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The legitimacy of experts in policy: navigating technocratic and political accountability in the case of global poverty governance

Justyna Bandola-Gill

School of Social and Political Science

University of Edinburgh

Contact: Justyna.Bandola-Gill@ed.ac.uk

Abstract:

Background: The canonical view of expert legitimacy in policymaking links it to objectivity and autonomy from politics. Yet, in practice such ‘epistemic gains’ stemming from the separation of facts and values are problematic, as expert advice inherently combines political and technical considerations.

Aims and objectives: This article addresses the puzzle of double – technocratic and political – legitimacy of experts by proposing a framework for understanding expert legitimacy as an interplay of three analytical levels: epistemic, individual actor and institutional. The paper explores this problem in the case study of global poverty measurement as a field located at the interface of science and policy.

Methods: A comparative case study of poverty measurement in the World Bank and UNICEF. Data was collected through semi-structured interviews with 40 experts employed by the two organisations.

Findings: The analysis posits expert legitimacy as constructed via navigation between specific practices of knowledge production such as the production of policy-relevant and methodologically robust knowledge, a strategic distance between the research and the political setting aimed at extending or shortening the distance between experts and policymakers, and institutionalised cultures of evidence of the organisations through which expert advice is given.

Discussion and conclusion: The paper offers a theorisation of expert legitimacy as symbiotic negotiation between technocratic and political modes of accountability which are irrevocably linked whilst remaining strategically separated.

Keywords: expertise, legitimacy, evidence-based policymaking, poverty

The key messages:

- The legitimacy of experts is underpinned by a dual logic of political and technocratic accountability.
- The paper proposes expert legitimacy as an interplay of three levels: epistemic, individual actor and institutional.
- The tension between technocracy and politics is enacted on all three levels through practices of evidence production and exchange as well as institutional evidence culture.

1. INTRODUCTION

Expert advice is central to addressing complex policy challenges. And yet – as shown by interdisciplinary scholarship over the last couple of decades (Fischer, 1990; Jasanoff, 1990; Turner, 2010) – the role of experts in politics is not simply a matter of ‘following the science’ but rather is a result of a complex interplay of scientific knowledge with interests, values and politics. This defining quality of expert advice has become increasingly pronounced in the broader public and academic discourse during the ongoing COVID-19 pandemic. However, little is known about the practices experts engage in to navigate this tightrope of independence and objectivity, whilst pursuing relevance and viability in producing their advice. Therefore, it is pertinent to explore expert legitimacy as an inherently hybrid phenomenon – one that is a matter not only of scientific knowledge but also of political acumen and ability to contextualise research in a particular political setting (Grundman, 2017). This paper explores this key tension within expert legitimacy, with experts seen as legitimate based on seemingly competing grounds of their academically independent technocratic insights and the political usability of their advice (Turner, 2010; Weingart, 1999).

The technocratic mode of expert legitimacy reflects the traditional view of expertise as a rational, value-free and often linear mode of the research-policy relationship (Owens, 2015). This model is grounded on an important ‘epistemic virtue’ (Daston & Galison, 2007) of expert advice as objective and value-free (even if in reality it is often used for political gain – Boswell, 2019). This virtue is achieved through the separation, often more discursive than practical, of facts and values, and hence through the autonomy of the process of production of facts from their implementation (Haas, 2004). In recent decades this mode was most visibly underpinned by two dominant agendas: evidence-based policymaking and quantification (Scheel & Ustek-Spilda, 2019). The evidentiary standards established by these two logics privilege such epistemic values as rationality and methodological and technical robustness (Montuschi, 2009; Petticrew & Roberts, 2003). In particular, moves towards ‘governing by numbers’ (Miller, 2001) opened up the production of metrics (targets, indexes, indicators) as one of the key venues for promoting evidence-based policymaking as a preferred mode of decision-making, besides shaping the idea of ‘evidence’ itself (Best, 2014).

Nevertheless, expert legitimacy in policymaking is equally shaped by political rationality. Policymaking is inherently political and characterised by bounded, rather than absolute, rationality (Cairney, 2016). The use of evidence is a domain of pragmatism – as argued by Sanderson (2009, p. 711): “policy making is not a ‘technical’ exercise in instrumental rationality but rather a domain of ‘practical reason’”. Hence, the legitimacy of experts in policy is not only epistemic but also political – relying on production of knowledge that is highly contextualised and appropriate in specific contexts (Hawkins & Parkhurst, 2015) and might be used to both substantiate and legitimise policy decisions (Boswell, 2009).

Therefore, understanding the ways in which experts negotiate and integrate the competing ‘two fires’ of technocracy and politics is important – and increasingly common – to both the interdisciplinary scholarship of expertise and its practice. And yet, despite clear acknowledgement of the dual legitimacy of policy expertise, the existing literature pays considerably less attention to the ways in which these two modes are mediated in practice, both materially and discursively. This leads to the central question of this paper: how is the legitimacy of experts constructed in policymaking? As such, this research is concerned not with the question of *if* but rather with that of *how* technocratic and political modes shape expert legitimacy, and which constellation of these modes shapes the productive and destructive patterns of science-policy interactions.

The starting point of this inquiry is a recognition of the social and political dimensions of expertise, which are – as highlighted by STS scholarship – culturally and institutionally determined rather than limited to individual attributes (Epstein, 2011; Jasanoff, 2003). Therefore, to understand the construction of expert legitimacy through the lens of dual political and technocratic accountability it is useful, I argue, to conceptualise it as an issue not only of personal credibility but also of knowledge production and the institutional ‘epistemic cultures’ (Knorr-Cetina, 2007) through which expert advice is given. By employing this approach, the paper addresses a central gap in the literature on policy expertise by theorising the construction of expert legitimacy as navigation between political and technocratic legitimacy in the iterative processes occurring on three closely interrelated levels: the epistemic level of knowledge produced by experts, the actor level of strategic navigation of the distance between academic autonomy and involvement in the policy process, and the institutional level of specific cultures of the advice-giving institutions.

Empirically, this paper draws on qualitative interviews with experts working in the area of global poverty in the World Bank and the United Nations International Children's Fund (UNICEF). International Organisations (IOs) offer an ideal case study for an exploration of the interaction between technocracy and politics as underpinning logics of expert legitimacy, as they are themselves at the centre of science-policy interactions (Grek, 2014). IOs emerge as international knowledge institutions (Miller, 2007) which are authoritative not through their power to influence decisions but rather through their ability to structure and validate the epistemic process of knowing global problems. As such, expertise in global governance is both highly technocratic (embodying the dominance of quantified forms of knowledge and bureaucratic rationality) and political – as it is the central way in which IOs exert their influence.

In particular, the recent rise of quantification and global statistical agendas, embodied by the Statistical Development Goals introduced in 2015, has crystallised the position of IOs both as custodians of the technocratic order of ‘governing by numbers’ but also as mediators of the political process of obtaining country ‘buy-in’ and participation in shaping the international responses to global challenges (Fukuda-

Parr, 2014). The comparison between the World Bank and UNICEF offers a particularly productive empirical setting for an exploration of the ways expert legitimacy is constructed on epistemic, individual and institutional levels, as the two organisations differ significantly in their approach to a seemingly singular topic (poverty measurement). The World Bank is a leader in monetary poverty measurement (as reflected in its status as an SDG custodian agency), with its flagship International Poverty Line. UNICEF, on the other hand, has been a pioneer in multidimensional measurement since 2003.

Exploration of the construction of expert legitimacy as navigation of technocratic and political modes of accountability provides insights into the nature of expertise which spans multiple settings. Thus, although a variety of actors might be interested in this analysis, the central audience for this paper consists of scholars and practitioners working in global social policy and international development. IOs, as purveyors of development agendas, are key actors in the science advisory systems (Fang & Stone, 2012) since they produce as well as disseminate evidence between various communities, including academia, country governments and international bureaucracies (Littoz-Monet, 2017). As such, the inquiry discussed in this paper is most relevant to audiences working in IOs, as well as scholars and practitioners focusing on global challenges.

The following section summarises the literature on the sources of epistemic and political accountability of experts and introduces a conceptual framework for understanding expert legitimacy as an outcome of three levels of practice: epistemic, actor and institutional. This section identifies the key gap in the literature: the specific mechanisms for combining technocratic and political considerations in the process of expert advice giving. This is followed by a section on methods employed in the study, in particular the approach to data collection and analysis. The empirical findings are organised across the three levels outlined in the analytical framework and discuss knowledge production practices, navigation of the strategic distance between research and politics, and institutional cultures of objectivity. The paper concludes with a theorisation of expert legitimacy as a malleable navigation of technical and political considerations across the three levels.

2. BACKGROUND: LITERATURE REVIEW AND A CONCEPTUAL FRAMEWORK

2.1. Double legitimacy of experts in policy

The role of experts in decision-making has been a focus of policy studies over the last decades (Haas, 2004; Fischer, 1990), exploring the conditions under which expert advice is sought in policymaking, and also ways in which it can be enacted in various settings. Expert advice – as argued by Lindblom (1959) – is not only a technical exercise but also requires a political judgement. As highlighted by Weingart (1999) the interaction between science and politics leads to both politicisation of science (as it becomes guided by political priorities) and scientisation of politics (as decision-making is expected to be guided by scientific evidence). The boundary between science and politics is in reality

blurry as facts and values are ‘intertwined’ in policymaking, prioritising the process of persuasion rather than purely technical advice-giving (Majone, 1989). Nevertheless, autonomy from the political context – even if purely discursive – is an important source of experts’ epistemic authority (Haas, 2004).

The centrality of political judgement in the work of experts stems from a particular set of criteria of quality assessment. Production of knowledge at the ‘science-policy nexus’ (Hoppe, 2005) requires engagement with the criteria of ‘usability’ (Haas, 2004; Lindblom & Cohen, 1979; Bandola-Gill, 2019) of the produced knowledge rather than of its purely scientific robustness. As such, evidence production is a domain of ‘double legitimacy’ of the epistemic qualities of policy-relevant knowledge as well as of its political and policy effectiveness (Krick, 2018; Maasen & Weingart, 2005).

The value of expertise stems from the symbolic standing of different types of knowledge and the selection of those which are recognised as having more value in society (Arnoldi, 2007). This line of inquiry – positing that expertise is constructed by the social environment, rather than based solely on inherent qualities of experts – is summarised by Sheila Jasanoff:

expertise is not merely something that is in the heads and hands of skilled persons, constituted through their deep familiarity with the problem in question, but rather that it is something acquired, and deployed, within particular historical, political, and cultural contexts. (Jasanoff, 2003, p. 393)

Accordingly, STS scholarship highlights the contingency of expert legitimacy and its underdetermined, historically bounded character (Arnoldi, 2007; Epstein, 1995; Turner, 2010). In other words, expert legitimacy is not a singular, objective characteristic but rather a multifaceted, institutionally and culturally determined concept. Therefore, the exploration of double – technocratic and political - legitimacy of experts in policymaking requires an exploration of the broader setting in which experts operate. This paper in particular builds on Jasanoff’s (2005) insights that the problem of expert legitimacy might be explored by looking at it as a ‘three-body problem’ comprising the body of knowledge, the body of an expert and a body of an institution through which expert advice is being given. By this conceptual distinction, Jasanoff points to the centrality of epistemic and institutional determinants whereby expert legitimacy is assigned and mobilised, including the information underpinning the advice, the personal standing and perceived merit of experts, and the institutional setting of the advisory body.

2.2. Analytical framework

Drawing on these insights, the paper proposes an analytical framework conceptualising expert legitimacy that requires an exploration of three themes: (i) the knowledge production practices of experts, (ii) the individual standing of experts within and across institutions; (iii) institutionalised

notions of expert authority and its venues. As such, the proposed framework (Figure 1), building on Jasanoff's (2005) theorisations of expert legitimacy, argues that expert authority goes beyond the individualised politics of specific actors and their claims to epistemic authority, but rather requires an exploration of the "construction of the machineries of knowledge construction" (Knorr-Cetina, 2007, p. 363). Importantly, even though these three levels are conceptually separate, in practice they are closely intertwined as knowledge, expert practices and institutions are shaping each other.

[Figure 1 here]

Epistemic level. The first element of the framework posits that understanding of expert legitimacy is determined by the epistemic qualities of the knowledge produced by the experts. The central role of experts in policymaking, as often discussed in both academic and public debates, lies in their ability to produce objective evidence. The notion of objectivity in this context entails both the scientific reliability of evidence (Montuschi, 2009) and its political impartiality (Jasanoff, 2011). This status of evidence is achieved through epistemic practices of experts, which Daston and Galison (2007) described as 'mechanistic objectivity'. This type of objectivity is achieved through adherence of researchers to the scientific criteria of methodological robustness (Daston & Galison, 2007). The focus on evidence robustness as one of the tenets of the logic of evidence-based policymaking leads to prioritisation of quantified knowledge, such as RCTs (Pearce & Raman, 2014) or indicators (Davis, Kingsbury, & Merry, 2012). Such quantified tools act as what Hirschman and Berman (2014, p. 782) call policy devices: a "wide variety of sociotechnical tools that help policymakers see and make decisions about the world". Eyal and Levy (2013) proposed that economic indicators have become the central venues for expert advice, replacing the role of the expert as a public intellectual.

On the other hand, the production of knowledge for policy might require what Daston and Galison (2007) call 'trained judgement'. It involves analysis and pattern recognition by experts, not based purely on adherence to scientific methodology but rather depending on intuition and 'unconscious judgement' (Daston & Galison, 2007, p. 44). This view reflects the notions of appropriateness (Hawkins & Parkhurst, 2015) and persuasiveness (Greenhalgh & Russell, 2006) of evidence as the key qualities determining its use, rather than its scientific reliability alone. As such, evidence in policymaking is seen as useful based on two types of criteria of technocratic notion of 'objectivity' achieved through methodological robustness as well as the ideals of relevance in specific contexts.

Individual level. The second group of determinants of expert legitimacy entails an individual level of practices of experts involved in producing knowledge for policymaking. Production of knowledge that is expected to be both objective and policy-relevant is (as discussed above) somewhat paradoxical, raising expectations of both impartiality and engagement in the political process (Jasanoff, 1990; Bandola-Gill & Lyall, 2017). This inherently paradoxical position can be mediated by approaching it in terms of practice, rather than epistemic content of policy knowledge. Hilgartner (2000, p. 146) argues

that advisors engage in “social machinery of credibility” by separating the front stage – a seemingly objective and unified body of advice – from the backstage of knowledge production, which is more disordered and ideologically and epistemically pluralistic. Similarly, Williams (2019) argued that the credibility of experts in policy requires navigation of multiple distances, including disciplinary, epistemic, temporal and economic ones.

Institutional level. The final determinant of expert legitimacy – and arguably one that is the least explored in the existing literature – entails institutional and organisational determinants of the scope and format of expert legitimacy. Karin Knorr-Cetina (2007, p. 371) called for the exploration of not only knowledge production regimes but also of so-called macro-epistemics: “concrete institutional arrangements for exchanging and processing information”. Expertise is a malleable concept which might entail a multiplicity of different forms of knowledge and positions (Fischer, 1990). Furthermore, the formats of expertise might be explored as institutional phenomena, as expertise is a result of the process of socialisation into specific practices, norms and values (Collins & Evans, 2008). Therefore, the institutional setting in which knowledge is produced and disseminated is one of the central factors shaping the format of expert legitimacy. The existing scholarship pointed to such elements as providing an institutional setting for knowledge production and dissemination (Liverani, Hawkins, & Parkhurst, 2013), positioning of experts within organisations (Hirschman & Berman, 2014), and institutional framings of problems (Djelic & Sahlin-Andresson, 2006).

The proposed framework consisting of a three-level idea of expert legitimacy should shed light on the central problem of the paper: that of navigating technical and political modes of expert legitimacy. Even though, as discussed in this section, the presence of the tension between them is widely acknowledged in the literature, the specific ways through which this tension is resolved remain underexplored. Problematising expert legitimacy as an interdependency of three levels on which expert legitimacy in policy is constructed addresses this exact gap, by providing detailed insights into the micro-politics of expert advice as well as the broader mechanisms of construction of the credibility and authority of experts in policy.

3. METHODS

3.1. Empirical setting and case selection

With the emergence of the global challenges – such as global poverty, IOs rose as central actors of international knowledge production (Miller, 2007). There are multiple ways in which IOs execute this remit – from developing global standards and monitoring, publishing global reports and country reports to developing methodologies to measure the global problems (Best, 2014; Davis et al, 2012). As such,

IOs play an important role in policy advisory system (Fang & Stone, 2012) by mobilising ‘soft’ policy instruments (Lascoumes & Le Galès, 2007).

This paper explores the advisory role of IOs by employing a comparative case study methodology exploring two organisations responsible for poverty measurement at the international level – the World Bank and UNICEF (see: methodological Annex A). The experts working in these two organisations carry out their advisory roles through two-fold activities: providing technical support at the country level for implementing poverty measurement and conducting country specific analysis (using organisation’s methodologies) with policy recommendations. The need for such expertise accelerated after the introduction of Sustainable Development Goals in 2015, as countries are required to report on the levels of both monetary and multidimensional poverty and IOs act as ‘custodian agencies’ of this process (UN, 2019).

Selection of the World Bank and UNICEF was based on the rationale of a comparison between ‘extreme’ cases (Bennett & Elman, 2006) – in terms of their methodological approach to poverty measurement, as the two organisations differ significantly in their approaches. The World Bank is a leader in monetary approach which was established in the 1990s with its flagship dollar-a-day International Poverty Line. The line has been revisited a number of times (in 2001, 2008 and 2015), and is currently set at 1.9\$ PPP (World Bank, 2018). In 2016, resulting from a review led by Prof Tony Atkinson (2017), the World Bank reviewed its approach by tracking a broader variety of indicators of poverty and to introducing a multidimensional poverty measure (World Bank, 2018).

UNICEF is a pioneer in multidimensional approach, adopted as early as 2003 in the report co-authored with scholars from the Bristol University and the London School of Economics (Gordon et al, 2003). Its flagship *Global Study on Child Poverty and Disparity* was using the Bristol Approach which employed the dimensions of childhood poverty stemming from the Convention on the Rights of the Child (UN Assembly, 1989), including education, health, nutrition, water, sanitation, shelter, information. The newest approach – MODA (Multidimensional Overlapping Deprivation Analysis) – was developed in 2012, building on the Bristol Approach (UNICEF, 2020). The focus of this measure is on overlapping areas of deprivation, including eight dimensions of deprivation: education, health, nutrition, water, sanitation, shelter, information, protection from violence.

3.2. Data sources

The research draws on 40 qualitative interviews. The interviews are semi-structured and follow a topic guide covering four main themes: approaches to measuring poverty, challenges and facilitators of poverty measurement, collaboration with partners, and the role of measurement in poverty reduction. The interviews were conducted with key experts within the organisations - the interviewees are

permanent employees of both organisations and their positions ranged from analysts to senior analysts/economists and three heads of departments. The interviewees had varied disciplinary backgrounds, including statisticians, economists and policy specialists.

The interviewee selection was based on the initial list identifying central actors within the organisations based on their websites and documents, which was then narrowed down. The process of selection was guided by the following attributes of the interviewees, in order to assure diversity amongst participants: 1.) seniority level; 2.) disciplinary background; 3.) demographic characteristics (nationality, age, gender); 4.) employment status (current and former employees, collaborators). (see: Table 1). The research obtained an Ethical Approval Level 1 at the University of Edinburgh.

[Table 1 here]

The interviews were digitally recorded. The interview transcripts were coded in NVivo. The central analytical approach was one of grounded theory, requiring multiple rounds coding (including descriptive, focused and theoretical coding). The first round of coding entailed the creation of descriptive codes which were then contextualised in the theoretical debates in the following rounds of coding by introducing the key concepts (such as legitimacy, credibility, mechanistic objectivity, etc).

4. FINDINGS

4.1. Epistemic level – the practices of objectivity

The interviewed experts perceived the production and dissemination of poverty metrics as the central venue for their policy influence. When producing poverty measures and analysis, the experts were guided by two types of principles: the scientific principle of producing technically robust indicators in accordance with the current methodologies, and the political principles of producing measures which can be applied in specific contexts (for example in terms of existing statistical infrastructures, political acceptability of numbers, or fitness with the existing policy agendas and national strategies, such as National Development Plans).

This negotiation between methodological robustness and the political usability of poverty measures differed across the two organisations. Experts working in the World Bank discussed the tension between the universality of the global poverty measure (such as the International Poverty Line) and the advisory activities at the country level – practices carried out at times by experts working within the same department. For example:

I think that the global conversation is a very different one from the country level conversation. The country-level conversation, nobody would disagree at the Bank if you were to say that building up poverty measure is a political process as much as a

technical one. And then, and you see if you go into the details on how poverty lines are constructed across the world in which the Bank provided support, there's lots of variability in those. Whether some items are included or not included. How things are, whether prices are deflated across the country or not. (WB1)

When working with specific governments at the country level, experts had to be more flexible and prioritise methodologies which could be implemented in specific contexts over their 'objectivity', expressed in terms of methodological robustness. Therefore, even something so seemingly technical like the production of monetary measures was guided by its applicability rather than purely by methodological criteria (even if this meant inconsistent indicators across the globe).

The majority of interviewees who engaged in multidimensional measurement in UNICEF highlighted the centrality of flexibility and the adaptability of the measure to the context. Multidimensional poverty measurement was perceived as requiring even more explicit negotiation between technical guidance and practical challenges and priorities, since the specific dimensions of poverty and their associated measures could, at least to a degree, be shaped by the decision-makers. For instance:

Not just robust. It's like robustness academically, but also robustness in terms of that wide spectrum of people accepting this to be a valid measure. So, robustness in terms of a spread of acceptability, not just calculated in the best, most effective way. (Government1)

The choice of specific dimensions of poverty required multi-stakeholder deliberation on the goals and formats of the measurements. Therefore, the production of this metric was drawing more strongly (yet not completely) on 'trained judgement' (Daston & Galison, 2007). The interviewees within the organisation considered the context in which the measures are applied, such as the existing forms of poverty measurement employed in countries, the statistical capacity and appropriateness of the strategy, and the political priorities of the government, as well as the acceptability of specific indicators. For example:

This is a very country-specific question, it's just very specific to where are the levers, where's the interest in government, who are the partners? You need to be able to work within that realm to find your way to what is going to be most effective. So I think we just want to find a balance [with strict methodological guidelines]. But it's really encouraging that balance, but within some parameters which fall within: 'yes this is child poverty measurement'. (UNICEF3)

Multidimensional poverty measurement is by its nature contextualised through the choice of dimensions, regional discrepancies, and the focus on an overlap of dimensions. The interviewees acknowledged that the decisions regarding measurement type should take into account contextual information, and therefore were inherently not framed as ‘universal’. Importantly – as evidenced in the quote above – this required not only methodological consideration but also reflection on what was effective in a specific context. This was not always straightforward, as methodological robustness acted as checks on politics. The interviewees discussed a risk of politicisation of measurement when the technocratic considerations were side-lined: in one example the participatory process led to strengthening the government’s position and production of poverty numbers which were very low.

As a result, the perception of the main source of political capital from the evidence-based tools, namely the objectivity of the measurement, was central to determining expert legitimacy. However, the focus on consensus-building and generating local support for measuring poverty (i.e. the political mode of legitimacy) has implications for the conceptualisation of objectivity. In this context, the effectiveness of the measures was seen as based not purely on methodological robustness but also on fitness to the context in which the measure was used. Hence, the production of metrics as venues for evidence-based decision-making required navigation between the objectivity of numbers as representing the ‘view from nowhere’ and as representing the ‘view from everywhere’ (Jasanoff, 2011), while frequently switching between these two modes of legitimation depending on the policy context.

4.2. Individual level - strategic distance

At the individual level, production of evidence that was at the same time effective (in terms of guiding the decision-making) and methodologically robust required cautious navigation of the epistemic and political distance from policymakers (akin to Jasanoff, 1990; Hilgarten, 2000). Sustaining a close relationship with policymakers while protecting one’s image of impartiality was challenging, as the policymakers and experts had varying criteria of evidence assessment (Author, 2019) and timelines (e.g. expecting the change within the election cycle). Consequently, the experts were faced with contradictory expectations of being perceived as close enough to policymakers to be regarded as well-informed insiders, and retaining a position of neutral distance. This unique positioning is discussed in the following quote:

The thing is the political/diplomatic skill. Because you need to engage external counterparts [in governments] to keep them abreast of what you’re doing, to get their advice, to give them a heads up on what the numbers are going to be. To have the political intuition of which number might cause a problem with the government, so that you can alert the country office. The other one is you have to have the technical expertise to be able to handle the calculations of these things. My colleagues [in

UNICEF] are recognised by their peers in academia - outside of UNICEF as leaders. They don't just write this so-called bureaucratic report, they also publish in academic journals with cutting edge analysis and innovations. (UNICEF2)

At the same time, the vast majority of interviewees acknowledged that combining these two types of skills mentioned by the interviewee above was not straightforward; for example:

[Experts at the country level] want to have a good relationship with the government. And if your changes in the poverty matters are going to mean that the World Bank is saying something really nasty about their country, and it pisses the government off, they'll fight against it. And so those guys sometimes have the schizophrenia where they are, they understand why we're doing these methods, but they really don't want to piss off the government. It's one of the most important reasons why research wants to stay independent. We're the ones that ultimately will say: "Well I understand this may be a politically uncomfortable message, but let's look at the methods and why we're doing it". (WB3)

The key strategy aimed at dealing with this challenge of simultaneously close and critical relationships with governments was that of drawing intra-professional boundaries – either by splitting the roles of experts responsible for technical assistance and political advice or by separating the process into technical (production of indicators) and advisory (translation of indicators into advice). An example of this strategy was the separation of the work on poverty measurement within the World Bank between two departments: the Development Research Group and Poverty and Equity Global Practice. As described by one of the interviewees:

I think it's important to have this separation because the person who is involved in trying to address a problem should not necessarily be the same person as trying to measure the problem; otherwise, they would have an incentive to look good in a certain way. This is no, in no way is this a, do I suspect any wrongdoing there, I think by and large the [department] is very useful or very sensible and honest people. But sometimes a bit of separation is useful, also because they are responding to their country governments, and it's very hard for them sometimes to use a different CPI for example because then they might jeopardise the whole dialogue and sometimes, and they would argue that it's better to have some dialogue than none. (WB7)

Experts charged with the technical analysis were using scientific practices as proxy for independence and autonomy. But also – as indicated by the quote above could entail an important barrier when the produced numbers or methodological recommendations were politically sensitive.

Experts responsible for proposing the solution were tasked with diminishing the distance between knowledge production and the local setting by mobilising their own judgement about the context and engaging various stakeholders. Thus, they acted in accordance with the principles of relevance over scientific robustness and were charged with mediation and brokerage between the existing measurement and analysis and the specific country setting, rather than with the production of new knowledge. Experts working in such a collaborative way were drawing on a specific set of skills, including consensus building, networking and sustaining relationships. This type of work was located neither purely in the area of ‘science’ nor in that of ‘politics’, but rather entailed – both epistemically and practically – a unique set of practices. These experts prioritised – in collaboration with government officials, National Statistical Offices and (at times) civil society – the applicability of the analysis stemming from the measurement.

If it [the report] is done really well then you would have liked all the different ministries involved, and that they have drafted these policy recommendations together as a technical working group” (UNICEF5).

Through establishing intra-professional boundaries and separating the technical and political elements of measurement and advice, the IOs aimed to secure both the legitimacy and usability of reports. Consequently, the experts were guided by double meaning of ‘robustness’ embedded within these two stages of advice. The political robustness assumed that the applicability of research stems from its potential for use; accordingly, robust evidence was understood as that which was highly contextualised and acceptable by the widest variety of stakeholders. The technocratic robustness was seen purely in scientific terms and prioritised the technical advancement of evidence over its contextualisation as a way of ensuring that the (scientifically) best possible evidence was available.

4.3. Institutional determinants of expert legitimacy

The final factor shaping the expert legitimacy in the global governance of poverty was the institutionalised epistemologies (or ‘macro-epistemologies’ – Knorr-Cetina, 2007) of the organisations. To a large degree, the practices of objectivity discussed in the preceding sections were in fact shaped by the institutionalised strategies of IOs enabling various formats of expert advice and consequently expert legitimacy. One of the key differences in the organisation-wide approaches to knowledge production and dissemination lay in the levels of centralisation of knowledge structures. This could be illustrated by the following two quotes:

The difference between the World Bank and UNICEF is we’re super decentralised, so whatever we decide here at HQ can be a nice guidance note, and it can be a learning experience and useful for [experts in-country offices], but ultimately they decide how to

do things. If you have a very strong representative who has a different opinion, then that's that. It's not like the World Bank where it's more clear directives. (UNICEF4)

– and

You need a position – how we measure poverty for children, what is the guiding principle and we justify this principle, this is the measure that we propose. Whether it's MODA, MPI [Multidimensional Poverty Index], MPI plus, a modified MODA, a new blend of both, this is our method. The same way the Bank would go about and say when we measure monetary poverty using the international poverty line. So that's the position of the Bank. UNICEF doesn't have a position. UNICEF will say, all depending on the country, we go for MPI or we go for MODA (WB2)

The varying levels of (de)centralisation of knowledge production machinery shaped different enactments of the politics of knowledge practices. Consequently, the important element of the 'cultures of evidence' (Lorenc et al., 2014) of the two organisations was the way they managed the tension between technocratic and political modes of legitimation, for example in terms of institutionalised prescriptions as to how expert advice should be produced and mobilised.

The centralisation of epistemic structures within the World Bank resulted in tensions surrounding 'closing down' the measures – identifying a common framework for measurement and working towards promoting it across the organisation, for example via working groups or innovation within specific projects at the country level. As such, it was oriented towards identifying technocratic approaches, reflecting the current academic consensus which was occasionally revisited as the body of knowledge grew. As depicted by one of the interviewees:

Now, this consensus might be revisited from time to time. So we intermittently form working groups where we take stock of new challenges or might revisit an issue if the balance of opinion has shifted. So there's a continuous debate. But at the end of the day, that debate leads to a consensus and it's the consensus that gets implemented. (WB6)

The organisation's approach to evidence production was widely debated in terms of its methodological robustness, but once agreement was reached and recommendations were endorsed, the accepted guidelines were seen as dominant for carrying out the measurement process. Such an approach reflected an organisation-wide focus on technocratic values as it formalised the approach to separating the technical and political forms of advice discussed in preceding sections (for example separation between universal and local measures, and between experts conducting measurement and those engaged in advisory activities). This approach of prioritising the technocratic mode on an institutional level

risked the lack of transparency regarding the politics of numbers, which could be produced and used in political ways without an acknowledgement of non-technical factors shaping the measurement process.

The more decentralised models of policy knowledge production employed by UNICEF were targeted towards ‘opening-up’ the potential forms of measurement and as such were more transparent about different forms of politics. The interviewees based in UNICEF discussed their organisation as being epistemically open, practising the distributed agency of experts, whereby actors based on different levels (headquarters vs country-level) were able to endorse and implement different forms of measurement, depending on the contextualised information gained from the setting. Hence, the evidence culture within this organisation was more situated, and encouraged the blending of technocratic and political modes of legitimation. Consequently, the poverty numbers were produced through close collaboration with different actors. This approach was more transparent in terms of the politics of poverty measurement but risked politicisation of the process. As recalled by one of the collaborators: “Sometimes UNICEF pushes too hard and it becomes too political” (Academic collaborator 1). Here, the interviewees identified the risk with a lack of process transparency as combining political and technical considerations was ceded on specific experts.

5. DISCUSSION AND CONCLUSIONS

This paper explored one of the central tensions of expertise, namely the notion of its ‘double legitimacy’ (Turner, 2010; Krick, 2018; Weingart, 1999). Experts are seen as legitimate – and needed – in policymaking based on two types of criteria. On the one hand, their legitimacy is grounded on the authority of science and its ‘epistemic virtues’ (Daston, 2007), enacted in its ability to produce objective, robust and value-free knowledge. On the other hand, the effectiveness of experts relies largely on their ability to produce evidence that is ‘usable’, i.e. relevant in the specific political context, addressing (and often substantiating) political demands (Haas, 2004; Boswell, 2009). Despite the wide acknowledgement of the ‘in-betweenness’ of expertise as a practice formed by two socio-political orders of science and politics, the existing literature pays considerably less attention to the ways in which expert legitimacy is actively *constructed* in political contexts.

The study explored this set of theoretical considerations in the case of global poverty. The empirical inquiry of the in-depth interviews with experts from the World Bank and UNICEF allowed for exploration of both individual practices and broader institutional values in which experts operate. The key contribution, summarised in Table 2, is the theorisation of expert legitimacy as symbiotic negotiation between technocratic and political modes of accountability. It is precisely the interaction between the technocracy and politics where expert legitimacy is constructed. There is an important implication of this theorisation - the reliance entirely on either the technocratic or the political mode risks corroding the legitimacy of experts – and as such can act as the de-legitimizing force at the science-

policy interface. The remaining part of this section summarises the findings across the three interrelated analytical levels (epistemic, individual and institutional) in order to foreground and expand on this insight by exploring the productive or destructive arrangements between technocracy and politics.

[Insert Table 2 here]

The symbiotic relationship between technocratic and political modes of legitimation unfolded – often simultaneously – in multiple and complex ways. On the epistemic level, it was enacted in production of scientifically authoritative and politically applicable knowledge – one that is fitting the existing political priorities, values and the existing statistical infrastructures. Such knowledge could not be too technical, as this posed a risk to its political legitimacy as a useful resource to policymakers – here the interviewees pointed to examples of reports which were technically complex but did not lead to any decisions. Correspondingly, relying entirely on the political model, for example by prioritising stakeholders’ views and values over methodological robustness, posed a similar risk. Such evidence was used by the policymakers in the short term (as often it was presenting favourable poverty number) but risked low accountability – and consequently effectiveness for policy change in the long term.

This tension was heightened on the level of individual practices. The legitimacy of experts was based predominantly on their distance to policymakers (Jasanoff, 2011; Hilgartner, 2004). A distance that was actively managed by experts themselves. As reflected by the interviewees, the distance was extended by focusing on (and communicating) traditionally academic work – for example highlighting the statistical and economic methodologies. In this context, the scientific practices were used as a proxy for independence from policymakers (akin to Owens, 2015), but overreliance on this mode risked a positioning as too detached to be politically insightful. Respectively, different forms of participation in knowledge production were shortening the distance by blurring the boundaries between the producers and users of knowledge. As such, focusing on networking and participation in the production of both the quantified knowledge (e.g. by co-designing the indicators) and the recommendations stemming from the analysis legitimised the experts as active participants in the policy process (as opposed to being the critical outsider). Too close of a distance was seen as risky to the credibility and independence of experts.

Finally, at the institutional level, the negotiation between technocracy and politics was formalised and scaled-up. The two organisations differed in terms of their cultures of evidence (Lorenc et al., 2014) – namely the ways in which the institutions shaped the dominant meanings of evidence and locus of standard-setting. In particular, the institutional setting impacted on the way their practices were shaped and deemed legitimate. The centralised knowledge structures of the World Bank were aimed at the strict split between technocratic and political modes of legitimation, as exemplified by their separation of technical experts and experts responsible for working directly with the country

governments. The UNICEF's knowledge structures enabled blending, rather than separation of the logics, as the specific strategies were shaped by experts themselves. In its destructive formats, these different institutional settings posed risks to the transparency of the expert advice. The centralised structures risked an overreliance on specific standards of objectivity – and consequently a 'stealth advocacy' (Pielke, 2007) for specific policy options without transparent discussion of politics. Correspondingly, the decentralised structures risked a lack transparency regarding the political considerations inherent to expert advice, as it was developed on case-by-case basis.

The central insight into the nature of expert legitimacy proposed in this paper – namely its theorisation as a result of co-dependent pressures of technocracy and politics have important implications for research and practice. Most importantly, it confirms Weingart's (1999) observation that interaction between science and policy leads to both scientisation of politics and politicisation of science. However, this paper has illustrated that these processes occur in a complex way: the experts engage in 'epistemic manoeuvring' in order to balance the effectiveness of their advice with its robustness, without a clear domination of either science or politics.

The key implication for policy and practice is the importance of experts as 'reflexive practitioners' (to borrow Schön's (1984) phrase), maintaining the balance between the scientific ideals and the messiness of the policymaking. In order to achieve both legitimate and effective expert advice, both researchers and policymakers need to be aware of not committing exclusively to either scientific ideals or the contemporary (over-)drive for the usability of produced knowledge. In practice, it might mean maintaining epistemic humility regarding the limits of applicability of scientific findings (on the epistemic level), assuring the diversity of participants in the knowledge production process, in terms of different disciplinary backgrounds, networks and forms of expertise (on the individual level) and maintaining transparency over the epistemic and political goals, values and processes within the advisory bodies (on the institutional level).

Research Ethics Statement

The research obtained the Level 1 Ethical Approval at the University of Edinburgh.

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Conflict of interest statement

The Author declares that there is no conflict of interest.

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Annex A: Methodology

Case selection

This research is based on a comparative case study of expert practices in global governance. Per case study methodology (Yin, 2003; Stake 1995) it focuses on specific, self-contained settings in order to achieve a multidimensional and multifaceted exploration. The case study methodology is often cited (Yin, 2003) as appropriate to an exploration of deeply contextualised settings such as expert advice. The study focuses on International Organisations (IOs) as sufficiently “bounded system”, which, according to Stake (1994), is central to a case study design.

The choice of comparison between UNICEF and the World Bank was guided by a consideration of similarities and differences between the organisations. Selection of the cases was based on the rationale of the comparison between ‘extreme’ cases (Bennett & Elman, 2006). These two were chosen instead of alternatives (e.g. United Nations Development Programme or Department for International Development) as they were sufficiently similar – being a part of the UN system and having a clear poverty remit. And yet are sufficiently different to enable insights from comparison, including their core focus on different aspects of poverty (child poverty vs overall poverty), types of poverty measurement (multidimensional poverty measurement vs monetary poverty measurement), data collection (household level vs individual level), structures (centralised vs field models) and the profile of the institution (financial vs humanitarian/aid). As such a comparison between UNICEF and the World Bank allowed for both a richness of comparison and the depth of analysis of various approaches to poverty measurement.

Interviews

Building on qualitative interviews with experts working in the World Bank and UNICEF, the paper focuses on specific practices of knowledge production and dissemination as ways of building medium-level theory (Best, 2014), allowing for exploration of both individual practices and broader institutional phenomena. Practices mediate the level of conscious ideas and values and the level of those that are unconscious and habitual (Swidler, 2011), and as such they open-up empirical inquiry that combines ideational and material considerations.

The main source of data was in-depth semi-structured interviews. An overall of 40 interviewees was recruited for this study (Table 1). The initial list of the potential interviewees was created based on the World Bank’s and UNICEF’s websites as well as authorship of the key documents. This initial list was reviewed to assure that the interviews capture the diversity of views, in particular by identifying participants with various 1.) seniority levels; 2.) disciplinary backgrounds; 3.) demographic

characteristics (nationality, age, gender); 4.) employment status (current and former employees, collaborators).

Table 1. An overview of interviews.

	Number of interviewees
World Bank	15
UNICEF	14
Collaborators	11
Academics/Consultants	(4)
Other UN agencies	(3)
Government officials	(4)
Total	40

The study went through the ethical approval process at the University of Edinburgh. Prior to a conversation, the interviewees signed a consent form discussing the goals of the study, the right to withdraw from it, data management strategy, and anonymity. The study names both organisations which poses a challenge with complete anonymisation of interviewees within organisations, since they could potentially be identified based on their organisational affiliations. Even with very limited quote identifiers (excluding names, gender, positions, projects), there is still a risk that the interviewees would be recognised, considering the limited pool of people employed by both organisations. This risk was made clear in the consent form.

The interviews were semi-structured and followed a topic guide covering four main themes: approaches to measuring poverty, challenges and facilitators of poverty measurement, collaboration with partners, and the role of measurement in poverty reduction. The interviews took around 60 minutes, the shortest one being 45 minutes and the longest one 90 minutes. The interviews were digitally recorded and transcribed verbatim by a transcription company.

Data analysis

The interview transcripts were coded in NVivo 12. The central analytical approach was inspired by grounded theory and followed a process in which abstract concepts are derived from empirical data through an inductive analytical process of constant comparison between different sources of data, emergent categories and concepts (Charmaz, 2006). The coding process followed multiple iterative rounds of coding, including descriptive coding, followed by focused coding and theoretical coding. The first round of coding entailed the creation of descriptive codes which were then contextualised in the theoretical debates in the following rounds of coding by introducing the key concepts (such as legitimacy, credibility, mechanistic objectivity, etc).

This paper is part of the larger project: ‘International Organisations and the Rise of a Global Metrological Field’ (METRO) funded by the ERC (grant number 715125) and as such, the coding structure was much larger than one used for this publication. The elements of the coding structure, including the set of hierarchical codes comprising of overall themes and sub-codes which entails the basis of this paper are reflected in the structure of this paper and included epistemic, individual and institutional determinants of expert legitimacy.

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