

# Motu Economic and Public Policy Research Statement of Strategic Intent

March 2008

## Purposes

The Trust is established to promote well-informed and reasoned debate on public policy issues relevant to New Zealand decision making. The Trust does not advocate an expressed ideology or political position. The Trust will promote this purpose by:

- 1 Carrying out and facilitating empirical and theoretical research on public policy issues relevant to New Zealand. The quality of the research will meet international academic standards, suitable for acceptance in reputable academic journals.
- 2 Making existing knowledge more accessible for policy debates in New Zealand. This may be done by summarising and critically reviewing existing work on public policy issues, or by contributing to and facilitating policy discussions through seminars, workshops and dialogue groups.
- 3 Disseminating the results of the Trust's work and knowledge through publication (particularly in refereed publications), the Internet, conferences, seminars, workshops, dialogue groups and teaching.
- 4 Building New Zealand capacity to carry out empirical and theoretical research on New Zealand public policy. This will be done by means such as training, collaboration, sponsorship of students or researchers and development of relevant databases.
- 5 Maintaining close links with international experts working on topics related to the Trust's purpose through communication and collaboration;
- 6 Advancing the Trust's work and purpose by facilitating the visits of relevant international visitors.

We summarise these goals in three main areas:

- 1 Research and Research Dissemination;
- 2 Building Capacity for New Zealand Economic and Public Policy Research; and
- 3 Outreach to End-users.

What distinguishes us from other economic researchers in NZ?

Below we discuss the overall principles that drive our actions in these areas as well as concrete objectives to achieve within them over the next few years. However we start with a general discussion of what Motu is.

Motu is in some ways like an academic department in the sense that the senior fellows have a lot of latitude in their research agendas. However we are unlike universities because we have a strong emphasis on relevance and outreach to end-users. This is reinforced by our need to attract and retain funding. We also have conditions that are more favourable to research including more research time (because of low teaching involvement) and access to highly skilled research analysts who are on permanent contracts.

Although we are soft funded, we are also different from consulting groups, of which there are many in New Zealand. All Motu work is published. Our projects are long term. This means we often cannot respond to short-term policy maker needs but also allows us to plan and specialise. We choose our own topics and seek funding rather than simply being responsive to client needs. Finally, we have a strong emphasis on objectivity rather than meeting 'client' needs. This makes us unattractive to some funders.

We work closely with government research units and in some ways have similar goals. We are different in that our time horizon both for project length and through the choice of topics tends to be very long term. We have a very strong desire to prove the academic quality of our work through publication. Some government researchers share this but most are constrained by other demands on their time. We have relatively stable staffing that allows continuity in research over long periods. Finally, we are strongly committed to building research capacity more broadly rather than only doing research using current infrastructure.

What distinguishes us from international research institutes?

Motu is based on a research institute model seen in both the United Kingdom and, most commonly, the United States. Europe, Canada, Australia and Japan have many research institutes but they tend to be closely linked to either government or universities, which makes them somewhat different.

The key difference between Motu and institutes elsewhere in the world is our emphasis on New Zealand issues. We also believe however that we have a somewhat different research culture. Because New Zealand is so small we must work with people from a range of institutions. New Zealanders also tend to be generalists because of the small number of researchers relative to issues. This may push us toward somewhat different and broader research emphases. The size and homogeneity of New Zealand may also facilitate interdisciplinary work. Finally, because New Zealand is so isolated, we emphasise links with other countries to increase our intellectual community. This may make us more open to ideas from a wide range of sources rather than focused within one 'school' of economics.

## Research and Dissemination among Academics

### Choice of Research Directions

- Motu staff will do only economic research. We want to create critical mass in one discipline.
- Where necessary to address a public policy question, we will work collaboratively with others to incorporate information and insights from other disciplines.
- The research Motu does should be designed to provide useful policy insights

The senior fellows' interests will drive the choice of research projects and programmes. This recognises that researchers are largely motivated by curiosity and interest. The choice of research topics will be affected by the availability of funding. Senior fellows will, however, be proactive in designing programmes and seeking funds rather than primarily responding to external demand. Our research will be objective and independent of both government and private sector specific interests

This does not mean that research will be unresponsive to policy issues and concerns. We maintain active links with people engaged in policy and identify many potential topics through those links. Good researchers are interested in the relevance of the research. We will tend to choose topics that both address issues of public interest and have the potential to yield interesting and well-supported research insights. We will also seek regular feedback from our Board and our International Panel of Advisors on our research directions.

### International vs. New Zealand research

We will do both but all research should have relevance for NZ policy. Where our work does not directly relate to New Zealand we will ensure that our dissemination processes draw out its local relevance.

We recognize that there are advantages in working on topics that primarily relate to other countries where better data exists to study an issue of interest to New Zealand, where comparative research is useful as part of a portfolio of research and where we can learn from excellent co-authors

### Research Quality

The audience we most wish to impress is:

- Top international academics
- New Zealand and international policy makers and private sector leaders with the analytic capability to understand and apply our results

To maintain and enhance our research we encourage senior fellows to maintain professional linkages with top academics. Our senior fellows take sabbaticals at and make both short visits to internationally ranked research institutes and economics departments. We facilitate senior fellows flexibility in choice of research topics and limit the percentage of time they must charge to specific contracts to allow them to control their research programmes. Internal quality control is through informal peer review and tracking of publications relative to ranking of journals. We publish as much work as possible in refereed journals. Some proportion of research should be of standard that it could have been published in a good US journal if it had been on a US dataset.

### Dissemination

We disseminate our research to other researchers through our website and publication as well as our many informal and more formal research network linkages. We actively present our research

in conferences and on university campuses both in New Zealand and internationally to get feedback and enhance the quality of our work.

#### Motu Working Paper Series

Motu working papers are research materials circulated by their authors for purposes of information and discussion. Any opinions expressed in papers are those of the author and do not represent a Motu position. The papers are published on the website, circulated in hard copy to libraries and key end users and submitted to international research databases including SSRN and HoPEc/RePEc. Papers are not formally refereed but are all read by a senior researcher other than the author prior to publication.

## Building Capacity for New Zealand Economic and Public Policy Research

### Linkages with Universities

Our relationships with universities can have three main aims:

- 1 Research and research dissemination:
  - a. Co-author relationships with faculty.
  - b. Disseminate our research to faculty to share results and get feedback on our work.
- 2 Building research capacity.
  - a. Data and information sharing that facilitates research.
  - b. Helping New Zealand academics make connections among themselves and with international researchers.
  - c. Teaching at graduate level.
- 3 Recruitment of summer interns and research analysts.

Each Senior Fellow should decide their own teaching commitments – this should be reassessed if fewer than half the senior fellows are teaching in any one year.

### Research Workshops

We run research workshops within most major research programmes. As we grow and develop new topics we may coordinate the project specific workshops into themes to maximise the crossover benefits between them. These workshops aim to facilitate communication among researchers working on related topics. They cover developments in data, provide feedback on work in progress, disseminate completed research, allow in-depth discussion of methodologies used and provide a forum for discussion of productive and useful future research directions.

### Linkages with other research institutes and networks

Through specific projects we will continue to build relationships with other research institutes and research networks within New Zealand. These relationships are within economics, with other social sciences, and with the natural sciences.

### Affiliate Programme

Affiliates are excellent active economic researchers working on issues closely related to Motu research programmes. They publish in the Motu working paper series and are engaged in Motu seminars and workshops. The programme was established in 2003.

### International Visitors

These come in three overlapping categories:

- 1 Those we could do or are doing joint work with.
- 2 Those who are specifically interesting to policy makers, private sector leaders and donors.
- 3 Fortuitous – those interested in coming to New Zealand for other reasons.

With each visitor we need to meet the first, and at least one of the second or third, of the following three aims:

- 1 Gain benefit for Motu capacity building and research quality
- 2 Provide benefit to other academics in New Zealand
- 3 Provide benefit to policy makers/end users within New Zealand

We organise the visits to maximise these gains, including providing exposure to media, politicians and the general public where appropriate.

We have funding in our grants that we proactively use. We also seek co-funding from sources such as SPEAR, Fulbright and the Commonwealth Fund.

#### Data access

Data is the core of many of our research programmes. We see high quality datasets as one way to facilitate New Zealand research and encourage communication among researchers. To facilitate this we have the following aims over the next few years:

- Create a system to document and make readily accessible the key databases that Motu has developed.
- Facilitate and encourage external use of Motu databases by providing documentation and facilitating the process of addressing confidentiality so that data can be released in a timely way.

While doing this we will balance the cost of creating a generalised system against the value of readily accessible data for both Motu and non-Motu researchers.

## Outreach to End-users

Key goals:        Facilitate dissemination and productive use of our research findings.  
                      Keep the research clearly separate from the interpretation of the research.

We engage end-users in the design stage of projects to help guide our choice of research questions. We then re-engage for end-user outreach when research is complete to let them know our results and work with them to explore any policy implications of the results. We work with end-users to get feedback, data etc. during the research process but our interactions with them in this phase use them as a research resource - i.e. they are not wearing their 'end-user' hats.

We have two basic strategies for outreach. A 'broad' strategy that makes our research widely available through providing high quality materials and presentations for a range of audiences, and a 'focused' strategy where we work directly with a small number of key end-users to both guide our research choices and draw out possible policy implications from our research findings.

### Broad outreach

#### Motu Website

Our website continues to be our main mechanism for dissemination. It includes working papers and other publications, basic information on projects and materials from workshops and seminars. To complement our existing website, we will publish one page non-technical briefs of directly policy relevant working papers on the web and circulate these in hardcopy to key end users.

#### Motu Research Update

Our research update is aimed at a general policy audience. The short articles highlight interesting findings from our work. It also aims to alert more specialised readers to our recent work and provides links to recent working papers.

#### Motu Public Policy Seminar Series

In 2003 we established a public policy seminar series. The series aims to disseminate the results of our research and to make existing knowledge more accessible for policy debates in New Zealand. Motu staff and affiliates as well as other leading New Zealand and international researchers will give seminars. It is designed to be accessible to people not deeply involved in research (such as policy analysts) who want to keep up with research developments in particular areas, as well as to the wider public who may have an interest in a particular issue.

### Focused Outreach

#### Focused end-user meetings

Within our major research programmes we will run regular meetings with small groups of key end-users to both disseminate work as it is completed and also get input into future work directions. These meetings operate under Chatham House rules.

Each senior fellow will foster personal/professional relationships with a few key users who we meet informally on a regular basis.

### Outreach to Maori

Motu aims to develop relationships with Maori that are as strong as those with other key user groups. A lot of Motu research is relevant to Maori in that it addresses issues that particularly affect Maori. In addition many of our research programmes contain elements with specifically Maori perspectives, such as Maori land use, and Maori inequality. This means that we need to

engage effectively with Maori to ensure that the research directions we choose can produce results that are useful to Maori, and to improve the quality of our research in these areas. We also need to engage with Maori to ensure effective dissemination of our work as it is completed.

To do this we need to make sure that each aspect of our external relations involves Maori appropriately. These things may happen automatically with some groups but need more attention with audiences with which we are not as familiar.

- Include key Maori contacts in mailing lists to disseminate material generally, invite appropriate Maori to events, seminars etc.
- Develop relationships with key individuals for specific projects.
- Develop close personal relationships with a small group of Maori who we meet one-on-one in an informal way to talk more broadly about issues.
- Our Maori scholarship and internship programme will gradually improve our networks both as our interns develop in their careers and through the people we help them network with.

We are working with our existing Maori contacts to improve all aspects of our relationships as well as being pro-active in developing new contacts.

#### Local Government

Our extensive regional and spatial research means that much of what we do is relevant to local government. We are unable to directly engage with all regional councils and territorial authorities. We are working intensively with a few, but with an interest in the results that will be generalisable to other districts and regions.

#### Quality of communication and value to end-user

Our major projects involve explicit linkages with end users through regular group meetings. Through these and through feedback on our newsletter, public seminars, annual reports, working papers, website etc. we will assess our success in communicating and disseminating our research as well as the salience of our choices of topic.

## Motu's Development as an Institution

We are prepared to grow but not at the expense of the nature of the institution we aim to create. Motu has a workplace culture that we believe is central to its success in achieving a wide range of goals and maintaining balance between them. Our success depends on the dedication of our staff. We do not want to endanger that through rapid expansion and cultural change.

What is Motu Workplace Culture?

- Dedicated to excellence in all aspects of our work.
- Passion about research and public policy – intellectual ‘buzz’
- Curiosity and challenging of conventional wisdom (or any other sort) encouraged.
- Dedicated to training junior staff.
- Learning environment for all staff.
- Egalitarian, relatively non-hierarchical management structure
- Non-corporate
- Informal and not conformist
- Value balance between work and private/family life

Motu is breaking new ground in the New Zealand policy/research world. This implies that we are learning a lot, creating and consolidating our image and reputation, and continuously having to assess fundamental issues about who we are and how we make tradeoffs. Issues such as attitudes to data sharing, drawing clearer lines between analysis and opinion, and determining the balance between doing and disseminating research are not ones with simple answers.

We do not want the stress of expansion, or having to cooperate among a larger group of senior staff on issues to lead us in directions that we are not consciously choosing. Slow growth allows us to consider issues as they arise and gradually work out a set of operating strategies. We cannot simply apply those from other countries or institutions because our situation is unique. We need to create our own institutional culture.

Finally, the New Zealand labour market is thin. If we want to choose new senior fellows who fit very closely with our desired profile (research skills, ability to design and run projects, ability to communicate results to end users, and a personality fit), we are unlikely to be able to recruit many new senior fellows quickly.

For these reasons we do not want to, and do not expect to, grow very fast. We expect that we will increase by no more than one senior fellow per year on average for the next few years. On the other hand we may expand ‘offsite’ through increased collaboration with researchers in other institutions.

## **Motu Research and Education Foundation**

This Foundation was established in 2006. We are working with its Board to facilitate fundraising and establish appropriate procedures to manage the funds and to maximise the benefit from their application to the following purposes:

- 1 Commissioning, carrying out or facilitating empirical and theoretical research into and in respect of public policy issues of importance and relevance to New Zealand such research being of a quality which meets international academic standards and is suitable for publication in reputable academic journals;
- 2 So as to make existing knowledge, information and research concerning issues of New Zealand public policy more accessible in New Zealand commissioning summaries and critical reviews of existing published work on public policy issues;
- 3 Making available the results of the Trust's work and knowledge through publication (particularly in refereed publications), the internet, conferences, seminars, workshops, dialogue groups and teaching;
- 4 Improving the capacity and ability of individuals, groups and institutions to carry out empirical and theoretical research on New Zealand public policy by such means such as training, collaboration, sponsorship of students or researchers and development of relevant databases;
- 5 Maintaining close links with international experts working on topics related to the Trust's purpose and collaborating with such experts;
- 6 Advancing the Trust's work and purpose by facilitating the visits of relevant international visitors;
- 7 Promoting the charitable purposes of the Motu Economic and Public Policy Research Trust established by deed dated 25 July 2000;

and includes the following general purposes, namely:

- 8 Co-operating with any other person or persons, body, service, institution, company, corporation, club, society, statutory body or government department in order to promote achieve, support or maintain any of the foregoing activities AND IN PARTICULAR with the trustees of the said MOTU ECONOMIC AND PUBLIC POLICY RESEARCH TRUST;
- 9 The publication of books, manuscripts, journals, bulletins, circulars, newsletters or any other publications in order to promote, support or maintain any of the foregoing activities; and
- 10 Doing such other lawful acts and things as are incidental to or conducive to the attainment of the foregoing activities.