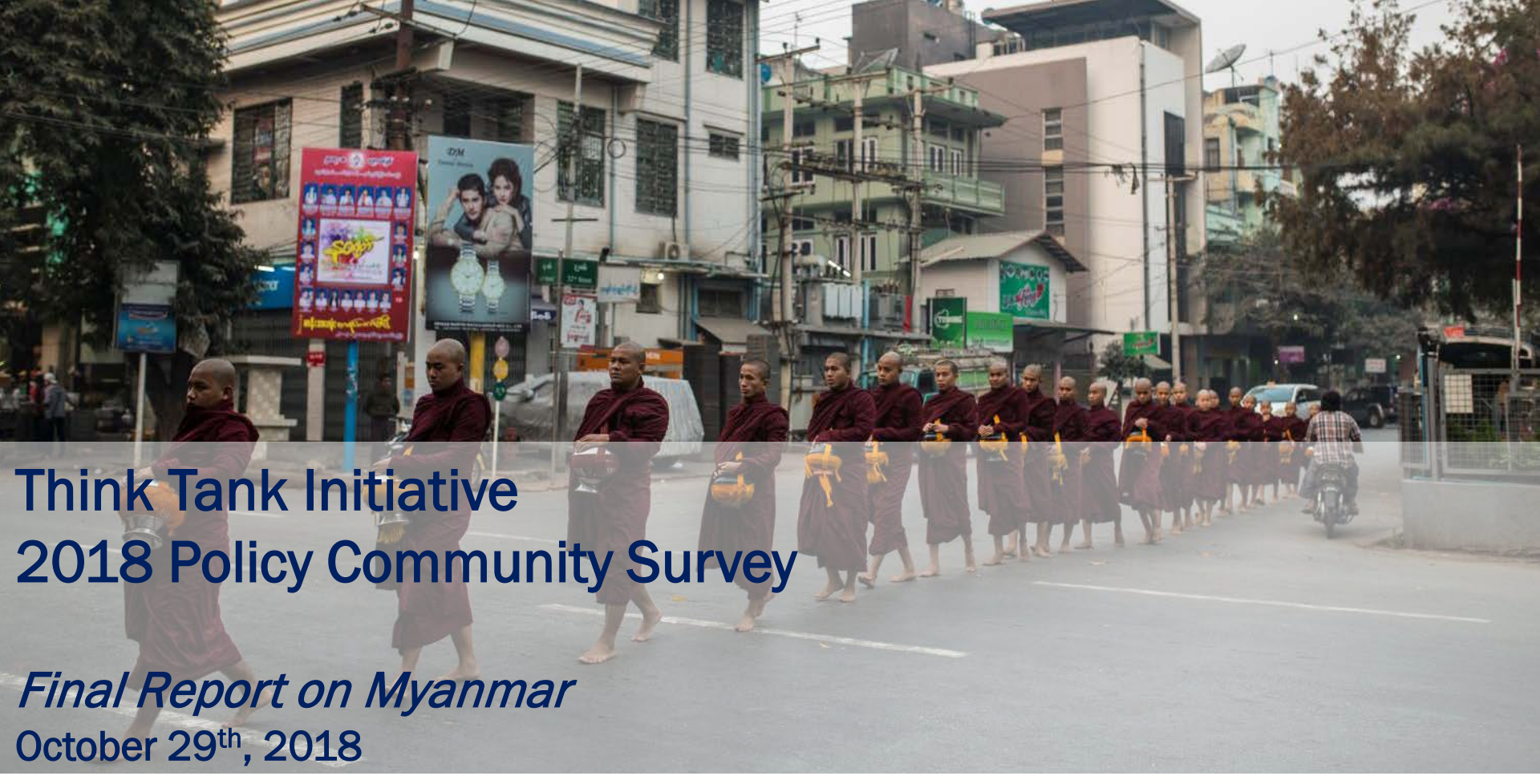


Think Tank Initiative
2018 Policy Community Survey

Final Report on Myanmar

October 29th, 2018

Initiative Think tank

GLOBESCAN

evidence and ideas. applied

Contact Us

For more information, contact:

Salim Binbrek
Senior Project Manager
Salim.Binbrek@GlobeScan.com

Nadia Hazime
Research Analyst
Nadia.Hazime@GlobeScan.com

Femke de Man
Director
Femke.deMan@GlobeScan.com

www.GlobeScan.com
evidence and ideas. applied.

The survey questions and results reported herein are provided on a confidential basis to the Think Tank Initiative (TTI). TTI is free to use the findings in whatever manner it chooses, including releasing them to the public or media.

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.

Project: 2976

Table of Contents

Executive Summary	5
Methodology and Sample Composition	8
Information Required for Policy Making in Myanmar: Type, Accessibility, Format	13
Information Required for Policy Making in Myanmar: Source and Quality	19
Familiarity and Level of Interaction with Think Tanks	23
Think Tank Performance Ratings	26
Factors for Improving Think Tank Performance	28

Introduction and Objectives

In 2010/1 and 2013, GlobeScan, a global stakeholder research consultancy, was commissioned by the Think Tank Initiative (TTI) to conduct a survey of policy stakeholders in three regions: Africa, Latin America, and South Asia.

In 2018, the TTI once again engaged GlobeScan to carry out the Think Tank Initiative Policy Community Survey (PCS) in the same three regions, along with Myanmar and Indonesia.

Through the Policy Community Survey, the Think Tank Initiative aims to:

- Develop an understanding of the policy community in specific countries
- Understand the strengths and weaknesses of particular think tanks, as perceived by a subset of the policy community
- Understand what activities are associated with the success of think tanks in order to help prioritize support strategies such as funding, training, and technical assistance
- Benchmark and track broad changes in the policy community and perceptions of think tanks in selected countries

This report presents the results of the Myanmar survey. Please also refer to the global report, for an overview of the findings of the studies undertaken across the three core regions.

Executive Summary

Executive Summary

Overall access to information is limited, with topics relating to economic/fiscal issues, SDGs, and education in high demand

Overall, the majority of respondents in Myanmar do not consider it easy to obtain information on any topic that could support national policy development. The most highly desired types of information by members of the policy community relate to economic/fiscal/monetary issues, the Sustainable Development Goals (SDGs), and education. However, only a minority of stakeholders believe access to these issues is easy. However, encouragingly, topics that are deemed more important are generally easier to access than less important topics.

Websites and reports/publications are considered the top source/format of policy information

Websites and print are considered the most useful formats for stakeholders to receive information for national policy development. Email and social media are also considered to be quite useful by respondents, while radio and blogs are the least useful sources of information. Stakeholders primarily rely on reports and publications, conferences and events, and consulting with experts to increase their understanding of policy development. Databases and statistical databanks are selected least by stakeholders.

International agencies are most preferred organization for information on social and economic policies, and also receive high quality ratings

Stakeholders report that international agencies are the most preferred institution for policy needs, closely followed by government ministries/agencies and international think tanks. National think tanks are used less frequently but score above average in terms of quality. Overall, stakeholders tend to turn to organizations with relatively high-quality research for their policy needs, aside from government sources, which have low perceived quality of research, but are used quite frequently.

Executive Summary

Initiative Think tank

Think tank performance ratings are well below South Asia average across all metrics

Across all metrics, the two think tanks tested in this survey receive performance ratings that are well below the South Asia average. While quality of research, regional knowledge, and knowledge of policy-making processes are the areas with the highest perceived performance, there is still much room for improvement. Transparency and value of in-person events are where perceived performance is lowest. Stakeholders report that improving the quality of research, the availability of trained/experienced staff, as well as building greater awareness of services, are the top three factors for improving perceived think tank performance.

Implications

On the whole, there is a considerable opportunity for improvement among think tanks in Myanmar. This is perhaps unsurprising as Myanmar has recently emerged from several decades of economic sanctions. As such, national think tanks are at a nascent stage in the country and will likely benefit from greater support, collaboration, and time to build awareness of their services and to build internal capacity to support national policy development. Findings of this study point to the following recommendations to help national think tanks play a greater role in the country's development:

- Dedicate efforts to improving the ease of access for topic areas that are considered to be the most important for policy making, including economic/fiscal/monetary issues, the SDGs, and education, and ensure that they are tied in, at least in some part, to the local context in Myanmar.
- Increase familiarity with think tanks by utilizing preferred formats/sources of information. Websites and reports or publications are heavily relied upon to share information and should continue to be used, while also building up email and social media communications.
- Focus efforts on building consistency and quality across all aspects of think tank performance, with special attention to improving the quality of research and increasing the availability of experienced and trained staff.

GLOBESCAN

Methodology and Sample Composition

Methodology for Myanmar

The survey of policy stakeholders was conducted through online, telephone, and face-to-face interviews in Myanmar from March 15th to August 1st, 2018.

The survey was offered in English and Burmese.

	Total
Total	42
Online	4
Offline	38
Telephone	32
Face-to-face	6

	Myanmar
Total	42
Government, elected	5
Government, non-elected	7
Media	5
Multilateral/bilateral	4
NGO	9
Private sector	4
Research/academia	8

Methodology for South Asia

The survey of policy stakeholders in South Asia was conducted through online, telephone, and face-to-face interviews in 5 countries from September 26th 2017 to February 12th 2018.

The participating South Asian countries are Bangladesh, Nepal, Pakistan, Sri Lanka, and India.

The survey was offered in English, Bengali, Hindi, Telugu and Tamil.

		South Asia				
	Total	Bangladesh	Nepal	Pakistan	Sri Lanka	India
Total	252	42	41	40	43	86
Online	39	8	7	5	6	13
Telephone	213	34	34	35	37	73

Methodology: Sample Summary for South Asia

Number of Stakeholders Interviewed by Country, 2018

		South Asia				
	Total	Bangladesh	India	Nepal	Pakistan	Sri Lanka
Total	252	42	86	41	40	43
Government, elected	35	6	11	6	6	6
Government, non-elected	38	6	12	6	8	6
Media	32	6	10	5	5	6
Multilateral/bilateral	30	6	11	4	3	6
NGO	41	6	16	6	6	7
Private sector	36	6	12	6	6	6
Research/academia	40	6	14	8	6	6

Methodology: Respondent Description

Respondents are from the following sectors:

- ***Government:** 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, who are knowledgeable about national policy issues.
- **Multilateral/bilateral organization:** Senior staff from organizations run by foreign governments either individually (bilateral such as DFID, USAID) or as a group (multilateral such as UN agencies, World Bank).
- **Private sector:** Senior staff working at large well-known national and multinational companies.
- **Research/academia:** Senior staff at universities, colleges, research institutes, and/or think tanks.

Stakeholders surveyed are senior-level staff in their organizations and active members of the national policy community, meaning that they develop or influence national government policy.

Stakeholder sample lists were provided by the International Development Research Centre (IDRC), a donor of the TTI, and TTI grantee organizations, and were supplemented by GlobeScan. GlobeScan stakeholder names were reviewed and approved by the IDRC and grantee organizations. To minimize bias, interviews were conducted with a mixture of people – some sourced by grantee organizations and some sourced by GlobeScan.

*Note: Government officials are referred to as elected government and non-elected government throughout this report. Which category government stakeholders belong to is determined by their answer to a survey question.

Think Tanks Tested in Myanmar and Number of Respondents Rating Each Think Tank

Myanmar, 2018

Think tank	Sample size
Centre for Economic and Social Development (CESD)	28
Advancing Life and Regenerating Motherland (ALARM)	15

A Note on the Approach

Views are not representative of the whole policy community. The study was designed to gather views of *senior*-level policy actors within national policy communities on their research needs and their perceptions of think tanks' research quality and 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 demand for research. This approach was chosen consciously, recognizing the limitation it brings to the survey, but acknowledging the value of perceptions of individuals in senior positions within each national policy community who often are very difficult to reach.

These views provide the basis for reflection within the organizations supported by the TTI on how the organization's current performance is perceived by key stakeholders, and on ways in which the organization may enhance its organizational capacity to undertake policy-relevant research.

As in other countries, we set a target of 40 respondents for Myanmar with a balanced quota of responses across different stakeholder categories.

Note that for comparison purposes, several charts include the 2018 five-country average scores from the PCS survey in South Asia (Bangladesh, India, Pakistan, Nepal, and Sri Lanka).

A Note on Charts:

All figures reported in the charts are expressed in percentages, unless otherwise noted. Some percentages may not add up to 100% due to the rounding of individual response categories or due to the fact that respondents could give multiple answers to a particular question ("total mentions" is then reported).

Please refer to the notes section on each slide to review actual question wording.

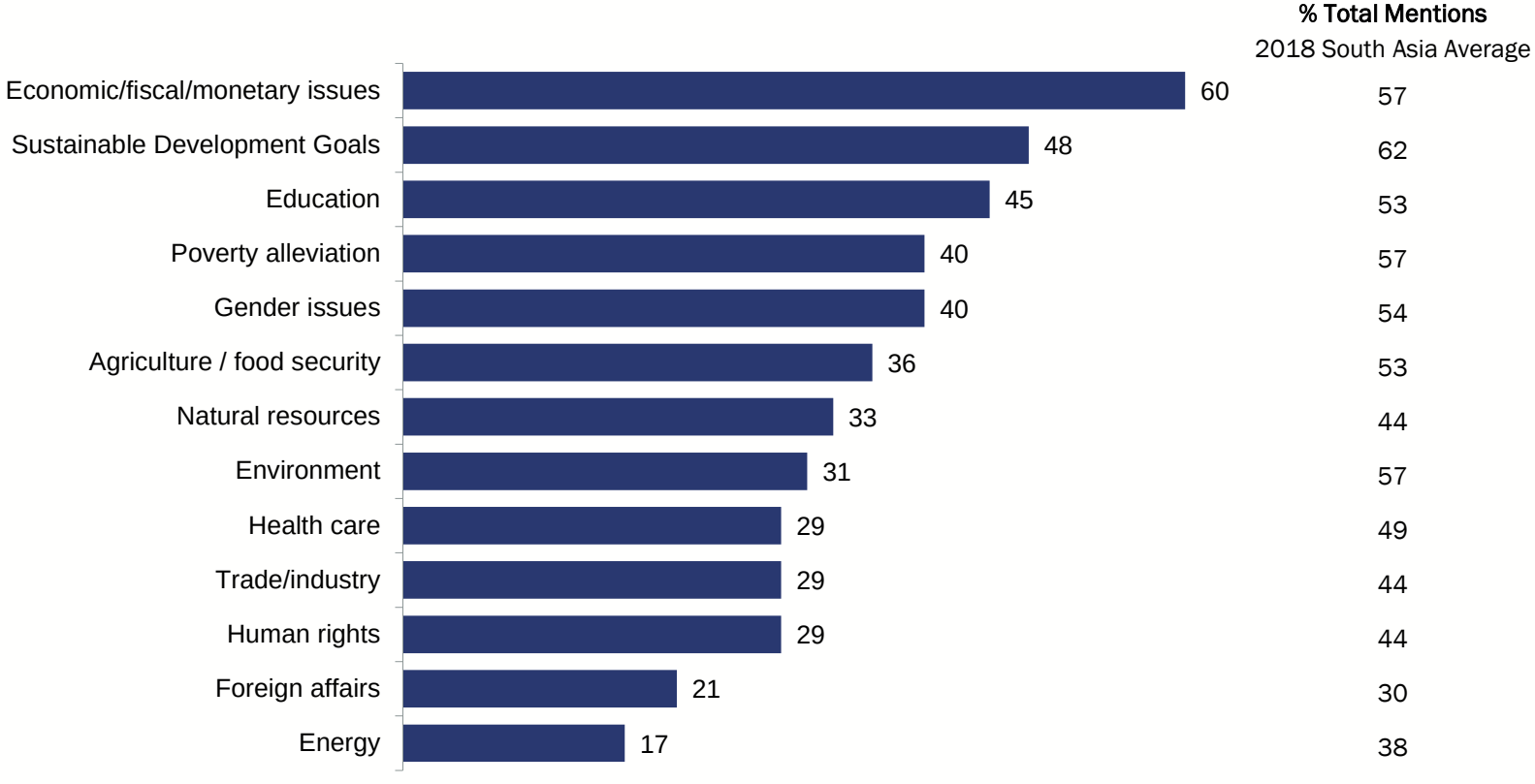
Initiative Think tank

Information Required for Policy Making in Myanmar: Type, Accessibility, Format

GLOBESCAN

Types of Information Required for Policy Making

Prompted, Multiple Responses Allowed, Myanmar, 2018



Information on economic/fiscal issues is the most highly desired type of information by members of the policy community. Information on the Sustainable Development Goals (SDGs) and education are also highly desired for policy making, while foreign affairs and energy are ranked as the least required types of information.

Demand for gender equality and female empowerment research

Open-end Responses, Myanmar, 2018

Those who said that there was a demand for gender equality and female empowerment research in their country gave the following as reasons why:

- To improve financial inclusion and empowerment through vocational training opportunities
- Address specifically the issues of sexual and reproductive health and rights for women and girls
- To promote equal opportunities for education and employment
- To address changing societal norms
- More inclusive roles for women in politics, particularly in leadership and decision-making roles

Respondents who did not believe that there was a demand for this research argued alternatively, that:

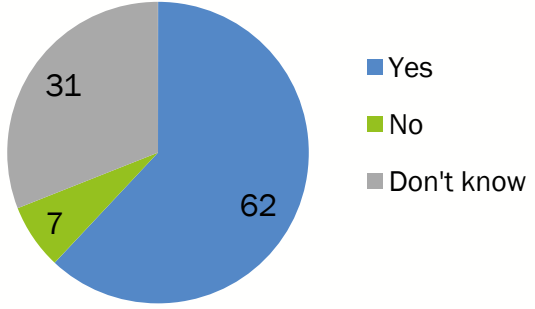
- There is no demand for this because it is not a dominant issue in their country – women and men are already equally represented

> "Policy decision making, equal opportunities for education, employment, and payments."
> – *Multilateral/Bilateral*

> "In the economic tier I work in (white collar – middle class), men and women are pretty much even in their representation. In fact maybe women are over represented compared to men. Women in Myanmar are great employees and employers know it."
> – *Private sector/Industry association*

In your country, is there a demand for gender equality and female empowerment research?

Percent of Stakeholders, Myanmar, 2018



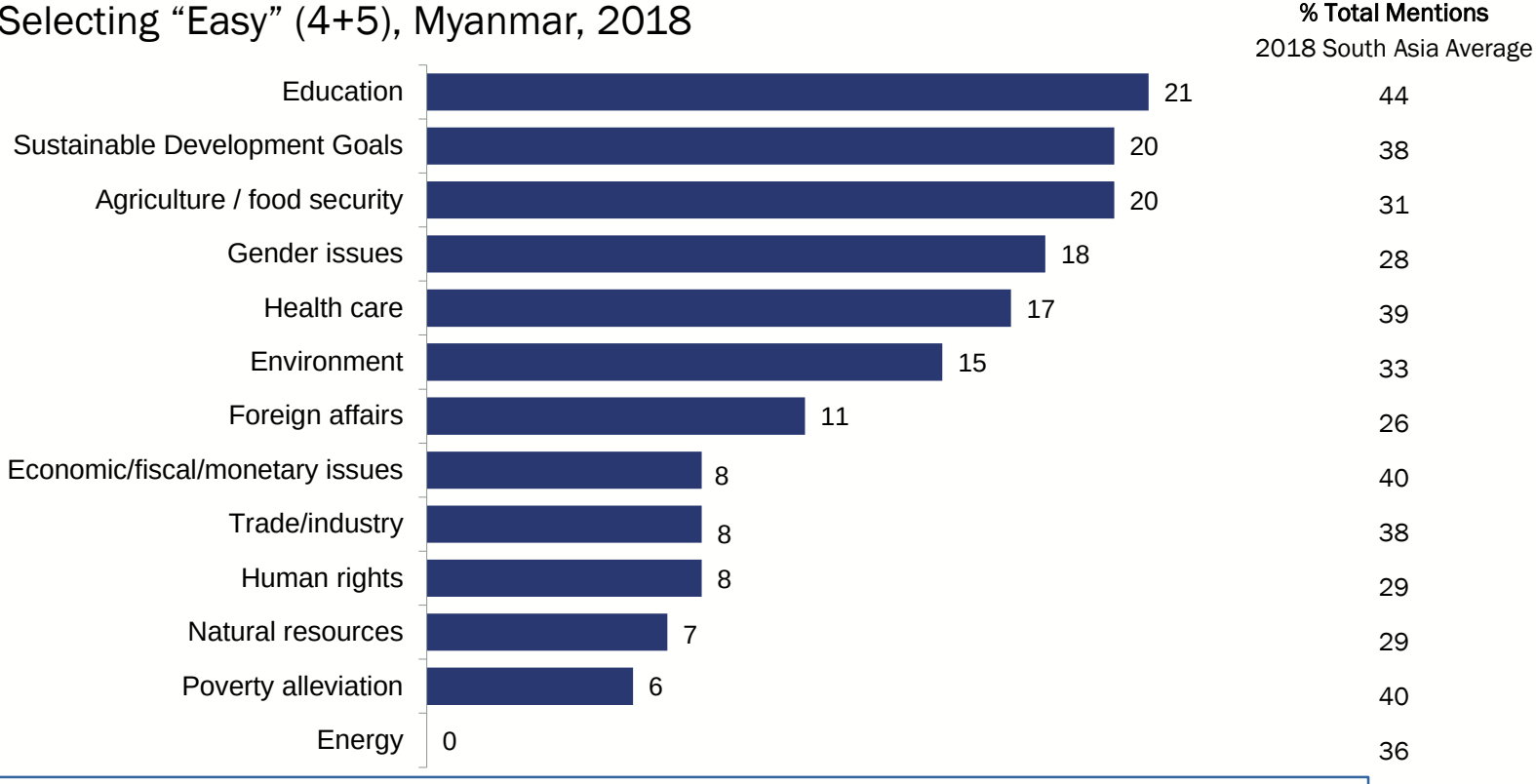
> "The role of women in leadership in industry, legislation, and economic development."
> – *Multilateral/Bilateral*

> "Sexual and reproductive health and rights – a landscape analysis covering need assessment, service mapping, policy and legislation followed by intervention prioritization and demonstration."
> – *Research/Academia*

> "Financial inclusion, training, harassment, and health care."
> – *Research/Academia*

Ease of Obtaining Information to Support Policy Development in the Following Areas

Percent Selecting “Easy” (4+5), Myanmar, 2018



Overall, the majority of respondents do not consider it “easy” to obtain information related to policy making across all topic areas. However, in relative terms, respondents report that information on education, SDGs, and agriculture/food security is somewhat easier to obtain than other issues. Ease of access ratings across all topics are much lower in Myanmar than the South Asia average.

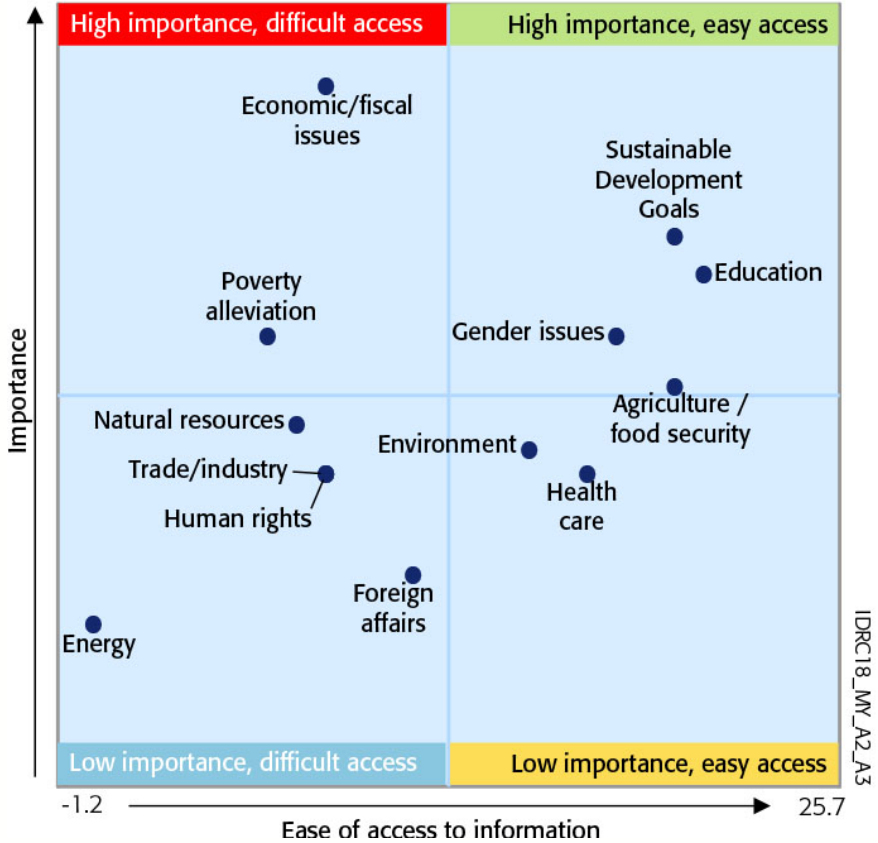
Importance vs Ease of Access to Information

Total Mentions of Information Topic vs Respondents Selecting “Easy” (4+5), Myanmar, 2018

Key topics of education, SDGs, and gender issues are of relatively high importance to stakeholders; they are also more easily obtainable than most other issues.

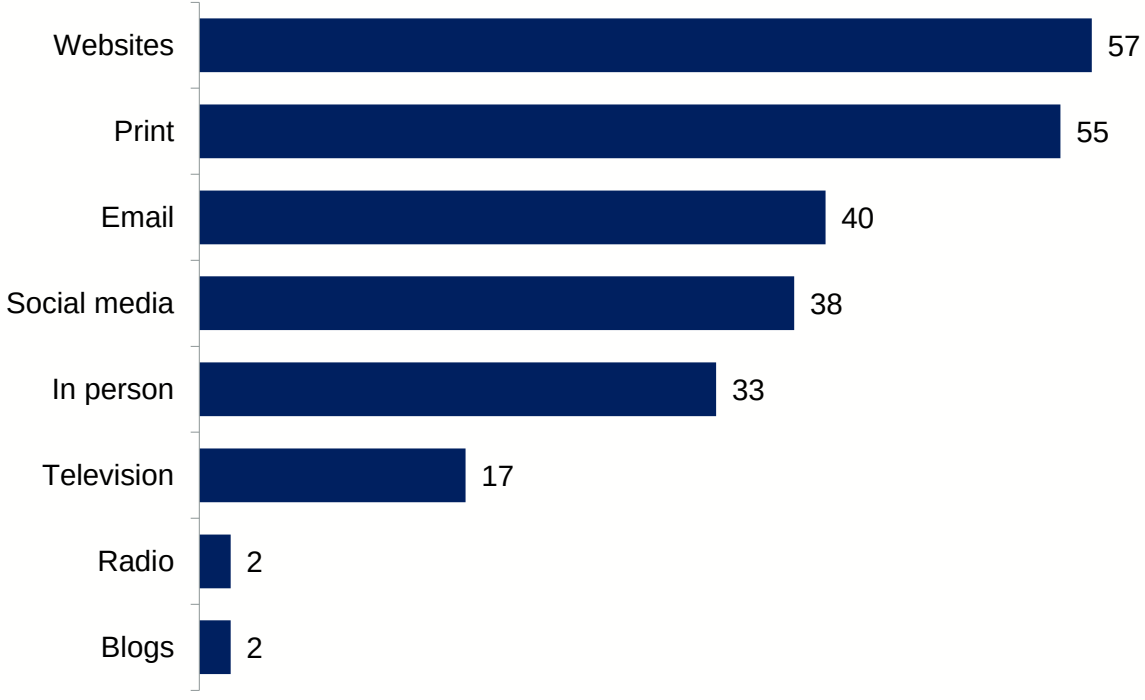
However, information on economic/fiscal issues and poverty alleviation, topics of relatively high importance, are relatively less easy to obtain than other issues of lower importance.

It is important to note that these issues are only considered easy or difficult to access in relation to each other. Given that the majority of respondents do not consider it easy to access information on any of the topics, it is important to focus efforts on increasing access to all issues of high importance.



Most Useful Format for Receiving Information for National Policy Development

Prompted, Could Select Up to Three Responses, Myanmar, 2018

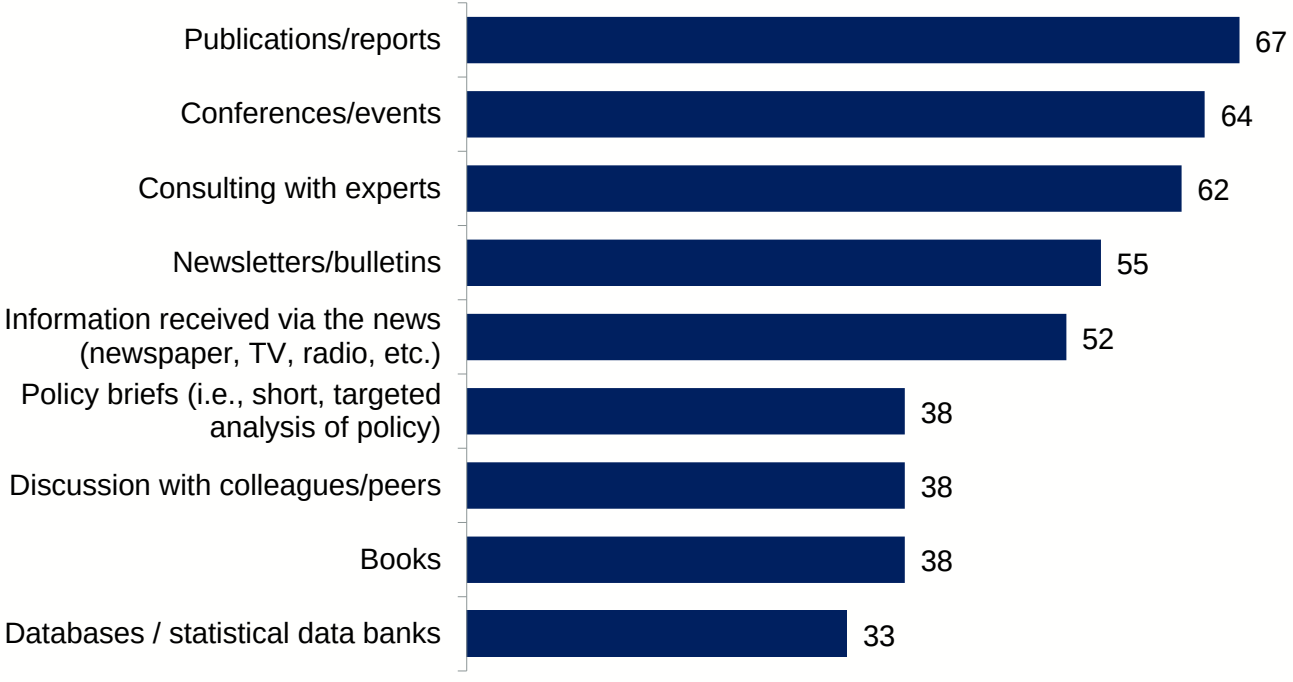


Websites and print are considered the most useful formats for receiving information for national policy development. Email and social media are also considered quite useful, while radio and blogs are considered the least useful sources of information.

Information Required for Policy Making in Myanmar: Source and Quality

Information Source Used to Increase Understanding for National Policy Development

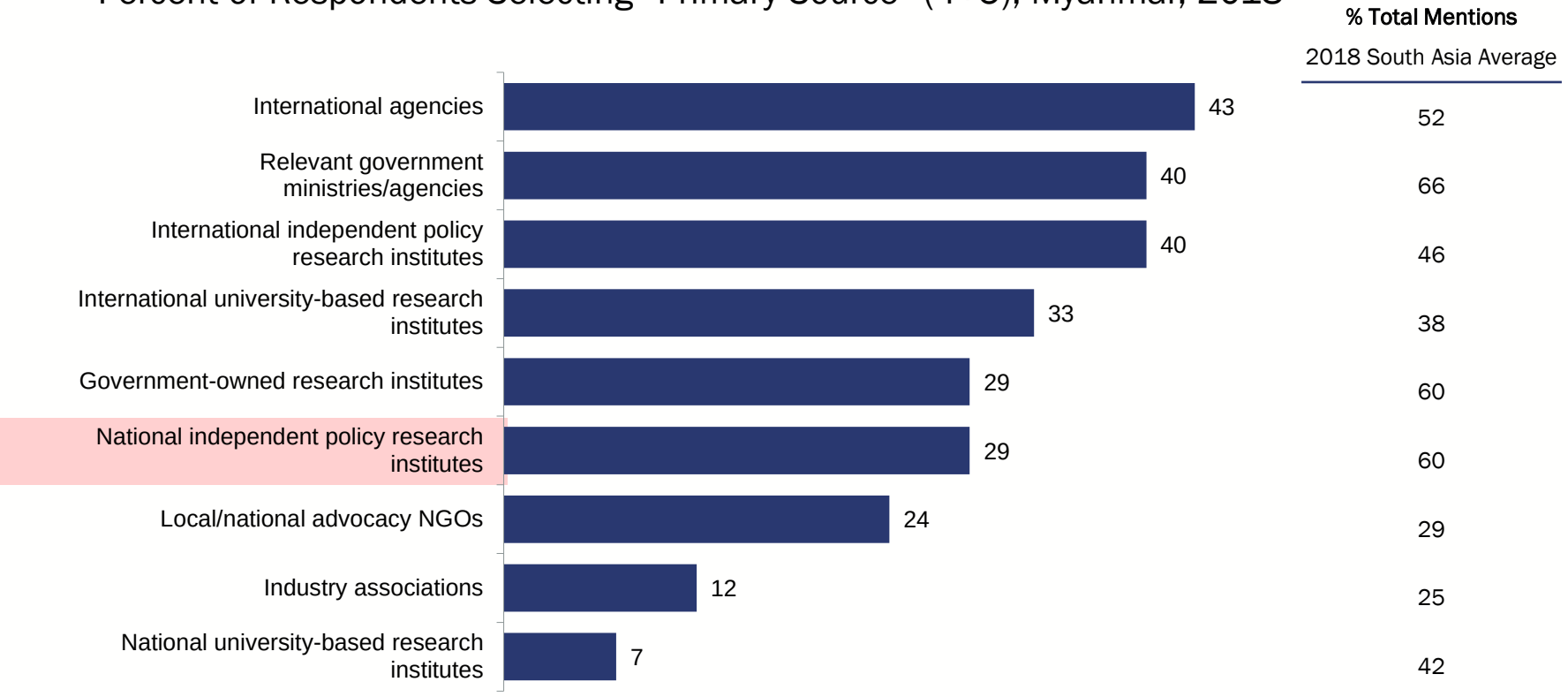
Prompted, Multiple Responses Allowed, Myanmar, 2018



Reports and publications are the primary information sources used by stakeholders to increase their understanding of national policy. Conferences/events and consulting with experts are also relied upon by the majority of stakeholders, while databases are selected least.

Types of Organizations Used as a Source of Research-Based Evidence

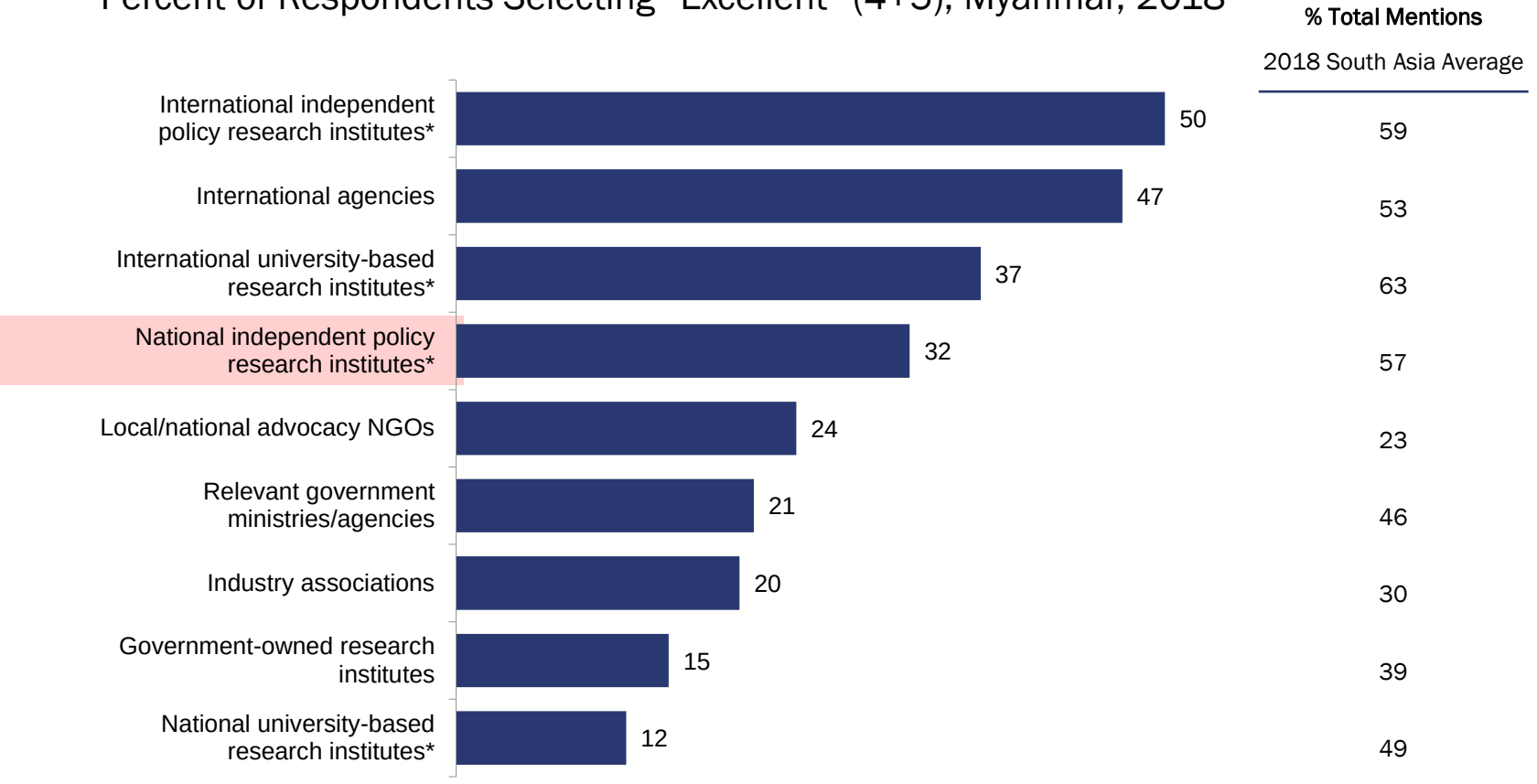
Percent of Respondents Selecting “Primary Source” (4+5), Myanmar, 2018



International agencies are the most preferred institutions that stakeholders turn to when they require information related to social and economic policies, with government ministries/agencies and international think tanks closely behind. National think tanks, on the other hand, are used less often, with just under a third of stakeholders reporting them as a primary source and far less than the South Asia average.

Quality Ratings of Research Provided by…

Percent of Respondents Selecting “Excellent” (4+5), Myanmar, 2018



International think tanks are viewed as having the highest quality of research, with half of respondents rating them as “excellent.” Meanwhile, national think tanks are viewed more moderately, with almost one-third of respondents rating their research quality as “excellent.” Government-owned research institutes and national university-based research institutes receive the lowest quality ratings.

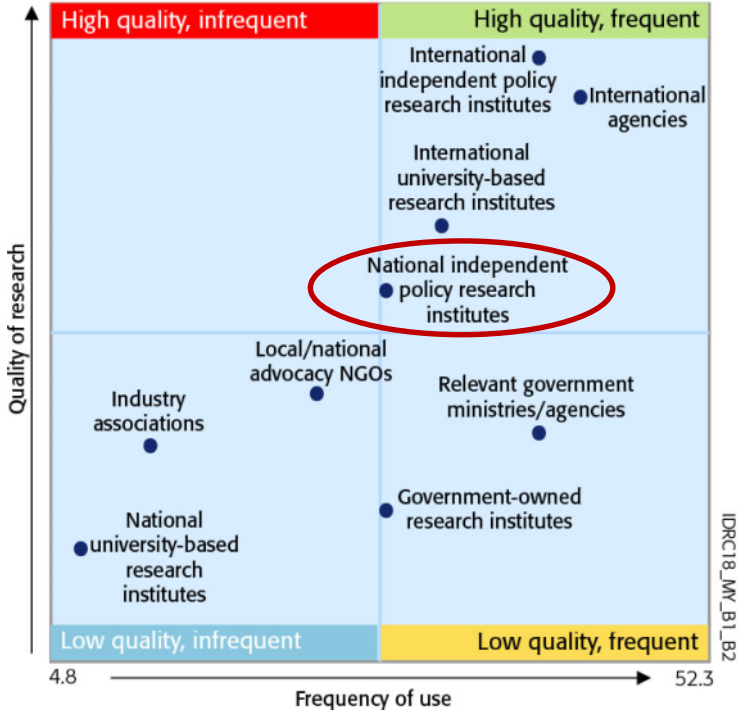
Familiarity and Level of Interaction with Think Tanks

Quality of Research vs Frequency of Use

Percent of Respondents Saying Quality of Research "Excellent" (4+5) vs Use as a "Primary Source" (4+5), Myanmar, 2018

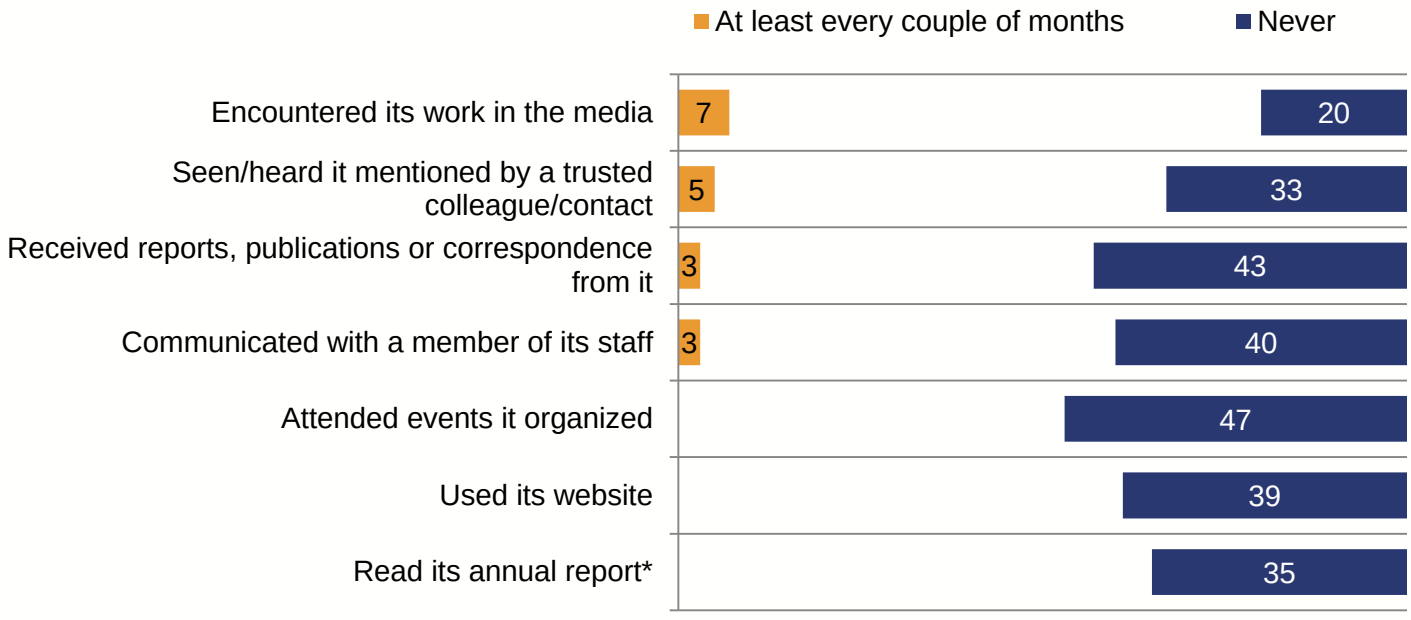
Overall, the types of organizations that respondents use most frequently are also those that are considered to have relatively high-quality research. The exceptions to this are government sources, which are used relatively frequently, but are considered to have relatively lower-quality research.

National think tanks are viewed as relatively good quality with average usage.



Frequency of Interaction with Think Tank via Various Channels

Average Responses Across All Rated Think Tanks, Myanmar, 2018



Frequency of interaction with think tanks is very low across all mentioned activities, with a significant proportion of stakeholders reporting they never engage in the mentioned interactions.

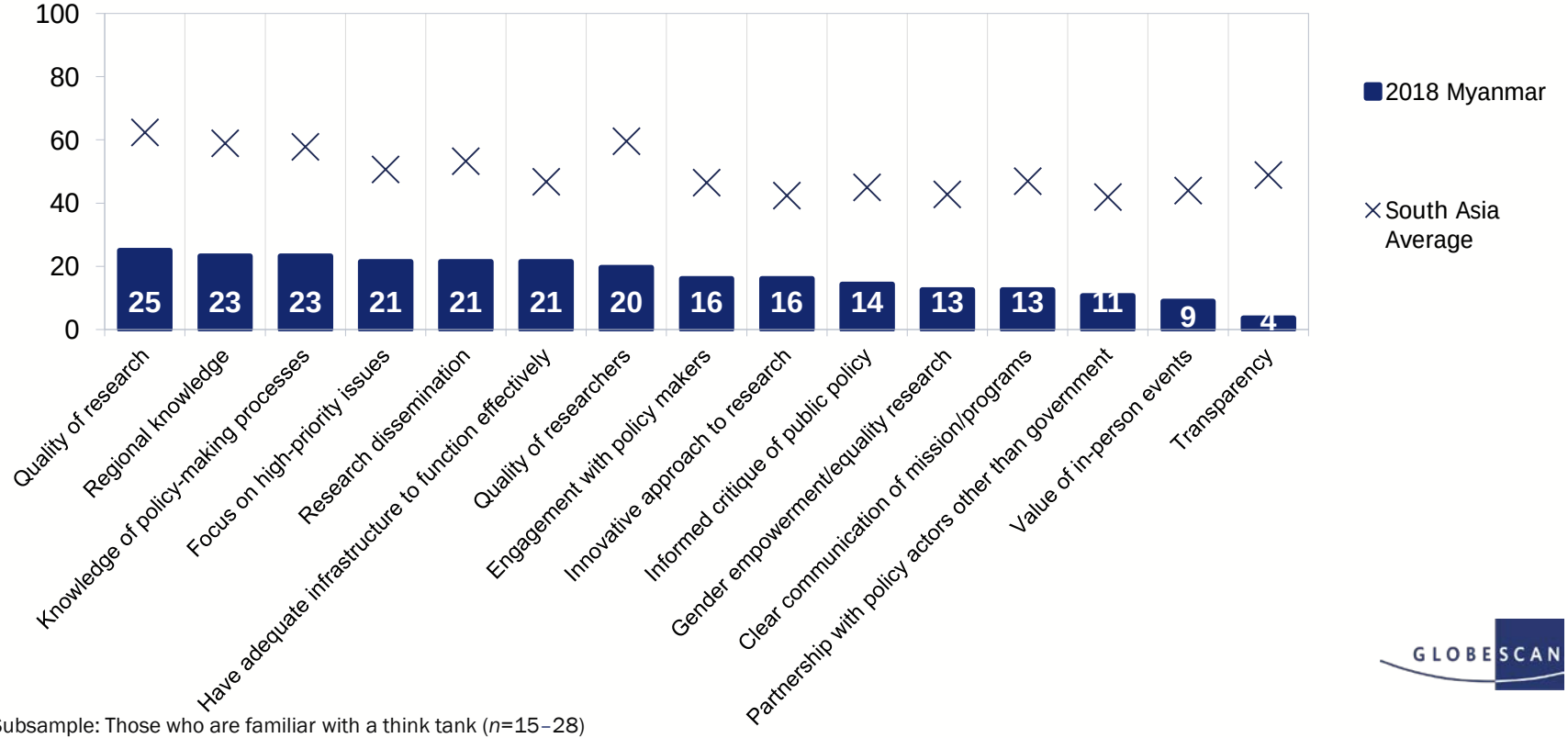
Subsample: Those who are familiar with a think tank (*n*=15–28)

Think Tank Performance Ratings

Think Tank Performance

Percent of Respondents* Selecting “Excellent” (4+5), Average Across All Think Tanks Rated, Myanmar, 2018

While quality of research, regional knowledge, and knowledge of policy-making processes are the areas with the highest perceived performance for the two tested think tanks, these ratings are well below the South Asia average. Transparency and the value of in-person events are where performance ratings are least positive.

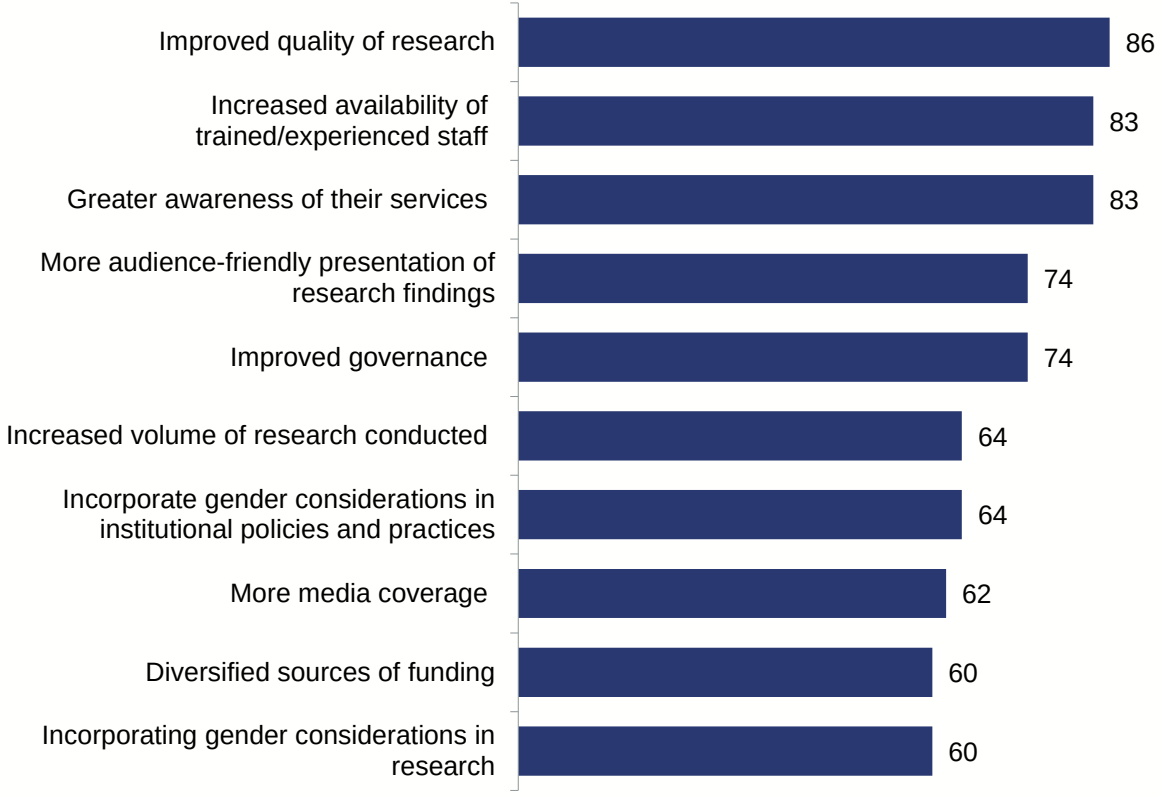


*Subsample: Those who are familiar with a think tank (*n*=15–28)

Factors for Improving Think Tank Performance

Importance of Factors for Improving Performance of Think Tanks in Myanmar

Percent of Respondents Selecting “Important” (4+5), Myanmar, 2018



The majority of respondents view all areas as “important” in improving think tank performance, however, improved quality of research, increasing the availability of trained/experienced staff, and greater awareness of services are perceived to be the most important factors for improving performance.

Advice for Independent Policy Research Institutes to Better Assist Stakeholders in Their Work

Open-end Responses, Myanmar, 2018

Advice for think tanks is relatively consistent, with many people specifically touching on research-related improvements. Advice includes:

- Many stakeholders suggested implementing a greater outreach strategy which targets a range of stakeholders. Mentions of the wider public, government, private sector, and operational actors stand as examples of a wider stakeholder reach in research.
- Conduct studies that are "local" in their context. Several respondents mentioned the need for survey data to draw on regional development, education, and employment at the grassroots level.
- Demonstrate support for local independent research institutes.
- Disseminate research results more widely (e.g., via media, in discussions/debates, and on website) to increase accessibility.
- Implement an independent governance/committee board.
- Improve communication strategies and increase collaboration.
- General recommendations also mentioned utilizing technology and improving service.

> "Often, some research missed out at the grassroots level. My advice is to include all levels when conducting the research so that the findings will be more inclusive and accurate."
> – *Media*

> "More research in the Myanmar context."
> – *Research/Academia*

> "To conduct more outreaches to the public, members of parliaments, and different levels of government actors."
> – *Research/Academia*

> "More consultation before the research is set in stone and much more use of the results through media and discussion and debate."
> – *NGO*

> "Share independent, credible reports on relevant issues."
> – *Private sector/Industry association*

> "Better quality. Easy to access. Fulfil the national needs and raise awareness."
> – *Government, non-elected*

GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a signatory to the UN Global Compact and a Certified B Corporation.

www.globescan.com