## Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Legacy of Groundbreaking Development Work</td>
<td>2</td>
</tr>
<tr>
<td>Reframing Development in a Dynamic Global Era</td>
<td>3</td>
</tr>
<tr>
<td>Our Unique Position and Contribution</td>
<td>5</td>
</tr>
<tr>
<td>Our Vision and Mission</td>
<td>7</td>
</tr>
<tr>
<td>Our Strategic Goals</td>
<td>8</td>
</tr>
<tr>
<td>Engaged Excellence</td>
<td>13</td>
</tr>
<tr>
<td>Meeting Our Strategic Goals: Our Aims and Activity Areas</td>
<td>17</td>
</tr>
<tr>
<td>Engaging, Learning, Transforming</td>
<td>20</td>
</tr>
</tbody>
</table>
Engaged Excellence for Global Development

Institute of Development Studies (IDS)
Strategy 2015–2020

A Legacy of Groundbreaking Development Work
IDS has been at the forefront of setting development agendas and contributing to change since its establishment in 1966. We have built a strong international reputation for our development research, teaching and learning, and impact and communications based on the quality of our work and our commitment to applying academic skills to real-world challenges, linking many actors from grass-roots practitioners to national governments and international agencies. As we move forward to celebrate our 50th anniversary, we can reflect on how together with our partners we have set and shifted some of development’s major paradigms. IDS has helped lead agendas on redistribution with growth, human development and the social face of economic reforms, and gender and development. It catalysed and led the participation revolution in development, and its groundbreaking methods and practices. Innovative programmes on trade and value chains, citizenship, governance, sustainable livelihoods, environmental change and health systems have created new ways of thinking and new action on the ground. In these and many other areas, our work is motivated by passion and sometimes anger at injustice. It mobilises evidence and analysis to challenge orthodoxies, interrogate power relations, and bring the voices and realities of people – often those experiencing the worst forms of vulnerability and marginalisation to the heart of debate and decisions.

Today, these IDS traditions continue in our vibrant work across many issues. We and our partners are shaping agendas, policy and practice around taxation, health and nutrition, gender and sexuality, conflict and violence, resource politics, green transformations, rural futures, and life in cities. We are extending and connecting our longstanding expertise in state governance and citizen participation, exploring the emerging roles of popular politics, business and markets, and digital technologies in development. We are doing this in an Institute that is thriving intellectually and organisationally. In 2015, the University of Sussex with IDS was ranked number one in the world for development studies by the QS World University Rankings. Financially, we have a strong balance sheet with a good level of reserves. Our annual turnover has exceeded £20 million for the last five years. We have close to 250 staff and 200 students working at any one time in our building on the University of Sussex campus. This student and staff body are just a small part of the rich, diverse IDS community across the world, including more than 3,000 alumni, and partners in more than 300 organisations. These partnerships and networks are central to our work and ability to make a real difference.

Nevertheless, a challenging external context means we cannot afford to be complacent. Our world is one of rapid change, contradictions and uncertainties, and major interconnected challenges which look set to intensify into the future. Development in this context cannot rely on old, aid-related paradigms nor on simple solutions. We are entering a new global era in which we must question the very meanings
of ‘development’ – where and for whom it matters, and who should do what to support it. This changing context is also facing us with new forms of competition for funding, talents and influence.

In this environment we face both the need and the opportunity to refresh what we work on, and how we work. Progressive economic, social and political change for people in our emerging global development era needs new kinds of action and relationships, shaped by new kinds of research and engagement. Our strategy for the 2015–20, prepared in close consultation with the Institute’s staff, strategic partners and alumni, takes up this challenge. It lays out the distinctive contribution we believe IDS can make in this changing and challenging world, how it will be achieved and how we will continue to thrive over the next five years and beyond.

**Reframing Development in a Dynamic Global Era**

The last few decades of international development reveal a series of paradoxes and contradictions. Growth has accelerated in many countries, yet this has been accompanied by growing inequalities of many kinds. We have seen ‘rising powers’ such as China, India, Brazil and South Africa achieve extraordinary economic and political advances, yet two-thirds of the world’s poor live within these countries. There has been growing recognition of the environment and imperatives for sustainable development yet the world is facing a climate change crisis and many people lack access to the land, water and clean air they need for resilient lives and livelihoods. Deaths and illness from some of the major diseases – including AIDS, tuberculosis (TB) and malaria – have reduced dramatically, yet many people lack access to basic health services and there are new threats and vulnerabilities from neglected and emerging diseases. There is more education for young people, yet also rising unemployment and frustration with life opportunities. Political participation is given more attention, yet there is growing distrust in political institutions. There are more efforts to promote the status of women and girls, yet anti-feminist backlash and new forms of discrimination are evident as gender inequalities intersect with those linked to class, sexuality, ethnicity and disability. Both nation states and the international community have invested intensively in military security, yet conflict and violence affect many people’s lives. Technological innovations offer once unimagined opportunities, yet are also exposing people to new threats, exclusions and invasions of privacy.

Global interconnectedness is also on the rise. From climate change to epidemics, finance to food and nutrition, and war to terrorism, recent events underscore how hazards arising in one part of the world increasingly extend through mobile ideas, people, microbes, atmospheric particles, money and information in a highly networked world to affect others elsewhere. Novel risks and hazards are generated which affect all people and places, but in very different ways – with some more vulnerable than others. Climate change is undoing livelihoods and economies in parts of the world far distant from those that cause it. The Ebola outbreak of 2014–15 exposed both the world’s vulnerability to global epidemics, and also the extreme effects of crisis in highly unequal political economies. Conflicts in areas from Northern Nigeria and Mali to Iraq and Syria highlight devastation to civilian lives and livelihoods, and the effects of globalised networks of ideology, militarisation and terror. Such processes and systemic risks, connecting global, national and local in new ways, pose enormous challenges for people’s lives and livelihoods. As people, technologies and nature respond, many uncertainties and surprises are in store.
The global political and economic landscape is also shifting fast. The influence of Brazil, Russia, India, China and South Africa (BRICS), Mexico, Indonesia, Nigeria and Turkey (MINT) and other rising powers is fundamentally challenging old North–South divisions. Global action on climate, health, economy, finance and related issues will depend fundamentally on the positions of these national players in global negotiations, while their own experiences in tackling poverty and building resilience at home will be increasingly relevant as they emerge as significant development actors and donors, in relation to other countries in Africa, Asia and beyond. Meanwhile, European countries and the United States – once pre-eminent in global aid and development systems – have experienced financial crisis and recession, and face problems of poverty and inequality themselves. The global knowledge economy is also changing, as technology and increasingly complex information ecosystems have changed flows of ideas. Ideas of North–South technology transfer as the engine of development are challenged by vibrant grass-roots, citizen and business innovation in all corners of the world, including by aspirant young people. The open access and data revolutions, and technologically-savvy policy actors and practitioners, all pose challenges to traditional producers and curators of knowledge.

In this context of contradictions and complex, globally-interconnected challenges, development needs to be reframed from:

• narrowly tackling poverty and vulnerability, to navigating complex challenges in ways that reduce inequalities and build more sustainable, inclusive and secure futures for people and societies;
• a focus just on so-called ‘developing countries’ or the ‘Global South’, to a universal framing of development that recognises these challenges as matters for everyone, everywhere from – London to Lagos, Sussex to South Sudan, and Brighton as well as Beijing;
• incremental change to transformation recognising that the global challenges ahead mean business as usual is not an option, and transformations are needed in some of the key structures, institutions, systems and norms that shape our societies and economies, along with the transformational politics to deliver these;
• one-way knowledge transfer to mutual, multi-level learning that combines attention to global action and governance in areas like climate, health, food, finance and economy, with support to diverse local perspectives and solutions, facilitating multi-way learning including from low-income to higher-income countries, and from the BRICS to others about what works in different contexts.

Important changes in the international policy context align, at least to some extent, with this shifting context and reframing of development. The post-2015 agenda defines a set of universal Sustainable Development Goals (SDGs), which all countries will be expected to implement as a contribution to progressive change both for their own populations, and to meet shared global challenges. Supporting countries in ensuring that these universal goals are meaningful and owned at the country level is a key challenge. Meanwhile, proposed global agreements and reforms around climate, health governance, disaster management and other issues signal an intensified era of global cooperation and governance, as well as contestation. Yet while emerging agendas require collective recognition, responsibility and commitment, connecting global agendas to people’s lived realities, perspectives and priorities is critical. There are no single motorways or roadmaps to progress. Multiple and flexible pathways of change and transformation that adapt and respond to diverse contexts, needs and priorities will be required, supported by new ways of thinking, acting and collaborating.
Engaged Excellence – Our Unique Position and Contribution
IDS has long experience in tackling complex development challenges, contributing the evidence, analysis, theory and facilitated learning that can help communities, practitioners and decision-makers at all levels work together for practical, positive change. Our work also critiques, highlighting where powerful actors, relations and systems are blocking progress, and supporting evidence-based advocacy for alternatives. We do this neither as a university organisation nor a thinktank, but by combining elements of both in a unique mix. We produce academically-rigorous, theoretically-grounded, empirically-rich research and knowledge, often involving extensive engagement with particular countries and localities. This provides deep contextual understanding that we can mobilise when needed, for example, our work responding to the 2008 financial and food crises and the 2014–15 Ebola outbreak. Our location on the University of Sussex campus and our close collaborations with many of its schools and scholars are of great value to us, and important to our intellectual rigour and academic reputation. Our partnership with the University also supports and accredits our teaching and learning programmes, where in PhD studies and a range of high-level Masters’ programmes we aim to build the next generation of development thought, policy and practice leaders. The reach of these pedagogical resources is multiplied through our diverse offerings of professional short courses, summer schools and learning initiatives embedded in our research partnerships. It is this capacity for high-quality, conceptually-innovative research and ideas-leadership, and the interaction between our research and our teaching and learning, that marks us out from the world of thinktanks.

Yet like the best thinktanks, we mobilise evidence and analysis to make a difference, informing and intervening in up-to-the-minute and future-looking policy debates, and offering challenging policy propositions, practical advice and solutions. Here, our reputation for high-quality communications, capacities for knowledge mobilisation, and range of world-class knowledge services – such as the online information service ELDIS, the specialised gender and development research and information service BRIDGE and British Library for Development Studies (BLDS) – come to the fore. We have invested over many years in our own and our partners’ capacities to ensure that research knowledge links effectively with policy and practice, and so delivers real impact – while recognising with humility the diverse forms this can take. Our partnerships and networks, built up through many years and involving close relationships of trust, are amongst our greatest assets. Our ability to work across disciplines and with partners in different countries; to combine a grass-roots people-focus that engages with the perspectives and priorities of the most marginalised with high-level international engagement; to convene networks of mutual learning amongst people and institutions across the world; and to remain flexible and ready to respond are amongst our unique strengths, needed more than ever in a dynamic global context. We are uniquely positioned to be able to define and deliver new standards in this way of working that go beyond the traditional metrics of academic excellence on the one hand or research uptake on the other.

In this strategy for 2015–20, we define this unique blend by an approach of ‘engaged excellence’. We want to develop and deliver this more coherently and consistently over the next few years, so strengthening our distinctive identity and position. Yet we recognise that we must do so amidst growing competitive pressures on our niche. Amidst government incentives, British, European and US universities are increasingly investing in research impact, with their priorities and practices moving...
Thinktanks are multiplying, and are joined by a growing array of large private sector consultancy organisations which are well equipped to deal with the management costs and risks of major development contracts. At the same time, research institutions are thankfully blossoming in many middle- and low-income countries, with impressive growth in capacity, and privileged capabilities and credibility to deliver effective research and impact in their own local and national contexts.

To continue to thrive and make a difference in this more competitive context, we must articulate our unique identity and approach more clearly and coherently than ever, by defining and promoting our engaged excellence approach, ensuring that this is embedded throughout all our work, and that we are known for it. We must ensure that we contribute to the big issues of current and future eras by focusing more of our work around major defining challenges, in ways that can contribute to transformative change over time. We must strengthen our capacity to work globally, strengthening our partnerships and networks, including joining forces where appropriate with those we would otherwise compete with. As a relatively small organisation, we cannot do everything and this strategy helps define our focus and become more selective about what, where and with whom we choose to work. We will avoid consultancy bids and contracts that do not clearly contribute to our focal issues and defining challenges, or where there is not a sufficiently substantial research, knowledge or learning component compared with the required commitment to management. As a general principle we will refuse activities that work against our strategic goals, however lucrative they may seem in financial terms.

During the last year (2014–15) we have made a number of key changes to the Institute’s structure and procedures which begin to respond to these challenges, positioning us for our new strategy. We have restructured our research and knowledge work, moving from five teams to 12 clusters forged around the most exciting, forward-looking ideas and agendas, and involving an innovative ‘home and affiliate’ membership system for staff that encourages cross-cluster communication and interaction. Knowledge professionals, previously in a separate department, are now integrated far more fully with the Institute’s research, with thematic staff joining clusters. The new senior role of Director of Research, is working well to facilitate cross-cluster links around major issues and funding opportunities. We have joined up postgraduate teaching, professional short courses, learning partnerships and e-learning under our new Director of Teaching and Learning. We have restructured our Communications and Impact work, with the creation of a new Director of Communications and Impact role to oversee three units (Communications and Engagement, Open Knowledge and Digital Services, and Knowledge Mobilisation and Impact), each interacting strongly with our research and knowledge work through new matrix management and peer-learning arrangements. We have created three Engagement Hubs which bring together administrative, communications and finance staff to provide high-quality bespoke project management support to our research clusters and centres, and are upgrading our systems and processes to ensure that these operate as efficiently and effectively as possible. We have restructured our decision-making processes, with a new smaller Strategic Leadership Group interacting with a Strategic Leadership Forum and All-Staff Forum and sub-committees, enabling us to achieve a good balance between decisive decision-making and inclusive staff consultation. All these changes have been designed and implemented with intense and inclusive staff engagement. We believe that they prime us well to deliver effectively on the goals in our new strategy, and to work more efficiently, ensuring that we are able to offer best value for money in a competitive market.

Our 2015–20 strategy defines the vital contribution we believe IDS can make to development and development studies. It integrates a refreshed vision and mission for the Institute, with a set of four goals for our work in research and knowledge, teaching and learning, communications and impact, and our professional and operational services, and ten aims that articulate how we will work together to meet our ambitions for the next five years.
Our Vision
In this dynamic context, our vision is of equal and sustainable societies, locally and globally, where everyone can live secure, fulfilling lives free from poverty and injustice.

In keeping with our current and future era, it acknowledges ongoing challenges and change; emphasises global as well as local ideals; and brings equality, sustainability and security centrally to the fore.

Our Mission
We believe passionately that cutting-edge research, knowledge and evidence are crucial in shaping the changes needed for our broader vision to be realised, and to support people, societies and institutions to navigate the challenges ahead. But dynamic global contexts and challenges require new kinds of research and knowledge, developed and shared in new ways.

The distinctive contribution that we believe we can make is embodied in our mission.

Through our commitment to engaged excellence applied across the interlinked areas of research and knowledge, teaching and learning, and communications and impact, we will work locally and globally in mutual learning towards transformations that reduce inequalities, accelerate sustainability and build more inclusive and secure societies.
Our Strategic Goals

The key elements of our mission translate into four strategic goals. Over the next five years, we will:

1. Contribute to transformations that reduce inequalities, accelerate sustainability and build inclusive, secure societies.

2. Embed engaged excellence and its four pillars across all that we do.

3. Work locally and globally within a universal framing of development.

4. Create an institute that is thriving financially and organisationally, and living its values.

Defining Challenges and Transformations to Achieve Our Mission and Goals

Our chosen emphasis on reducing inequalities, accelerating sustainability and building more inclusive and secure societies reflects our conviction that these are the major defining challenges of our era. Our consultations affirm their importance for the coming five years, and beyond; we also believe that these are themes around which IDS and its partners can make important progress. Three framing papers produced to underpin our strategy articulate why this is so, reviewing key debates, gaps and potential contributions.

Each challenge is a vast area, which we make no claim to be able to cover comprehensively. However, we consider that our expertise, experience and capacities, taken forward with an engaged excellence approach, will enable us to make distinctive and vital contributions that will complement the work of others.

Reducing Inequalities

Our focus on reducing inequalities recognises that while the absolute and chronic poverty that besets so many people’s lives remains an outrage and a development priority, rising inequalities present growing and related challenges. Countries experiencing rapid economic growth – such as China and India – have also seen growing inequality. Apparent economic growth successes in some of the lowest-income countries in Africa have been very unevenly distributed, with benefits accruing to elite, privileged people and places, and failing to contribute to broader livelihoods and wellbeing. Gaps between the top 20 per cent and bottom 20 per cent are growing in all countries.

We know that inequality within and between countries deeply affects social mobility, compromising pathways out of poverty. Gaps and steep hierarchies of income and assets negatively affecting health and wellbeing matter to everyone, rich and poor alike. Inequalities can compromise the ability to work collectively and cooperate – a major problem where so many pressing development challenges require collective action at different scales. Inequalities are associated with vulnerability to shocks and stresses, and difficulties in creating and maintaining resilience. They contribute to inequalities in voice and power, which in turn perpetuates economic inequalities, and at the extreme, are associated with civil unrest, violence and conflict.

1Accelerating Sustainability: Why Political Economy Matters
Inequality: Trends, Harms and New Agendas
Whose Security? Building Inclusive and Secure Societies in an Unequal and Insecure World
Economic inequalities intersect with social and political inequalities whether associated with gender or age, identity or ethnicity, place or (dis)ability. Cognitive injustices – that privilege some people’s knowledge over others – intersect with, and often support, material ones. Such ‘intersecting inequalities’ play out in diverse ways, requiring ongoing, finely-textured analysis and evidence.

Yet there is poor understanding of the mechanisms through which different sorts of inequality intersect, and hence where points of leverage in policy, practice, activism or alliances can redress them. We will focus more of our work in this area over the next five years, untangling interactions between economic, political, social and cognitive mechanisms, and seeking routes for transformative change. We will build understanding of the roles of global governance and macroeconomic processes in tackling inequalities. We will build evidence and analysis of, for instance, the interactions between material and civic inequalities; how inequities of income and assets affect citizen voice and channels and styles of claims-making; and conversely, how diverse forms of democracy enhancing political equality can serve to challenge and redress economic inequality. Evidence and analysis of what works, where and why will not yield one-size-fits all solutions, but can inform powerful processes of mutual learning, and sharing of innovation, between countries and settings across the world.

Accelerating Sustainability

Our focus on accelerating sustainability derives from the growing urgency of environmental and climate change challenges. Recent social and economic advances have come at increasing cost to the environment. Dramatic economic growth in some countries has resulted in massive demand for resources, and shifts in patterns of urbanisation, pollution and land use. The growth in consumer demand from an increasingly rich, urban middle class has created huge pressures on the planet.

We now know a good deal about the array of problems, their causes and consequences. Environmental scientists have defined a set of ‘planetary boundaries’, and provided evidence on which of these have been transgressed, suggesting the need for development to steer within a ‘safe space for humanity’ and build resilience, or be undone through greater exposure to shocks, stresses and resource constraints. At the same time, people’s experiences around the world reveal environmental change is already contributing to droughts, floods, depleted resources, unhealthy cities and devastated livelihoods. Business as usual is no longer an option.

Yet there is remarkably little systematic understanding of how to tackle these problems: how to get from dangerous to safe situations, and the political, institutional, social and economic requirements for such journeys. We will focus more of our work on ensuring that development is truly sustainable development, and on creating and maintaining green transformations – recognising that the urgency of the challenge means that such changes must be accelerated. We will produce evidence and analysis of how green transformations occur, and who drives them or holds them back. This will involve attention to the roles of technologies and of markets, of states and of business and citizen action – and ways of combining these – with a strong analysis of power and political economy from local to international scales. In areas like low carbon energy, waste recycling and the development of sustainable cities, we are already seeing novel alliances and hybrids contributing to transformative change. We will explore what works where, how and why, and the potential of innovations in some places to be adapted and scaled up elsewhere.

Building on our long-established work on local knowledge and adaptive capacities, we will explore and support the roles of small farmers, urban dwellers, indigenous people and their social movements and networks, as well as of aspirant, young, educated middle classes and new business-linked coalitions, in charting sustainable alternatives.
We will also untangle the many interactions between inequalities and (un)sustainability. Poverty and inequality may drive people to unsustainable practices. Differences across class, gender, race, wealth and location are often highly correlated with exposure to environmental pollution, land degradation, poor health and nutrition, climate change impacts and more. Economic inequalities can drive competition for status that in turn reinforces unsustainable patterns of consumption, while inequalities may undermine the collective solidarities needed for cooperation to address environmental challenges. While sustainability solutions may be achieved through technical–managerial–market processes, if their distributional implications are not considered they are unlikely to have political momentum and citizen buy-in. Hence, a crucial task is to develop pathways to sustainability and green transformations that are also socially just.

Building More Inclusive and Secure Societies

Our focus on building more inclusive and secure societies acknowledges the appalling dangers and lasting harms to people’s lives and livelihoods from everyday conflict and violence, as well as from risks associated with the environment, health and the economy. Being and feeling unsafe and insecure is devastating to individuals, families, communities and societies. Causes often involve global processes, such as transnational religious ideologies and terrorism, or climate change. In other cases the sources may be local, such as conflicts or disease outbreaks triggered by human–ecology interactions. Nevertheless, a mixture of social, political and economic factors across scales can magnify initial shock effects to cause crises that do extreme and sometimes widespread damage. Untangling the multiple, multi-scale causes of violence and insecurity is important to develop effective responses that not only enable people to cope with immediate effects, but also build safety and resilience for the long term.

Resilience to shocks and heading-off their magnification into crises requires inclusive institutions. Where people feel excluded from or distrust state or outside agencies, it is difficult to build acceptable responses and resistance is likely. Lack of inclusion in this broadest sense underlies and drives many of the processes that create violence and insecurity, as groups whose claims are unheard or marginalised resort to violence. We have seen this in many civil wars, and it is part of the dynamic of current challenges from extremist groups.

Security is a powerful but contested concept. We will engage critically with debates, practices and institutions, identifying how security-related ideas, institutions and practices can contribute to peace, freedom and safety for people, and will also highlight and challenge problematic forms of ‘securitisation’ that uphold repressive regimes and power relations. We will explore ‘security in the vernacular’, emphasising the value not just of ‘seeing like a state’ but also of ‘seeing like a citizen’ or from the margins. Here, concepts of safety may prove more relevant to people and communities as they worry about and strive to achieve healthy, dignified lives and liveable communities and neighbourhoods, now and for the future. We will build on notions of ‘human security’ to consider ‘inclusive security’, encompassing not just people’s material needs but also political inclusion, and the diverse ways that people understand and seek this. In the context of threats of many kinds, we will address how state, donor and citizen-led perspectives and strategies can best be combined in alliances to generate resilience and future-proofing.
We will also untangle the interactions between inclusion and security, and degrees of equality and sustainability. For instance, inequalities are amongst the fundamental drivers of conflict as we see in gender-based forms of violence or ethnic marginalisation. Inequalities contribute to difficulties in building workable political settlements, and therefore to long-term situations of insecurity as we have seen from Gaza to Rwanda, from Syria to Sierra Leone. Inclusive patterns of growth and development, that promote a wider distribution of benefits, are more likely to reduce inequality. Environmental pressures can be a threat to safety and security, not just through the direct effects of climate and environmental shocks but also as conflicts over scarce resources such as food, water and land intensify. Inclusive forms of politics are more likely to produce inequality-reducing, sustainability-enhancing processes and outcomes. Building on our longstanding expertise, experience and partnerships in participation, governance and popular politics, we will produce a new body of evidence and analysis examining the relationships between inclusion and safety, equality and sustainability, and on how this might best be pursued in different local, national and global settings.

Achieving Transformations through Understanding Challenges and their Interlinkages

IDS and its partners are in a particularly good position to recognise and pursue the interlinkages between equality, sustainability, security, and inclusivity. There has been less attention to these interactions in development-related research and action, yet they often make the crucial difference as to whether an intervention achieves its intended outcomes, constitutes progressive change, and for whom. Achieving our vision of equal and sustainable societies, locally and globally, where everyone can live secure, fulfilling lives free from poverty and injustice thus requires a better understanding and appreciation of these interactions. We need to recognise and be prepared to address tensions and trade-offs between these aims, in different contexts and settings. This will enable us to identify and support reinforcing processes and outcomes, and synergies, between equal, just, sustainable, inclusive and secure development.

Thus reducing inequalities, accelerating sustainability and building inclusive, secure societies are the three defining challenges around which we will seek to contribute to transformative change, in ways that appreciate their interlinkages. We will develop and apply our engaged excellence approach and intensify our global partnerships and networks to ensure that our research and knowledge, teaching and learning, and communications and impact work contributes substantially to meeting these challenges.

The emphasis in our mission statement on transformations underscores that achieving our vision will require fundamental changes in social, economic and political arrangements and institutions, including those involved with knowledge. This inevitably involves politics and power, at many levels, from the global to the local, in tackling vested interests that block progress, encouraging progressive forces and alliances, destabilising some dominant pathways and recognising and supporting imaginative alternatives. Long experience shows that transformational change is difficult to steer and does not happen rapidly. It is often the result of small incremental changes by different actors in different places, adding up over time and space to reach key thresholds and tipping points as was the case with some of the biggest transformations in our history, from the ending of the slave trade to the rise of the vote for women. We will work with others to advance concepts and knowledge about transformations and diverse ways to influence them, paying special attention to the role of research and learning in contributing to whether and how these occur.

This will require engagement with an array of actors that extend well beyond governments, formal international agencies and the donors and civil society actors conventionally seen to drive development. IDS already seeks alliances outside the ‘development industry’. But there is now an expanding array of new actors relevant to development, and resource flows conventionally associated with ‘aid’ are
increasingly dwarfed by others. We are seeing a growing number and vibrancy of transnational citizen networks using diverse forms and tactics to push collective agendas on a global stage, while articulating with their own local contexts. The private sector involves an ever-increasing range of actors and forms of collaboration. Change is happening through novel partnerships and hybrids, and sometimes unexpected alliances that challenge conventional divisions between market and state, public and private, formal and informal. So we need to be more ambitious and coherent in identifying opportunities for transformation and change and the roles of different actors in it seeking to identify and multiply, scale up and out alliances for a transformative politics of development.
Engaged Excellence

This is IDS’ distinctive approach to constructing and mobilising knowledge, and to teaching and mutual learning for development. Engaged excellence means that the high quality of our work (excellence) is dependent upon it linking to and involving those who are at the heart of the change we wish to see (engaged).

Four pillars of engaged excellence:

1. **Deliver high-quality research.** Rigorous, relevant and robust research draws on multiple forms of knowledge, links diverse social science disciplines with natural sciences and professions as well as with local knowledge, in order to develop the evidence, insights and understanding that will help address highly complex contemporary challenges.

2. **Co-construct knowledge.** Through the co-construction of research and learning with others whose lives and futures are affected by the issues, we address communities, local researchers, scholars, civil society organisations and policy actors to bring their own experiences and knowledge to bear on shaping research and learning agendas, gathering evidence, or interpreting research findings. We pursue a democratic approach to the construction and sharing of research and knowledge, promoting cognitive justice.

3. **Mobilise evidence for impact.** By generating, communicating and mobilising research in partnerships we seek to produce and share practical knowledge and create scalable solutions to poverty and inequality. Learning partnerships enable us to better understand the environment in which development happens and map out desired changes, key stakeholders and policy processes. Achieving impact means not just producing evidence, but engaging with the politics of knowledge – who it is produced by and for, and whose voice counts.

4. **Build enduring partnerships.** Extending the quality, relevance and impact of our work relies on extensive collaboration with partners and networks around the world. We are committed to the belief that through enduring partnerships with others in our research, mutual learning and communication we can collectively make an impact at local, national and global levels.

While each of these pillars is important in its own right, they also interact with one another. We believe that research excellence is enhanced through excellence in how we engage with others, that impact is enhanced by having high-quality research, and that partnerships strengthen what we do and are strengthened by how we do it. Engaged excellence is also embedded in our teaching and learning activities, preparing today’s leaders and professionals to think critically and act effectively on complex global issues. And while many institutions are known for one or more of these approaches, what is unique to IDS is our ability to link them together across all of our work.

In this strategy period, we will continue to articulate and embed engaged excellence across the work of all of our research and knowledge clusters, our communications and impact units and our teaching and learning activities. It will also be embedded in how we deliver our professional services, and in how we develop and interact with our wide networks of partners and alumni. Each part of IDS will elaborate and adapt the concept of engaged excellence in slightly different ways – not as a rigid framework but as a live, adaptable set of values and commitments that provide coherence while fostering, rather than stifling, creativity and diversity in our work and networks.
Working Locally and Globally Within a Universal Framing of Development

This element of our mission captures both the global character of current and future development challenges, and ways we will need to change in order to meet these, building synergies between the ways development is defined and how we work. This will involve engaging with and helping to shape debates about development as universal, progressive change for all, without losing sight of people’s diverse local priorities and realities. It will also involve being more globally-defined and positioned: for reach, credibility, and critical mass and voice around the challenges that matter globally and locally. We will more actively connect global issues with local ones wherever they may be found, including where appropriate working in UK and European settings, drawing these into comparative work and learning partnerships. The increasingly global distribution of development studies expertise, grounded in national and regional contexts, challenges the position and identity of a ‘northern-based’ organisation. However, our response is that they also offer opportunities for new and strengthened partnerships and consortia, constructed in equal ways.

Our challenge for the next strategy period is to strengthen and build these partnerships and networks strategically. We will strengthen current and build new, equal partnerships and consortia with organisations in Asia, Africa and Latin America. We will strengthen and expand our role as a convenor of networks of mutual learning, knowledge mobilisation, policy and practice, fostering mutual capacity-building processes in which individuals, institutions and countries can learn from each other. All this can be facilitated by a revolution in digital technologies and innovations that has already produced huge innovations in poverty-reducing service delivery and access; channels for voice and demands for justice; ‘real-time’ networked research, monitoring and learning, research opportunities using ‘big data’; and of course in research communications, as digital and social media multiply and amplify channels and voice. IDS and its partners are well positioned to advance this curve and its relevance to development, building
on existing innovation across the Institute and its networks. We will seek digital opportunities to enhance our own and our partners’ engaged excellence while also contributing to vital research and knowledge agendas in emerging digital economies and societies. IDS will help lead the way in questioning some of the assumptions currently being made around digital innovation and development, asking questions about who is included and excluded, whose knowledge counts and does not, who represents whom, and who bears what risks, so we can ensure that advances contribute to, rather than undermine equality, justice and inclusion of the perspectives and priorities of marginalised people.

Remaining Competitive
Being competitive is essential to underpin all our other goals. Financially, this means ensuring that we stay competitive amidst pressure from both the growing number of research organisations and thinktanks, including in lower – and middle-income countries, and the large private sector consulting firms positioned well to win and manage the largest multi-partner bids. It means improving our knowledge of, and horizon-scanning ability, amongst the many new potential funders, including philanthropic foundations. It also means addressing the reality that many foundations, as well as research funders such as the European Union (EU) and governments, are unable or unwilling to pay our full economic costs, either because ‘overheads’ lie outside their charitable objectives or because the expectation is that organisations receiving funding can co-fund from government sources (such as HEFCE in the case of UK universities). Meanwhile, there is growing and understandable pressure from all funders to show increasing value for money.

To maintain competitiveness, we need to enhance and project even better our approach and value proposition. We need to increase our access to more diverse and less restricted forms of funding, in order to co-fund priority research and knowledge work where donors cannot pay full costs. We also need to become more selective in which large bid competitions we choose to enter, and where we lack appropriate capacity to lead, to seek appropriate partnerships. Over time we need to drive down our central costs relative to income by becoming more efficient in our systems and practices.

Our Values and Our People
Our key asset is our people – not just our staff but our many partners, students and alumni networks whose commitment and professionalism enable us to work to make a difference. Over the next strategy period we will seek to grow our research, teaching and influencing capacity, through a modest increase in the number of fellows and early-career research staff, and through expanding our networks of strategic partners and honorary research associates in ways that also increase our global reach.

Investments that we have already made in organisational restructuring, in HR policies and procedures, and in ensuring staff wellbeing are paying dividends, shown in the high scores in our 2015 Staff Wellbeing Survey. However, the intensity of our work and environment creates real pressures and in the 2015–20 strategy period we must continue to ensure that our systems, culture and practices allow our staff, partners and associates to flourish and thrive.

“ Our key asset is our people – not just our staff but our many partners, students and alumni networks whose commitment and professionalism enable us to work to make a difference.”
To help with this, we have articulated a set of values which are core to who we are, what we stand for and how we behave. They also provide a means to align our internal practices with the external changes highlighted in our mission – around reduced inequalities, sustainability, and more inclusive and secure societies:

**Respectful**
- We use effective, appropriate, meaningful, open and respectful communication with everyone and foster relationships built on trust.
- We respect the needs, capacities and wellbeing of people; their diverse backgrounds, origins, ideas and identities.
- We promote equality and justice in everything we do.

**Resourceful**
- We strive for sustainable environments in our external work and in our organisational policies, practices and use of space and resources.
- We are prudent and ensure value for money in achieving our strategic purposes, as well as financial sustainability as an organisation.
- We create long-term sustainable solutions.
- We are adaptable, cooperative and innovative.

**Inclusive**
- We include the perspectives of all, through a participative culture that listens and acts.
- We work with unity and purpose, seeking understanding and joint work that transcends boundaries.
- We value and promote diversity.

**Excellent**
- We continually learn and grow our skills, our professionalism and our passion to achieve outstanding quality.
- We are innovative, curious, entrepreneurial, imaginative and dynamic, and promote discovery and new ideas.
- We are accountable, transparent, consistent, and work with integrity.
Meeting Our Strategic Goals: Our Aims and Activity Areas

To achieve our high-level strategic goals, we have identified ten aims which we will pursue over the next five years. The aims provide a guiding framework for decisions about what we will do and prioritise – as well as what we will not do – and how we will make choices. These aims will be implemented at multiple levels on an ongoing basis. Each embodies a number of key activity areas. Many of the aims involve the work of several areas of the Institute. Activity areas under some aims also support others – for instance, several of those under teaching and learning will also support our financial sustainability aim.

The aims and activity areas listed below will guide the Institute’s annual operational plans. These set out the specific activities we will prioritise each year, who will do what, and how we will organise and resource these. By reviewing progress each year against the aims and adapting activities for the following year as necessary, the operational plan provides a rolling assessment of milestones and overall progress towards our aims over the five-year strategy period.

**AIM 1:** We will focus our work on the defining challenges of reducing inequalities, accelerating sustainability and building more inclusive and secure societies.

- a. Produce new conceptual, critical and reflective knowledge of these challenges and their intersections that influences global debates, policies, practices and discourses, and establishes our reputation as the go-to place for key lines of innovative thinking about them.

- b. Ensure that all our clusters intentionally reflect at least one of these themes.

- c. Ensure that these challenges are also reflected in our operational units, teaching and learning, and organisational policies and practices.

**AIM 2:** We will be ambitious and innovative in pursuing opportunities for transformative change.

- a. Position IDS and partners’ work at the forefront of global debates about transformational change and how it can be brought about.

- b. Actively strengthen existing partnerships and build new strategic alliances with public and private sector actors with the power to influence positive change.

- c. Pursue a transformative research agenda by pioneering theoretical and methodological innovation to reframe key debates and inform policy and practice, developing new methods and tools to open up alternative pathways, exposing blind spots and blockages that inhibit transformation, and linking long-term research and incremental change with rapid mobilisation when crises or other openings for transformational change arise.
AIM 3: We will strengthen our capacity to undertake and produce high-quality, co-constructed research and knowledge.

a. Ensure that research staff turn their work, when appropriate, into high-quality analysis and publications, through support to writing time and skills.

b. Actively seek out and deliver project opportunities that involve radical boundary-crossing and co-construction across disciplines and actors, building learning processes into these and developing tools and methodologies for future innovative work and collaborations.

c. Promote open access approaches to research, publications and communications that facilitate the co-construction of knowledge, including the implementation of an institutional open access policy.

AIM 4: We will embed effective knowledge mobilisation and impact-orientated communications into all our work in order to strengthen the links between research, policy and practice.

a. Integrate our knowledge mobilisation expertise more fully within all IDS-led programmes and Institute-level research and knowledge agendas and further improve the quality of our research uptake approaches and tools.

b. Work with our partners to strengthen their knowledge mobilisation capabilities and their networks in order to forge closer links between research, policy and practice, and help mobilise locally and globally-generated knowledge for impact.

c. Develop and implement an appropriate system for tracking, monitoring, evaluating and learning about the impact of our research and knowledge work on policy and practice, attuned to long-term, indirect and qualitative, as well as more immediate and easily measurable, influences and effects.

AIM 5: We will reflect, articulate and promote a framing of development as universal and as progressive change for all.

a. Create space for reflection and discussion about what it means to frame development as a universal agenda, in external and internal workshops, communications and in our teaching and learning.

b. Build on, conduct and communicate comparative research and knowledge activities that straddle locations across the global North and South.

c. Champion a (non-colonial) mutual learning agenda in the UK, exemplifying and communicating how experiences in other parts of the world are valuable to and can be adapted to a UK context.
AIM 6: We will strengthen and expand our global networks and ways of working with others.

a. Increase our global presence through internationally-based honorary associates, advisors and (where feasible) staff.

b. Strengthen our strategic partnerships, nurturing and deepening relationships, trust and abilities to work together for mutual benefit, where appropriate over the long term.

c. Expand, widen and engage in new partnerships and networks in ways that support our strategic goals and enhance opportunities for influence.

AIM 7: We will strategically expand and enhance our teaching and learning programme.

a. Expand and diversify our Postgraduate teaching programmes.

b. Expand and diversify professional short courses and learning programmes.

c. Enhance the quality of teaching and learning, creating a more inclusive and formative pedagogical environment, supporting good teaching practice across both postgraduate and professional learning programmes.

AIM 8: We will make use of digital technologies to enhance our work.

a. Invest strategically in the use of digital technologies in our communications, research, teaching and operations areas, making decisions guided by ongoing monitoring of needs and opportunities to achieve an efficient and effective allocation of human and financial resources.

b. Break down technological barriers to increase the availability of research evidence and present diverse perspectives on development issues. This will include the development of an online Global Library for Development Studies as a focus for southern and co-constructed content.

c. Taking a user-driven approach, support the digital capabilities of our partners, staff and students through appropriate technical support and training, whilst promoting face-to-face, analogue and low-bandwidth approaches when needed.

AIM 9: We will enhance our financial sustainability.

a. Increase the level of funding from sources other than bilateral aid donors (including DFID) in our overall portfolio, through building new funding relationships with foundations, philanthropic and private sector funders who share our values.

b. Increase the level of unrestricted income, to increase our ability to invest strategically in and co-fund research and knowledge work where funders are unable to pay full economic costs. Key areas are to explore higher education funding routes and to grow our revenues from teaching and learning, by expanding our Masters’ student numbers by 50 per cent and investing in a new generation of professional training and short course activities, run efficiently and to scale.
c. Maintain and ideally enhance our proportion of longer-term (five–ten years) programme funding that can support sustained work and partnerships, while becoming more selective about when to lead and when to partner in large bids, balancing strategic and intellectual benefit against management costs and risks.

d. Improve our financial, management and support systems and procedures to enable maximum efficiencies and effectiveness in our proposal and project management processes, and help over time to drive down our indirect costs relative to income.

**AIM 10:** We will commit to policies and practices which support excellence, wellbeing and the development of our people.

a. Embed and reinforce our organisational values in everything we do and so engage our people to enhance wellbeing, involvement and job satisfaction.

b. Shape our workforce so that its size, diversity, structure, location and composition meets current and future needs.

c. Support and enable excellent performance in a culture of continuous professional development – with a positive culture of high performance aligned with our vision, relevant training and development, mentoring, career growth and enrichment.

d. Recognise and reward our staff to enable effective contributions to changing organisational goals and priorities and appropriate support and reward.

**Engaging, Learning, Transforming**

The goals and aims outlined in this strategy are ambitious and their success is not easily measurable. They will only be achieved in partnership with others, and via as yet unknown pathways, which cannot be charted and predicted through a simple linear model of change, followed by predictable indicators of success.

Despite these challenges, for our own learning, as well as for our accountability to our Board, partners, donors, those affected by our research and to one another – we must continually strive to understand whether and how we are making a difference through our collective efforts.

For our overall strategic goals, we will do this in a number of ways, recognising that their scale and ambition will make any single approach inadequate. We will develop new Institute-wide approaches in each area, and in so doing strive both to innovate and test state-of-the-art monitoring, evaluation and learning approaches to our own work. For the ten aims that will guide us to achieving our strategic goals, annual operational plans will set specific activities each year. We will review progress and adjust specific plans each year, in a rolling process that should keep us on course towards our goals, but enable us to adjust our detailed path to suit changing internal and external contexts.

Through this ongoing process of engaging, learning and transforming ourselves, we will build engaged excellence and contribute to transformations in the external world that are so clearly needed to shape futures that are more equal, sustainable, inclusive and secure for everyone, everywhere.