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Understanding policy research in liminal spaces: Think tank responses to diverging principles of legitimacy

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Abstract

Research on scientific, social scientific, and technical knowledge is increasingly focused on changes in institutionalized fields, such as the commercialization of university-based knowledge. Much less is known about how organizations produce and promote knowledge in the 'thick boundaries' between fields. In this article, I draw on 53 semi-structured interviews with Canadian think-tank executives, researchers, research fellows, and communication officers to understand how think-tank knowledge work is linked to the liminal spaces between institutionalized fields. First, although think-tank knowledge work has a broadly utilitarian epistemic culture, there are important differences between organizations that see intellectual simplicity and political consistency as the most important marker of credibility, versus those that emphasize inconsistency. A second major difference is between think tanks that argue for the separation of research and communication strategies and those that conflate them from beginning to end, arguably subordinating research to demands from more powerful fields. Finally, think tanks display different degrees of instrumentalism toward the public sphere, with some seeking publicity as an end in itself and others using it as a means to influence elite or public opinion. Together, we can see these differences as responses to diverging principles of legitimacy.

Keywords

Canada, epistemic cultures, expertise, field theory, intellectuals, policy ideas, think tanks

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Introduction

Research on scientific and technical knowledge is increasingly focused on the transformation of university-based knowledge, the growth of non-university science, and the consequences of public–private partnerships (Berman, 2012; Evans, 2010; Kleinman, 2003; Kleinman and Vallas, 2001; Mirowski and Van Horn, 2005; Sismondo, 2009; Slaughter and Leslie, 1997; Slaughter and Rhoades, 2004). As important as this literature is, it tends to emphasize knowledge work *within* the boundaries of institutionalized fields. For example, Kleinman and Vallas (2001) show how both industry and academic science are increasingly borrowing norms from one another, resulting in industry science becoming more autonomous and university-based science becoming more commercialized. Evans (2010) focuses more directly on partnerships, arguing that industry promotes speculative research in an effort to patent and profit from discoveries, and that without ties to industry interests academic science tends to form dense hubs of scholarly activity around incrementally developed theories. In both of the cases studied by Kleinman and Vallas (2001) and Evans (2010), the focus is on changes within institutionalized fields rather than how knowledge is produced in the 'liminal spaces', or 'thick boundaries', between universities and other powerful institutions (Eyal, 2002, 2013; Medvetz, 2012; Stampnitzky, 2013). I argue that it is vital to understand how ideas are produced and promoted in these liminal settings because they operate differently than institutionalized sites of knowledge production and because they are becoming more common.

This article contributes to recent efforts to understand knowledge work in the liminal spaces between institutionalized fields by examining how think tanks in Canada produce and promote policy ideas. Much of the established social scientific literature on think tanks is dominated by macro-level political theories and organizational typologies (e.g. Domhoff, 2010; Polsby, 1983; Weaver, 1989). This article builds on empirical field analyses of think tanks in the United States (Medvetz, 2012) and Canada (McLevey, 2014) to present a more complicated picture. I argue that the epistemic cultures that think tanks inhabit reflect responses to diverging principles of legitimacy established in more institutionalized fields, such as academia, journalism, and politics (Medvetz, 2010).

Based primarily on 53 semi-structured interviews with research participants representing over 40 think tanks, I propose that production and promotion of ideas in Canadian think tanks vary in three key ways. First, although nearly all think tanks share a broadly utilitarian epistemic culture, there are important differences between those that see intellectual simplicity and political consistency as markers of credibility versus those that emphasize political inconsistency. Second, some organizations attempt to keep their research and communication strategies separate, while others conflate them, arguably subordinating knowledge production to demands from more powerful fields. Finally, think tanks vary in degrees of instrumentalism toward the public sphere. While some seek publicity as an end in itself, others seek it to change elite or public opinion in specific ways.

We should not think of these differences just as ideal types that can be used to categorize think tanks. Instead, building on recent work (McLevey, 2014; Medvetz, 2012), we should see them as responses to diverging principles of legitimacy that bear on think-tank work in the liminal spaces between more institutionalized fields. I explain each of the three dimensions below.

Think tanks in Canada

Think tanks are an increasingly visible set of actors in the Canadian political, policy, and intellectual worlds, contributing to discussions on issues as diverse as tax policy, educational outcomes, and climate change. With few exceptions, Canadian think tanks are staffed by economists and are predominantly conservative. It is relatively common for them to be housed in universities, but think tanks also have more indirect ties to the academic world. Because of their modest budgets, many rely heavily on academic economists for contract work. This is true even for small conservative think tanks that aggressively criticize universities as 'ivory towers'. In contrast to the United States, where think tanks emerged in the early 1900s, think tanks in Canada did not start appearing until the 1970s, concurrent with the rapid expansion of the Canadian social sciences and university system (Abelson, 2009; Lindquist, 2004; McLevey, 2014). These historical trajectories have been strongly shaped by differences in the American and Canadian political systems. While the American presidential system provides many opportunities for think tanks to directly influence the policy-making process, Abelson (2009) has shown how Canada's parliamentary system, strong party unity, and permanent civil service result in think tanks taking more indirect approaches to shaping policy. For example, Canadian think tanks tend to prioritize agenda setting and high-profile media commentary over direct lobbying. Finally, 'legacy think tanks' – such as the George Bush Presidential Center – are increasingly common in the United States but are rare in Canada.

Canadian think tanks operate in a fundamentally different funding environment from that of American think tanks. In the United States, most think tanks across the political spectrum are funded by donations (Medvetz, 2012).[1] In Canada, many think tanks are supported by government grants and contracts. Those funded by private donors tend to be more conservative, while centrist think tanks are supported primarily by the state. Since 2005, the cluster of conservative think tanks receiving money from private donors has become tighter; at the same time, centrists have turned toward self-generated revenue in order to compensate for reductions in state funding (McLevey, 2014). This has had profound consequences for small and medium-sized centrist organizations. For example, substantial reductions in government funding resulted in the closing of two well-known Canadian think tanks: the Canadian Policy Research Networks in 2009 and the North-South Institute in 2014. Even the largest and most well-funded think tanks in Canada – the Conference Board of Canada and the Centre for International Governance Innovation (CIGI) – have substantial difficulties with their funding models.

The structural opposition in the Canadian funding environment compels think tanks to orient the production and promotion of policy ideas toward *either* private donor interests or the state. This fuels 'classification struggles' (Bourdieu, 1984) over what types of policy knowledge are considered credible, and ultimately what counts as a legitimate think tank. For donor-supported conservative think tanks, state funding de-legitimizes centrist think tanks, while centrist think tanks see privately funded think tanks as beholden to the interests of only a few stakeholders. Think tanks oriented primarily to the state have to be able to adapt to regime changes without losing support, which provides an incentive to promote centrist positions on policy issues. In line with Medvetz (2012), this suggests that Canadian think tanks operate in uncertain funding environments with competing understandings of what a legitimate think tank is. Think tanks have strong dependencies on their supporters and therefore must ensure that what they produce and promote appeals to the preferences of one type of sponsor or another.

Theory

How do think tanks produce and promote policy ideas?

Recent literature on think tanks focuses on their involvement in political processes, their influence on policy outcomes, their historical origins, and their structural topography (Abelson, 2009; Abelson and Lindquist, 2000; Lindquist, 2004; Medvetz, 2012; Stone and Denham, 2004). In this article, I analyze interview data to bring into focus the less-examined area of how employees produce and promote ideas in think tanks.[2] While we know that think tank employees produce research, hold conferences and working lunches, write opinion pieces, talk to journalists, appear before parliamentary committees, engage in fundraising, develop media strategies, maintain websites, and spend increasing amounts of time on social media, we do not know how these activities are shaped by dependencies in the academic, political, and economic fields (McLevey, 2014; Medvetz, 2012). We do not know about the 'cultural and organizational machineries of knowledge' (Knorr Cetina, 1999; see also Kurzman, 1994) that enable think tanks to know what they know or what the key sources of variation in those machineries are. Instead, as mentioned above, explanations of how think tanks produce and promote policy ideas tend to rely on macro-level political theories or organizational typologies. In political theories, think tanks tend to be presented as either members of a 'corporate-policy elite' or as independent institutes where policy experts can be trusted to carry out their research more or less as academics do, but without teaching responsibilities (Domhoff, 2009, 2010; Domhoff and Dye, 1987; Peschek, 1987; Polsby, 1983). When it comes to knowledge production, these accounts offer little more than a statement about whether or not some think tanks should be trusted.

Another tendency is to approach the study of think tanks by dwelling on the question of how they can be defined as organizations (McGann and Weaver, 2000; Stone and Denham, 2004). Weaver's (1989) popular typology of think tanks as advocates, contract researchers, universities without students, or political party think tanks is unable to speak to the diversity found within and across universities and disciplines; describing a think tank as a university without students says almost nothing about how it produces and promotes policy ideas or about the consequences of working in an ambiguous institutional context. Furthermore, the typology classifies *types* of think tanks, rather than the complex mix of strategies, practices, or cultures that might co-exist within think tanks and other policy research organizations. Breaking with these debates, Abelson (2009) places greater emphasis on how think tanks influence policy outcomes by comparing think-tank strategies in Canadian and American political processes. Medvetz (2010, 2012) analyzes the emergence of multi-institutional space in which organizations mediate and transfer forms of symbolic capital from one field to another. He shows how the hybridity of the American think-tank field engenders complex intellectual dispositions and practices. This results in a tension between academic orientations, on the one hand, and the policy aide, the policy entrepreneur, and the media specialist, on the other. Drawing on the widely used juxtaposition between the action-oriented 'policy hack' and the evidence-obsessed 'policy wonk', Medvetz's (2010, 2012) research illuminates a conflict over the kind of work that gets prioritized in American think tanks. Specifically, the conflict is between the kinds of work that enable experts to move their ideas through the channels of the policy world and the kinds of work that enable experts to produce strong evidence to back up their ideas. This re-framing of the problem opens up a new set of research questions about how think-tank knowledge is produced and promoted in the liminal spaces between more institutionalized fields and in the face of diverging principles of legitimacy.

Epistemic cultures and the sociology of ideas

Recently, there has been a significant amount of research on how knowledge is produced in the social sciences and humanities. Economics and finance have received considerable attention (Babb, 2001; Fourcade, 2009; Knorr Cetina and Bruegger, 2002), as have sociology (Abbott, 2001; Abend, 2006; McLaughlin, 2005; Steinmetz, 2004; Turner and Turner, 1990), social network analysis (Freeman, 2004), philosophy (Collins, 1998; Gross, 2008; Lamont, 1987), psychoanalysis (Bos et al., 2005; Krause and Guggenheim, 2013; McLaughlin, 2001), and black studies (Rojas, 2007; Small, 1999). Others, such as Leahey (2008), have focused on social research practices across disciplines. A few studies have moved beyond institutionalized fields in order to examine social science research in more hybrid settings. This work includes Breslau's (1997) study of contract research organizations and the body of research that explores the thick boundaries between the military, security agencies, and the state (e.g. Eyal, 2002; Solovey, 2013; Stampnitzky, 2011, 2013).

Science and Technology Studies, with its focus on diverse knowledge practices and cultures in concrete settings, even within the social sciences and humanities (e.g. Camic et al., 2011; Eyal and Buchholz, 2010), signal a break with older traditions in the sociologies of knowledge and intellectuals, which focused on the political affiliations of intellectuals and the 'problem of allegiance' (Brym, 1978; Kurzman and Owens, 2002). Researching 'epistemic cultures' is a promising way to understand knowledge production in think tanks. Knorr Cetina's (1999) comparative ethnography of high-energy physics and molecular biology examined the 'cultural and organizational machinery' enabling scientists to know what they know; epistemic cultures are 'the cultures of knowledge settings' that are rapidly expanding and changing as more expert knowledge is produced outside of university settings (Knorr Cetina, 2007). The concept encourages research that is comparative and multi-level, and that emphasizes diversity within institutional contexts (Knorr Cetina, 1999).[3]

Lamont (2009) has extended the concept of epistemic cultures to differentiate four cultures in her study of multi-disciplinary granting agencies in social sciences and humanities. 'Constructionist' epistemic cultures prioritize 'giving voice' to people through socially and politically engaged research and emphasize the personal, political, and social elements of research. 'Comprehensive' cultures emphasize empirical complexity, contextual specificity, *verstehen*, and insist on a theoretically informed research agenda. ‘Positivist’ and ‘utilitarian’ cultures both seek to produce generalizable empirical findings, disprove theories, and solve puzzles by testing hypotheses with formal models. The difference is that utilitarians place great importance on ‘real-world’ problems, while positivists are interested in problems that advance theory and that may or may not have clear ‘real-world’ significance.

This emphasis on epistemic cultures has the potential to advance our understanding of how knowledge is made outside of conventional academic settings, but there are crucial differences to consider. For example, the institutional logics of the political and economic fields work *against* non-utilitarian epistemic cultures. It is clear that there are no constructionist epistemic cultures in think tanks equivalent to the academic ones described by Lamont (2009), and cultures that are primarily concerned with *verstehen*, uniqueness, and contextually specific claims are not well suited to action-oriented think tanks.[4] Positivist cultures are also absent because the emphasis on general theory is separate from the emphasis on social problems, which is what differentiates them from utilitarian cultures in the first place (Lamont, 2009). In short, the think tanks that stay in business are all committed utilitarians. And yet it is clear from previous research (Abelson, 2009; McLevey, 2014; Medvetz, 2012) that there is a world of difference between many of these organizations. In addition, all think tanks have mandates to communicate their research in ways different from those of other institutionalized sites of knowledge production, and yet they do not all do so in the same ways. As such, the goal of this research is to develop a better way of understanding variations in how think tanks produce and promote policy ideas in the ‘thick boundaries’ between institutionalized fields.

Data and methods

My analysis is based primarily on 53 semi-structured interviews with think tank executives (20), research directors and coordinators (15), communications specialists (6), academic policy fellows or regular contributors from economics and political science (6), and other think-tank staff (6). There were 34 women and 19 men in the sample, representing over 40 Canadian think tanks across the political spectrum. Following Small’s (2009a, 2009b) work on sequential interviewing, and best practices when interviewing ‘elites’ (Hochschild, 2005; Spector, 1980), I systematically recruited people based on their experience and position. I used a ‘side-in’ (Chambliss, 1996) approach by recruiting rank-and-file researchers first. I identified them through think-tank websites, recommendations, and by examining the CVs of political scientists and economists working in applied areas in Canadian research universities. Once I had established rapport, I worked my way up organizational hierarchies, interviewing more powerful think-tank employees and directors. In addition to opening access to some people who rarely agree to be interviewed, this improved the quality of my data.

Interviews were structured around four sets of questions: (1) career history and work experiences; (2) fundraising, project development, ‘peer review’, intellectual skills, and communication; (3) strategies and outcomes; and (4) knowledge of and opinions about other think tanks in Canada. Although I asked many of the same questions to everyone, I also followed the best practice of tailoring my interviews to the person or the job type

(Hochschild, 2005; Spector, 1980; see also Small, 2009a). I found researchers and fellows were often more open than directors about controversial and potentially compromising issues, while directors tended to be more aware of overall operations and seemed better versed in the ‘myth and ceremony’ of the institute. Unsurprisingly, I found that communications specialists gave the most sophisticated descriptions of idea promotion since they implement communications strategies and can account for their personal practices and networks. By tailoring my questions, I was able to develop a more comprehensive understanding of think-tank epistemic cultures. Interviews were digitally recorded and coded using TAMS 4, a qualitative data analysis application. I grouped both inductive and deductive codes into broader thematic sets and refined them through systematic comparisons across cases (Miles et al., 2014).

This analysis is part of a larger study that I conducted on think tanks in Canada. While the findings presented here are informed primarily by the interview data, they have been developed and refined through consideration of publicly available financial and employee data collected from Information Returns filed with the Canada Revenue Agency by 30 think tanks over 11 years, a content analysis of two large newspaper datasets, an analysis of organizational documents (e.g. annual reports, communications reports, strategic plans, and publications), and observations conducted at office visits and think-tank events.

Although ethnographic research is ideally suited for research on practices, many studies of knowledge and culture have traditionally relied on interviews, including Medvetz’s (2010) research on American think tanks. In addition, there are many strong arguments for the benefits of interview methods for studying institutional contexts (Lamont and Swidler 2014). I have not directly observed ‘peer review’ processes in think tanks first hand, nor have I witnessed exchanges between authors and researchers. Instead, I have interviewed many different types of think-tank researchers about these processes in detail and have considered my conclusions in the context of the additional data described above.[5] Ethnographic methods would have tied the analysis to a few organizations rather than enabling me to look across the field and develop the analysis comparatively. As Abelson (2009) has argued, such studies of think tanks tend to distort a more accurate understanding of the field as a whole. This is particularly true when one looks at the largest and most successful think tanks, overlooking many smaller organizations. Although the standard limitations of analyzing talk rather than practices apply (Swidler, 2003), I do not think a more observational approach would have changed the findings.

In my analysis, I refer to interviewees by name unless they requested their identity be kept confidential. In those cases, I refer to them based on the type of job or position they held at the time of their interview.

Claiming credibility in a utilitarian epistemic culture

Think tanks all have broadly utilitarian epistemic cultures – meaning that they promote the idea of policy-relevant and action-oriented social research, which is generally but not exclusively quantitative and which can be communicated to a non-specialist audience. This broad epistemic culture sets boundaries around what is considered relevant and interesting, taken for granted or requiring explanation, and thinkable or unthinkable. Despite having this utilitarian culture in common, think tanks differ on the details. Most importantly, some appeal to intellectual *simplicity* and political *consistency* as signs of credibility. Others see this as excessively ideological and claim that their political *inconsistencies* and *pragmatism* are evidence of their integrity. In addition to different types of self-presentation, these appeals to consistency and inconsistency require different ways of relating to academic economics. I consider both in detail below.

Intellectual simplicity and political consistency as credibility

Think tanks that emphasize intellectual *simplicity* and political *consistency* as the markers of credibility employ 'peer review' processes that ensure they are working with simplified, textbook-style economic knowledge. This 'peer review' enables them to claim some academic credibility while promoting simplified versions of economic ideas and making more universalistic claims, which are often types of market fundamentalism. At the same time, many academic economists are happy to publish their more textbook-style work with think tanks because it is unlikely that it would be published in a desirable peer-reviewed academic journal.

Most think tanks in Canada advertise 'rigorous peer review', but the goals of their 'peer review' are fundamentally different from those of academic peer review. In almost all cases, reviewers are tasked with ensuring that think tank policy research conforms to textbook knowledge in contemporary mainstream economics. Generally, assessment is based on a set of basic assumptions about how markets work and about utility maximization and rational action. One academic economist described his role as a reviewer of think tank manuscripts as making sure that the research is simple, but not *too* simple:

> Would other professional economists who read this, umm, not be worried that the analysis has been too oversimplified? Is it an easy set of results to report to a non-economist? Has the baby been thrown out with the bathwater? I mean yeah, these are kind of stark and arresting results, but actually they could be embarrassed by the fact they they're based on simplifications that are too expensive, as it were. (Interview senior economist, No. 39)

Many other interviewees who reviewed manuscripts for think tanks described how they focused on making sure that manuscripts were aligned with textbook economic knowledge, especially when the proposed policy solutions were radical (e.g. Interview with economist, No. 25). This effort to be consistent with textbook knowledge is about ensuring that think tank work can be defended, if necessary. The goal is to isolate think tanks from damaging criticisms by academic economists and to shift debates away from the details of the research and onto policy ideas. In other words, peer review is more about practicing a narrow form of accountability than about rigorously evaluating policy-relevant research.[6]

This tendency to emphasize simplified versions of the most conventional aspects of mainstream economics – and therefore more universalist ideas about markets, utility maximization, and rationality – is reinforced by academic economists who prefer to publish their more theoretically and methodologically innovative work in journals where it will be evaluated and read by their peers, and is more likely to 'count' than in academia. When I asked one academic economist if he would consider contributing to some of Canada's more politicized think tanks, he explained that he would be deterred more by their low academic standing than by political ideologies (Interview with senior economist, No. 50).

While academics may send work from a larger academic research project to a think tank, they do not send writing that would do well in an academic journal because they want the professional credit for those innovations (Interview with senior economist, No. 50). This is ideal for think tanks because they *do not* want work that advances the research frontiers (Cole, 1992) of professional economics. The think tank editors I interviewed expressed frustration with academic economists who were not willing or able to exclude equations, tables of coefficients, or discussions of theory and other relevant literature that are necessary in academic journals. These frustrations came out in my interviews with think tank editors and are exemplified below in an editor's account of an academic economist:

> There is one very good economist I won't name, who I think is a decent guy and assumes that everyone is as intelligent as he is. On a few occasions I've been editing his stuff. And he would do stuff in math, and we would say to him 'you can't do it in math, it's not going to hit the target audience, have an appendix if you want for the economists, but for the other people you can't do it in math'. So he would do it in math, and then he would re-write the whole thing but he would just put the math into words … It just didn't work. But I mean he is a bright guy and he wrote very smart and sensible stuff, so we published him. But we knew it wouldn't work. You know, he had written a couple of textbooks so he would go to the level of a textbook, but the level of a textbook is too advanced for this stuff, typically. (Interview with think tank editor, No. 52)

The overlap between the type of textbook style knowledge that think tanks are looking for and the type of work that academics are inclined to share creates a relationship between think tanks and academic economics that makes it possible for think tanks to claim academic legitimacy while still working with simplified versions of economic ideas. Using 'peer review' practices to help maintain this relationship reduces the chances of an academic critique of think tank research and enables think tanks to frame criticisms as differences of opinion rather than as exposing fundamental flaws. In other words, if 'distance lends enchantment' (Collins, 1992; Collins and Evans, 2007), these think tanks attempt to be close enough to academic economics to be able to claim academic credibility, but distant enough to promote simplified economic ideas about markets – for example, as transcendent scientific and moral truths. This can be seen in how Michael Walker, one of the founders and long-time director of Canada's most well-known right wing think tank the Fraser Institute, attributes their recent 'mainstream' status to a political climate that is increasingly receptive to the 'truth' about free markets. As illustrated by the quote below, Walker is proud of the fact that nobody at the Fraser Institute has changed their position on a policy issue since the 1970s. He seeks legitimacy by aligning the think tank's work with 'science', but he does so by making strong claims that would be highly suspect in a scientific community:

> The truth is that the Fraser Institute's work has not changed – not in an iota. There *isn't anything* about our work after being in existence for almost 40 years … We haven't changed our view on *any* subject, because before we published our view we made sure that it would stand the test of

> time, that our measurements would stand the test of scrutiny of the most critical kind. So we have never had to reverse ourselves on any policy question. We *never* had anyone successfully challenge, on a scientific basis, our research on any subject. Now even though at the end of the day they might decide to disagree with us, you know, it's not because … they might have some different perspective on the issue or whatever, but you know. (Interview with Walker)

Walker's position exemplifies the assumption that economic truths are consistent, stable, and universal, and therefore that the Fraser Institute can bring economic truth to the table with simple and consistent recommendations. For many researchers at the Fraser Institute, this also includes a belief that *everything* can and should be measured and that those measurements unproblematically capture the truth. Discussing measurement in the context of a larger conversation about the Fraser Institute's work on markets and economic freedom, Walker continued:

> People have an inclination to say: 'You can't measure that!' Fortunately I've been a very wide reader of science and other things, and so I've encountered people like Enrico Fermi, the great Italian physicist who remarked that measurement is the making of distinctions, and *fine* measurement is the making of *fine* distinctions. And so when you start from that perspective, rather than starting from the perspective that measurement is about weighing … Measurement is *not* about directly making measurements; measurement is about, as Fermi says, the making of distinctions between things. Once you realize that, you realize that we are *always* making measurements. We are making measurements in almost every, like I just said, almost all of the time [laughs]. If someone says, 'I like that restaurant, I don't like that restaurant', that's a measurement. If someone says, 'I like my food hot, not cold', that's a measurement. The whole of human existence is about making distinctions. It's one of the characteristics of humans, in fact, that we make such distinctions. If we say, 'that woman is beautiful, that [woman] is not, …' that's a measurement … As one of my friends at the University of Chicago used to say, 'if you can't measure it, measure it anyway!' (Interview with Walker)

In sum, think tanks that emphasize intellectual simplicity and political consistency as the key markers of credibility position themselves close enough to academic economics that they can claim academic credibility, but distant enough that they can promote simplified versions of economic ideas that lend themselves to consistent political positions. This relationship to academic economics is maintained by think tank 'peer review' processes and the fact that many academics are most likely to share their more textbook-style work with think tanks.

Inconsistency as credibility

On the other hand, some think tanks see this emphasis on intellectual simplicity and political consistency as ideological, and instead argue that *inconsistency* is the ultimate sign of integrity. More specifically, they frame inconsistencies as an indication of pragmatism and a willingness to confront the messiness of the real world and of empirical research. For example, many interviewees from the Institute for Research on Public Policy (IRPP) proudly described a leaders' debate where the Conservative and Liberal party leaders argued their opposing positions on healthcare policy with research from two different IRPP studies on healthcare in Canada (Interviews with Leonard, Shingler, Cappe). The event has become an organizational myth of which few people know the details but that everyone thinks is important.

In another interview, Glen Hodgson, an executive member of the Conference Board of Canada, described how he had to take one of his researchers aside and consider revising their models in light of the 2008 recession, during which the Conference Board of Canada had been forecasting continued growth:

> What the model doesn't have is behavioral things around the financial sector in great detail. So when credit dried up in the fall of 2008, it began to affect expectations, which began to pull down consumption and investment behavior, the model could *not* pick that up very well. The model does not do a great job of dealing with shocks to the financial system. It has the link between investment and interest rates, and confidence all modelled. But it doesn't deal with the situation where banks don't trust each other anymore. So we were still forecasting growth into Q4, when it was obvious that the bottom was falling out of the world economy. And so we had a little sit-down and sort of, as economists, had to use our brainpower to think through what the consequences would be for the global economy, and for Canada, and make adjustments to the model. (Interview with Hodgson)

The larger context for this quote is a conversation about the value of identifying and stepping away from taken-for-granted assumptions – 'I'm very much a Washington consensus economist, but …' – to resolve problems that are empirically observable. While Hodgson and his team of economists are doing work that is strongly informed by a set of assumptions grounded in economic theory, they relaxed some of those assumptions in an effort to come to terms with major changes in the global and Canadian economies and to account for people's expectations of economic problems.

More broadly, encountering 'messy situations' that complicate 'elegant' and parsimonious models was a dominant theme among academic economists who have started to conduct serious policy research to satisfy a different part of their intellectual self-concept. Many of their descriptions called to mind the classic distinction between 'clean models' and 'dirty hands' in the social sciences (Hirsch et al., 1987). For example, one senior economist who also runs a university-based economic think tank described how going back and forth between the messy empirical research for the policy world, and mathematical formalization for other professional economists, satisfies different aspects of his intellectual self-concept:

> There is nothing like the satisfaction of solving a tightly written mathematical problem and getting a clean crisp answer to it. On the other hand, when you do that, often the problem that you solved – while satisfying and even mathematically beautiful – may be totally irrelevant to the real world. And I find myself after working on that sort of thing for a little while, sort of frustrated that, well you know, there are better things that I could spend my time on. So I go off and do applied work. And then after a while doing applied work, maybe writing a few papers, I become somewhat dissatisfied because it's so messy, there are so many things you have to sort of, deal with, getting data access from [Statistics Canada], new revisions, this, that, and the other thing. (Interview with senior economist, No. 5)

Although some economists differentiate between their policy and academic work, others use their policy experiences to identify theoretical assumptions that are untenable outside of professional economics. One economist with whom I spoke, for example, uses his experiences in the policy world to identify over-simplifications in academic work, effectively using the epistemic cultures of the policy world to identify context-specific problems that are glossed over in economic theory. He explains,

> So then I walk away from [my conversations with think-tank researchers], and I say: 'What was the assumption that drew the most lightning? What was the one that seemed to bug the "real world guy [sic]"?' And when we do these things we are all used to making the same assumptions and some things don't seem very objectionable at all and it's so handy! So I just pick the one that's the most upsetting to them and say: 'OK, that's my idea for my next academic paper'. Let's try to relax that assumption somewhat and see how things turn out. (Interview with senior economist, No. 39)

Of course, there is a difference between the goals of parsimony and mathematical elegance in current economic theory and the emphasis on intellectual simplicity that many think tanks promote. Rather than aligning themselves with think tanks that emphasize simplicity and consistency, many academics who identify themselves as serious policy researchers often get involved with think tanks that prize political inconsistencies and pragmatism. In Canada, some of these think tanks are affiliated with universities, and they publish work that is more academic than what other think tanks publish and more applied than much work in academic economics.

Separating or conflating research and communication strategies

All think tanks are mandated to communicate their work to external audiences of one type or another. Despite lists of the common activities that think tanks are commonly understood to do – write op-eds, eBriefs, hold events, conduct both short- and long-term studies – there is certainly no standard or dominant model for the relationship between producing policy ideas and promoting them. Instead, these relationships represent responses to diverging principles of legitimacy that come from more institutionalized fields, including economics, politics, and journalism. On the one hand, some think tanks continually emphasize the importance of separating their research and communication strategies in order to preserve the 'integrity' of both. One the other hand, some think tanks conflate their research and communication strategies, arguably subordinating the more academic side of their work to competing demands from the media, or from economic or political fields.

Separating research and communication strategies

Researchers at think tanks that claim to separate their research and communication strategies often discuss expert knowledge in conventionally academic ways. For example, many of my interviewees strongly asserted that expert knowledge is cumulative, time-consuming, and labor-intensive to produce and that high-quality research should have a shelf life beyond the news and policy cycles that circulate it among non-academic publics. This culture is dominated by the academic discourse of 'knowledge translation and exchange'. Certainly this is true for university-based think tanks, whose contributors are often faculty members with their own research agendas as well as teaching and service commitments.

The communication strategies that these think tanks adopt rarely stray far from conventional methods of academic communication. They hold conferences on policy issues, publish edited volumes, occasionally do media interviews, and coordinate research for community groups and government ministries. Many of the contributing academics also publish in professional journals. An executive member of a university-based research institute explained tensions between keeping the quality of the research high while still being timely, responsive, and good at the *translation* aspect of the business:[7]

> There are issues there about how to position yourself to be valued and seen as responsive by the public sector organizations that might be funding you. […] You have to be seen as responsive and yet your faculty are in positions, and their responsibilities are aligned with the university mandate. They have research programs, and research itself, I mean, good studies take years sometimes to produce, and so, living with that tension between wanting to be responsive, also doing work that is the kind of stuff that not just any contract organizations could kick out. (Interview with Hurley)

Non-university think tanks sharing this epistemic culture often develop more extensive communication strategies, but many also emphasize how important it is to preserve the independence of research. The IRPP exemplifies this culture well. A former president was particularly clear:

> *Don't* bastardize the research paper. Come up with a *different* instrument to represent it in a way that is going to be comprehensible. And I would be a big fan, I am a *big* fan of keeping the quality of the research high. Most academics are incapable of distilling their high quality research into 800 words. So the test we gave to the two hires we had in communications […], was give them an esoteric, abstract scholarly work and said, 'Write an op-ed'. So they had to get into it, understand it, comprehend it, translate it, and then write it. That's how we picked the person. It's a talent, and frankly it's way beyond me! (Interview with Cappe)

Other think tank researchers and directors emphasize the importance of 'multi-pronged communication strategies' tailored to specific audiences (Interviews with St-Hilaire, Voyer, Myers, and a confidential participant). The idea is to strategically promote the think tank's work to the right people at the right time, which often involves turning down many media opportunities to comment on current issues that are not directly related to research conducted by or for the institute.[8] In interviews, two communication officers at IRPP explained how they constantly promote older but still relevant studies as the news cycle and policy priorities change. This enables them to keep on top of the fast-paced media and political environments while still emphasizing more long-term and intensive research projects (Interviews with Shingler and Johnston).

With this relative separation of research work and communication strategies, think-tank employees reported being most concerned about perceptions of the 'integrity' of the research. As a research director put it, 'the worst nightmare is to open the paper one morning and see an article on something you've published and it says that the methodology was all wrong, or that false conclusions were drawn' (Interview with St-Hilaire).

Conflating research and communication strategies

To maximize their impact on public opinion and policy debates, a number of think tanks conflate communication and research very tightly from beginning to end and use systematic environmental scans to help them tailor their work to where their audiences already are. The Canadian Centre for Policy Alternatives (CCPA) is an example of one think tank that makes a considerable effort to do this. One executive member of the think tank, Trish Hennessy, explained that the CCPA considered the separation of research and communication to be a major problem and that the best way for the institute to coordinate its projects was to tightly integrate the research and communication teams from the start:

> We felt … that communications and research [teams] should collaborate together at the *start* of a project, and consider what our goal was in terms of communicating public policy issues to a broad public audience, and from there the researcher would do the data scraping, the analysis, etc. It might be a reflexive process when they come back after the initial data scrape and say 'OK this is what the data is telling us', and then we have a further discussion about it before the report gets written. And sometimes I'm extremely active in what I would call a heavy edit. Reshaping and *embedding narrative*; that narrative discussion happens from the very beginning and throughout. What's the story we want to tell? (Interview with Hennessy)

To facilitate this process, Hennessy and her colleagues at the CCPA explain how they use in-house studies of changes in the news cycle and in Canadian attitudes to develop strategies of how to address large social, political, and economic problems most effectively. For example, when they were developing their current project on inequality, they conducted focus group studies to better understand how Canadians talked about income inequality. Based in part on that research, they developed a research and communication plan based on revealing and describing the problem to people who didn't realize the extent of the problem in Canada. As Hennessy explains, this is part of a larger strategic goal of affecting public discourse in Canada:

> For us, we put the strategic goal first and foremost, and the tactics support that strategic goal. So the media monitoring, the focus group research, the being closely attuned to Canadian perspectives on emerging social, economic, and political issues, *helps us* do more responsive, relevant research on the issues of the day. Because *that's our goal*, we want to impact the public discourse on the emerging and big issues of our time. For another think tank that strategic goal might be totally different. It may not matter to them. […] Now I would say at the end of the day that any organization that does research without considering public attitudes and what mainstream media is covering or not covering is missing an opportunity, but … (Interview with Hennessy)

Along the same lines, when web analytics showed that many people were searching for older reports (e.g. from 2002) on income inequality, the CCPA focused on how to make that work more easily available. In addition to web searches, Facebook and Twitter were driving a lot of web traffic to their income inequality research project, which led them to develop new ways of telling 'inequality stories' through videos, data visualizations, and infographics.

This conflation of research and communication strategies is not limited to long-term projects. In fact, many projects with tightly integrated research and communication strategies are short-term, with the production and communication of policy ideas sometimes happening simultaneously. Most of the time, this means prioritizing advisory roles and working within elite networks out of the public eye. Other than reports on meetings, 'knowledge' is not what gets written up for other people to consume later; it is what gets produced *and* shared at the same time in conversations. It does not always leave a record, and it is not intended to be built upon by future researchers.

Many think tanks, for example, the CD Howe Institute, regularly schedule events with the intention of 'getting a bunch of experts in the room to hash over' a specific problem and to 'learn what people are interested in and what gets them worked up' (Interview with Robson). While these roundtables and luncheons are standard parts of the communicative repertoire for most think tanks, some see them as *producing* expert knowledge rather than simply communicating it. For example, the whole idea behind Canada's Public Policy Forum (PPF) is to convene discussions with elites from different sectors and to produce new expert knowledge *through those encounters*. An executive member of the PPF explained how these roundtable conversations work and the expectations they have of their elite participants:

> We don't ask them to go out and carry the ideas back to their constituencies and say 'here are the ideas!' […] Our forte is in *convening* – in getting a mix of different perspectives around a table on a critical issue and trying to, hopefully, look at the issue through some new and creative means. (Interview with Ledwell)

Interviews showed that the challenge of 'engineering productive conversations' was at the root of all of the concerns facing the PPF. Common problems include getting people interested in mid- to long-term issues, getting enough of the right people 'around the table', identifying and developing relationships with emerging leaders, setting the 'tone' of debates, and finding a way to continue conversations outside of roundtables. Having an impact by 'continuing the conversation' is fundamentally different than translating an existing research product across institutional boundaries, for all of these reasons and more. An executive member even described their role as similar to 'a midwife birthing ideas'.

It is clear that the PPF sees these conversations as generating new knowledge. In part because of this preference for knowledge production based on short-term expert exchanges, they are reluctant to push that knowledge far beyond the situations in which it is produced. This creates unique difficulties in terms of the broader problem of establishing influence. While other think tanks develop proxies like media mentions, web analytics, downloads, and copyright requests, think tanks that have this conversational approach to integrating their research and communication strategies have to create narratives about how they engineered the context that ultimately planted an idea in someone's head or that they fundamentally changed the relationships structuring the flow of information across institutional boundaries. Beyond these narratives, the only way to judge influence is whether or not people show up to talk.

Sometimes, the conflation of research and communication speaks to the impatience that some think-tank researchers have with the temporal organization of academic life. For them, expertise is something produced through action and 'doing' rather than sustained discussion. This is exemplified by an interviewee employed in a university hospital and with international experience in health policy think tanks:

> Academia is one step forward two steps back, one step forward six steps back. I tend to be more *damn the torpedoes* forward. And that causes friction. At times I am accused of not being 'scholarly' enough. And my answer to that is, 'it depends what "scholarly" is'. If 'scholarly' is sitting around navel gazing in a kumbayah ceremony, OK fine I'm not scholarly. But if 'scholarly' is getting the job done and achieving better outcomes, then I think I *am* scholarly. But it's not always in a way that some of my colleagues, *appreciate* (drawn out). (Interview with MD and disaster preparedness and prevention policy researcher, No. 26)

In sum, there are major differences between think tanks that claim to promote the integrity of both research and communication by separating them and think tanks that proudly conflate research and communication strategies from beginning to end. The distinction holds for a wide range of think-tank activities, from long-term projects to informal policy conversations. Both approaches are responding to the multiple principles of legitimacy structuring the liminal space that think tanks operate in. One approach emphasizes the importance of research integrity and is broadly aligned with academic principles of legitimacy. The other emphasizes the primacy of communication and often subordinates research concerns. In doing so, it is more aligned with principles of legitimacy from journalism and politics.

Degrees of instrumentalism toward the public sphere

The subset of think tanks that are actively engaged in the public sphere display different degrees of instrumentalism in what Jacobs and Townsley (2011) call 'the space of opinion' – which is a particularly influential part of the public sphere where elites 'discuss serious matters of common concern' (p. 13). While some see publicity as a worthy end in itself, others use it to help them accomplish specific goals, such as shaping elite or public opinion.

Publicity as an end in itself

A number of think tanks approach the space of opinion as an important intellectual space with its own status hierarchies (Jacobs and Townsley, 2011; Kowalchuck and McLaughlin, 2009). This is often based on notions of 'public intellectuals' or technocratic experts weighing in on timely social, political, and economic problems.[9] To effectively perform these roles, many of the best-known think tanks do extensive media monitoring and tailor their work closely to emerging opportunities in the media – 'keeping a finger on the pulse of national debates'. Think tanks like the IRPP, the CIGI, and the Conference

Board of Canada, to cite just a few examples, use systematic media analyses to inform regular strategy sessions.

Almost all of the academics I interviewed claimed that publishing with these think tanks is often very exciting. They reported that it allows them to reach wider audiences, to feel important, and to fulfill a public mission. For example, one political scientist submitted an essay to IRPP's magazine *Policy Options* because they are 'famous for their influence and because they offer significant political commentary on ongoing issues of interest in a much more timely fashion than academic journals'. In this case, the turnaround time took some 5–6 months, but the eventual response was enthusiastic, his article was well received, and it attracted considerable media attention, including from *Maclean's* (Interview with senior political scientist, No. 12).

Afterward, this political scientist was contacted regularly by *Policy Options* to write on related matters, but they declined to publish a more controversial paper that he wrote on the prerogative powers and the political power to declare war. *Policy Options* considered the piece too polemical, and Canada's largest-circulation national newspaper *The Globe and Mail* rejected it as well. While continuing to contribute occasionally to IRPP, he shopped his piece around. When *The Globe and Mail* later published a similar op-ed by a constitutional lawyer, he was upset. In a tone conveying disbelief, he said, 'I just about flipped! I was so pissed! I spent years trying to get this message out and then comes along some constitutional lawyer …'. For this political scientist, *The Globe and Mail* and *Policy Options* are part of a wider sphere of public debate in which outlets are more or less desirable to publish in. To write in these venues is understood as both 'a feather in one's cap' and an opportunity to make a public argument (Interview with senior political scientist, No. 12).

There is an almost Habermassian (1989) ethical and political imagery when some think tanks describe the space of opinion – or the public sphere more generally – as a democratic intellectual arena where a diversity of experts and advocates talk through the issues of the day. Many interviewees emphasized that there is a place for all manner of politicized think tanks in democratic societies. Interestingly, interviewees from think tanks with well-known political orientations were much more dismissive of other think tanks, rarely invoking democratic or pluralistic ideals.

Publicity as a means to an end

While some think-tank researchers describe the public sphere as an intellectual attention space that is important in and of itself, others display more instrumentalism, describing it as a means to an end. Specifically, these think tanks want to leverage publicity in order to influence elite or public opinion. For example, a former think tank executive member explains that he cares about writing to general publics only because it increases his institute's standing among elite policymakers:

> I am not interested in the public. I'm interested in the elites, and I make no apologies for that. Now, partly I need the elites to know that the public cares. So an op-ed with an IRPP tagline is very powerful not because my mother reads the newspaper and the public is being affected, it's because the MPs in Ottawa read the newspaper and that adds to the credibility of IRPP. (Interview with Cappe)

In an equally instrumental fashion, the public sphere can also be a resource to change *public opinion* in a specific way. Many of my interviewees discussed ‘changing the terms of the debate’ or ‘shaping public discourse’. A common strategy is to develop a signature event, analysis, or promotional tactic that is high profile and recurring. For example, the CCPA publishes annual reports on income inequality and the incomes of Canada’s wealthiest (Interviews with Hennessy and Yalnizyan), and the Fraser Institute has ‘Tax Freedom Day’ to mark when Canadians ‘stop working for the government and start working for themselves’ (Interviews with Flanagan and a confidential participant). In these and other cases, the public sphere is a venue for launching coordinated intellectual interventions (Eyal and Buchholz, 2010) that address public attitudes on specific issues, for example, tax policy, income inequality, or national childcare programs.

Discussion and conclusion

This article contributes to recent efforts to understand knowledge work in liminal institutional contexts using the case of think tanks in Canada. Much of the substantive literature on think tanks to date has accepted shallow organizational typologies or differentiates think tanks based on their politics.[10] This literature tends to imply that some political and organizational types can be trusted and others cannot. Building on recent field analyses of think tanks (McLevey, 2014; Medvetz, 2012), I find that think-tank knowledge work varies in three important ways. First, think tanks share a broadly utilitarian epistemic culture, but there are important differences between organizations that see intellectual *simplicity* and political *consistency* as a marker of credibility and those that emphasize *inconsistency* and pragmatism. This difference can be seen in how think tanks relate to academic economics. While the former attempt to position themselves closely enough to academia to claim some credibility, they are distant enough to promote simplified versions of economic ideas that lend themselves to consistent, and often extreme, political positions. On the other hand, think tanks that appeal to political inconsistencies often produce work that is understood as much more academic than other think tanks and much more applied than academic economics. This work is often done by academics who see themselves as serious policy researchers and conduct most of their research in academic settings. Second, think tanks combine their research and communication strategies differently in response to diverging principles of legitimacy. Some organizations explicitly argue for the separation of research and communication, arguing that this preserves the integrity of both. Others conflate their research and communication strategies, arguably subordinating some intellectual aspects of their research work to the demands of the political, economic, and media fields. Finally, think tanks differ in the degree of instrumentalism that they display toward the public sphere. Some seek publicity as an end in itself, while others use it as a means of changing elite or public opinion in a specific way. While all think tanks share a broadly utilitarian epistemic culture, they conduct the business of producing and promoting policy ideas very differently. I have argued that these differences are linked to the liminal institutional context in which think tanks operate, which is structured by diverging principles of legitimacy that come from more powerful institutionalized fields.

As think tanks become more established in the Canadian political and intellectual fields, they are expected to perform the range of activities that are commonly assumed to be ‘what think tanks do’. Although the variations in how they produce and promote policy ideas can be mixed and matched in unique ways within and across organizations, they are not free-floating. Think tanks operate in ambiguous and uncertain institutional spaces and face diverging principles of legitimacy. In this context, they can do things that other types of research organizations cannot (Medvetz, 2012), but they also have to find a way to adapt and survive. Perhaps most importantly, they must create coherent identities that allow them to attract funding from sponsors, secure contracts, or win grants. As previously discussed, this is particularly contentious in Canada, where there is a sharp divide between conservative think tanks that are funded by private donors and centrists funded in part by the state (McLevey, 2014). In other words, think tanks have to adapt to circumstances.

Becoming a major player in a cultural field or attention space generally requires a deep level of mastery (Bourdieu, 1990; Collins, 1998; Lizardo and Strand, 2010). Although think tanks do not attempt to dominate the academic, media, business, or political fields, they have to understand those fields well enough to take advantage of conflicting institutional logics rather than fight against them, and they have to respond to diverging principles of legitimacy from more institutionalized fields. With the steady stream of opinion pieces, talk show appearances, working lunches, conferences, studies, appearances before parliamentary and senate committees, and daily eBriefs, we need research on think tanks that brings into focus how policy ideas are produced and promoted in the spaces between powerful fields.

This analysis opens up a number of potentially innovative lines of research. For example, we could map these multi-dimensional social spaces using techniques like multidimensional scaling or correspondence analysis (McLevey, 2014), which would be especially useful for systematic cross-national comparisons of think tanks. While these tools have been very useful in mapping institutionalized fields (Bourdieu, 1990) or clarifying the cultural structure of poorly understood fields (O’Neil, 2008), they have rarely been used to clarify the organization of the liminal spaces where institutionalized fields meet.

Beyond think tanks, the three dimensions discussed in this article could be used to help us better understand how liminal institutional settings shape social research that is increasingly common in commercial firms, including massive technology companies like Google, Facebook, Microsoft, and Yahoo. Closer to academic institutions, they may help us clarify some of the potential effects of increased pressures to communicate social research to broader publics.

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Notes

1. Unlike in the United States, there is relatively little philanthropic support for centrist think tanks, and the few leftist think tanks get far smaller donations than those on the right.
2. More precisely, this is an analysis of how employees talk about the production and promotion of policy ideas in think tanks. While ethnography is, in general, a preferable method for understanding what people actually do, interview methods are more suited to studying knowledge production in think tanks. As Medvetz (2012) did, I supplemented my interview data with observation at public events, analysis of documents and publications, and analysis of funding data.
3. The concept differs from Kuhn's ([1962] 2012) 'paradigms' in important ways. For Kuhn, paradigms shape the theoretical knowledge of specialist communities. They are coherent ways of thinking that are held strongly enough to influence how whole communities observe and understand the world around them. New members of the bounded community are thoroughly socialized into paradigms through many years of demanding training. Epistemic cultures, however, are not as tightly bounded or exclusive. They can coexist with other epistemic cultures, be strongly or weakly held at different levels, and are not necessarily academic. Knorr Cetina (2007) goes so far as to propose that you can analyze macro-epistemic cultures in the context of highly distributed international networks, such as in finance.
4. As Vaughan (1996) documented in her research on the National Aeronautics and Space Administration (NASA), as research moves up the chain, context, contingency, and qualitative insights are stripped out so as to make knowledge more actionable and usable in decision-making.
5. This is aligned with Miles et al.'s (2014) recommendation to build triangulation into the data collection and analysis process at each stage of the project.
6. Thanks to an anonymous reviewer for emphasizing this point.
7. In fact, members of his center have pioneered work in knowledge translation and exchange in Canada (e.g. Lavis et al., 2003).
8. In an interview, a former director of the Institute for Research on Public Policy (IRPP) told me that the only time he broke this policy was during the peak of the long-form census controversy in 2010 (Interview with Cappe), when the Conservative federal government scraped the mandatory long-form census and replaced it with a voluntary survey. A number of other think-tank researchers and executives were also very vocal about what this means for the future of social science and evidence-based policy in Canada. At the same time, there were related controversies about massive funding cuts for climate-change science in Canada, censorship of federal environmental scientists, and downsizing of the scientific and social scientific research capacity of the federal government.
9. See Townsley (2006) for an analysis of the trope of public intellectualism and McLaughlin and Townsley (2011) for an analysis of controversies about public intellectualism in Canada.
10. This is less true of literature on think tanks that is focused on when and how think tanks influence specific policy issues.

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