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Chapter 2

The Evaluation Market and Its Industry in England

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Abstract

This chapter presents an analysis of the evaluation market in England. It examines the context within which evaluation takes place and the structure and dynamics of the evaluation marketplace. It charts the growth and retrenchment of demand for evaluation in England over the past 20 years or so, the diversity of commissioning arragements, and the types of evaluation undertaken. The structure and dynamics of the supply side of the evaluation market in England over the past two decades are also considered. Specifically, these include the barriers to entry into the market, skill and expertise levels, training, professional regulation, and quality of outputs. The development of mergers, consortia, partnerships, and emergence of small-scale evaluation companies are identified as significant trends on the supply side.

The Evaluation Market in England

This chapter presents an analysis of the structure and dynamics of the evaluation market in England. It is based on a structured search of the existing literature on the market for evaluation in England, as well as interviews with 23 key informants who have considerable experience commissioning evaluations on the demand side (n=11) or undertaking them from the supply-side (n=12). These informants work in central or local government; not-for-profit foundations; the private sector; the voluntary, community, and social enterprise (VCSE) sector; academic institutions; and as independent contractors. They have experience and expertise across a number of policy sectors, including crime and justice;

employment; labour market; skills, innovation, and training; education; family and youth services; health services; community or place-based interventions; and environment, transport, and rural policy. A number of informants have experience and expertise in more than one sector.

Statistical data was sought from commissioners of evaluation on the number, types, and monetary value of evaluations commissioned in the English market, but such data was not made available. A similar observation has been made by the UK National Audit Office (NAO) which "found it difficult to obtain reliable, accurate information from departments on overall spending on evaluation, because departments either said they did not have this information, or that it would only be available at disproportionate cost" (NAO, 2013, p.40). The fact that such data are not generally available in the public domain nor, apparently, within the Government, is a key finding of this investigation.

A recent report from the UK Institute for Government (Sasse and Haddon, 2018), while having little to say directly about evaluation, discusses the relationship between government and academia, suggesting ways in which the relationship could be improved with the aim of enhancing the quality of policy making. The study notes that the amount of research commissioned in general by *most* government departments (of which evaluation forms a part) has declined over the last 10 years. The increase in headline research expenditure across UK government as a whole 'masked deep cuts' in research spending in many departments (Sasse and Haddon, 2018, page 45). Again, although not necessarily capturing the pattern of expenditure on evaluation specifically, data from the UK Office for National Statistics (also reported by Sasse and Haddon) gives a flavor of the broad retrenchment in expenditure on reseach and development across UK government departments over the period 2008 to 2015 (Table 1):

Table 1: Government expenditure on Reseach and Development by selected government departments 2008 to 2015, current prices (£millions)

Department	2008	2015	Change in absolute expenditure 2008-2015
Environment Food and Rural Affairs	187	70	-117
International Development	149	314	165
Culture Media and Sport	47	46	-1
Engergy and Climate Change	27	44	17
Transport	60	44	-16
Health (excluding NHS)	57	44	-13
Home Office	44	20	-24
Work and Pensions	19	17	-2
Education	33	14	-19
Communities and Local Government	27	7	-20
Ministry of Justice	12	7	-5

Source: UK Office for National Statistics, UK government expenditure on science, engineering and technology, 2015 (https://www.ons.gov.uk/releases/ukgovernmentexpenditureonscienceengineeringandtechnology2015)

The data in Table 1 relate to all research and development spending of which evaluation comprises but a small fraction. Patterns of expenditure across departments reported in Table 1 are also not a reliable guide to the balance of expenditure on evaluation across departments. Nonetheless, the data paint a picture of general retrenchement in R&D expenditure by a number of central government departments which many of our respondents would recognise.

Given the lack statistical evidence on evaluation expenditure, most of this chapter relies on existing literature and the interviews conducted with the key informants mentioned above.

The Demand Side of Evaluation in England

The customer-contractor relationship. Since the 1970s, the publicly funded evaluation industry in England has been organised around the customer-contractor relationship that was initially proposed by Lord Rothschild's *Framework for Research and Development* (Rothschild, 1971). This framework sought to establish a market relationship between the Government of the UK (the 'customer') and a range of providers (the 'contractors') in the private sector, academia, non-government organisations, and the 'third sector' (voluntary organisations and charities). At this point in time, the UK and England had a highly centralised system of social and public policy making, such that central government represented the main purchaser or commissioner of research and evaluation. The principles and practices of market forces were introduced to the research and evaluation sector in the 1970s. The objective was to promote competition and to replace what was seen by some political actors as an outdated approach to public administration. Existing arrangements were seen as rewarding a narrow range of providers and failed to encourage new entrants and innovation in the research and evaluation industry.

The political context. The development of evidence-based policy was a central feature of the governments of Tony Blair (1997-2007) and Gordon Brown (2007-2010) and had a major impact on the evaluation market in England. The *Modernising Government White Paper* (Cabinet Office, 1999), for instance, called for "better use of evidence and research in policy making" (p.16). Another study by the UK Cabinet Office, however, found that "demand for good analysis is not fully integrated in the culture of central Government (Cabinet Office, 2000, p.12). This provided a challenge and many opportunities for the evaluation market to develop in England and the rest of the UK. This was set against a period of increasing public expenditure that made resources for research and evaluation more plentiful.

Whilst maintaining a notional commitment to evidence-based policy, the conservative-led coalition government under David Cameron (2010-2015) actively sought to reduce the size of the public sector, partly in response to the 2008 financial crisis. This approach took the form of promoting strategies such as ‘the Big Society’, grounded on a political ideology combining free market with social solidarity, and pursuing a strong preference for localism in the development, delivery, and evaluation of policy and public services. This commitment to austerity government and substantial reductions in budgets continued with the majority and minority governments of Prime Ministers David Cameron (2010-2016) and Theresa May (2016-present). Furthermore, retrenchment in public spending forms the backdrop to the considerable uncertainy surrounding the UK’s withdrawal from the European Union following the 2016 referendum.

Current and recent evaluation activity in England is increasingly funded and commissioned by agencies other than central government. The localism agenda developed by the Cameron government devolved some evaluation funding and commissioning to local government, arms-length agencies such as the ‘What Works’ network and the VCSE sector. The private sector also commissions and undertakes evaluation, though much of this is more like results-based monitoring and accountability assessment than impact and process evaluation.

It is against this political background and context that the present chapter examines the dynamics of the evaluation market in England.

Market Dynamics of Demand

Growth and Retrenchment of Evaluation

There was general agreement amongst our respondents that the period 1997 to 2008 saw a significant growth in spending on evaluation, and in the number and types of evaluations commissioned by central government. As has been noted above, however, statistical data to support this view does not appear to have been collected by government departments or agencies.

The period from 1997 to 2010 also saw an expansion of Government analytical services in England (and the rest of the UK), and the inclusion of 'analysis and use of evidence' as a key competency for policy makers. This period also saw the development of *The Magenta Book* (Cabinet Office 2003; HM Treasury, 2011) as a guide to evaluation for policy makers and analysts across the UK government. Impact assessments, which are tools of policy making that involve *ex-ante* estimates of the likely outcomes of government projects, programs, and policies, as well as *ex-post* evaluations of achievements against these estimations, became widespread during the Tony Blair Government (1997-2007) as an integral part of the policy making process. These *ex-ante* and *ex-post* assessments and evaluations were in addition to the extensive portfolio of evaluations that had been carried out by, and for, government departments in England for many years.

This increase in evaluation activity was not without controversy, particularly around the types of evaluation that were being commissioned, and the quality of the evaluations that were undertaken. The 'paradigm wars' that excite much of the supply side of the evaluation market were fought vigorously, especially in the academic sector and some other parts of the evaluation industry. Different understandings of what constitutes evaluation were strongly contested. These differences reflected different philosophical and epistemologial positions on science, positivism, post-positivism, realism, experimentalism, and social constructionism. Whilst the so-called 'paradigm wars' have undoubtedly influenced both evaluation commissioners and providers of evaluation it would be easy to overstate the importance of methodological and epistemological debate on day-to-day evaluation practice. The past two decades in England have seen the growth of both impact and process evaluation, experimental and non-experimental approaches using quantitative and qualitative methods, realist evaluation, as well as results-based monitoring masquerading as evaluation. A ‘mixed economy’, comprising different methodological aporoaches, characterizes the evaluation market in England over the past two decades (a finding that resonates with the broadening array of evaluation services in the U.S. Federal evaluation market, as documented in Chapter 4 this issue).

Under the coalition government of David Cameron (2010-2015), and the subsequent Conservative majority and minority governments, there has been reported retrenchment in evaluation funding, and in the number of civil service personnel commissioning, managing, and undertaking evaluations. This is similar to what happened in the United States during the 1980s and early 1990s (documented in Chapter 4 of this issue) and in Canada during the 1990s (as described in Chapter 3, this issue). The UK National Audit Office Report (2013) on *Evaluation in Government*, noted that Government Departments spent £44 million in 2010-2011 in commissioning evaluation from external sources, and that cuts in spending on evaluation amounted to £3 million. The NAO report also found that:

> since 2010-11 four departments have reduced evaluation resources. Four have cancelled or curtailed 25 evaluations between May and December 2010. Eleven ongoing evaluations were cancelled before completion, reducing spending by more than £3 million. A further 14 evaluations were cancelled (NAO, 2013, p.40).

The NAO also found that “overall, there is a range of barriers to the production and use of evaluation evidence, on both the demand and supply sides,” one of which is “the absence of consistent demand for evaluation from ministers and senior civil servants” (NAO, 2013, p. 42).

Interviews with key stakeholders from the demand and supply side of the evaluation market in England confirmed the view that, at least initially, the demand for evaluation by central and local government declined significantly in the aftermath of the financial crash of 2008 and the subsequent period of government austerity. Demand for evaluation was still forthcoming from central government in England, but tended to be for smaller-scale evaluations rather than for full mixed-methods impact evaluations using counterfactuals with, or without, detailed process evaluations. In part this reflected the scaling back of government ambition in many areas of policy reform, but also the increased 'arm's-length' nature of much service provision that has accompanied the ideological shift towards localism and contracting out of services to the private sector, where there is less of a culture of evaluation.

One area of policy that escaped much of post-2010 austerity government is international development, for which the UK development aid budget had more than doubled over this seven year period (Krutikova & Warwick, 2017). This has resulted in increased demand for evaluation in the international development sector. Some of our respondents felt that the growth in international development work had deprived the domestic market of some of its best and brightest evaluation suppliers. Due to a lack of reliable data, however, it is unclear to what extent the supply side of the evaluation market in England has responded to this growth in demand from the international development sector by switching focus away from domestic evaluation. Alongside the rise in the UK aid budget, philanthropic foundations, particularly those based in North America, have also spent significant funds on evaluation of global social development (see Kinarsky, this issue), as have many bilateral aid agencies and non-governmental organisations. The growth in demand in the international development sector has seen a renewed emphasis on counterfactual impact evaluations, mixed methods evaluations, and evidence syntheses[i].

According to some informants the period of retrenchment in demand for evaluation may be coming to an end, though none of them could point to clear evidence of this. Getting Ministers to approve expenditure on evaluation remains difficult. The term 'evaluation' itself is off-putting in some quarters where studies are often 'rebranded' and terms such as 'what works' have come to the fore. The *Civil Service Reform Plan* (Cabinet Office, 2012), for instance, barely mentions evaluation explicitly, but there is reference to 'real world testing' that includes the work of the Behavioural Insights Team (BIT), a social purpose company that 'spun out' of the UK Government Cabinet Office but remains partly owned by the UK Government, and with a strong commitment to the 'What Works' agenda.

The 'What Works' agenda promotes the use of randomised controlled trials to establish 'what works' effectively and efficiently across the range of government policies, programs, and projects. The work contributed by the BIT to this agenda has, however, tended (though not uniformly) to focus on small incremental changes, often to operational practice rather than evaluation of whole programs or complex, multifaceted interventions. The 'What Works Centres' also work to ensure that "local practitioners and commissioners can access and understand the relevant evidence base" (NAO, 2013, p.27). Thus, a lot of the work of the Centres has been in reviewing and disseminating the existing evidence, rather than undertaking new primary work. The *Civil Service Reform Plan*, however, claims that:

> in its first two years [the Behavioural Insights Team] has identified tens of millions of pounds of savings by testing new insights in the same way that a new drug might be tested – conducting randomised controlled trials to understand the relative impact of the new intervention. (Cabinet Office, 2012, p.17)

A report by HM Treasury titled *Manging Public Money* (HM Treasury, 2015) does mention the role of evaluation, but is mainly concerned with economic appraisal (cost-benefit and cost-effectiveness analysis) and value-for-money assessments. Government demand for evaluation in England now seeks to combine the ‘rigor’ and causal attribution of experimental designs with economic appraisal methods that can establish the cost-effectiveness, cost-benefit, and value-for-money of government policies and expenditures (NAO, 2013). The National Audit Office report on *Evaluation in Government* (NAO, 2013), however, found that only 14 of the 34 evaluations they reviewed in 2013 provided sufficient evidence of policy impact, and only 70 of 305 “government evaluations between 2006 and 2012 have cost-effectiveness data” (NAO, 2013*,* p. 4). Furthermore, four of the 15 government chief analysts they interviewed found these cost-effectiveness evaluation to be “quite poor” (NAO, 2013*,* p. 4).

Commissioning of Evaluation

For many years the demand for government funded evaluations in England included direct commissioning between government departments and contractors in the different sectors (usually procured, managed, and quality assured by the government’s analytical services), whilst others were administered *via* various intermediary entities. These include the national scientific research councils, research foundations, and sector-specific NGOs that have been set up to procure, commission, and quality assure research and evaluation. These intermediary organisations, in effect, operate as ‘brokers’ in the evaluation market. They are an important bridge between policy customers and evaluation contractors in England’s evaluation market.

There has been increased diversity in evaluation commissioning since 2010. The number of commissioners in the marketplace has expanded and what they are requiring is more varied than had been the case when central UK government had dominated the evaluation marketplace on the demand side. Some respondents suggested that this may have led to an increase in the total number of commissions across the public sector, with total spending either holding steady or declining. The varied nature of this demand was felt by some to range from highly technical approaches combining counterfactual impact evaluations (often randomised controlled trials) and sophisticated process studies, to 'alternative' approaches to impact evaluation, such as those espoused by complexity theorists, advocates of scientific realism, qualitative comparative analysis, and process tracing (Stern et al., 2012). It also includes evaluation commissions from local government in England for customer attitude surveys, 'Trip-Advisor' types of studies, expert panels, consultations, and studies that use lower quality designs than those promoted by the UK Government's own Magenta Book. Self-evaluation, which includes customer feedback, reflective practice, and monitoring and adjusting service delivery, has also become more in demand by local government and various civil society organisations, charities, and quasi-autonomous non-governmental organisations, in response to the challenge by funders (such as the Big Lottery)[ii] to evaluate initiatives.

Some in local government have embraced the big data/data science 'revolutions' as a silver bullet solution that can provide evidence to inform policy and practice at reduced cost (Bamberger, 2016). Our key informants suggested that evaluation commissions from local government in England are often poorly specified and under-funded, reflecting increased pressure on local service providers to conduct evaluations without the necessary resources in place or available expertise. By way of contrast, a greater degree of sophistication in the demand for evaluation by some parts of central government was repeatedly mentioned by the key informants interviewed for this chapter.

The government-led evaluation market in England, however, is not a completely open market. In order to ensure high quality products and services from the evaluation industry in England, central government, and some non-government customers of evaluation services, have set up research and evaluation commissioning frameworks (including frameworks instituted by UK Shared Business Services). These frameworks admit suppliers on the basis of pre-qualifying requirements that typically include legal, financial, and technical conditions (similar to the framework contracts identified in the Danish evaluation market by Nielsen, Lemire, & Christie, 2018). Only after a provider has demonstrated that it can meet these requirements are they able to bid for research and evaluation contracts. Each research and evaluation framework is in place for a limited period of time, usually three to five years, during which time new entrants are typically excluded from the framework and, hence, the market. It was felt by some respondents, that this has created something of a oligopoly of supply within some parts of the evaluation market in England.

Some low-cost evaluations may be let to contractors outside a research and evaluation framework, and are usually subject to an open, or invited, competition (this is similar to the Simplified Acquisition Program for contracts under $150,000 in the U.S. Federal evaluation market described in Chapter 4, this issue). Single-bidder contracts for evaluation services are fairly uncommon in England's evaluation market, and in the case of central government normally require Ministerial sign-off having met quite stringent conditions of eligibility.

The Supply Side of Evaluation in England

Context

The context and market dynamics of the demand for evaluation outlined above have had an impact on the supply side in England. As one respondent put it "the supply side follows the money". In addition to in-house government evaluation, the market in England comprises large commercial suppliers, not-for-profit independent research institutes, universities, and smaller boutique and sole trader consultants (similar to the supply side in the U.S. evaluation and the Canadian evaluation markets, as documented by Lahey et al., this issue, and Lemire et al., this issue).

Entry to the evaluation market in England is not restricted by a professional body in terms of required qualifications or standards. Most of the people interviewed for this chapter concurred that the evaluation market in England is open in the sense that there are no formal standards or technical competencies that an entity or individual are required to meet before they can describe themselves as an evaluator.

This does not mean, however, that there are no barriers to entry to the market. As has been noted above, the proliferation of procurement frameworks does inhibit new entrants, particularly in the higher-value segment of the market. At the same time, the lack of a professional body that determines and enforces conditions of entry and exit from the evaluation market was remarked upon by a number of our respondents. This stands in marked contrast with the Canadian market, where the Canadian Evalution Society Credentialed Evaluator (CE) designation program allows for evaluators to be formally certified (Lahey et al., this issue). There seems to be little appetite for a similar credentialised arrangement in England, though it has been considered and discussed by the UK Evaluation Society. The UK Evaluation Society does publish *Guidelines for Good Practice In Evaluation* and an *Evaluation Capabilities Framework for the Conduct of Quality Evaluation*, but it is unclear to what extent these documents are used by evaluators in England, or whether they constitute a set of professional standards to which evaluators are held responsible.

Market Dynamics of Supply

As with the demand-side, there is little data on the number or size of evaluation suppliers in England currently or over time. The UK Evaluation Society does not publish a comprehensive list of its membership, but it does provide a list of ‘institutional members’ This list comprises just 33 organisations (one of which is Australian, and two others are from devolved countries of the UK), and does not include many of the organisations that undertake evaluations for the government and other customers in England. There is also the list of evaluation suppliers on the evaluation research framework overseen by UKSBS (UK Shared Business Services - a company owned by various public sector agencies and the Department for Business Energy and Industrial Strategy). This list comprises a large number of private consulting firms and research agencies of various sizes, a smaller number of independent not-for-profit research organisations, and 14 universities. The Crown Commercial Service (CCS) has a Behavioural Insights Framework that registers suppliers who "will be able to inform policy and service design by using behaviour change" (CCS website, 2018). Currently, there are only six companies registered on the CCS Behavioural Insights Framework. The Market Research Society (MRS) is "the UK professional body for research, insight and analytics [that] promotes high professional standards throughout the sector *via* the MRS Code of Conduct" (MRS website, 2018). The MRS recognises 5,000 individual members and over 500 accredited Company Partners in over 50 countries, some of whom provide evaluation services.

Types of Suppliers

The structure of the evaluation industry in England has changed over the past decade with the mergers and integration of some companies. Other evaluation suppliers do not trade explicitly as evaluation companies but undertake evaluations under organisational units and research areas. Respondents generally indicated that the independent non-for-profit research institutes, often based on university campuses but operating with either full or partial autonomy, were worst affected by the downturn in the market that commenced from around 2008. Commerical companies, particularly those with evaluation practices that were part of much larger global corporations, were much better able to absorb reduced margins, and universities were able to cross-subsidise research and evaluation through teaching revenues and income from other sources.

The greater sophistication of buyers in some areas on the demand side, and the growing requirement for comprehensive evaluation studies, has led to suppliers entering into consortia in order to meet the requirements of commissioners (a trend also observed by Nielsen et al., 2018, in the Danish evaluation market following the financial crisis). Respondents on the supply side of the evaluation market in England noted that as government commissions became more complex and demanding, they were required to seek partners to ensure that all the requirements of a commission would be met. One respondent suggested that the move to form consortia was often motivated by a need to 'take out the competition', particularly where the size of the contract was likely to be large, and the rewards sufficient to justify a sizable number of partners.

A development of smaller boutique or sole trader consultancies over the past 10-12 years was noted by our respondents. These consultancies may be better suited to the types of evaluation being demanded by voluntary, community, and social enterprise organisations outlined above. Also, many experienced economic analysts employed as civil servants were made redundant by austerity measures or took voluntary severance. These skilled and experienced professionals quickly moved to address the need for economic analysis in the VCSE sector, and by doing so filled an important gap in the market. Sole trader consultants and boutique agencies are able to provide a competitively priced product in comparison to the larger corporate management consultancy firms, whose daily rates often proved prohibitive for the cash-strapped VCSE sector. The increased demand for 'accountability' monitoring and evaluation, and value for money appraisal, has brought forth an increase in the supply of such work carried out by independent sole traders, private sector consultancy, and market research firms.

Skills and Expertise

The skills and expertise of the supplier base in England was generally thought to be high by those operating at the more sophisticated end of the demand side—particularly those in central Government. Commissioners in local government and VCSE sectors, however, were less certain about the skills and expertise of the supplier base. They found it difficult to assess the quality of what suppliers offer, pointing again to the importance of technical skills on the demand side. Often VCSE and local governments will turn to the university sector in the belief that universities will provide guarantees of quality, are generally more accountable, and would act in a way consistent with a public service ethos.

Some respondents noted that the skills-base of evaluation in England reflected the status of evaluation in UK universities. One issue is the lack of training in evaluation in UK universities. Only a few universities offer courses in evaluation design and implementation, and many courses in research methods do not include evaluation. One major evaluation organisation in England has set up its own in-house evaluation training programme in response to the lack of quantitative and experimental evaluation skills in the evaluation supply chain and the limited training and professional development provision elsewhere in England.

Another issue is the Research Excellence Framework (REF), which is the UK's system for assessing the excellence of research in higher education institutions. The REF "is a process of expert review carried out by expert panels for each of the 34 subject-based units of assessment (UOAs), under the guidance of four main panels" (Research Excellence Framework website, 2017). Respondents noted that subject-based units of assessment discouraged, or did not easily accommodate, the cross-discplinary and multi-disciplinary nature of evaluation. This led to a domain focus for much evaluation work conducted by universities and tended to mitigate, according to some respondents, against the emergence of a distinctive discipline of evaluation within higher education.

Quality Control

The recent expansion of the evaluation supply base in England has raised issues about the quality of the supply chain as new entrants, often operating at the lower-value end of the market, were viewed as not sufficiently skilled or experienced relative to more established incumbants. One respondent noted that quality looked different at the end of the contract relative to the beginning. Commissioners focused on driving down costs during procurement when quality issues were less apparent, only to come to a more nuanced view of the quality adjusted price by the end of the contract.

Higher-end, or more expensive providers, were said to be more reliable, more likely to deliver results on time and maintain quality standards in the face of cost pressures. Cheaper providers often compromised on these aspects of the work, and these compromises became more apparent as the work proceeded. One respondent told of a strategy whereby a supplier might agree to meet a commissioner's requirements to a specified budget, even where they believed it impossible to deliver what was being required without an unacceptable decline in quality. Once the contract had been signed the supplier believed they were in a stronger position to negotiate more favourable terms through pressing contract variations and petitioning for increased costs, eventually recouping their paper losses at the point the initial contract was signed.

The Impact of Brexit

There appears to be some concern amongst suppliers about the impact that Brexit might have on the evaluation market. The concern is that the UK's exit from the EU would hinder access to the wider European markets, particularly evaluation work for the European

Union and its agencies. This was seen as particularly problematic for organisations operating from the UK only and without a presence in mainland Europe. Respondents generally felt that UK research firms and universities had been relatively successful at winning work from the European Commission. Suppliers were also concerned over the possibility of skills shortages post-Brexit, due to their reliance on migrant labour, particularly highly skilled graduates from European Union countries, often educated in the UK higher education sector.

Conclusions

The evaluation industry in England has operated within a customer-contractor market since the early 1970s. The demand for, and supply of, evaluation in England grew significantly during the governments of Tony Blair and Gordon Brown from 1997 to 2010, consistent with the rhetoric around 'evidence-based' or 'evidence informed' policy. There is a general belief, and some evidence, that the austerity measures brought in by the Coalition (2010-2015) and subsequent governments, led to contracts of a lower average value, but not necessarily fewer opportunities. Indeed, the general consensus among our respondents was that the post-2010 evaluation market in England has seen an increased diversity in evaluation commissioning in which the number of commissioners has expanded and the types of evaluation demanded has diversified, with low value/low quality and higher quality/higher value sectors emerging. The demand for many evaluation services have been devolved to local government and to the voluntary, community, and social enterprise sector, whilst central government has supported randomised controlled trials to establish 'what works' effectively and efficiently across the range of government policies, programs, and projects. These trials are often initiated and overseen by arm's length bodies, such as the What Works Centres and the Behavioural Insights Team. The externalisation and devolution of evaluation in England has also seen a shift to more locally based, small-scale evaluations including customer attitude surveys, process studies, expert panels, consultations, self-evaluation, accountability monitoring, and value-for-money appraisals. This may have led to 'more for less' in terms of a greater volume of smaller-scale evaluation activity for less money.

The evaluation industry in England is seen by most of the respondents to be highly competitive, and entry to the evaluation market is not restricted by a professional body in terms of required qualifications or standards. The use of commissioning frameworks that require pre-qualification for a supplier to be considered for evaluation contracts has introduced some constraints on entry to the market, but this has been accompanied by mergers of some companies, a greater use of consortia and partnerships, and the growth of smaller boutique consultancies and sole trader consultants working outside of these frameworks.

The evaluation market in England uses a wide range of evaluation designs and methods. While the so-called 'paradigm wars' have undoubtedly influenced both evaluation commissioners and providers in England, it would be easy to overstate the importance of methodological and epistemological debate on day-to-day evaluation practice. The combination of localism, performance management of public services, and the downward pressure on public budgets seems to be of greater influence on the demand and supply side of the evaluation market in England than methodological -isms and -ologies.

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[i] Witness the evaluation portfolios of the International Initiative for Impact Evaluation (3ie-http://www.3ieimpact.org/), the Abdul Latif Jameel Poverty Action Lab (J-PAL-https://www.povertyactionlab.org/about-j-pal), Innovation on Poverty Action (IPA-https://www.poverty-action.org/) and the World Bank Impact Evaluation Group (IEG-http://www.worldbank.org/en/research/dime/research).

[ii] Big Lottery is a non-departmental public body responsible for distributing funds raised by the National Lottery to local organizations in the UK.