four brief “snapshots” of IDRC funding phases, which provide somewhat of a story in which policy influence is later analysed.

The task of identifying logical patterns to policy influence is not an easy one. At first glance, the project appears to be a tangled web of the “who, what, where, when, and how” of policy influence. To start, the TSS is identified within the larger policy community in which it functions, and the role of the various other actors. This is an important backdrop of the targeted audience in which two processes to influence policy are addressed. The first of these is a linear approach in which research is expected to plug directly into the decision making process. This approach assumes short, timely, specific research, generally more technical by nature. The second process is indirect in that it seeks to “enlighten” the actors over a longer period of time through more normative research.

Having identified the actors and process to which influence is targeted, the study reviews three types of policy influence as previously identified by IDRC. These include expanding capacity building, broadening policy horizons, and changing policy regimes. Examples specific to the experience of the TSS are included, focusing particularly on its ability to broaden policy horizons.

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1 Carden, Neilson et al., *IDRC Supported Research in the Public Policy Process: A strategic evaluation of the influence of research on public policy.* (Ottawa: IDRC, 2001) p.2.
Subsequent sections highlight various internal and external factors that have affected policy influence of the TSS. These include individual personalities and perceptions, outreach strategies, political issues, structural mechanisms, budgetary constraints, and gender dimensions. Such factors are key in positioning the G-24 research programme in terms of policy influence. The conclusions highlight how this is so and offers four scenarios that represent the TSS role in international public policy influence today. In varying extents, each is reflective of possibilities for policy influence within the context of project objectives as perceived by the various stakeholders.

Despite initial scepticism on the role and effectiveness of the G-24 and its research program, these prejudices were unveiled as the study progressed. Pieces were gradually put together and the context in which the project evolved became clear. Building policy on a minority view is very hard work and involves intense diplomatic efforts. The Group of Twenty-Four is more influential than expected at first glance; the research program has managed against all odds to sustain a developing-country agenda for reform of the international monetary system, including the mechanisms and facilities of the International Monetary Fund (IMF) and the World Bank (WB). To a large extent the research program is the glue that brings together the G-24, and there is a continuing sense of ownership over its agenda. The Group has remained alert, and when weaknesses in the agenda were identified, parallel funding was sought and obtained. This said, much can be done to strengthen its governance mechanisms and increase its influence.

IV. Methodology

Data Collection

This report is designed as a descriptive study of IDRC’s technical support to the G-24. Initial sources of information include IDRC project related documents such as proposals, appraisals, progress and project completion reports, trip reports, technical reports and other correspondence. The more significant project outputs such as the discussion papers were subsequently reviewed.

Further dimension was then added by approaching people involved in the project for personal interviews. With input from the IDRC Evaluation Unit and project officers, names for interviewees were identified considering five types of project actors – (1) project co-ordinators; (2) policy makers; (3) researchers; (4) IDRC project officers; and (5) other stakeholders. From all areas, a total of 16 interviews were conducted. Various actors had duplicate roles – such instances are briefly addressed below.

1. Project co-ordinators interviewed include both research co-ordinators in succession (Gerry Helleiner and Dani Rodrik), as well as officers from UNCTAD as the Executing Agency. Both Helleiner and Rodrik also contributed as authors, as did UNCTAD staff. It is also interesting to note that Helleiner was on IDRC’s Board of Governors that voted to support the project in its initial phase. He later resigned his position when approached to take over as the project’s research co-ordinator.

2. In regards to the policy-makers, efforts were made to include past and present Executive Directors (EDs) from both the IMF and the WB. Through the interviews, attempts were made to identify policy makers at the national level that might have been influenced.

2 Appendix A includes a map of interviewees including respective roles in the project.
but it seems that this occurred rarely. Reasonable regional representation was also considered, and preference was given to people that had various roles both within and beyond the G-24. For example, both Patrick Akatu and Ariel Buira were involved in the Technical Group and Aziz Ali Mohammed and William Larralde were from the Liaison Office in Washington. Mohammad Reza Shojaeddini is currently back at Iran’s central bank, and Montek Ahluwalia is now the Director of the IMF’s newly formed Evaluation Office. The policy makers approached were limited to those involved in the G-24. A fruitful addition would have been the perception of G-7 policymakers. Joseph Stiglitz was seemingly open to an interview, but a date could not be arranged through his secretary.

(3) A third category of interviewees aimed to reveal the opinion of contributing researchers. However, most actors contributed as authors; only two of the interviewees had a role limited to research. In this group Jose Antonio Ocampo was selected because of indications in the project completion reports that this project might have had influenced him specifically. Ngaire Woods was selected because of her engagement as an academic, knowledgeable in both G-24 issues and the issue of policy driven research as such. She was one of three women contacted in an effort to incorporate perspectives from both genders.

(4) Two IDRC project officers were interviewed: Rohinton Medhora and Susan Joekes. This reflects responsible officers as indicated in the IDRC project documents through the various phases of IDRC support.

(5) Other stakeholders identified included Jo Marie Griesgraber as an NGO representative and Manuel Montes from the Ford Foundation as a prospective donor. As donor sponsorship is often a “seal of approval” we sought a donor that was not sponsoring the project for information on if they were ever contacted and if so, why they chose not to participate.

Efforts were made to move out from the original contacts by indications of the initial interviewees. However, most direct requests for additional names sent via email were unresponded, and otherwise only obvious contacts, names already on the interview list, were provided. Also, when asked during the interview, “who was influenced and in what ways” answers rarely offered direct indication of others to follow up on, but rather groups or abstract reference to “policy makers” in general. Perhaps the only exception here is when Ngaire Woods suggested that Ariel Buira be contacted. While his name had come up in consultation with IDRC, he was not considered a definite candidate before Woods’ indication. He turned out to be a key actor, who was in the process of taking charge of the Liaison Office of the G-24 in Washington DC.

**Factors Affecting Data Collection**

We have been careful not to refer to the study as an “evaluation” when contacting potential interviewees. Even so, there may have been occasions when the idea of a general project evaluation influenced responses. Specifically, there were a few cases of people disillusioned with the direction that the research program was taking, who tended to make prescriptive indications, betting on IDRC’s future readership.

Along similar lines of language, the official titles and roles were not always used within the G-24. For example, the official IDRC title for the project is the Technical Support Service, (TSS) yet it is rarely used, replaced more systematically with reference to the Research
Programme. However, the Research Program is confused with the Technical Group (TG), and on occasion, perhaps even confused by some to be the G-24 itself.

While the interviews were conducted using a standard interview sheet, it was not always strictly adhered to. There were instances where the interviewee answered various questions together, forcing adjustments along the way. On one occasion, the interviewee was less attentive and the interview questions were kept to a minimal. Although it is not expected to have altered responses, the interview sheet was provided on three occasions on the request of the interviewees. The complete questionnaire is provided in Annex B. Looking back, the design of the interview might have been altered slightly to facilitate more focussed responses. For example, some interviewees partially answered multi-part questions. Partial responses were not always noticed on the spot, but afterwards when reviewing the tapes.

In regards to process, some interviews were conducted in person while others were conducted by phone – all were taped. Two people undertook the interviews – when not involved personally, tapes were exchanged and reviewed. The over-all result is a more fruitful report having considered the perceptions of all team members.

One last factor to consider is that of timing and the issue of availability over summer months. Although the G-24 TSS is global project by nature, many involved are in the North and were difficult to contact during their summer months. Interviews were rather dispersed time wise, with several conducted in the final two weeks. In the end though, all desired interviews were conducted. This is noted here as it may be a factor to consider in future efforts of a similar sort.

V. The Story: The G-24 Technical Support Service

From the Beginning

While the focus of this report is on the research program since IDRC’s involvement, a brief introduction to how the G-24 came about serves as a useful backdrop for viewing the project as a whole. This provides the historical context in which the original need was identified, and also offers insight to some of the factors that are seen to inhibit policy influence today.

The Intergovernmental Group of 77 (G-77) in UNCTAD proposed the development of a smaller grouping of developing countries to represent interests of the entire group in issues of international finance. Considered by some as an arm of the G-77, this group was formally established the following year as the Intergovernmental Group of 24, better known as the G-24. Since 1972 then, the G-24 has met twice annually, previous to the spring and fall meetings of the IMF and the WB. In 1975 the G-24 expressed a need for information, analysis and technical support to strengthen their negotiating position, and approached UNCTAD for assistance in building their capacity to contribute to the debate on international monetary and financial issues.

Initial technical support was advanced by the United Nations system (UN) through a research program led by Sidney Dell from the United Nations Institute for Training and Research (UNITAR). Financing was eventually arranged through UNDP with administration by UNCTAD. Because of a UNDP provision that prohibited continued financing beyond 10 years without parallel financing, UNDP funds came to an end in 1986. Sidney Dell, research
co-ordinator at that time and major advocate for its continuance, sought other external funding, which led to IDRC’s involvement. David Glover was the IDRC project officer who reviewed the proposal and recommended it for funding even though it fell somewhat outside of IDRC’s programming guidelines of the time.

Project objectives put forth where in line with the original objectives of the 1970’s. The 1988 proposal indicated that the project aimed to:

“assist developing countries in building up their capacity in international monetary negotiations and to strengthen their technical preparedness and their ability to participate in and contribute to all phases of discussion and negotiation within the framework of the Fund and the World Bank”.

While originally intended as a one-time grant covering a three-year period until alternative financing could be secured, this initial step resulted in IDRC’s participation through four phases and almost 15 years. Each of these funding phases is briefly summarised below.


IDRC’s involvement brings new actors into the process and new concerns. IDRC funds were deposited into a newly created trust fund that was administered by the UNCTAD secretariat as the Executing Agency, to avoid donor control over the G-24. Sidney Dell who had been a research director since 1975, passed away unexpectedly in 1990. There was a short lull in project activities until Gerry Helleiner of the University of Toronto took over as research co-ordinator in mid 1991.Shortly after, Rohinton Medhora became project officer at IDRC.

Medhora and Helleiner worked closely together, although Medhora notes that IDRC’s involvement was limited primarily in response to concerns of donor control. While understanding the situation, IDRC did not consider this to be a problem because of two design reasons: the first, was the high calibre of research co-ordinators (Helleiner; then Rodrik) and the second was the international reputation of people involved. IDRC was mostly involved only when the project was revisited for financial renewal at which time specific issues were brought up. The fruitful interaction between Helleiner and Medhora was noted by both, allowing the input from IDRC to be incorporated even though there were no formal mechanisms for it. The team as such proved quite successful. The selected methodology ranged from historical and descriptive analyses, to critiques of existing literature, to more formal and full-blown modelling techniques. In the words of Helleiner, the objective was to provide a voice to the “under-dog.”

In terms of outreach, UNCTAD began publishing the papers as volume sets under the title *International Monetary and Financial Issues for the 1990's* until G-24 effectiveness was also important as it drew the governance issues of the G-24 into the spotlight. If governance was ineffective, the research program intended to serve the Group, would have limited prospects.3

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Helleiner was a very active project director. He attended meetings of the G-24 Deputies and G-24 Ministers as well as one meeting of the G-24 Governing Council. He also put together for the first time ever in April 1992, a meeting with some G-9 members to discuss research papers and the research program in general. A second meeting took place the following year. Documented in IDRC reports as “well attended and well received”, with consensus that meetings were highly desirable and that the research papers would make an important contribution to the activities of the G-9 EDs as well as the G-24. It was also noted that the papers presented at the second meeting in April 1993 were discussed by EDs in time to influence inputs to the forthcoming meeting of the Development Committee of the WB. The outcome of these meetings were recalled differently in interviews. Helleiner noted rather, more of a mixed response. This appears to be the more accurate recollection as there was limited interaction with G-7 actors in subsequent years. Moreover, Medhora said ‘One of the major players that this project has neglected to consider is the G7 themselves. There was an emphasis on building capacities for the policymakers of the South, but out of the context in which policies are made, within the structure of vote of the IFIs’.

IDRC had few critiques of the project. Medhora notes that the mailing lists used for distribution were outdated, also indicating the erroneous assumption that by distributing the products to the EDs, the rest of the national machinery would be in contact with the outputs. A second and minor critique of phase I was the lack of regional consistency or of a unifying theme among publications, beyond current issues in North South economic relations. As a result, the final volumes read like a collection of paper rather than a study or research program.

When the funding period came to a close, Medhora indicated that the future of the TSS project may be left in the hands of the G-24 themselves. IDRC was experiencing its own budget constraints and there was a lack of parallel funding.


At the time of grant renewal, important steps were taken to increase G-24 ownership of the research program. G-24 members themselves contributed to the trust fund in response to IDRC’s requests for parallel financing. New mechanisms for guiding research and gauging policy needs were tried out, first through the creation of a Research Studies Advisory Group in 1992 which did not flourish; and subsequently, with the creation of the Technical Group (TG). Established as a result of a ministerial resolution adopted in Madrid in 1994, the TG was a key development in this second phase. By bringing the researchers together with G-24 representatives in a formal setting that did not exist previously, it aimed to improving policy implications and research findings into the draft Communiqués. Acting as an intermediary between the research program and the G-24, it was a mechanism in which dialogue was expected to bridge the gap between research and policy.

The introduction of these mechanisms offered a more defined process for the functioning of the research project. To some extent, it may have provided the G-24 with a greater sense of “ownership” of the programme. This is reflected in the year-end report for phase II which indicates that “interaction with G-24 members was further improved.”

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4 While the G-24 was originally to parallel G-10 countries, this grouping was later compressed to the G-9, and most recently to the G-7.
Very generally, publications during this period concentrate on examining a “new Bretton Woods” in context over dissatisfaction with existing financial and trade relations. Perhaps the highlight of this phase was the publication of the Special Volume of International Financial and Monetary Issues for the 1990s (IV) published in 1994 reflecting papers that served as the basis for the well-attended G-24 Cartagena Conference on the occasion of the 50th anniversary of Bretton Woods. International Conference well attended in Cartagena April 94 – anniversary of BW Conference. The conference itself was organised around the discussion of 16 papers and includes a catalogue of major policy suggestions compiled by Helleiner. This was followed by Helleiner’s publication of his work on capital control regimes (Capital Account Regimes and Developing Countries) which was considered the most influential of all G-24 publications. In response to high demand, it was updated and re-published in 1999.

In addition to strategic production, there was also use and demand from within. Some G-24 countries, discontent with Bank/Fund research, requested separate work on commodity prices and income stabilisation schemes as they did not trust the other studies’ numbers and results. In this same line of demand-driven outputs, the critiques of the WB’s World Development Report were discontinued at the request of EDs, who considered that by the time they saw the light, it was too late to influence the debate.


In 1997, Medhora predicted in his reports that 1998 would be a critical year for the G-24 project. He indicates first, that there seemed to be considerable uncertainty on the raison d’être and modus operandi of the Group. In addition, Helleiner had expressed a desire to leave his post, and the G-24 governing council was undergoing an internal evaluation on how to better represent the interests of the developing countries, particularly on how to improve the movement of research results into the policy process.

Closer contact between researchers and policy makers was further improved in this phase. In 1997 the Liaison Office was set up to facilitate access to EDs and to avoid its ‘hibernational’ tendencies. Informal meetings between researchers and G-24 policy makers under the umbrella of the TG were held twice annually following the rhythm of the Ministers meetings. A senior expert meeting was held on new international financial architecture as well as a high-level workshop on possible repercussions of a new trade round for developing countries.

Helleiner retired in March 1999 and Dani Rodrik of Harvard University took over as research co-ordinator. Strategic steps were taken during this period to improve dissemination and outreach. First, detailed research papers were complemented with shorter position papers on strategy. Second, dissemination via the internet was finally initiated. Third, the papers were no longer disseminated as volume sets because of the lag time involved, but rather published as a joint initiative with UNCTAD and Harvard as stand alone discussion papers. Fourth, three papers for consideration of the Ministers and Deputies were made available in French. Finally, to add fuel to the wider debate on the Initiative for the Heavily Indebted Poor Countries (HIPC Initiative) promoted by the IMF and

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the WB, Matthew Martin’s “Multilateral Debt: Key Issues for Ministers”, was resubmitted as Debt Relief International – a request of the Ministers.

On bureaucratic issues, UNCTAD’s role in the project continued to grow particularly with the administrative concerns of negotiating contracts, travel and meeting arrangements, as well as arranging editing, publishing and dissemination. Neither of the research co-ordinators seems to have had a problem with this arrangement. In interviews however, UNCTAD insinuates the role of the research co-ordinator to be redundant, especially if the person is to be involved only in commissioning research. While this thought serves to illustrate the problem of ownership, the UN having lost relevance with the international financial policy community, as such was not a feasible replacement for the research coordinator.


Susan Joekes took over from Medhora as IDRC project officer and inherited his portfolio of which the TSS was part. Fully involved now, this phase has Rodrik’s trademarks. He has spelt out more clearly what he envisages as a development dimension, evidenced in the phase IV proposal in the new subtitles of “development impact”. Rodrik’s phase also marks a change in objectives. While Helleiner had been inclined to give a voice to the “underdog”, Rodrik highlights the need to bring about a paradigm change, in other words to change the environment in which policies are framed. In consonance with changing emphasis, new actors are brought in. Papers are increasingly commissioned to influential academics in the US.

The change in approach that Rodrik pushes during his reign, is the formal recognition of what has been a secondary audience. Project documents indicate its design to influence public policy at the global level, and also to contribute to the academic debate on international monetary and financial issues in the academic arena. The studies would be published with “a view to contributing to the wider international discussions on financial and monetary issues from a development perspective in political, intergovernmental, academic circles and the civil society at large.”6 This wording represents a key departure from previous phases that focused on the EDs as the primary target audience.

In line with the effort to bring in the academic community, consideration for outreach has been stepped up, with a significant number of publications circulating in academic and research circles. In addition to the dissemination of the discussion papers, consultants presented their papers to the TG or to specially organised expert meetings. There is emphasis on other experts engaged in relevant academic research often being invited to participate.

The change in goals has not been free of conflicts. The research program is considered by most stakeholders to be the glue of the G-24. Therefore efforts to influence direction and content come from many quarters. Tensions have emerged between the Liaison Office, favouring more demand driven research, and the research director, more bent on a longer-term effort of changing paradigms. Interviews revealed a new and significant development: a parallel research project supported by the OPEC Fund that will not be added to the trust nor rely on the existing structure for its implementation. Rather, the Liaison Office will be responsible for commissioning papers, which are expected to be short policy-driven briefs

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presented through workshops with policy makers replacing one of the TG meetings. The following section attempts to reveal the context for these tensions and their implications.

VI. Project Results and Policy Observations

As it stands today, the TSS is oriented to G-24 members because of their positioning on the inside of the policy process. However, the substantive contributions of the TSS is intimately related to the interaction among three main actors: the G-24 Liaison Officer, the research director and the program coordinator at UNCTAD. Although no explicit guidelines exist on procedures, defining boundaries and division of labour among them, and no explicit guidelines exists on procedures or boundaries, the Liaison officer manages the relations within the policy community, the research co-ordinator handles the research policy dynamic. UNCTAD is in charge of the management of the project, having a secondary role in terms of intellectual input. The governance issue among the TSS, UNCTAD, and the G-24 is a recurring theme throughout the project which have caused tensions and been detrimental to project efficacy.

UNCTAD sees the project as an UNCTAD project of technical assistance to the G-24, in line with other technical assistance they do. While certainly taking on the bulk of the administrative elements, they would not object to taking over the role of the research co-ordinator, and in doing so receive more recognition in the process. Though never voiced, this would certainly be opposed to by the G-24 who not only are hesitant to give too much of a role to donors, but certainly also concerned with the increasing irrelevance of the Geneva process. While there are not many instances that the G-24 is able to exert control in the project’s management, restricting attendance to meetings and selecting the research co-ordinator are two examples.

The extent of the research coordinators’s responsibilities is another matter of debate. Helleiner seems to have managed the G-24 governance issue well and gained their confidence in doing so. The same is not true of Rodrik who is seen especially by the EDs as distance, and unavailable to the G-24 members, believing himself accountable to UNCTAD. A certain amount of animosity generated by the G-24 is evident, and their keenness to pick up the project management is reflected in the arrangement of the OPEC funding which will not be deposited to the trust, but administered by the Liaison office.

In effect, the G-24 is concerned with the ownership of the project, certainly highlighted by Helleiner, but also through the efforts to improve their involvement (especially through the TG and the Liaison office). This frustration in failed efforts to have more of a say is illustrated in a comment to the current Harvard – UNCTAD joint publication of the papers, with no reference to the G-24 except for in the title.

Having clarified the various roles within the TSS, exactly how the research is intended to reach its audience is addressed below.
Various perceptions of triangular management:

<table>
<thead>
<tr>
<th>UN Sponsorship</th>
<th>IDRC Sponsorship</th>
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<tbody>
<tr>
<td>UNITAR Coordination</td>
<td>Research Coordinator</td>
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<tr>
<td>UNCTAD Admin</td>
<td>UNCTAD Liaison Office</td>
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<tr>
<td>UNDP Financing</td>
<td>G24 Liaison Office</td>
</tr>
<tr>
<td>Pre-IDRC involvement.</td>
<td>Perception from N. Woods.</td>
</tr>
<tr>
<td>Positioning of the research project within the UN architecture.</td>
<td>More holistic perception of the TSS in relation to the international context.</td>
</tr>
</tbody>
</table>

**The Policy Community**

Various authors working in the area of policy influence have identified concepts useful for understanding how policy is influenced. Pross introduced the concept of policy communities to account for the larger milieu in which influence might be exerted. Circles represent various levels of access to the decision-makers who occupy the inner circle. The following reflects the policy community for international monetary and financial issues.

**The Policy Community for International Monetary and Financial Issues**

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The blue core and inner circle represents the decision making body, monopolized by G-7 Ministers together with the upper echelons of the IMF and WB. Most interviewees considered that the ability to influence policy is reflected in the voting structure (itself a function of the structure of capital contribution) within the WB and the IMF with the richest having the strongest voice. Or more specifically, that policy is often strongly led by the US government, with the other members of the G-7 looking on. Others commented that although the large developing countries do not have a say in agenda-setting, they may have a role as “process drivers”. But in general, even the largest are usually in an unbalanced situation - certainly in negotiations, but also in the body of knowledge.

As such, the G-24 as a body has limited ability in decision making as reflected in the orange circle, which overlaps only very slightly with the inner circle. The Research Programme, an arm of the G-24, is represented by the yellow circle. Depending on what type of links is set between the research program and the policy-process, access to decision-making may be more or less direct. Moving outwards, there are a plethora of other actors with varying degrees of access to the policy centre. Only the insiders are seen to make the decisions; but how the plethora of actors of the policy community influence decisions is yet another issue.

**Policy Processes**

Traditionally, policy making is viewed as a linear process where paper and positions are prepared and presented to policy makers who use them in negotiating and taking policy decisions. Today this concept is discarded by many who view the concept as much too simplistic and that in truth it is a complex process involving a number of different aspects. Both of these views are discussed below.

*Linear Policy Influence*

When asked “what is policy influence” no interviewees responded specifically that it is a linear process where one reads a paper and changes policy. Even before IDRC involvement, the research programme was intended as a structure to offset the support that the G-10 relied on, and it was assumed that Deputies and Ministers would read what was prepared for them before their negotiations. The second reason is the loudly voiced concern for work to be presented in a digestible format, preferably in the format of policy briefs, and in time enough to be useful for the Ministers in their meetings within the Bank and the Fund.

In earlier years, a greater number of stakeholders had faith in a linear approach to policy influence. The extent of G-24 involvement in the research programme however, is not clear until perhaps the middle of Helleiner’s leadership. From the mid 1990’s on, several mechanisms were incorporated to improve the EDs’ access to research outputs. The creation of the Research Studies Advisory Committee, the Technical Group, and the Liaison office – though perhaps not successful in the roles originally envisioned – were to improve the flow of information to the EDs. This indicates that there was at least some hope that the Deputies and Ministers would read them and be influenced in their position by what

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8 Medhora (2002) specifically notes that policy influence is not a linear process where it can be proved that what is written in reports resulted in a change in the WB and the IMF. Also Ocampo 2002, Helleiner 2002.
they read. Because the G-24 members themselves initiated these mechanisms, there was apparently an interest in making use of what was at their disposal.

This perception apparently still exists today, particularly among Deputies and EDs. Akatu’s opinion that the “current research is helpful to understand the context in which policy is made, but not helpful at the time to negotiate specific issues that are in the daily negotiating agenda” highlights a developing country view that research should feed directly into the policy decision process. He indicted that the research agenda should follow the negotiations with special attention to the timeliness to avoid the gap that limits potential use by the EDs. Put succinctly, “the more academic, the less useful”.

The graphic below illustrates the perception of many G-24 members that research is used in a linear manner. One example of this was illustrated in Cornfords interview in which he says his work on the Basle Committee was well received by the Indian Central Bank who took some of the propositions for their own position. This is indication of national influence. Global influence is noted by Kotte who said that without the research programme, the Communiqués would be a list of topics discussed, but would not have general argumentative underpinnings for future debate. Similarly, and as illustrated in the graphic below, Ocampo commented that “of course when Ministers approve a Communiqué in the G-24, they always expected them to have an influence on the debates.”

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9 Akatu 2002.
10 Ocampo 2002.
The ability of linear policy influence is based on the assumption of direct access to decision making. From this, there are two aspects that also seem to be present in linear policy influence. First, that policy-makers are informed on specific issues via policy-driven briefs. Second, that the research is demand driven with a short term run dictating the need.

**Enlightenment**

When attempts to influence policy cannot count on direct access to decision making, the linear process seems to give way to a form of policy influence where research might indirectly over a period of time, influence the “circulation and percolation” of ideas and concepts. In the work by Stone et al., this is referred to as “enlightenment”. Both research co-ordinators made very specific reference to this approach. Helleiner made an analogy to the water that drips and drips and drips on rock until the rock slowly gives way. Rodrik, recognising two approaches commented that he sees the linear process as being more immediate with views of the G-24 countries possibly having an impact on the WB and the IMF operations, and the second as being more long-term which aims to change the process and the policy environment in which policies are pursued. This requires a general but gradual change in people's view of what policy should be and what reality is. This approach is oriented towards policy change as a result of changing perceptions. Rodrik is aware that these views suppose different research strategies and in general, the research program is more focused towards the second.

The inability to penetrate that inner circle was considered by most to be due to: the dominance of the US and G-7 in areas of international finance as a policy monopoly, as well as the inability of the G-24 members to fully take advantage of the outputs of the research programme and use what power they had.

The actual use of the research output on the part of developing country ED’s is not clear. While some indicated they knew EDs to read the papers, others expressed their doubt. Mohammed felt those at the lower levels of the policy making machinery were more likely to read the papers. Rodrik and others indicated EDs and assistants, especially those that actually attend the TG meetings as primary users of the material. Yet Akatu felt that the papers though of high quality did not fully penetrate the policy community at the level of the IMF and the WB. There was no doubt as to the use by the G-7: Helleiner noted their lack of recognition to G-24 (both formal and informal attempts) and that there were never any formal G-7 response to G-24 efforts and recommendations.

A current of opinion holds that given the policy monopoly and such limited access to the centre core of the decision making circle, developing countries would fare better involving other actors in the campaign. Moving outwards from the inner circles of the policy community, there is a constellation of further actors. Beyond the G-24 and the research programmes are other principals from around the world, both within IFIs and from the national capitals, management and staff of multilateral institutions, academics, think tanks and NGOs. The G-24 research programme feeds into this broader arena and is considered by many to influence policy by means of “enlightenment”.

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12 Rodrik 2002.
13 Baumgartner and Jones (1993) observed domination in each policy community, in Lindquist, E., op.cit., p6,
Through web and traditional dissemination papers as well as TG meetings attended by experts, the G-24 papers reached other political, academic, research, and advocacy communities. Medhora was one who considered American and European academics to be “inside outsiders” or outsiders that are plugged into the machinery and Cornford notes UNCTAD itself had fruitful use of the G-24 productions, although the declining influence of UNCTAD in international financial issues was also noted. Some advocacy networks such as OXFAM, Center of Concern, Friends of the Earth, etc, also drew on the outputs of the research programme.

Manuel Montes, Project Officer at Ford Foundation, who runs a network on similar issues under the title of the Emerging Markets Eminent Persons Group (EMEPG) feels that the main contribution of the research program was related to the debt crisis issues and specifically to the perception of the policy-makers that the debt crisis was not sustainable. Moreover, the research demonstrated the inconsistencies of the current analytical framework of neo-classical economics approaching issues such as privatisation. Also noted how the G-24 itself is less-critical overall than in the past.

Direct and Indirect Mechanisms in Policy Processes
The research production of the G-24 can be categorized as falling in two types of knowledge generation. The first is technical economic research —sometimes oriented to a restricted audience— that basically focuses on financial and monetary issues, and management of the financial system in light of recent crisis. The primary ‘users’ of this type of research are EDs and those on the front line of policy recommendation and development.

A second type of research is more normative research and it focuses on the role and reform of international financial institutions (in fact, only the World Bank and the IMF are approached, leaving aside regional development banks and the private financial market). The users of this research are more ample, and the outsiders in the policy process, those who directly or indirectly influence policy-makers—e.g. researchers NGOs, think tanks, etc. There is a permanent exchange of information among researchers, research institutions, universities and scholarly activities that increases the capacity of the G-24 research production to be part of the mainstream in international development. Many interviewees highlighted, the G-24 Research Program has had an impact in framing concepts and critical views from developing countries perspective that, as a primary building block, shaped the terms of the global debate. As Medhora has put it, ‘policy influence then is exerted in the community in general and secondarily on policies’.\footnote{Medhora 2002.}

In sum so far, linear policy influence has been associated with short-term influence via policy briefs on specific issues and targeted to policy makers with the ability to make decisions. Enlightenment has been associated with more academically oriented papers on systemic issues intending to alter the prevailing paradigm over a longer period of time in which a constellation of other actors in the broader policy community are harnessed in parallel efforts. More specific examples of how this is done are addressed below.
**Types of Policy Influence**

As seen above, research via indirect influence is valuable in precluding policy debates and anticipating discussions in order to inform key players. Policy influence of the research programme can be categorised into three areas.

**Expanding Policy Capacities**
Improving knowledge, supporting recipient to develop innovative ideas, improving capabilities to communicate ideas, and developing new talent for research and analysis are considered means of expanding policy capacities. IDRC project documents indicate that this was a secondary objective of the TSS project, and is why although efforts were made to incorporate authors from developing countries, it was not necessarily adhered to, and the “inside outsiders” could be counted on and fruitfully have an impact on policy reform.

Efforts were made to involve more actors from the national capitals, especially via the TG meetings, which if successful, may have reflected expanding policy capacities. However, this was not particularly successful partly because of budgetary issues that limited travel, and partly because the EDs sent staff from their offices in Washington who are more currant with international global issues than residents in capitals.

In any case, Rodrik noted that developing country officials are mostly educated in the US, reducing the need to improve their knowledge. However, requests for detailed policy briefs lend to the perception that they needed knowledge on specific issues which is either improving knowledge or improving their capabilities to communicate knowledge. The 1997 annual report to IDRC indicated that “[T]he project has contributed to enhancing the developing countries’ understanding of current and upcoming issues subject to discussion and negotiation in the international financial institutions, and their capacity to contribute constructively to these discussions.” Perhaps the G-24 Liaison Office is looking to do more of this with the OPEC funds, remaining independent of the research co-ordinator’s purview.

**Broadening Policy Horizons**
Closely linked with “enlightenment” as a means to influence policy, the resulting form of influence is often in terms of new concepts being introduced to frame debates, new ideas on the agenda, and researchers and others educated to take up new positions with broader understanding of issues. Montes especially highlighted the importance of this form of policy influence, as many finance ministers today are less critical in their analytical approaches than during Helleiner’s time. He attributed this to the fact that most are all trained in the US now. In this sense, “broadening policy horizons” has led to the belief that “good economics” means economics should be specific to the conditions in which they are to be implemented – or rather, what is meant by “good economics”.

Ngaire Woods stressed how her participation affected her career directions. The policy issues developed in her work with Helleiner, inspired future academic research and shaped a whole new research agenda. She is currently working on a similar project, and developing other similar ones, as well as focusing on the gap between research and policy. While this is certainly one clear example, Rodrik feels several researchers in the US are tracing steps back and being more critical, with many gaining a more global awareness resulting in different perspectives towards developing countries. Griesgraber also felt that the project was influential in expanding policy capacities, especially in developing new talents in northern researchers.
Providing networking opportunities for learning within the jurisdiction is also considered a form of broadening policy horizons, but there are fewer instances of this found in the TSS. Helleiner describes the research program as a loose knit network, but highlights that the researchers were never considered a team. There were few opportunities for interaction among the various stakeholders, especially those beyond the G-24. Networking activities increased after 1998 with the inclusion of the TG meetings.

**Affecting Policy Regimes**

This type of policy influence refers to a fundamental redesign or modification of programs or policies. Most interviewees were hesitant to give the G-24 research program credit for such significant influence, though considered that it should be a long-term vision to work towards. G-24 influence was seen by most to be best classified as expanding policy horizons because of the scarce possibility to affect policy regimes, due largely to power relations.

Even so, there are at least four instances that merit attention here. The first is the creation of the IMF Extended Fund Facility during Dell’s time. The second is the creation of the Evaluation Office within the IMF that came out of the resulting suggestions of the Cartagena Conference. The third is, as Griesgraber noted, the increased openness to information within the IMF. While it is unlikely that any one of these can be attributed to G-24 research work alone, it is thought to have contributed to the debate in general and eventually make a significant difference. In a similar line, the work on capital controls was a ready stock of knowledge that came in handy when financial crises hit. As pointed out by Ocampo, crises provide opportunities for change in policy regimes, but the stock of knowledge needs to be ripe and ready for such times.

**Factors that Affect Policy Influence**

Incidents of policy influence are affected by an array of internal and external factors. It is not always true that one factor always contributes to or always detracts from policy influence, rather there are often incidents of both occurring. Once recognised, certainly there is potential for using these factors in improving the reach of policy influence. The more important factors identified in the TSS project include: personal approaches and perceptions; outreach strategies; structural mechanisms; political issues; and gender.

**Perceptions and Personal Approaches**

Personal characteristics can be influential in the policy process. The most prominent example in this project is in regards to the research coordinator. Helleiner’s leadership and work was considered to many to have been crucial. Woods highlighted Helleiner as largely responsible for expanding her policy capacities and affecting her future work. Griesgraber considered that his coining of the concept of the IMF as “gatekeeper” key, which was subsequently debated and developed by other researchers. Helleiner had a close and friendly relationship with many, including G-24 members. He constantly highlighted the need to respond flexibly to requests for analytical work addressed to him by the G-24. Certainly the G-24 were pleased that he considered that the research agenda “must come from the G-24 and be seen to come by the G-24, which is best positioned to know its own needs, which often arise unforeseen, and at short notice”.\(^\text{16}\)

\(^\text{16}\) Several IDRC internal documents indicate Helleiner’s concern for G-24 ownership.
As a research coordinator, Rodrik is considered to be very adept at identifying issues and mobilizing powerful resources. However, other stakeholders considered him to be too distant and not fully engaged. Some G-24 members felt Rodrik believes himself accountable to UNCTAD, not to the G-24 and as such not dedicated to the G-24. Rodrik indicated his personal involvement in events with G-9 officials, but in his personal capacity rather than through his role with G-24. In any case, there was obvious discord and on occasion outright animosity of the G-24 towards Rodrik as the research co-ordinator.

A lack of a common vision may have to do with perceived difference in regards to effective policy influence. For example, the G-24 members generally requested soundly argued policy briefs to influence the policy debate. Rodrik, steadfast to change the paradigm in which critical approaches would eventually have greater effect, choose a style and strategy that targeted the broader policy community as a whole rather than the EDs more particularly.

Further examples of how personal qualities may affect policy influence include NGO actors and Executive Directors. While there was probably lack of trust towards the NGO community in general, the particular delivery of a paper at the Cartagena conference seems to have been such a negative experience so as to inhibit future NGO involvement. Also, EDs were considered to have conservative approaches and Helleiner outlined one case where an officer would not make a specific stance because he felt the ED, (and himself in turn) would be ridiculed and spurned. He refused to make radical stances before the group of developing countries advanced them first.

**Outreach Strategies**

Outreach strategies included meeting, workshops, and mailing the research papers in the volume sets or in the individual discussion papers to recipients on a mailing list. Publications were sent to out-dated mailing lists and embassy libraries are just two examples here. Few are disillusioned over the failed dissemination strategy, but improved dissemination alone doesn’t necessarily translate into policy influence.

Other important factors include format, timeliness, quality, and availability. As stated earlier many G-24 members and some others felt research is sometimes too broad to be systematised in a policy position and does not accomplish the role it should have. “Policy makers need policy position papers not academic works.” While the research coordinators, and especially Rodrik, commission academic papers, G-24 officers as well as several researchers felt that the output should be in the form of shorter policy driven briefs. This was because EDs did not have time to read long academic papers and that such long-range objectives were not clearly helping policy-makers in the developing world. Major deficiency is lack of short non-jargon pieces for specific negotiations and representing the developing country view. Others made reference to time: time to read long academic papers and time for the officers to digest them before Ministerial meetings and for processing into the official Communiqués. Akatu considers the research agenda not always relevant in terms of policy priorities for current negotiations within the institutions. He notes

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17 In reference to Nancy Alexander of the Center of Concern, who was asked to leave the meeting. Woods 2002.
18 Helleiner 2002.
19 Akatu 2002.
that the policy negotiations followed a specific cycle but that the research followed its own time. Yet others commented on the frequency of meetings between policy makers and within the G-24. Lack of time to read long research papers led to a much-voiced demand for policy briefs.

Cornford feels that influence is considerably affected by the quality of the papers and the availability of other papers on the same subject. In contrast, Rodrik stressed that influence was limited because the research from the G-24 program is really quite a trickle compared to the “mountain” which comes from the IFIs to the EDs. Rodrik had a very personal take: “my ability to have a big influence is really quite limited.” Helleiner, aware of this mountain to molehill disparity had made efforts to leverage those sources to the advantage of the research program.

Meetings, with one big exception, Cartagena in 1994, were seen to provide impact but not necessarily seen as a way of increasing influence. Mohammed noted that TGM cut from twice to once a year, because of scarce resources, were good for discussion of papers but not in practice.

**Political Issues**

Some interviewees considered political issues to affect policy influence. One example told by Mohammed indicated that the papers might influence ED and get into a draft communiqué, but would stop there without getting to the ministerial level because of the “clienteleist” mentality of some EDs. Similarly is the fear of “offending” the capital markets as seen in debt proposals for example. Helleiner described an anecdote with a younger and energetic researcher within the EDs office at the Fund: instead of encouraging the woman to develop innovative ideas, she was told to enjoy her break, that her work wouldn’t make a difference anyway.20 In sum, the G-24 does not find it easy to run against the grain.

More positively, the G-24 is the only official research program and as such provides a certain seal of approval to the issues of interest to developing countries. The Managing Director of the IMF and President of the WB attend the G-24 meetings, these being the only meetings of developing countries that they attend, giving the issues they raise more legitimacy than similar issues raised in WIDER, EMEPG or even the G-20.21 The fact that it receives funding from donor institutions also acts as a seal of approval.

**Structural Mechanisms**

Structural mechanisms can be partially attributed as internal factors and partially as external factors. Internally, who was “running” the research program remains unclear— the research coordinator, UNCTAD, or G-24. While UNCTAD does have responsibilities and likes to think of the research program as an UNCTAD project, others felt that EDs did not take advantage of the role that they did have in formulating clear demands to the research community. The geographic distance between research programme, presently located in Harvard, and the inner policy community, residing in Washington DC, does not seem to

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20 This was an employee of either the Bank or the Fund, but not funded by the G-24 research project.

21 WIDER is a UN initiative. The Emerging Markets Eminent Persons Group was a Ford Foundation initiative on Rebuilding the International Financial Architecture. The Group of 20 is basically a parallel effort to the G24, but members are seemingly invited by the US.
help either. In any case, the two (the TSS and the G-24) are not always seen as the same body, and how issues are translated from one to the other remains a matter of contention.

Through the 1990’s there were clear attempts to bridge the gap between the G-24 and the research program. First a Research Studies Advisory Committee was developed in 1992. Although unsuccessful, it served as predecessor to the TG formed in 1994 which was to translate the policy implications of research work for use by the Ministers. Established in 1997, the Liaison Office was to provide greater institutionalization to the G-24 and provide facilitated access to the EDs.

Even so, there was limited capacity within the G-24 to move the agenda at the level of the WB and the IMF for numerous reasons not the least of which was due to the policy monopoly and the structure of voting power in the institutions. Other issues were more specific to G-24 governance issues such as: weak institutional arrangement that led to a difficulty in establishing where power resides and how it is delegated; membership that couldn’t accommodate changing contexts; the obstacles to a common vision representing the group as a whole; lines of accountability which make EDs more accountable to the IFIs than to their countries; legitimacy issues due the uneasy relationship with the G-77; and ministerial communiqués viewed as shopping lists.22

**Budget**

Financial constraints are often quoted as limitations in projects and this was no exception. UNCTAD especially noted recent financial shortcomings and felt the increased number of external experts invited to attend TGM was partially responsible. Buira felt that the project might have been more effective had the heavy allocation for the research co-ordinator been directed to output instead.

Helleiner also mentioned budgetary restrictions but had a very ingenious approach to the issue. With no hope of competing with the sheer quantity of research done within the IFIs, a few quality papers with alternative perspectives that could undermine arguments of existing research, could result in IFIs pouring a million dollars of new research into the topic. There was still the question of bias within that research but the approach notably addressed the project’s sustainability where the project could influence the weighted table with a very limited budget and offer an alternative perspective and a voice to the underdog.23

On a similar line and thinking specifically about sustainability, it is worth noting that the Ford Foundation was approached about a year ago to fund a workshop. Incidentally, support was not granted primarily because of the very broad coverage and lack of “project orientation”. Yet the Liaison Office has secured OPEC funding which is certainly encouraging.

**Gender**

IDRC considers gender an important issue to consider in its programming agenda. Gender has not been considered a factor in this project – or perhaps considered a neutral factor.

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23 An example of this is that Williamson, J., op.cit.
No gender dimensions were recalled by participants interviewed. Some G-24 papers address environmental impacts (ie WB’s environmental safeguards) and Helleiner wrote on children’s issues in the context of Structural Adjustment Programs (SAPs). Rather, it was perhaps thought that greater equality for nations would imply improved situations for all. Very topically, some women were involved as researchers though with no conscious regard to gender. The total number of women authors identified was nine, half of which were co-authors.

IDRC seems to be aware of the fact, as the phase IV appraisal indicates under “social or gender considerations” that aspects of such issues may be covered by future studies. Certainly a point worth looking into as Montes felt that a gender dimension might have facilitated negotiations with the Ford Foundation.

**Factors that Affect Policy Influence: A Synthesis**

<table>
<thead>
<tr>
<th>As Contributing to Policy Influence</th>
<th>As Inhibiting Policy Influence</th>
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<tbody>
<tr>
<td><strong>Personalities and Perceptions</strong></td>
<td></td>
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<tr>
<td>Participation of renowned leaders and generally influential people.</td>
<td>Inconsistencies about objectives and policy influence among actors, which affects the way the project is carried out.</td>
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<tr>
<td>Helleiner stressed agenda must come from G-24, and be seen to come from there. This earned him the trust of the G-24.</td>
<td>Eds with resigned or timid positions regarding the power structure.</td>
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<tr>
<td>Rodrik’s ability to mark policy trends.</td>
<td></td>
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<tr>
<td><strong>Outreach Strategies</strong></td>
<td></td>
</tr>
<tr>
<td>Some publications considered very influential. Such as the book on Capital Accounts and the WDR critiques, which altered the way future reports were done.</td>
<td>Disagreement on whether the outputs should be in the form of academic papers or policy oriented briefs.</td>
</tr>
<tr>
<td>Publication via internet reaches wider audience.</td>
<td>There was often little time for Deputies or Ministers to read papers before meetings or publishing communiqués.</td>
</tr>
<tr>
<td>Successful meetings with G9 in early 1990’s Also Cartagena meeting appears quite successful.</td>
<td>Published documents could have been more widely distributed. Even the “internationally renown consultants” did not receive subsequent project documents.</td>
</tr>
<tr>
<td>Big names and presentations in key events gain external credibility.</td>
<td>Limited audience because of language.</td>
</tr>
<tr>
<td>Body of outputs considered a “major building block” of current analysis of international reform.</td>
<td>While meetings generally conducive for policy influence, in some cases the paper in printed form only may have had more impact. (NGO)</td>
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<table>
<thead>
<tr>
<th>Political Issues</th>
<th>Government participation increases power of individual countries.</th>
<th>Government participation lends it to be an alliance of powerless countries acting as a consortium.</th>
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<tr>
<td></td>
<td>IMF and WB personalities attend meetings.</td>
<td>Government participation leads to “clienteistic” position.</td>
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<td></td>
<td>Government participation allows access to policy and increases power.</td>
<td>Government participation inhibits common visions on sensitive issues.</td>
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<td></td>
<td>Donor involvement provides “seal of approval”.</td>
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<table>
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<tr>
<th>Structural Mechanisms</th>
<th>Helleiner indicates in proposal III that the research programme of the G-24 is at the very centre of its activities, and its raison d’être.</th>
<th>TSS separate from G-24 with G-24 wary of donor participation and keeping them at arms length.</th>
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<tbody>
<tr>
<td></td>
<td>UNCTAD carries the burden of administration and allows research co-ordinator time to think strategically.</td>
<td>UNCTAD as secretariat which may inhibit dissemination policies.</td>
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<thead>
<tr>
<th>Budget</th>
<th>High allocation to research co-ordination where might have been used to commission other papers.</th>
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<tr>
<th>Gender</th>
<th>May have harnessed others in the policy community</th>
<th>May have alienated G-24 who may not have wanted to push topics as gender issues. (political)</th>
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<tr>
<td></td>
<td>May have reached gender oriented policy makers</td>
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VII. Conclusions

The Technical Support Service to the G-24, otherwise known as the research program has developed significantly since IDRC’s involvement in 1988. It is currently on its fourth funding phase and to show for it has an eleven volume sets of *International Monetary and Financial Issues for the 1990’s* and at least 24 papers published individually in the *G-24 Discussion Paper Series*.

IDRC is pleased with the project as the Centre receives good visibility and achieves reach and impact among senior policy makers and institutions working in this area. In addition to providing research as related to development, it also provides a source of fresh ideas for the international public policy community at large as well as for academics and research institutes. IDRC reports claim the remarkable success of the project as an alerter and provider of solid technical material from a southern point of view. The tensions over the research programme show the value to the stakeholders: yet these inconsistencies translate into mixed reviews on project results.

These inconsistencies are an important aspect of the project and represent the tangle of perceptions the various stakeholders have in regards to the policy process. The objective of this paper was to untangle the variety of concepts, mechanisms and factors related to policy influence within the G-24 research programme. The result is a framework of four
scenarios positioning the research program’s targeted audience against its strategies for reaching it, each considering a number of internal and external factors. These are drawn below in the table below with relevant factors indicated for each.

**Scenarios of Policy Influence**

<table>
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<tr>
<th>Process for targeting audience</th>
<th>Target Audience</th>
<th>Policy Community</th>
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<tbody>
<tr>
<td>Direct or Linear</td>
<td>Limited policy influence because of only slight access to decision making and topics likely to be influence are very specific.</td>
<td>Least influencing policy as lacking direct access to decision-making core.</td>
</tr>
<tr>
<td></td>
<td>• Voting structure provides limited access to decision making</td>
<td>• G-7 ignores G-24 publications</td>
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<td></td>
<td>• Consensus and other G-24 issues complicate cohesive standing</td>
<td>• Cannot compete with internal documents to support G7 policies</td>
</tr>
<tr>
<td></td>
<td>• G-24 research minimal compared to that coming out of the IFIs</td>
<td>• US holds policy monopoly</td>
</tr>
<tr>
<td></td>
<td>• Current budget allocations do not have the capacity to provide a steady flow of timely research</td>
<td></td>
</tr>
<tr>
<td>Indirect or “Enlightenment”</td>
<td>Improved policy influence by instilling critical reviews of established views.</td>
<td>Greater policy influence by harnessing other actors to “carry the message”</td>
</tr>
<tr>
<td></td>
<td>• Well written reports may reveal unstable analysis which is supporting existing truths.</td>
<td>• With improved dissemination can access large audience who may be convinced of alternative views</td>
</tr>
<tr>
<td></td>
<td>• Needs to compete with mountain</td>
<td>• Actors work in their own mechanisms to expand the knowledge.</td>
</tr>
<tr>
<td></td>
<td>• Limited number of actors to “carry the message”</td>
<td>• “Mountain versus molehill” less applicable as one well written paper may increase debate in the policy community which serves as agenda setter.</td>
</tr>
</tbody>
</table>

Starting with the top right corner, box 1 represents a strategy of targeting research outputs to the G-24 EDs in a linear manner. This project considers outputs with direct access to policy decisions to be technical in nature, designed to present specific scenarios to plug directly into the policy process. This scenario as a TSS strategy was given very little attention – there were no formal meetings with the G10 in early years, and many feel that the G7 today simply ignores G-24 research. This is quite logical really as the decision making core has a policy monopoly and as such is not interested in changing the status quo. In any case, TSS research of more technical matters that would have plugged into the
policy machinery were often restricted – in this sense the broader policy community was not targeted with technical briefs.

Moving counter clockwise to the second box, policy influence is increased. By targeting the EDs more specifically, a window of opportunity to the decision making centre was opened. Strategic decision making is still dominated by the core, if even so the G-24 themselves are limited in presenting policy options either because of their structural limitations or time and often conservative approaches to presenting alternative views. While the technically oriented papers have the potential of feeding directly into the process, this is also hindered by the sheer multitudes of competing information from the IFIs. Finally, the timeliness of the papers may have been a further factor, especially if the EDs have been more pro-active in requesting specific issues. That they are not lends to the belief that those decisions affected by the G-24 EDs are supported more so by their ‘in-house’ machinery, than through the TSS research.

The third box is again targeted specifically to the EDs, but this time relying on indirect access to decision making through enlightenment. This offers improved possibilities for policy influence, as timeliness is not such a critical factor. By absorbing the more normative research generally associated with enlightenment, EDs recognise that their principle source of influence is biased. The research then serves to instil in the Ministers and their advisors a critical stance and for generating alternative viewpoints. The primary limitation of this approach is in sheer numbers: the G-24 members hold a minority view without necessarily a common vision, and comprise a very limited grouping of actors to distil a critical approach in the decision making circle.

Different instances of influencing policy are represented in the fourth box. This scenario assumes an indirect approach of disseminating normative research to the broader policy community as a whole. Doing so, a constellation of other actors and advocates of alternative theory are harnessed and hopefully convinced via effective dissemination strategies which gradually draw attention to the flaws of the existing “truths” dominating the system. Furthermore the concern of competing with internal publications is less problematic because if holes in existing approaches can be proved, millions of dollars worth of complementary research may be commissioned: a potential army against the policy monopoly.

The approaches identified in boxes 2 and 4, and to a lesser extent box 3, represent strategies by various actors within the G-24 research programme. Very broadly, each box is seen to represent a group with a particular vision on the research programme. Box 2 represents those requesting a steady flow of policy oriented technical papers for immediate and linear use in decision making. This group is constituted primarily of G-24 Ministers and Deputies faced with the day to day issues and agendas that demand attention.

The other group is represented primarily by Rodrik as the present research co-ordinator (box 4). Other researchers, particularly those from the North, support him in his view to help the EDs, though not necessarily directly. Recognising the limited ability of the EDs to make important changes, Rodrik’s approach was power by numbers. The overlap mentioned earlier includes some researchers sympathetic to the needs of the EDs, as well as Helleiner who was perhaps more accommodating in his attempts to balance competing demands.
While very close review of project documents indicate Rodrik’s intention to harness the influence of the wider policy community, changes do not seem to have been agreed to by all principle stakeholders, noted by this tension between box 2 and box 4 supporters. Presented in the box below is a review of objectives, which is useful to highlight this change.

Past and Present Objectives

1988
Early project documents to UNDP indicated that the project was to “assist developing countries in building up their capacity in international monetary negotiations and to strengthen their technical preparedness and their ability to participate in and contribute to all phases of discussion and negotiation within the framework of the Fund and the World Bank.”

2000
The most recent proposal to IDRC indicates “a view to contributing to the wider international discussions on financial and monetary issues from a development perspective in political, intergovernmental, academic circles and the civil society at large.”

In conclusion, Henning offered valuable insight to the role and effectiveness of the G-24 and its research program:

The Group of Twenty-Four has successfully placed before the world a developing-country agenda for reform of the international monetary system, including the mechanisms and facilities of the IMF and the World Bank. The G-24 has not become the forum, however, through which the developing countries conduct hard-headed negotiations with their advanced–country counterparts.

However, Henning’s perception can be extrapolated to reflect the G-24 research program today: The G-24 has not become the forum through which the developing countries conduct hard-headed negotiations with their advanced–country counterparts. However, the research programme has successfully sustained a developing-country agenda for reform of the international monetary system, including the mechanisms and facilities of the IMF and the World Bank.

Although the agenda cannot break the policy monopoly, the stock of knowledge accumulated can be drawn upon when the opportunity arises. Building policy on a minority view requires alertness to opportunity and ability to be present with policy-driven papers.

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25 IDRC copy of 1988 proposal.
26 IDRC copy of 2000 proposal.
27 Henning, R., op.cit., p. 137
VIII. Bibliography


Carden, Neilson et al. IDRC Supported Research in the Public Policy Process: A strategic evaluation of the influence of research on public policy. (Ottawa: IDRC, 2001).


Ocampo, Jose Antonio., Executive Secretary, CEPAL, Chile. 2002. Taped interview August 23.


IX. Appendix A: Map of Selected Interviewees

- **Project Co-ordinators**
  - Gerry Helleiner
    Former Research Coordinator
    University of Toronto
  - Dani Rodrik
    Actual Research Coordinator
    Harvard University
  - Andrew Cornford
    Project Director UNCTAD
    Geneva
  - Detlef Kotte
    Project Manager UNCTAD
    Geneva

- **Policy Makers**
  - Patrick Akatu
    Ex IMF ED - Nigeria (TG)
    Washington
  - Montek Ahluwalia
    Director IMF Evaluation Office
    Washington
  - William Larraíde
    Director, G-24 Liaison Office
    Washington
  - Aziz Ali Mohammed
    G-24 Liaison Office
    Washington
    (Currently advisor to Chair)
  - Mohammad Reza Shojaeddini
    Advisor to Iranian ED
    Central Bank of Iran
  - Ariel Buira
    Former Mexican Deputy
    (currently in Oxford)

- **Other Beneficiaries**
  - Jo Marie Griesgraber
    Oxfam America
    Washington

- **Project Officers, IDRC**
  - Rohinton Medhora
    Former Project Officer
    Ottawa

- **Other Researchers**
  - Ngaire Woods
    G-24 researcher
    Oxford
  - Jos? Antonio Ocampo
    G-24 researcher
    CEPAL
  - Susan Joekes
    Actual Team Leader, TEC
    Paris
X. Appendix B: Interview Questions

The interview sheet was divided into three parts commencing with information on the case study and personal contact information. Multi-part questions started from number 17.

17. What led to the project?
   a. How did you get involved?
   b. What was your role?
   c. What was the issue you were trying to address? (policy issue, capacity building issue, etc.)
   d. What do you understand by “policy influence”
   e. Who are the key players in your view?
   f. Who makes policy? (Try to get at their understanding of “good” vs “bad” policy)
   g. Did the team discuss policy influence and was this incorporated into the proposal?
   h. How long did it take to start the work from the time of your involvement?

18. What happened during the project?
   a. When it started, what did the project intend to achieve?
   b. What happened?
   c. Who was influenced?
      People inside the policy process
      • policy workers (those in the front line of policy recommendation and development)
      • policy decision makers (those in charge of policy decisions: political and bureaucratic)
      People outside the policy process
      • those who directly influence policy makers
      • those who indirectly influence policy makers
   d. Were the objectives met, revised, changed, dropped, added?
   e. What dissemination strategies were used and to what effect?
   f. Who used the research? In what ways?
   g. What do policy makers know now that they did not know before? How do you know that? (Identify the type of policy influence you would call this from the table below.)
   h. What do researchers know now that they did not know before? How do you know that? (Identify the type of policy influence you would call this from the table below.)
   i. What does IDRC (POs) know now that they did not know before? (Identify the type of policy influence you would call this from the table below.)

Types of Policy Influence:

<table>
<thead>
<tr>
<th>Expanding policy capacities</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Improving the knowledge / data of certain actors</td>
</tr>
<tr>
<td>➢ Supporting recipients to develop innovative ideas</td>
</tr>
<tr>
<td>➢ Improving capabilities to communicate ideas</td>
</tr>
<tr>
<td>➢ Developing new talent for research and analysis</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Broadening policy horizons</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Providing opportunities for networking / learning within the jurisdiction or with colleagues elsewhere</td>
</tr>
</tbody>
</table>
Introducing new concepts to frame debates, putting ideas on the agenda, or stimulating public debate

Educating researchers and others who take up new positions with broader understanding of issues

Stimulating quiet dialogue among decision makers and among or with researchers

Affecting policy regimes

- Modification of existing programs or policies
- Fundamental re-design of programs and policies

19. What happened after the project?
   a. What dissemination activity continued?
   b. Who used the research (same people or new additions)?
   c. If they have left the project orbit, where are involved researchers and policy makers now?
   d. If they are still involved with the project or its research findings and recommendations, what role are they playing and what actions are they taking?
   e. What additional change has occurred?

20. Gender
   Was analysis gender sensitive or gender neutral in the policy influence process in the following domains: (indicate evidence)
   - Problem definition
   - Definition of goals and beneficiaries
   - Definition of research agenda
   - Definition of research-policy interface and linkages
   - Formulation of policy options
   - Choice of preferred options
   - (Where applicable, implementation, M&E, policy revision processes)