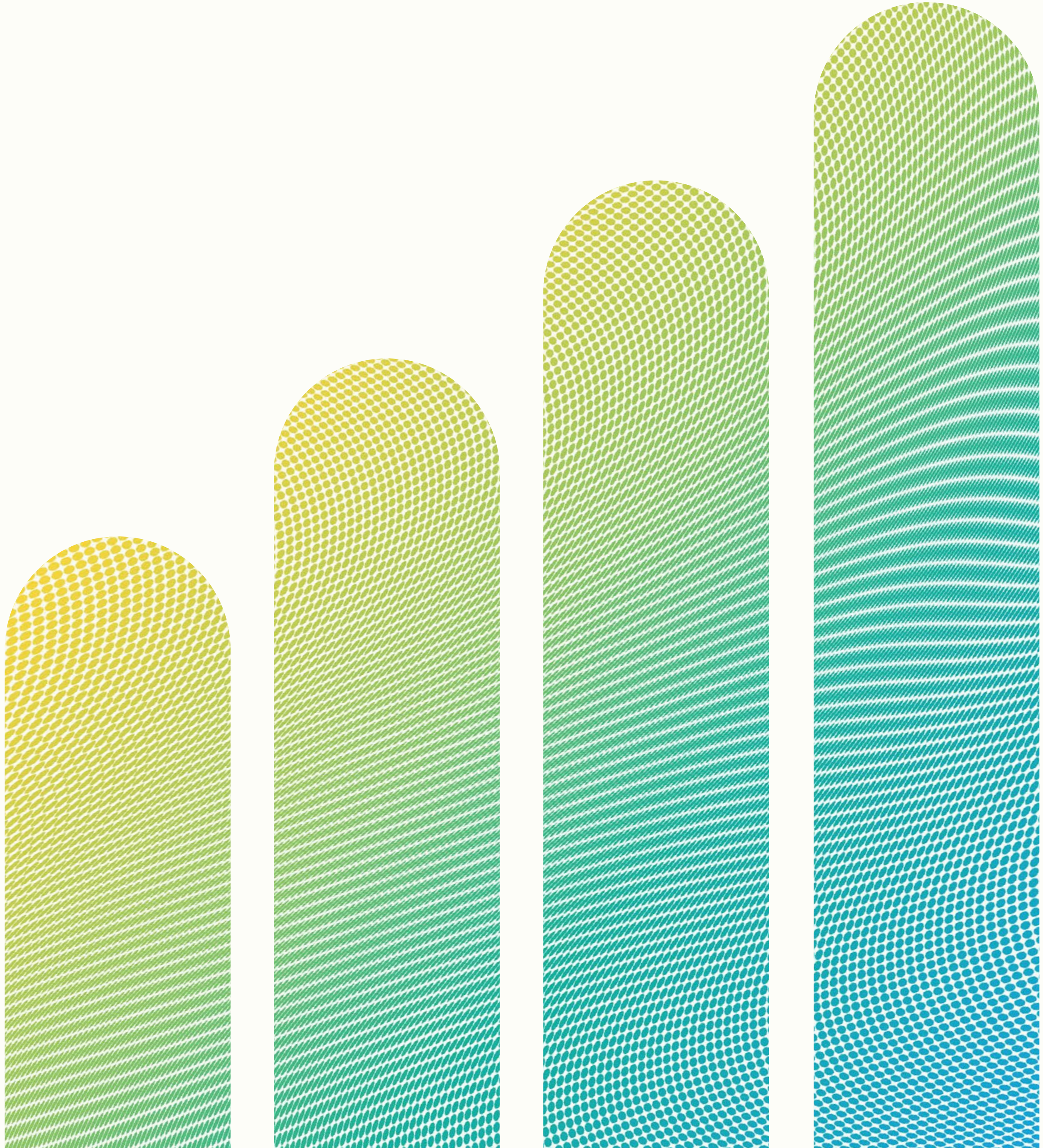
Open Think Tank
DIRECTORY

Think tank state of the sector 2022



Stephanie Nicolle
Andrea Baertl
Dustin Gilbreath

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Think tank state of the sector 2022

This report provides an annual snapshot of the state of the think tank sector across the globe. Drawing on data from the Open Think Tank Directory and a think tank survey conducted by On Think Tanks, this year's report offers insights to questions such as: How do think tanks view their political and funding contexts? What big challenges are they facing? What are the most pressing policy issues they identify? What's the average think tank size, age and turnover? And how do all these answers vary across regions? Explore the report to find out.

Acknowledgements

We are very grateful to those that make the Open Think Tank Directory and this report possible; to users of the directory for making our work relevant; to our extended network of associates, friends, colleagues and funders for lending a hand in the scoping exercises and for helping us make sense of the data; to data collectors; and to think tanks themselves for engaging with us and responding to our consultations.

Funding

The development and maintenance of the Open Think Tank Directory has been, and remains, possible thanks to many funders. The Open Society Foundations gave us the initial grant that made the directory possible in 2016; the Regional Programme Energy Security and Climate Change Latin America from Konrad-Adenauer-Stiftung e.V. funded a scoping of organisations in Latin America with a specific focus on environment and climate change in 2017; UNICEF funded a scoping of organisations working in their priority regions and issues in 2019-2020; Robert Bosch Stiftung funded a scoping of organisations worldwide focusing on topics related to migration, peace and security, inequality and environment in 2019-2020; USAID supported the scoping of data on think tanks in the USA and Panama in 2021; and most importantly, long-term funding from the Hewlett Foundation makes the management, improvement, update and analysis of the Open Think Tank Directory possible.

The Open Think Tank Directory

Is your organisation in the directory?

Register here

On Think Tanks set up the Open Think Tank Directory in 2016 to respond to the lack of publicly available information on think tanks and other policy research centres worldwide. Today, it features public information[1] on more than 3,600 organisations from around the world.

The directory supports sector transparency. It enables think tanks and those in the evidence-informed policy world to find and connect with one another. Think tanks can identify potential partners and funders can identify potential grantees. It is also a useful resource for those who study think tanks. The database is public and is downloadable here.

Defining which organisations are to be included in the Open Think Tank Directory is a difficult task, as thinks tanks themselves are difficult to define. For the Open Think Tank Directory, we have defined think tanks as a diverse group of knowledge and engagement organisations with the (main) objective of undertaking research, generating knowledge and/or using evidence-informed arguments to inform and/or influencing policy and its outcomes.

The directory has been compiled and is updated using a mixed approach: web searches on Google to find existing think tank lists and organisations; suggestions by country and regional experts; and direct submissions by think tanks. All organisations are reviewed to verify they fit the inclusion criteria and are either accepted, accepted but deemed 'boundary',[2] or not accepted. Information is retrieved from think tanks' websites and, in some cases, submitted by organisations themselves.

It is important to note that the nature of the database and the information it holds make it a *live* tool. The directory does not claim to have a complete list of ALL think tanks worldwide. But it does feature a good sample, one which is continuously updated: with new think tanks coming in, defunct ones being taken out, and data being added. Hence, while the data is not perfect, its analysis offers an interesting overview of the trends and patterns in the sector.

1. The list of variables can be accessed here.
2. Read the FAQs for the definition of a boundary organisation.

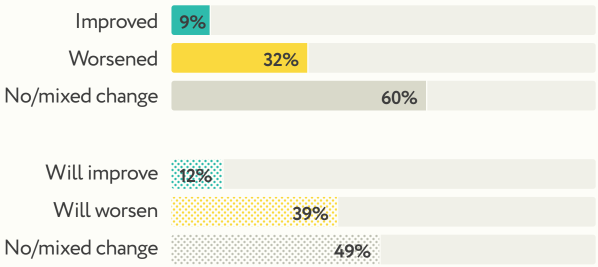
Contents

Think tank state of the sector 2022

An annual snapshot of the think tank sector globally, drawing on data from the On Think Tanks sector survey and the Open Think Tank Directory.

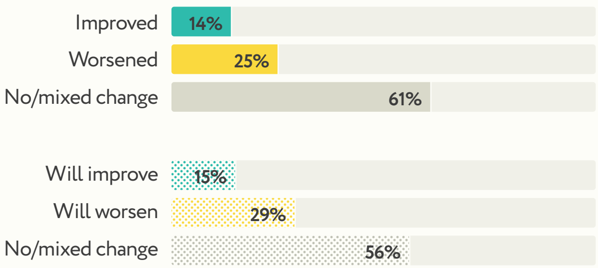
POLITICAL CONTEXT

More think tanks globally perceive a worsening in their political context than an improvement – and more expect it to worsen in the year to come.



FUNDING CONTEXT

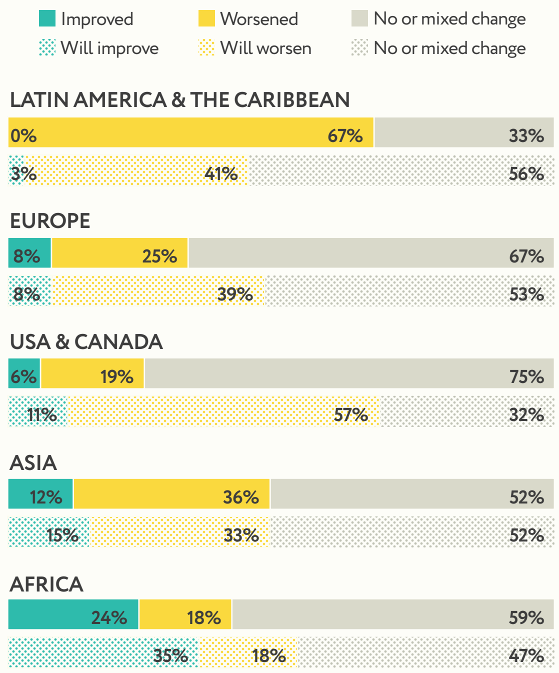
Think tanks are slightly more optimistic about the funding context – but it's still a cause for concern for many.



Think tanks in Latin America & the Caribbean report the most worrying changes to political and funding contexts – citing erosion of democracy and civic space, inflation and restrictive politics.

African think tanks are the most optimistic – mentioning positive leadership changes, increased public demand and political will for evidence use, and increased international funding and partnerships in the region.

POLITICAL CONTEXT BY REGION



* Worsening of political context was more pronounced in West & Central Asia.

Younger (founded post-2000), **smaller** (annual turnover under USD 500k) and **women-led** think tanks are more likely to perceive worsening political and funding contexts.

Nearly twice as many female-led think tanks perceived a **worsening political context** in the last year than their male-led counterparts: 46% vs 24%.

More than twice as many larger think tanks predict a **funding improvement** in the coming year: 22% vs 9%.

MOST PRESSING POLICY ISSUES

AFRICA
- Trade/economics/finance
- Governance

ASIA
- Trade/economics/finance
- Social policy

EUROPE
- International affairs/development
- Environment/natural resources/energy

LATIN AMERICA & THE CARIBBEAN
- Governance
- Social policy

USA & CANADA
- Peace/security/defence
- International affairs/development

GROWTH

The think tank sector is set to grow, despite concerns about the future.

Europe and the USA & Canada have the biggest growth plans; Latin America & the Caribbean has the lowest. Within Asia, South and South-Eastern Asian countries have the most plans for growth.

Globally, 46% expect growth within their organisation. **51% plan to stay the same size.** Just 3% plan to downsize.

63% of larger (500k+ turnover) versus 44% of smaller think tanks plan to grow in the next year.

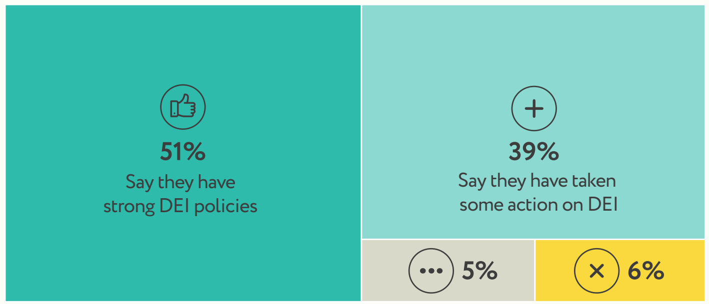
TOP FIVE CHALLENGES

Challenge	%
1. Fundraising	67%
2. Political uncertainty	51%
3. Quality of public debate	41%
4. Expanding reach & visibility	40%
5. Changing research agenda	37%

DIVERSITY, EQUITY AND INCLUSION

Definitions of diversity, equity and inclusion (DEI) tended to cover one or more of three broad categories: **staff** (diverse teams), **organisational policies** (such as salary transparency, flexible work), and **research processes** (such as engaging with diverse communities).

DEI POLICIES AND ACTION



Say they're not addressing DEI yet
Say they don't think they need to address DEI

About the report

The sector outlook

Data snapshots

References

About the report

Introduction

The think tank state of the sector is an annual report that offers an overview of the think tank sector worldwide. The 2022 report is the third in this publication series.[3]

The focus of this report is on the results from a think tank sector survey conducted in 2022, with further analysis drawn from 3,140 active think tanks registered in the Open Think Tank Directory.[4] The findings provide an overview of how think tanks see their contexts and forecast the future; the key challenges they are facing; and the policy issues they are paying attention to. The survey responses have been analysed alongside data from the directory to gain a holistic understanding of how these responses vary by region, the gender of the think tank's leaders, staff size, and the think tank's age and turnover.

This year's report also features a section on how think tanks address diversity, equity and inclusion (DEI) issues.[5] In the context of conversations on greater inclusivity in policy and workspaces, the report sheds light on think tanks' interpretations of and views on DEI policies, and the measures they are taking.

We hope that this report presents a rich and useful overview of the trends in the sector across the world. As we continue to update the database and conduct annual surveys, we will produce yearly State of the Sector reports. We invite readers to explore the insights and share your perspectives on the trends.

About the data

Every year, we undertake a consultation process with all think tanks in the Open Think Tank Directory for whom we have an email address. In this process, we ask organisations to update their profile information and to respond to a sector-wide survey to help understand how think tanks perceive their context, the key challenges faced, and their research agenda.[6]

This year's consultation and survey were sent out to all applicable organisations in the Open Think Tank Directory in May 2022. The closing date for submitting responses was 27 July 2022. In total, individuals from 234 think tanks participated in the survey.[7] The survey was not anonymous, and respondents were asked to disclose their names and their organisations – both to facilitate cross-referencing with the information in the directory and to enable follow up questions if needed to make sense of the data. However, the data has been anonymised for the analysis.[8]

The survey was hoping to reach senior-level staff from any area or department within think tanks. Chart 1 (respondents' role area) shows that most survey respondents (56%) were involved in the governance and management of their think tanks. Additionally, nearly 70% held senior-level positions (Chart 2). The makeup of the data shows that the responses come from well-experienced thinktankers, who are knowledgeable about their context.[9]

Chart 1

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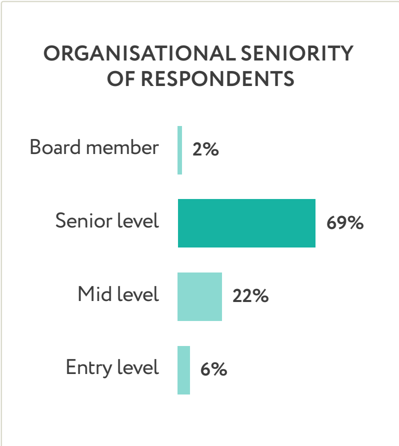
Chart 2



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3. All editions of the report are available here.
4. The analysis does not include organisations that are featured in the directory but are either defunct or deemed boundary.
5. Each year, we will address a different issue.
6. More detailed information about the sample and methodology can be read here.
7. A considerable increase from the 69 we received in 2021.
8. The anonymised database can be accessed here. The names respondents who were consulted and were comfortable to share more insights on key findings are mentioned in the report.
9. Regarding gender, 46% of respondents were female, 53% male, and 1% undetermined in the survey.

About the report

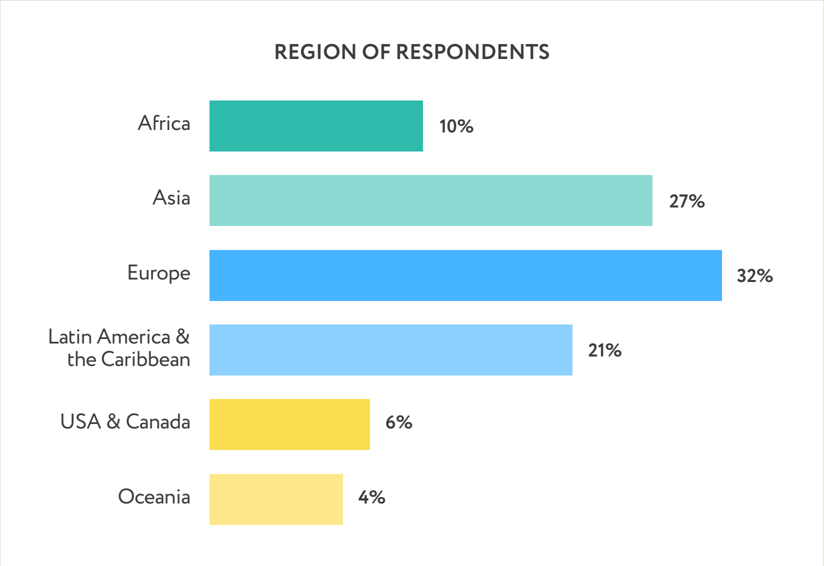
We took efforts to obtain responses from a representative number of think tanks in each region, but the sample obtained does not reflect the exact distribution of think tanks in the Open Think Tank Directory (in terms of region, staff number and founding date).[10] We therefore weighted the data to make the results and analysis more representative. Weighting was conducted by using the Open Think Tank Directory as a reference. The responses were weighted to region, think tank age, and think tank staff size – three variables that past analyses have shown are correlated with responses. As a result we have a (well-informed) weighted convenient sample.

There was considerable variation in the regions of respondents. For example, there was a high share of respondents from Europe, Latin America and certain countries in Asia, but very few responses from Eastern Asia. We had planned to offer a more nuanced analysis and feature specific insights by subregion (i.e. Eastern Asia, South Asia, and so on). However, the sample size and makeup did not make this possible, and we opted instead for a division that offered the most statistically sound distribution of responses. As a result, the 'Sector outlook' section conducts regional analyses on the following regions: Africa, Asia, Europe, Latin America & the Caribbean, Oceania, and the USA & Canada.[11]

Unfortunately, the low number of responses from Oceania posed challenges to weighting the data and providing statistically sound insights. Thus, the charts in the 'The sector outlook' section do not include responses from Oceania, but we do offer qualitative analysis of their responses in the accompanying text.

The data snapshots in the latter section of the report do offer insights from a greater division of subregions, taking its data from the 3,140 active think tanks in the Open Think Tank Directory database.

Chart 3



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10. As mentioned earlier, the Open Think Tank Directory does not claim to be a complete database of think tanks across the world, but it does offer an extensive picture. It is also, to our knowledge, the most complete public database of think tanks worldwide.

11. Countries in the MENA region are grouped under Africa and Asia.

The sector outlook

Globally, the 2021–2022 period has seen countries seeking to recover from the knock-on effects of COVID-19 and negative spill overs from the ongoing war in Ukraine. Countries across the world are experiencing political and economic instability compounded by global issues, and the survey results evidence this.

The results of the sector survey suggest a somewhat a pessimistic outlook, with think tanks concerned about their current and future political environment.[12] More worryingly, most think tanks in the sample expect the political context to worsen in the year ahead. But the forecast for the sector is not entirely negative, and there are pockets of optimism for improvement – particularly among African think tanks.

Think tanks are also concerned about their funding context worsening in the upcoming year. Hope for recovery from the economic costs of the COVID-19 pandemic is becoming increasingly challenging, as the world grapples with price hikes, shortages and conflict. Think tanks with smaller incomes perceive themselves to be among the worst hit. Their limited funds may lessen their capacity to plan for setbacks, potentially increasing their exposure to crisis.

Despite their largely pessimistic outlook, most think tanks are still hoping to grow or maintain their current operations in the year ahead – especially European think tanks and those with a turnover above USD 500k.

Thinktankers know that their work is increasingly important in these challenging times and, in spite of fundraising concerns, they keep working to secure the resources necessary to continue and improve their work. Periods of difficulty may also present windows of opportunity for impact.

Each subheading in this section provides a deeper understanding of the findings in question, along with the results that emerged from other questions included in the survey. The findings are also informed by our consultations with thinktankers and are compared with different variables.[13]

12. The views expressed in the survey represent those of think tanks in the sample and may not reflect the views of all the think tanks in each region.

13. We conducted a large amount of analysis for the report but are not presenting every chart and analysis in the report, as it would make it unwieldy. We invite interested readers to explore the trends and share your insights.

Looking back on 2021–2022

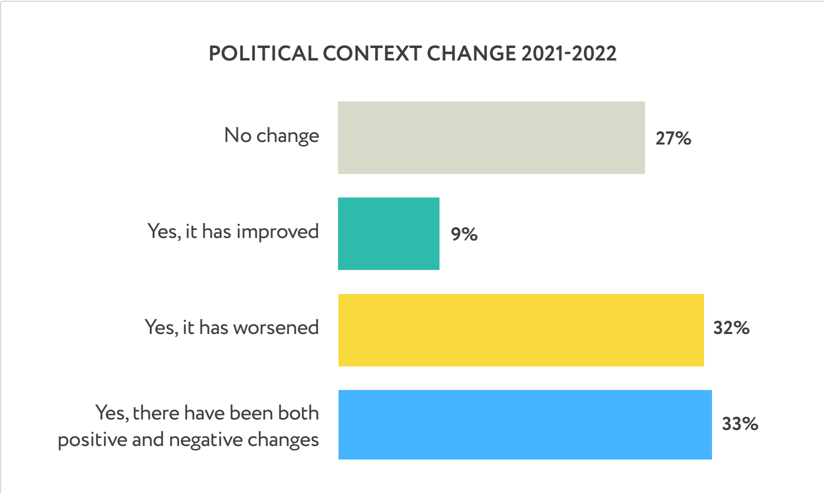
POLITICAL CONTEXT

SURVEY QUESTION:
Reflecting on the last year, did the political context for think tanks in your country change?

More think tanks perceived a worsening than an improvement of the political context in the past year. But the majority either see no change or a mixture of positive and negative changes. The negative assessment is the highest among Latin American & Caribbean think tanks and the most positive among African organisations. Younger think tanks (founded post-2000), those with a turnover below USD 500k and female-led think tanks were all also more likely to perceive a worsened political context in the past year.

The political and economic turmoil around the world, plus the reconfiguration into a post-pandemic world, has had different effects on think tanks. A third of think tanks in the sample perceived their political contexts to have worsened, which is considerably higher than the share of think tanks (9%) that reported an improvement. For the rest of the sample, results showed either a mix of positive and negative changes experienced, or no change at all.

Chart 4



n=234
Note: Due to rounding, percentages may add to slightly less or more than 100%

The sector outlook

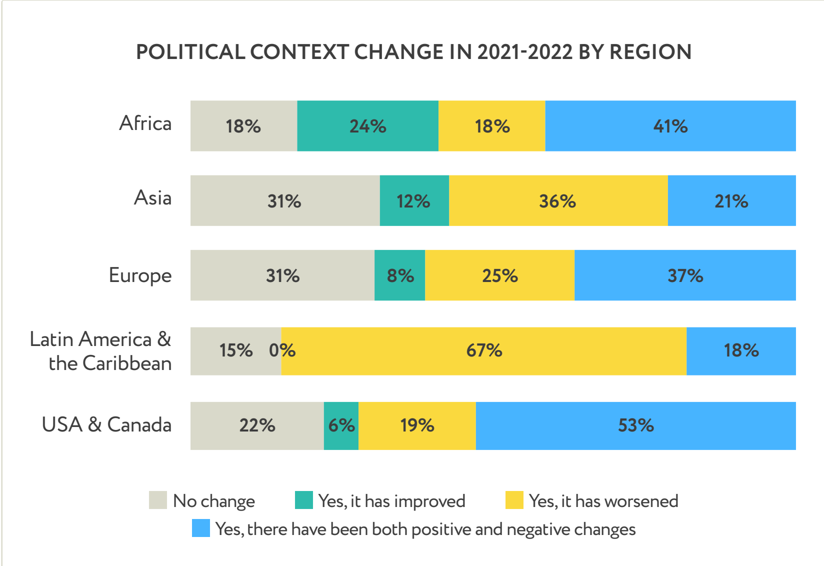
Regional differences

A regional analysis (Chart 5) shows marked differences in thinktankers' views on their political context over the past year. Most Latin American & Caribbean think tanks (67%) perceived a worsening of their political context. They raised serious concerns over democratic erosion, authoritarian governments, human rights violations, and repressive laws that may potentially have a negative bearing on the operation of non-governmental organisations and think tanks. A thinktanker from Costa Rica noted that 'the political context has become more polarised and leaders with authoritarian tendencies have increased in popularity.' These sentiments were echoed by think tanks across the region, which mentioned seeing 'a closing of the civic space and a deepening of political polarisation in the country [Mexico], with the current administration adopting a posture that rejects any expression that seeks to question its management or demand accountability—deeming it as a personal affront.' These results resonate with those of the 2021 Lationobarómeto, which reported that no one in the region is happy with the level of democracy in their country, and that there is growing concern and unrest over abuses of power, privileges for some, continued inequality, and the restriction of plurality.

More than a third of organisations in Asia also perceived a worsening of their political environment. This was more pronounced in West & Central Asian countries, while South & South-Eastern Asian think tanks reported a more mixed context that included both negative and positive changes as well as no changes for some.

African thinktankers reported the highest share of perceived positive changes across the world, although the picture is not positive for all in the region.

Chart 5



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The sector outlook

Age and turnover differences

Younger think tanks (42%) founded post-2000 (particularly those in Asia) and those with a turnover under USD 500k (40%) were more likely to perceive their political context as having worsened (Charts 6 and 7). In contrast, only 27% of older think tanks, founded pre-2000, and 29% of those with a turnover over USD 500k, considered their political context to have worsened. Younger and smaller organisations tend to be less established and/or less equipped to deal with changes and therefore are most likely the worst affected by any negative changes. Their assessment of the political context might be linked with their assessment of their environment as a whole. It is important to keep supporting the work of these smaller and younger organisations to support a healthy, evidence-informed policy ecosystem.

Chart 6

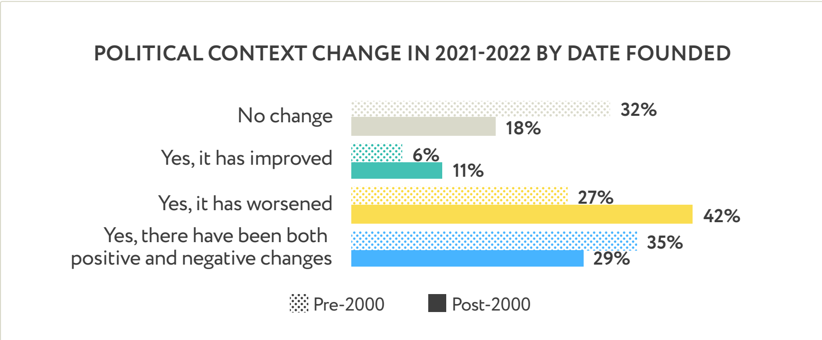

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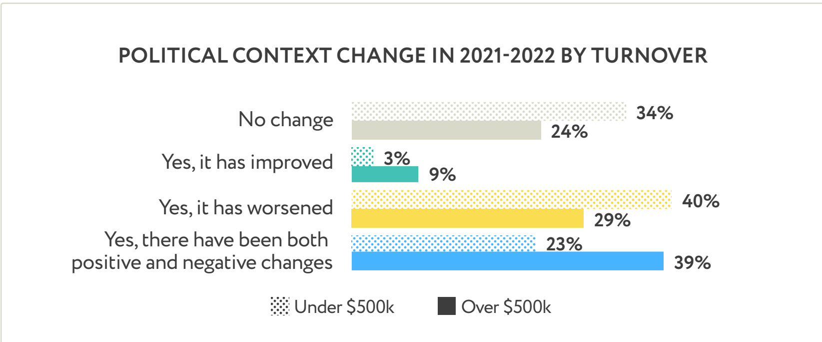
Chart 7



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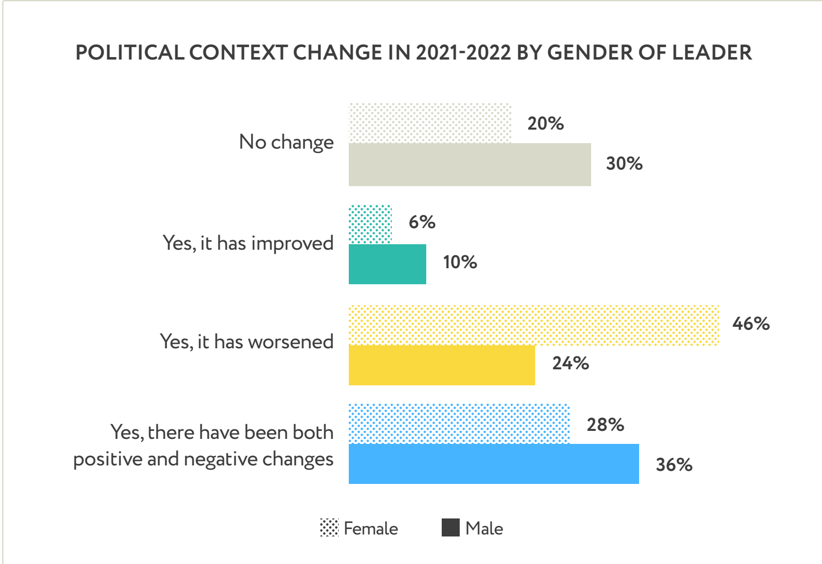
Gender of leader differences

We also found differences by the gender of think tank leaders. Female-led think tanks (46%) had a more negative assessment compared with male-led think tanks (24%). This is particularly the case for female-led think tanks in Asia and Latin America & the Caribbean.[14]

Chart 8



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14. The sample was somewhat balanced in terms of gender (46% of respondents were female, 53% male and 1% undetermined). But more than 60% of respondents from female-led think tanks were female, and more than 60% of respondents from male-led think tanks were male.

The sector outlook

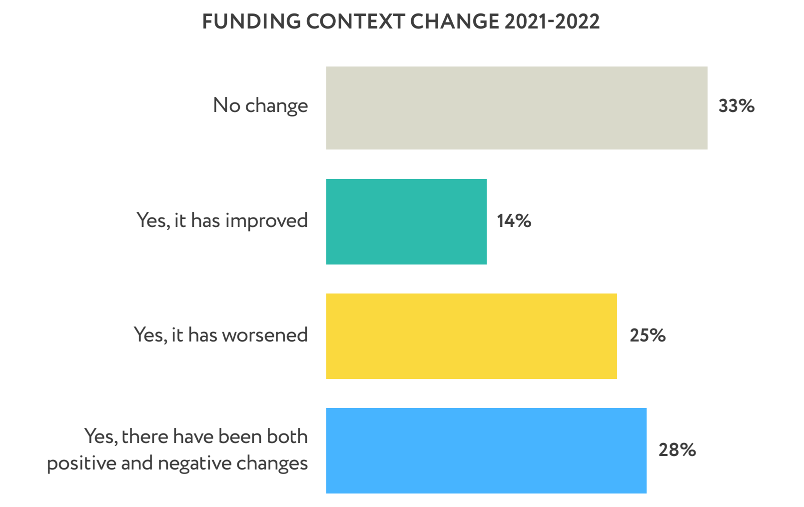
FUNDING CONTEXT

SURVEY QUESTION:
Reflecting on the last year, did the think tank funding context in your country change?

Thinktankers' assessment of their funding context is more positive than on the political front, but still more think tanks perceived a worsening than an improvement of the funding context over the past year. The majority see either no change or a mixture of positive and negative changes. The funding context in Latin America & the Caribbean in particular is perceived to have taken a hit due to political and economic problems.

The funding context lookback presents a slightly better picture than on the political front, although still there is a higher perception of worsening than of improvement. Thinktankers observed that 'the easing of COVID-19 related restrictions' and the gradual return of global supply chain activity had enabled 'the funding context to improve.' But still the results show assessment veering towards stagnating or worsening conditions as 25% of think tanks perceived funding conditions to have worsened in the last year – nearly twice the share of think tanks that observed improvements (14%). A third (33%) perceived no change.

Chart 9



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Regional differences

Once again, the highest share of think tank respondents that noted a worsening of their funding conditions were from Latin America & the Caribbean. Their concerns were mostly connected to economic issues, such as 'extremely high inflation', and restrictive political environments that had adversely affected funding avenues and financial management. For example, a respondent from El Salvador mentioned that 'donors have been very cautious since those supporting civil society have also been confronted by public officials.' Political issues are perceived to have negatively impacted funding. A Brazilian thinktanker observed how 'political polarisation in Brazil has worsened with the electoral year. Funders are changing their priorities and/or waiting for the political scenario to settle to set funding strategies.'

Responses from Asian think tanks were a bit more divided; the region had the highest share of respondents perceiving an improvement, but also a high share reporting worsening conditions.

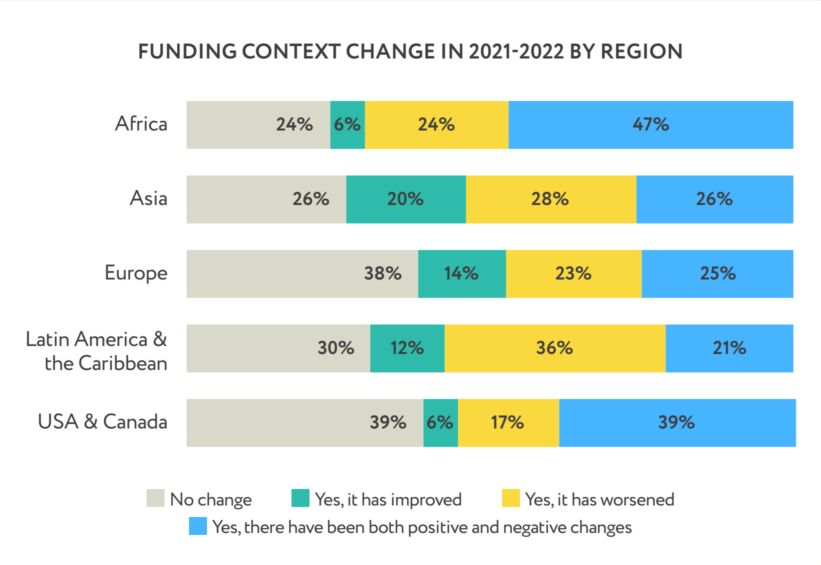
USA & Canadian think tanks have (along with Africa) the smallest share of respondents perceiving positive changes, but the picture in this region seems to be more one of stagnation, or mixed changes, than an overall worsening of its funding contexts. Europe also sees more stagnation, or mixed changes, than a worsening of funding contexts. This could be related to the stronger economies in those regions and more internal funding opportunities (foundations, private sector, local councils and so on), which the other regions lack.

Oceania slightly deviated from the trends observed in most other regions. A slightly higher share of think tanks surveyed in Australia perceived the funding context to have improved in the last year. Their positive perceptions around funding were linked to the new Australian federal government being committed to addressing and funding climate change and other development challenges.[15]

15. Serge Loode, Secretary to the Board, Peace and Conflict Studies Institute Australia mentioned that these positive perceptions may also be due to the time at which the survey was conducted – when there was optimism because of the election of Australia's new government – but that subsequently the government appears to be falling short of public expectations.

The sector outlook

Chart 10



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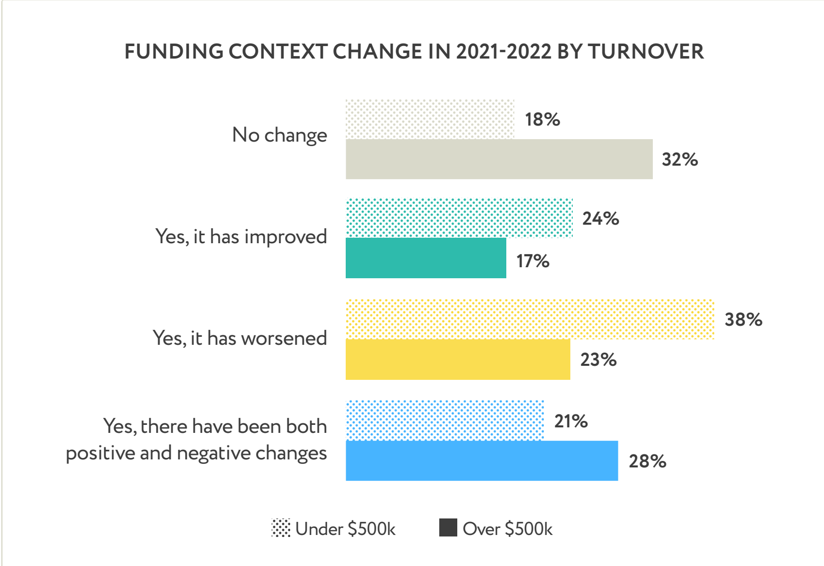
Turnover differences

Think tanks with a turnover under USD 500k (38%) were more inclined to view their funding conditions as having worsened than think tanks with a higher income (23%) Given their size, smaller think tanks are less equipped for economic changes, as their business model depends on more active fundraising for smaller (and often shorter-term projects). Given this, any small change in the funding context could take a harder hit on them compared to organisations with a higher turnover (who tend have support from bigger funders and donors).[16]

Chart 11



n=100

16. We found no significant think tank age or gender-of-leader differences and hence are not reporting them here.

The sector outlook

Looking forward to 2022–2023

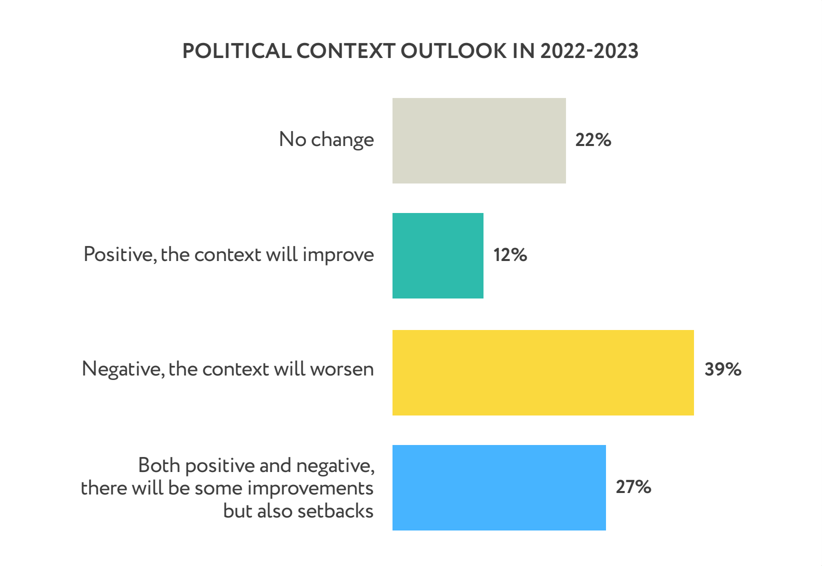
POLITICAL CONTEXT

SURVEY QUESTION:
How do you foresee the political context in your country in the year ahead?

Nearly 40% of think tanks forecast a worsening political context. More think tanks in the Americas – both the USA & Canada and Latin America & the Caribbean – expect a worsening, while African think tanks again deviate from this trend and show more optimism.

Several democracies across the world are experiencing difficulties. Repucci and Slipowitz (2022) consider the 'present threat to democracy' to be 'the product of 16 consecutive years of decline in global freedom.' Thinktankers' responses forecast this threat to continue and most (39%) expect a worsening political environment, while others expect a mix of setbacks and progress.

Chart 12



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Regional differences[17]

A regional analysis once again showed marked differences, with think tanks in the Americas particularly reporting a more negative outlook for their political context. The top political concerns in these regions were: 1) 'democracy in jeopardy' due to political changes/elections and 2) leaders with 'authoritarian tendencies' likely to be in power.

African thinktankers again had a more positive outlook than their counterparts in other regions. Our consultations with thinktankers from the region[18] revealed three possible explanations for this: **positive leadership changes** with better prepared people entering government and some improvements in the political representation of youth, women and other marginalised groups; **better informed policies** due to public demand and political will/interest; and **greater think tank contribution** with more think tanks being called on to produce policy-orientated research. Results from the 2021 Afrobarometer (Gyimah-Boadi and Asunka 2021) support this. It finds that democracy enjoys a wide base of support among African citizens, although political realities may vary by country. Although there are still multiple challenges in the region, some of these political developments may, to some degree, explain the optimism expressed by think tank respondents in the survey.

In both Europe and Asia, more than 30% of respondents see a worsening political context. But differences emerge within these regions. South & Eastern Europe sees more of a worsening of the political context than West & Northern Europe, where respondents see more continuity and optimism. Within Asia, West & Central Asian think tanks also forecast a more negative outlook than in South & South-Eastern Asia, where think tanks see a mix of positive and negative changes.

17. We found no significant differences dependent on think tank age, turnover or gender of leader and hence are not reporting them here.

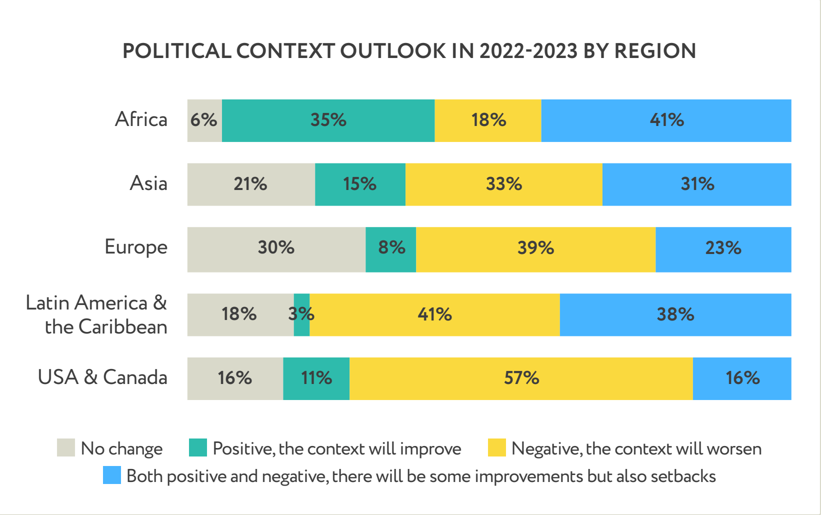
18. Insights shared by: Donald Houessou, Director of Operations, ACED; Patrick Obunga, Research Fellow, African Centre for Technology Studies.

The sector outlook

An interesting finding is that more think tanks in both Europe and the USA & Canada perceived a worsening political context to come compared to their assessment of it over the past year.

Although an 'authoritarian model' is on the rise globally, sustained support for democratic initiatives and active citizenry may counter this trend in the future (Repucci and Slipowitz 2022). So rather than a source of pessimism, these findings should promote more support for think tanks to keep working in their region in support for democratic processes.

Chart 13



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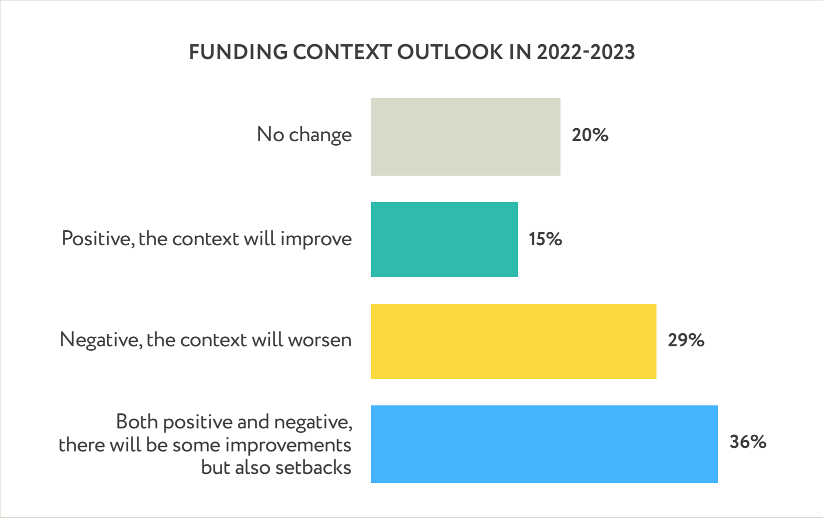
FUNDING CONTEXT

SURVEY QUESTION: How do you foresee the funding context in your country in the year ahead?

Think tanks are more optimistic about the funding context than they are about the political forecast. Even so, nearly a third expect the context to worsen. Respondents from the Americas (both Latin America & the Caribbean and the USA & Canada) were particularly more pessimistic. But nearly 30% of African think tanks anticipate their funding context to get better, as do a large share of think tanks with a turnover above USD 500k.

Roughly twice as many think tanks were pessimistic rather than optimistic (29% vs 15%) about their funding context in 2022–2023, while 36% expected both progress and setbacks. Unsurprisingly, think tanks are worried about economic hardships that may limit the availability of funds. Global economies are experiencing sudden changes to trade, production and consumption patterns brought on by the Russia–Ukraine war as well as trade wars. Surging inflation has increased economic uncertainty, with food and energy prices affecting economies across Africa, Asia, Europe and the Americas – regions that were already weakened by the pandemic (International Monetary Fund 2022; World Bank 2022).

Chart 14



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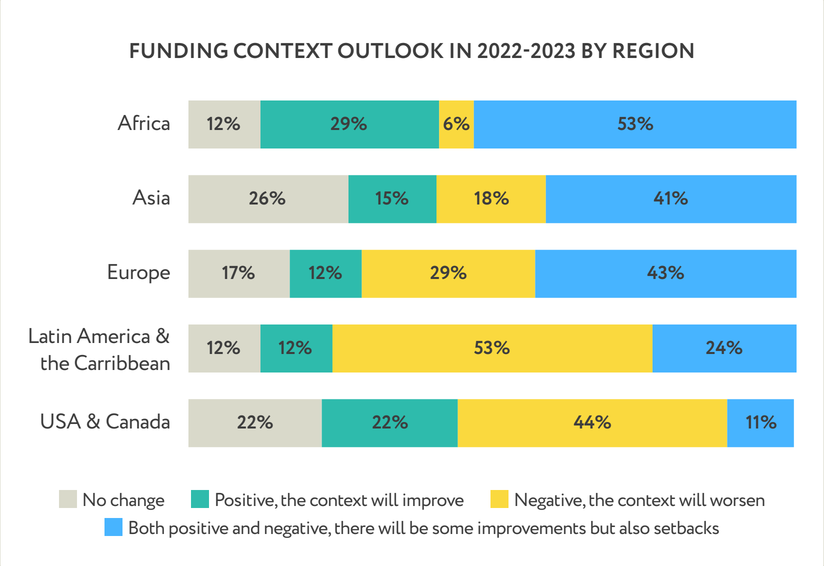
The sector outlook

Regional differences

Respondents from the Americas (both Latin America & the Caribbean and the USA & Canada) were particularly more pessimistic about next year's funding context than respondents from Africa, Asia, Europe and Oceania, where there were mixed expectations of progress and setbacks. Think tanks in the Americas anticipated their economic difficulties to worsen due to 'high inflation' and the 'lasting effects of the pandemic'. Additionally, there was some concern over limited funding, as funds were perceived to be 'insufficient' and 'allocated for specific topics', and not necessarily for what think tanks wanted to work on or what they thought was key. Funders were also seen by some as 'becoming more partisan in their giving'. Similar concerns over economic issues were also observed in responses from Africa, Asia and Europe.

African thinktankers again stood out in their optimism, as almost a third forecasted positive changes in the funding context in the year ahead. Their optimism may in part be due to an **improvement in funding efforts and partnerships with researchers in Africa**.[19] Our consultations highlighted two other factors: greater financial support aimed at **achieving regional goals** such as the Sustainable Development Goals and Agenda 2063; and an **increase in funder confidence** because of improvement in management and reporting practices.[20]

Chart 15



n=225

19. Some of these efforts include the Think Africa Partnership by the World Bank, the Mastercard Foundation's programmes in 33 African nations, grants to Southern researchers by organisations such as Partnerships for Economic Policy, among efforts from other funders to directly support African organisations.

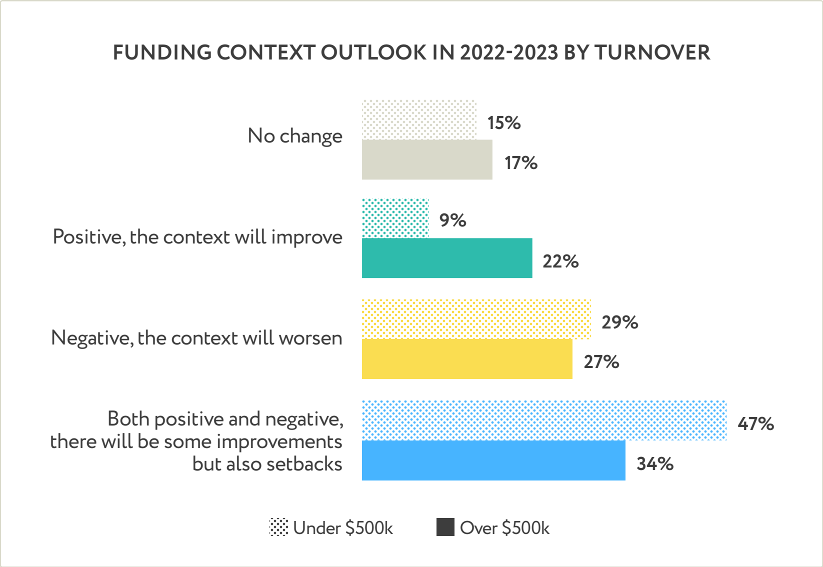
20. Insights shared by: Donald Houessou, Director of Operations, ACED; Patrick Obunga, Research Fellow, African Centre for Technology Studies.

The sector outlook

Turnover differences

A larger share of think tanks with turnover over USD 500k expect an improvement in the funding context (Chart 16) (22% vs 9%). Think tanks with a larger income in Europe (and Australia as well) were of the view that this was not related to their size or income; rather they believed their research agendas were more likely to align with funder priorities, resulting in greater financial support.[21] It might be a matter of all of these factors in combination: their size and resources can result in greater capacity to both cover a larger set of topics (larger think tanks are more likely to be multithematic) and also their larger teams can result in better engagement with funding and more capacity for proposal development and establishing partnerships.

Chart 16

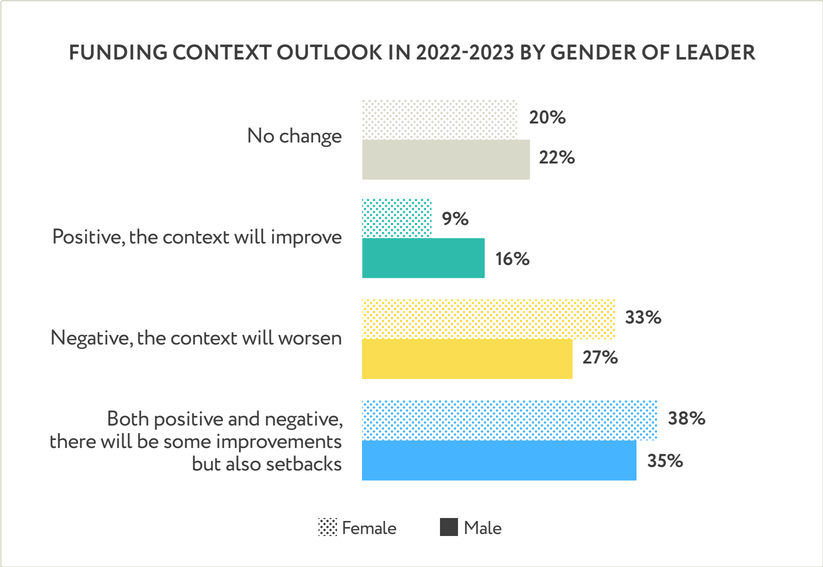


n=100

Gender of leader differences

Differences by the gender of the think tank leader (Chart 17) are less marked for this question, but they are still worth mentioning. Fewer female-led think tanks (9%) foresaw a positive funding context than did their male counterparts (16%), and they were also more likely to forecast a negative context. This is relevant as past State of the Sector reports have shown that female-led think tanks have a smaller turnover than their male counterparts, which could be an indication of invisible barriers or increased difficulties for female-led think tanks.

Chart 17



n=216

21. In addition to the survey responses from Europe and Australia, further insights from Australia were shared by: Beth Orton, Centre Manager, Development Policy Centre, Crawford School of Public Policy.

The sector outlook

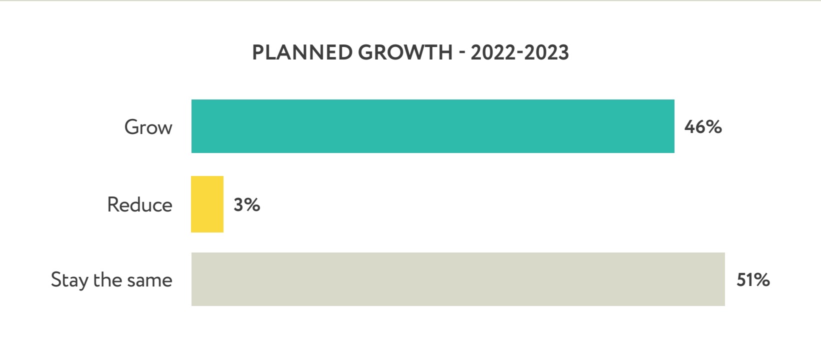
Growth forecast

SURVEY QUESTION:
Is your think tank planning to grow (increase staff numbers), reduce or stay the same in the year ahead?

Despite the negative forecast over the political and funding contexts, 46% of think tanks expect to grow in the year ahead. This is especially the case among European and USA & Canadian think tanks, and those with a turnover above USD 500k.

The previous survey questions have shown that think tanks expect the political and funding contexts to worsen, yet almost half of the think tanks in the sample (46%) have plans to grow, and only a small percentage of respondents reported planning to reduce their staff numbers (3%). At least half of those surveyed (51%) anticipated their staff composition to remain the same.

Chart 18

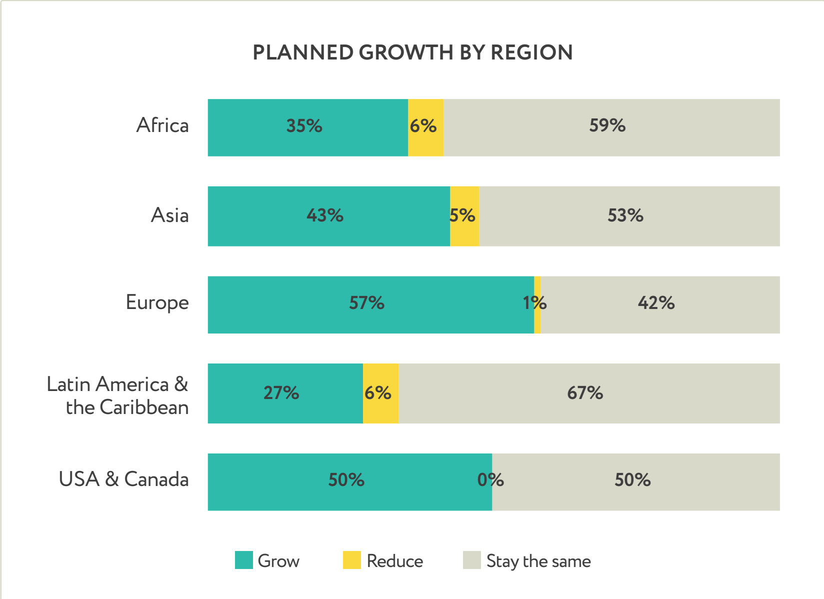


n=234

Regional differences

A regional analysis shows that more European (and USA & Canadian) think tanks reported an intention to grow. The share of European think tanks planning to grow was more than twice that of Latin American & Caribbean think tanks. Within Asia, more think tanks in South & South-Eastern Asia reported an intention to grow.

Chart 19

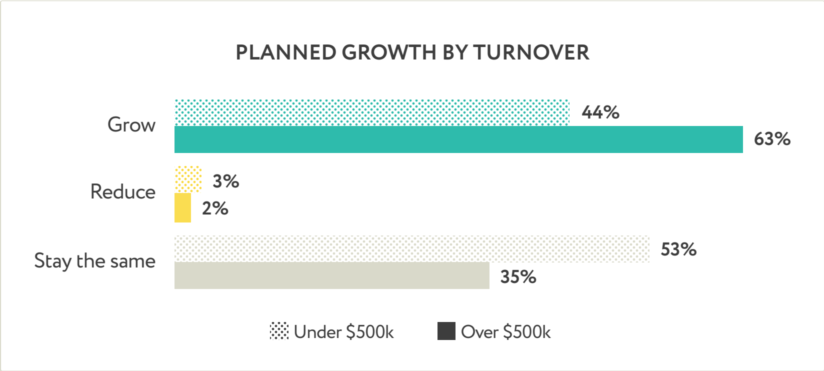


n=225

Turnover differences

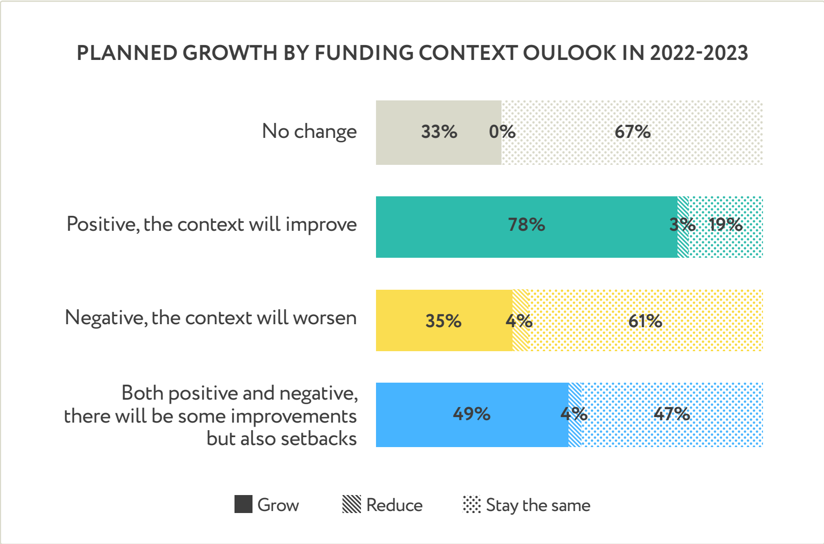
Sixty-three per cent of think tanks with a higher turnover (over USD 500k) expected their staff numbers to grow in the coming year. Most think tanks turning over under USD 500k (53%) reported that they intend to stay the same.

Chart 20



n=100

Chart 21



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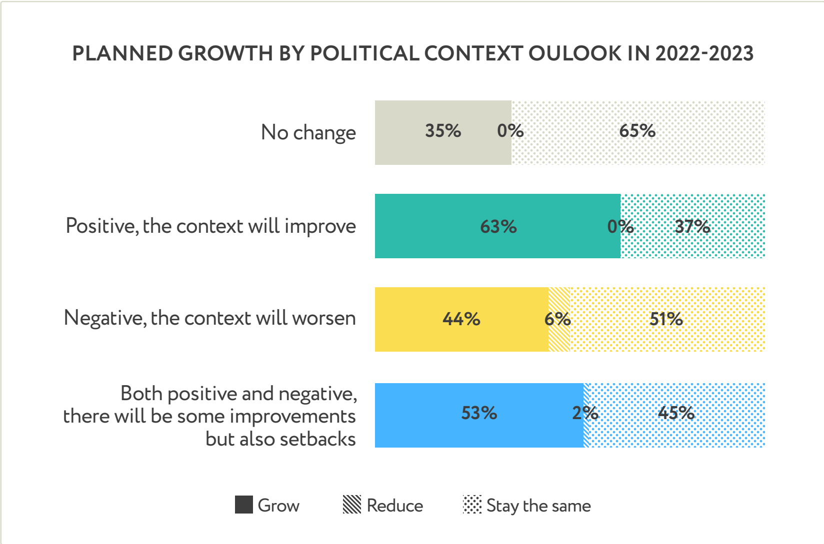
Relationship between intended growth and political and funding forecasts

Unsurprisingly, a high share of think tanks that are planning to grow are also optimistic about the future of their funding (78%) and political contexts (63%) (Charts 21 and 22). Conversely, most think tanks that foresaw a worsening funding (61%) and political context (51%) had no plans to increase their staff size. But at least 44% of think tanks with a negative political outlook still expected to grow. Although adverse political climates pose challenges for think tank operations, they may also present opportunities that think tanks can capitalise on. Stone (2005) recalls the 'proliferation of think tanks across the globe' in the 1970s that related to 'periods of economic and political instability or fundamental change'. Similarly, in a survey conducted among US-based think tanks, McGann (2005) observes how 'opportunities that arise from the changing environment afford think tanks the ability to advance both their institutional specific missions and the role of the think tank community as a whole'.

Chart 22



n=234

The sector outlook

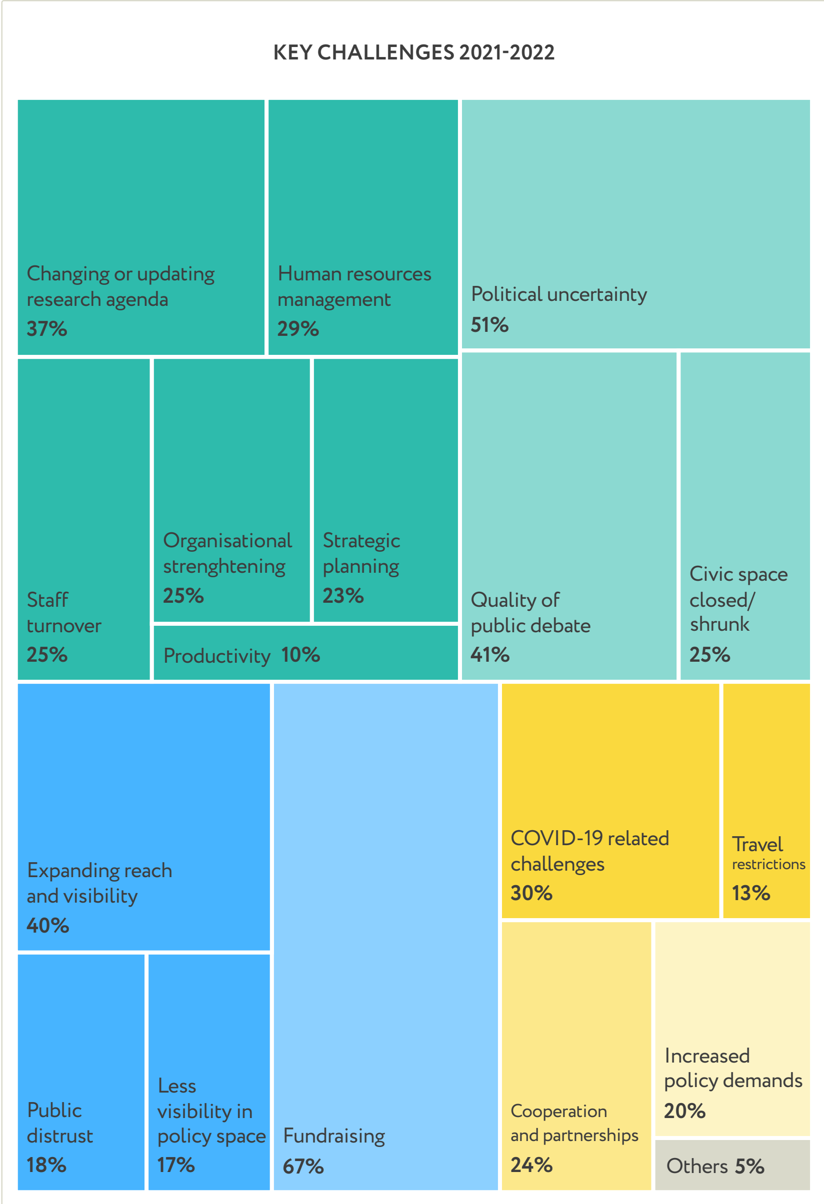
Challenges for think tanks

SURVEY QUESTION:
What are the key challenges think tanks in your country are facing in 2022? (multiple choice).

Fundraising is the biggest challenge for nearly 70% of think tanks. Other key challenges are those related to the political and civic context, expanding their visibility, and organisational management and strategic challenges. Smaller (less than USD 500k turnover) and female-led organisations are more worried about establishing partnerships and fundraising.

The key challenges[22] think tanks are facing in 2022 are not surprising – funding and political issues. Sixty-seven per cent of think tanks in the sample highlighted fundraising as their topmost concern, followed by political uncertainty (51%). Numerous other issues around politics were also mentioned, such as civic space closing/shrinking amid waves of protests around the world (Carnegie Endowment for International Peace 2022) and government crackdowns on protesters (Human Rights Watch 2022). Public distrust and the quality of public debate were also salient, especially with the global rise in political polarisation (McCoy et al. 2022; Hartmann and Thiery 2022).

Chart 23



n=234

22. Respondents chose from a list of challenges provided as part of the survey question.

The sector outlook

Regional differences

There were significant regional differences in the key challenges identified (Table 1). Although fundraising and political uncertainty were key priorities across most regions, their degree of importance varied. For example, a clear majority of African think tanks in the sample (82%) considered fundraising to be a critical issue. Their concern over fundraising was higher than think tanks surveyed in Europe (66%) and Asia (54%).

The African perception of fundraising as their biggest challenge is in spite of their optimism that the funding context will improve in the year ahead. Thinktankers we spoke to from the region outlined two reasons for this: political challenges and funding accessibility.[23] African think tanks lack government support (see Mudau 2021). As a result, think tanks are compelled to seek international funding to sustain their operations. Some thinktankers perceived longstanding political issues in the region to have initially discouraged certain donors from investing. However, they commented that this situation was changing, with positive developments emerging in the political landscape.

African thinktankers are seeing more international funds directly targeting the region along with international organisations seeking more partnerships with African think tanks. But an increase in the availability of funds does not mean easy access to funds. Meeting the eligibility criteria is a key challenge, particularly for non-English speaking think tanks. According to the thinktankers we spoke to from the region, these think tanks are 'more exposed' to the twin challenges of drafting concept notes in English and 'mobilising partners that clearly dominate the anglophone world'.

Table 1

Type of challenge	Africa	Asia	Europe	Latin America & the Caribbean	USA & Canada
Fundraising	82%	54%	66%	70%	83%
Political uncertainty	63%	46%	46%	61%	61%
Quality of public debate	19%	26%	44%	52%	61%
Civic space closed/shrunk	13%	30%	26%	36%	14%
Public distrust	31%	8%	19%	9%	33%
Changing or updating research agenda	41%	49%	30%	33%	39%
Expanding reach and visibility	35%	48%	41%	30%	31%
Increased policy demands	24%	13%	24%	21%	22%
Cooperation and partnerships	35%	21%	25%	39%	3%
Less visibility in policy space	24%	13%	21%	15%	14%
Staff turnover	41%	30%	20%	3%	50%
Human resources management	6%	36%	27%	12%	47%
Organisational strenghtening	13%	33%	26%	21%	14%
Productivity	18%	12%	11%	0%	14%
Strategic planning	35%	20%	23%	24%	22%
COVID-19 related challenges	47%	36%	27%	24%	22%
Travel restrictions	18%	13%	7%	9%	25%
Others	0%	0%	11%	0%	3%

Lower % — Higher %

n=225

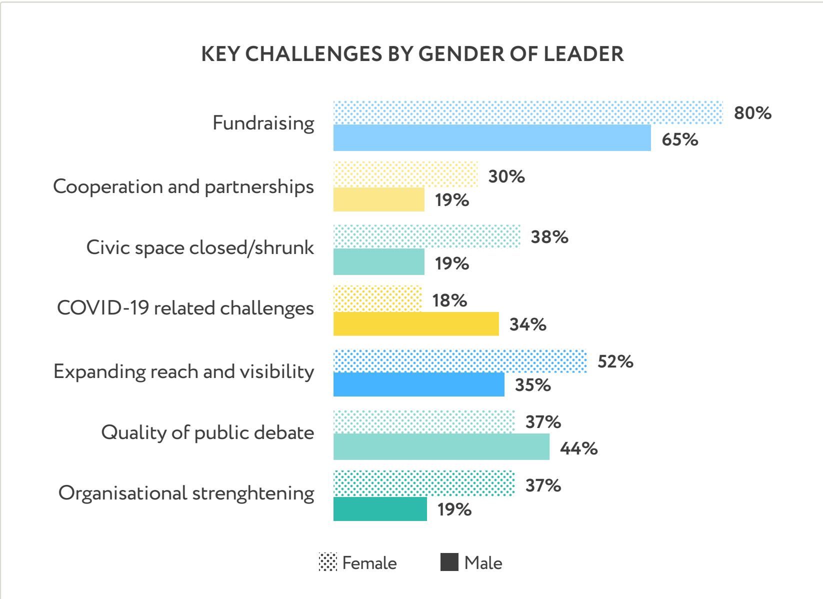
23. Insights in this section shared by: Donald Houessou, Director of Operations, ACED; Patrick Ouma, Research Fellow, African Centre for Technology Studies.

The sector outlook

Gender differences

The data also showed some differences between female- and male-led think tanks. Although fundraising was reported as a challenge for both, a higher percentage of female-led think tanks considered it to be a pressing issue (Chart 24). Other challenges identified by female-led think tanks – such as closing civic space, organisational strengthening, cooperation and partnerships, and expanding reach and visibility – were of relatively less concern for male-led think tanks. Instead, male-led think tanks were more concerned about COVID-19 related challenges that affected their operations.

Chart 24

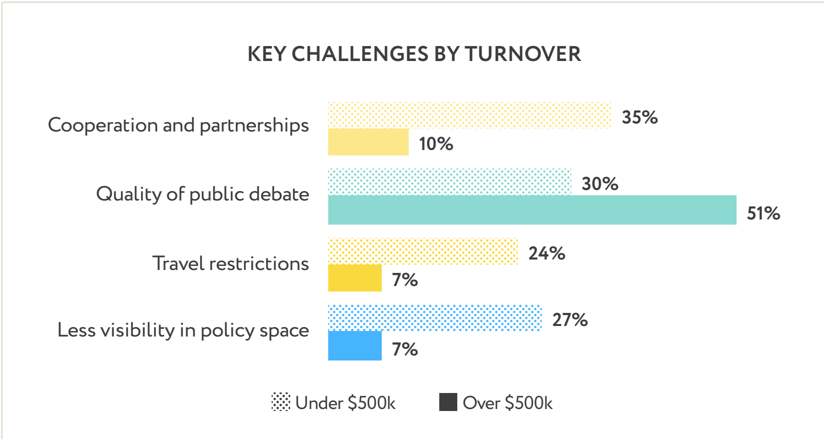


n=216

Turnover differences

The share of think tanks with a smaller turnover (below USD 500k) (35%) that were concerned about developing partnerships was markedly higher than that of think tanks with a higher turnover (10%). Thinktankers reflected on the 'great disadvantages' experienced by think tanks with a smaller turnover and how building and maintaining partnerships pose challenges for these organisations as they 'cannot necessarily put in the resources needed to sustain partnerships'.[24] Partnerships are important for their financial sustainability as large grants are rarely awarded to organisations whose 'previous contracts were small'. European think tanks with smaller incomes are understandably interested in partnering with well-resourced organisations, as 'EU funds are usually hard for a smaller organisation [to access]'. Thinktankers also claimed that partnerships are crucial to widen their impact in the sector.

Chart 25



n=100

24. Insights shared by: Magdalena Rathe, Founding President, Fundación Plenitud; Nora Latifi Jashari, External Associate and former Executive Director, Instituti GAP; Gambhir Bhatta, former Executive Director, Nepal Policy Institute; Rocio Guijarro Saucedo, General Manager, CEDICE Libertad.

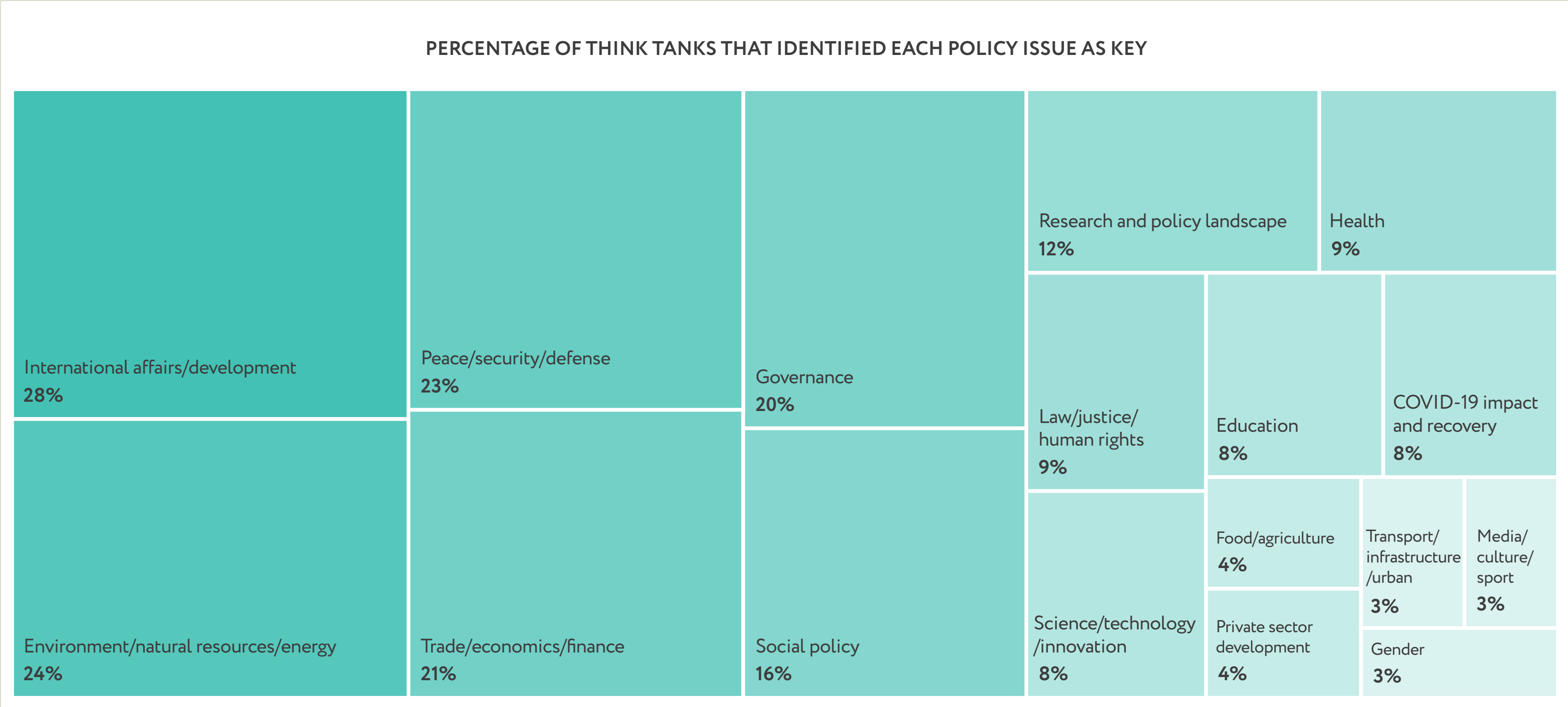
The most pressing policy issues

> SURVEY QUESTION:
> What do you think the research agenda in your country should be in the year ahead?

Issues relating to international affairs/development and environment/natural resources/energy are on think tanks' research and policy agendas for the year ahead. However, these issues are mostly being prioritised by think tanks that are better funded and based in Europe. Latin American & Caribbean think tanks are more concerned about governance issues; Asia about trade and economics, and social policy; and USA & Canada about international affairs, health, and peace and defence issues.

Thinktankers listed the policy issues they believe should be the key focus in their countries in an open-ended response format. We then conducted a content analysis to code these responses under different research themes or categories (based on the Open Think Tank Directory topics). For example, think tank responses relating to strengthening public institutions and transparency were classified under the governance category. Issues such as climate change or disaster management and preparedness were classified under environment/natural resources/energy.[25] The 17 categories we finalised are illustrated in Chart 26.

Chart 26



n=234

25. See the analysis here and the summary of topics in the Open Think Tank Directory here.

The sector outlook

Regional differences

Table 2 lists the overall percentage of think tanks in the sample that are working on each policy issue and how think tanks in each region differ from the global or overall figures. For example, 28% of think tanks in the global sample are focusing on *international affairs/development*. The percentage of African think tanks focusing on this issue is 4% less than the global figure, so it is 24%.

European think tanks that mentioned working on issues within the *international affairs/development* category, were primarily focusing on the impact of the Russia–Ukraine war, how to structure their engagement with Russia, and issues connected to European Union integration. Their focus on climate change (under the *environment/natural resources/energy* category) may also reflect a regional trend, as European countries are among those with higher research outputs on climate change (Klingelhöfer et al. 2020). European countries are also mobilising resources and taking action to improve their performance on climate neutrality (Germanwatch 2022).

Contextual factors may also, to some degree, contribute to certain policy issues that think tanks in Asia, Africa, and Latin America & the Caribbean are working on. Asian think tanks' reported research focus on *social policy* is more than twice the share of other regions, except Latin America & the Caribbean. One possible explanation is that social protection tends be a key issue in the region, as more than half the Asian population lacks any social protection coverage (United Nations Economic and Social Commission for Asia and the Pacific, and the International Labour Organization 2021). Similarly, African think tanks' interest in *science/technology/innovation* was significantly higher than that of their regional counterparts, where an interest in this category was generally under 12%.

Think tank respondents from Latin America & the Caribbean mentioned governance issues as key. This result corresponds with the findings from the questions on future context outlook and key challenges, as think tanks in the region raised serious concern over the worsening of political issues.

Table 2

REGIONAL PERCENTAGE DIFFERENCE FROM THE GLOBAL FOCUS ON POLICY ISSUES

Policy issue	Global	Africa difference	Asia difference	Europe difference	Latin America & the Caribbean difference	USA & Canada difference
Health	9%	-4%	+4%	-8%	-3%	+18%
International affairs/development	28%	-4%	-5%	+8%	-10%	+3%
Trade/economics/finance	21%	+11%	+6%	-9%	+1%	+2%
Governance/transparency	20%	+9%	+1%	-9%	+22%	-4%
Peace/security/defence	23%	-11%	-3%	-2%	+1%	+13%
Environment/natural resources/energy	24%	0%	-6%	+6%	-5%	-1%
Science/technology/innovation	8%	+16%	+2%	-6%	-2%	+3%
Social policy	16%	-10%	+12%	-6%	+11%	-11%

n=225

The sector outlook

Diversity, equity and inclusion

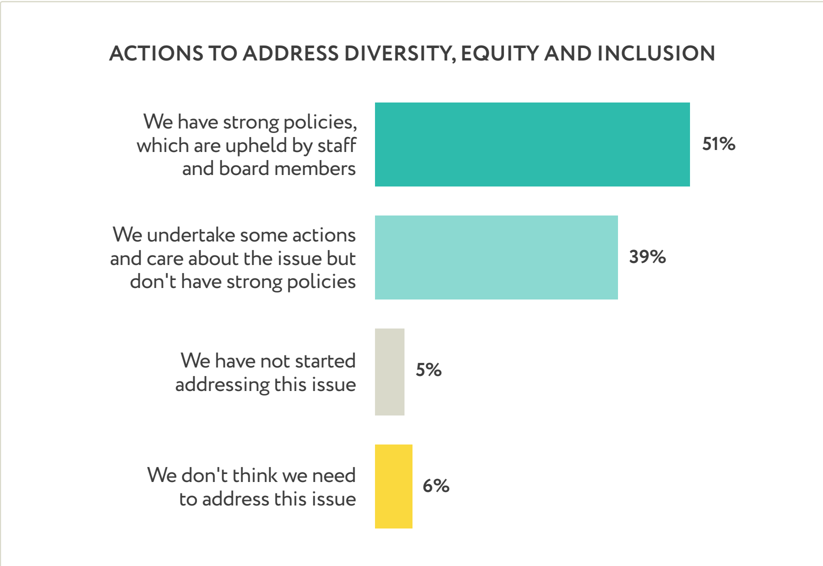
SURVEY QUESTIONS:
→ What does your organisation do to address diversity, equity and inclusion issues?
→ Could you share some examples of the policies or actions your organisation takes to address diversity, equity and inclusion issues?

Ninety per cent of think tanks report having strong policies on diversity, equity and inclusion (DEI) or are taking some actions to improve DEI. But there are varied understandings and interpretations of DEI in the policy sector.

DEI is on the agenda

Think tank responses evidence treating DEI as an important topic, with most think tanks taking different measures to improve DEI. As illustrated by Chart 27, the share of think tanks that have introduced strong DEI policies or have taken some actions (90% in total) were 8 times higher than the share of think tanks that had not taken any measures at all (11% in total).

Chart 27



n=234

Different interpretations of DEI

Think tank responses diverged with regard to how DEI is interpreted and understood in theory and practice. The responses suggest that there is no common interpretation of DEI in the sector; improving DEI has a range of meanings and, thus, a range of actions that fall within the scope of these different meanings. Interpretations of DEI tended to feature at least one of these meanings:

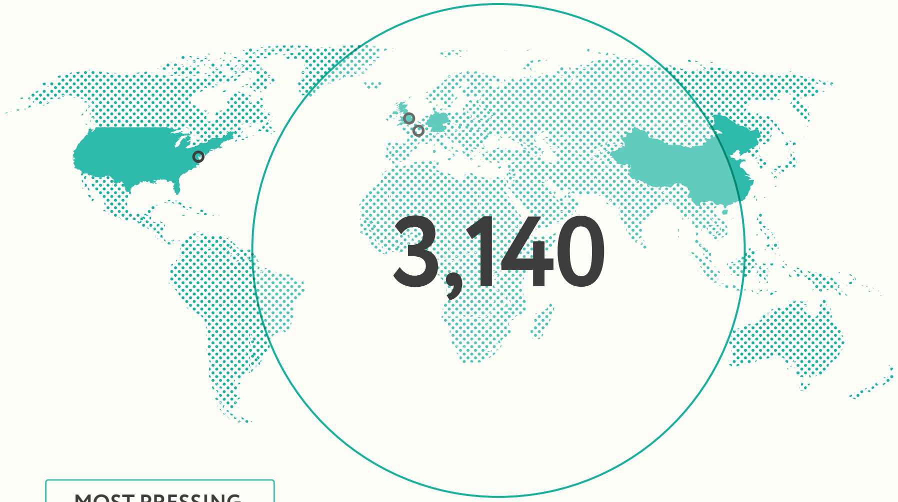
Better representation: this involves hiring employees from different groups, especially from historically marginalised groups, and appointing women to management and leadership positions. Most responses on improving representation in think tanks seemed to equate addressing DEI with improving gender equality, particularly women's representation. The greater focus on women's representation may possibly stem from women's empowerment and participation being longstanding issues that have seen poor progress.

Better working conditions: this involves organisational policies that address general employee concerns (such as flexible work conditions and salary transparency) and the concerns of specific employee groups (such as gender-specific policies). A few organisations had set up internal committees or an external group of advisors to assess their DEI policy compliance. Most policies were generally intended for and suited to the requirements of each organisation. In an exceptional case, a group of organisations had endorsed a collective agreement on preventing and acting on cases of discrimination and sexual harassment to advance safety in the sector.

Better research processes and engagement: some think tanks considered DEI in the context of their research work. They commented on the diverse communities they engage, the policy issues they research, and the diverse audiences they aim to reach by translating their findings.

Global snapshot

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



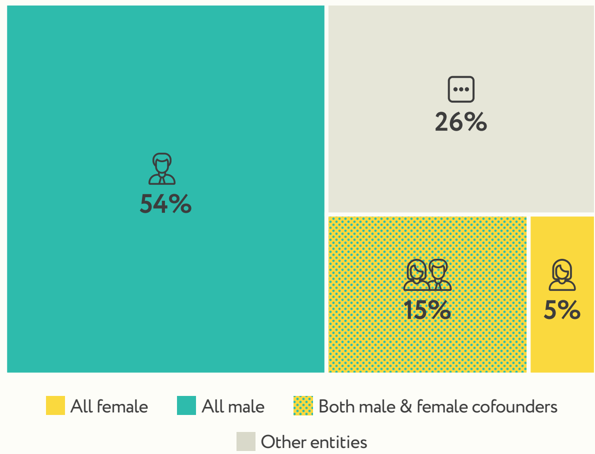
Countries with the most think tanks

- 453 USA
- 187 China
- 184 Germany
- 149 UK

Cities with the most think tanks

- 152 Washington, D.C.
- 113 London
- 80 Paris

GENDER OF FOUNDER



MOST PRESSING POLICY ISSUES

- International affairs
- Environment
- Peace & security
- Economics
- Governance

KEY CHALLENGES

- Fundraising
- Political uncertainty

OLDEST THINK TANK FOUNDED IN

1830
[DENMARK]

AVERAGE THINK TANK AGE (YEARS)	MEDIAN STAFF SIZE	AVERAGE STAFF SIZE	AVERAGE FEMALE STAFF (%)	FEMALE LEADERSHIP (%)	MEDIAN PUBLICATIONS
31	19	104	53	25	20

SOCIAL MEDIA CHANNELS

(Averages)

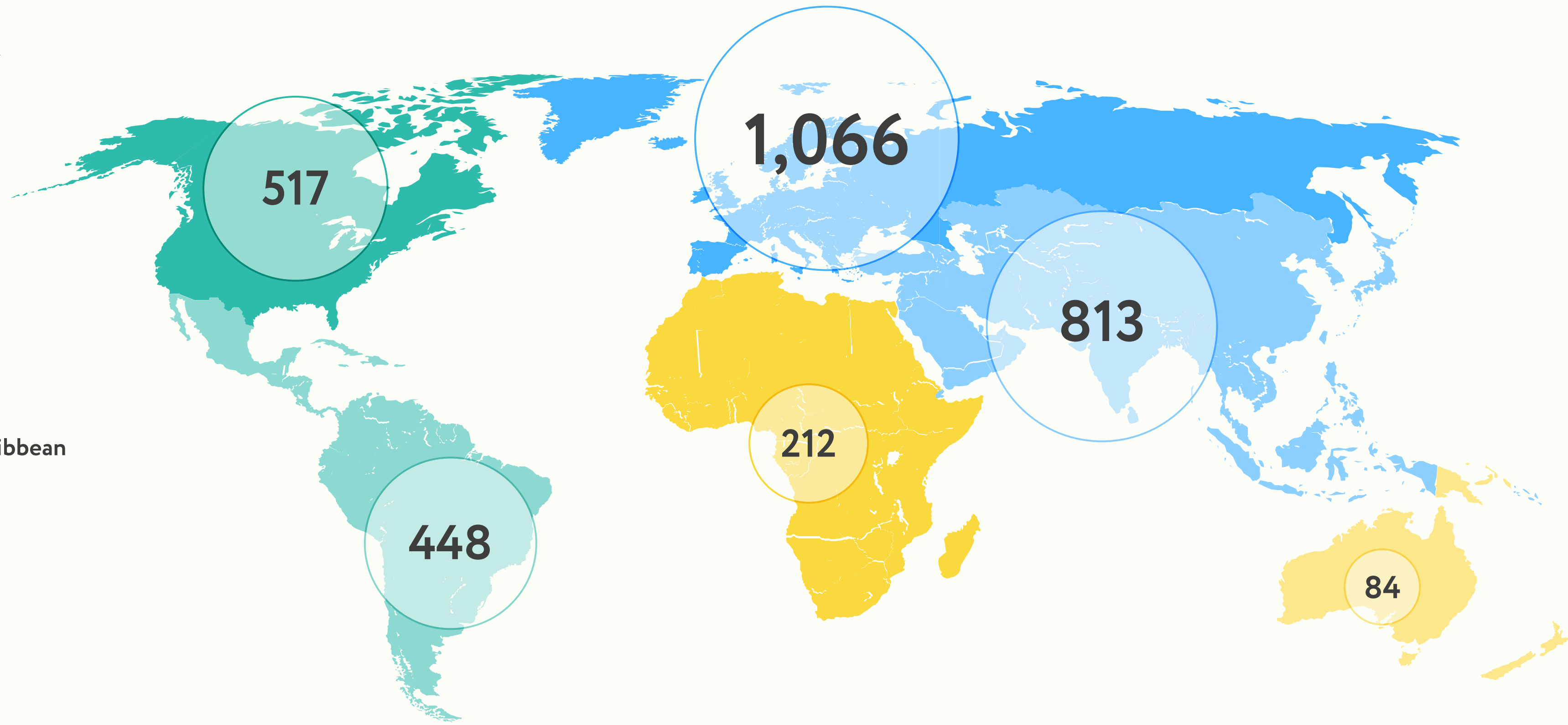
Usage

	Usage		
Facebook	75%	Likes	4,784
Twitter	72%	Followers	3,785
LinkedIn	49%	Followers	2,273
YouTube	47%	Subscribers	405
		Views per video	526
Instagram	20%	Followers	1,953
		Posts	337

Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

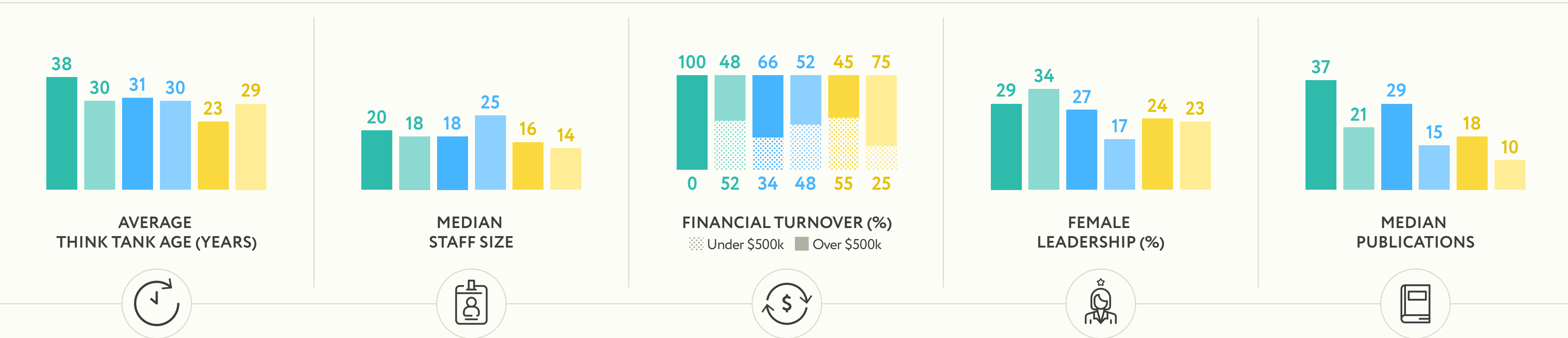
Regional comparison

THINK TANKS IN THE
OPEN THINK TANK DIRECTORY
BY REGION



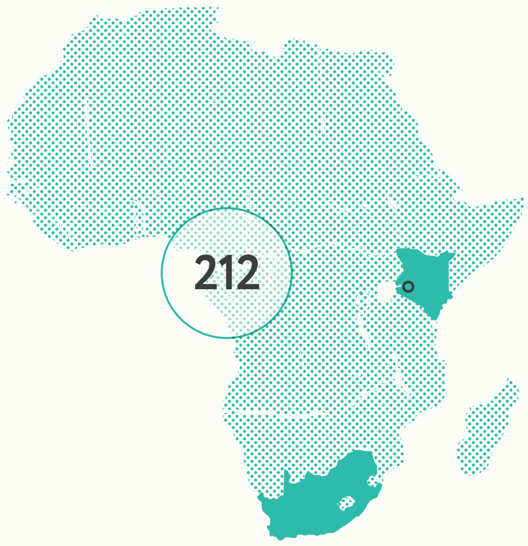
- USA & Canada
- Latin America & the Caribbean
- Europe
- Asia
- Africa
- Oceania

Data is based on 3,140 active think tanks in the Open Think Tank Directory.



Africa snapshot

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



Countries with the most think tanks

41 South Africa
32 Kenya

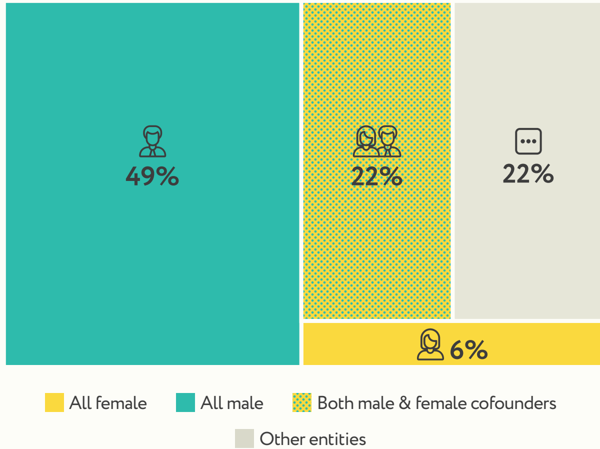
City with the most think tanks

29 Nairobi

OLDEST THINK TANK FOUNDED IN

1945
[SOUTH AFRICA]

GENDER OF FOUNDER



MOST PRESSING POLICY ISSUES

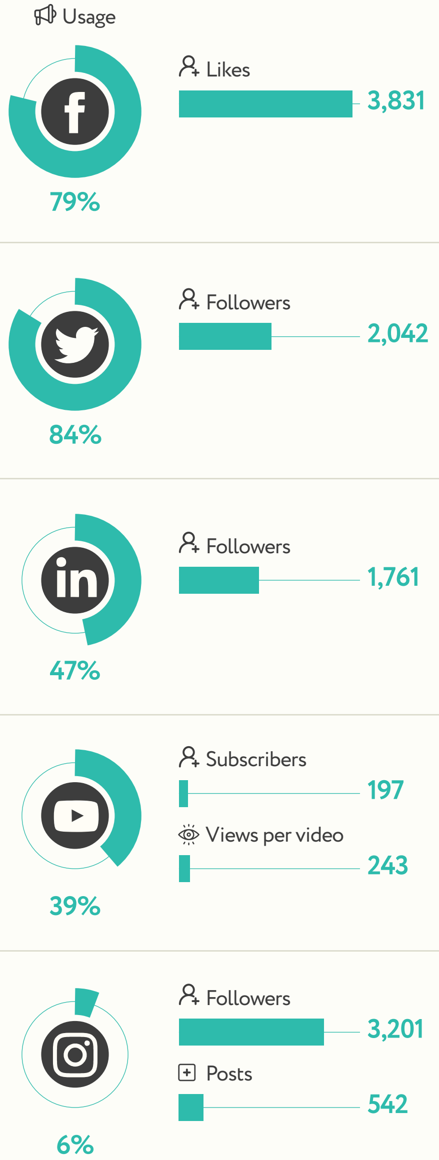
- Governance (democracy, political change)
- Economics (recovery, resilience & growth)

KEY CHALLENGES

- Fundraising
- Political uncertainty
- COVID-19-related challenges
- Changing/updating research agenda
- Staff turnover

SOCIAL MEDIA CHANNELS

(Averages)



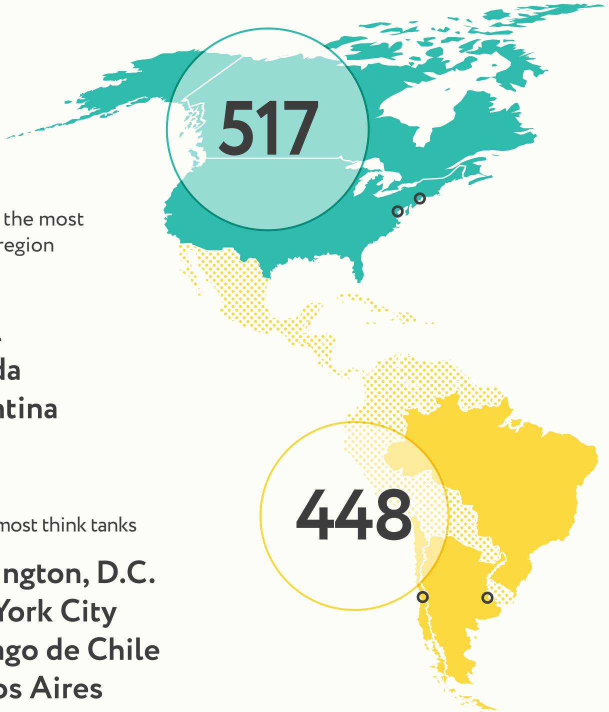
AVERAGE THINK TANK AGE (YEARS)	MEDIAN STAFF SIZE	AVERAGE STAFF SIZE	AVERAGE FEMALE STAFF (%)	FEMALE LEADERSHIP (%)	MEDIAN PUBLICATIONS
23	16	41	44	24	18

Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

Americas snapshot

USA & Canada | Latin America & the Caribbean

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



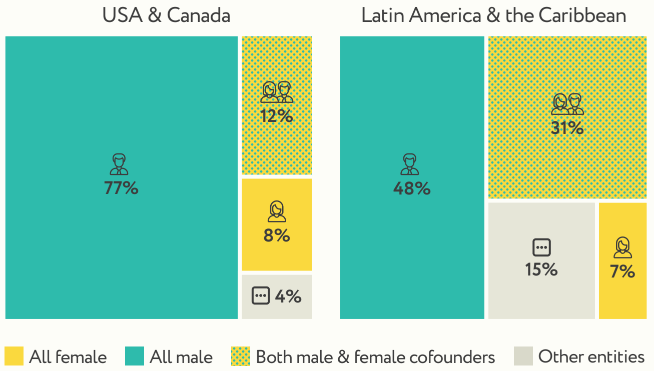
Countries with the most think tanks by region

- 453 USA
- 67 Brazil
- 64 Canada
- 53 Argentina
- 52 Chile

Cities with the most think tanks

- 152 Washington, D.C.
- 45 New York City
- 43 Santiago de Chile
- 42 Buenos Aires

GENDER OF FOUNDER

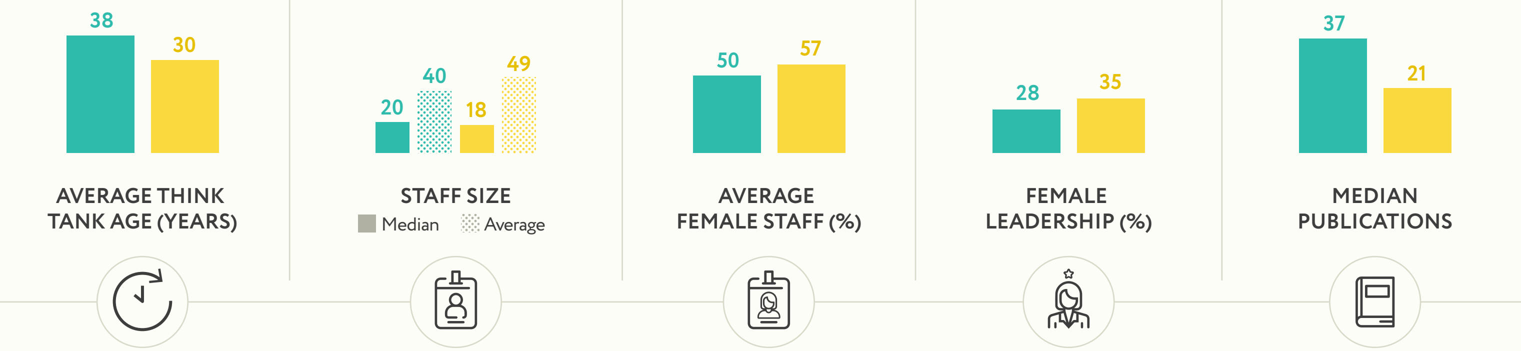


MOST PRESSING POLICY ISSUES	KEY CHALLENGES
USA & Canada: Health; Economics; Governance; Peace & security; International affairs	Fundraising; Political uncertainty; Quality of public debate
Latin America & the Caribbean: Governance (civic space, transparency, democracy, corruption etc.)	Fundraising; Political uncertainty; Quality of public debate

OLDEST THINK TANKS FOUNDED IN

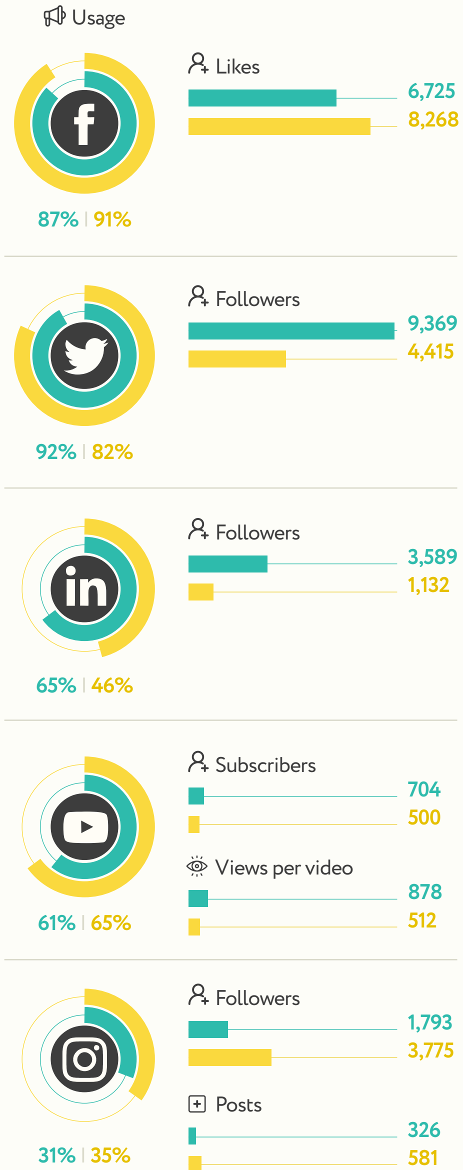
1910 [USA]

1930 [MEXICO]



SOCIAL MEDIA CHANNELS

(Averages)

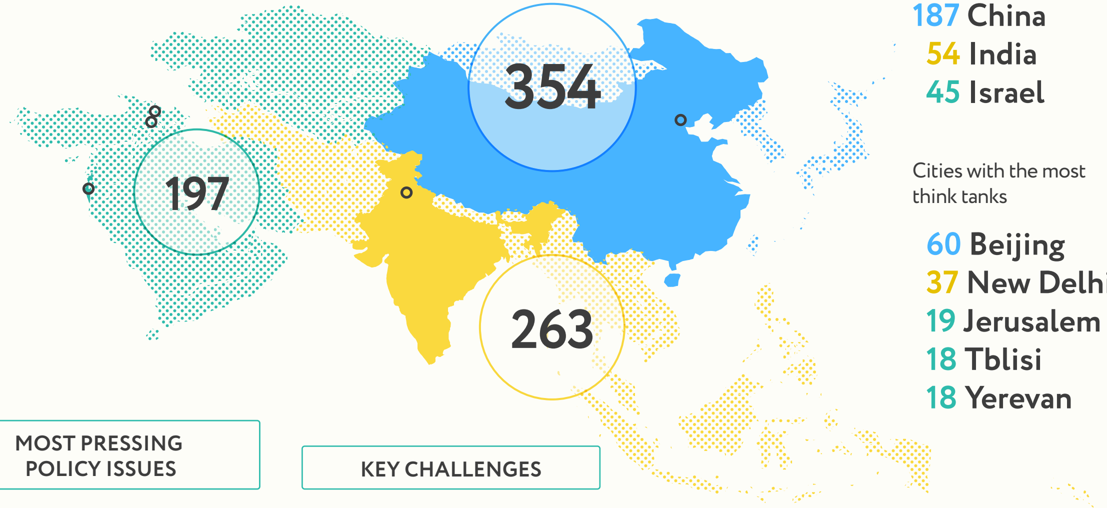


Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

Asia snapshot

Eastern Asia | South & South-Eastern Asia | West & Central Asia

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



Countries with the most think tanks by region

187 China
54 India
45 Israel

Cities with the most think tanks

60 Beijing
37 New Delhi
19 Jerusalem
18 Tblisi
18 Yerevan

MOST PRESSING POLICY ISSUES

Governance | Economics | Social policy | International affairs

Environment/energy | Economics | Governance | Peace & security | Social policy

*Not established due to small sample size

KEY CHALLENGES

Political uncertainty | Fundraising | Expanding reach & visibility | Staff turnover

Fundraising | Political uncertainty | Expanding reach & visibility

*Not established due to small sample size

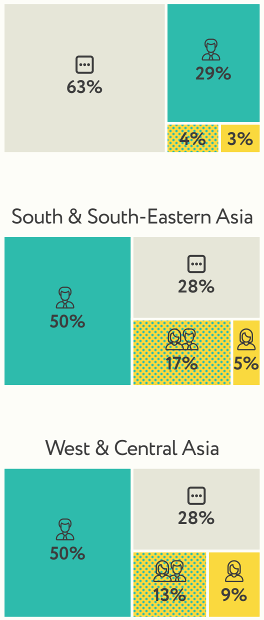
OLDEST THINK TANKS FOUNDED IN

1921 [JAPAN]

1937 [ISRAEL]

1870 [INDIA]

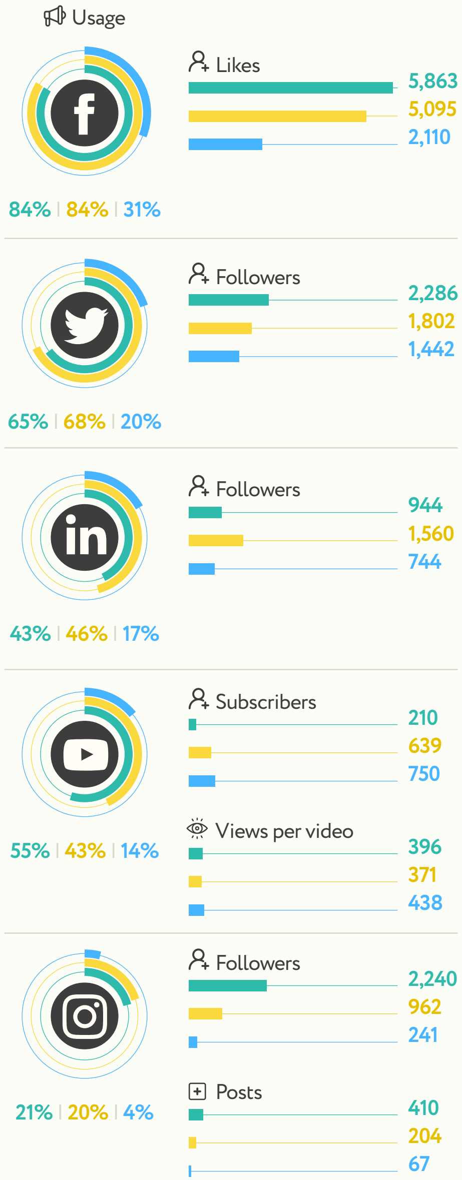
GENDER OF FOUNDER

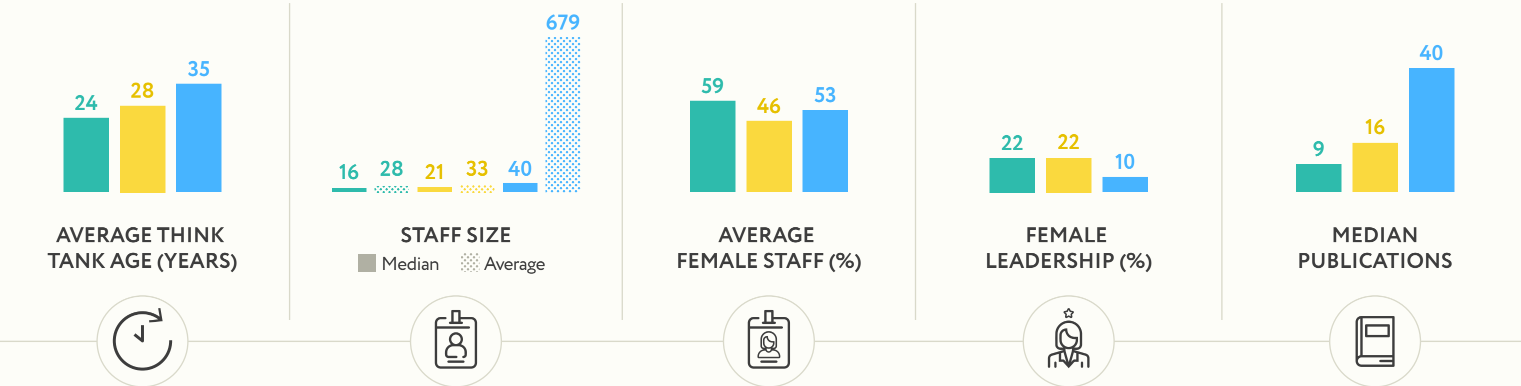


All female | All male | Both male & female cofounders | Other entities

SOCIAL MEDIA CHANNELS

(Averages)



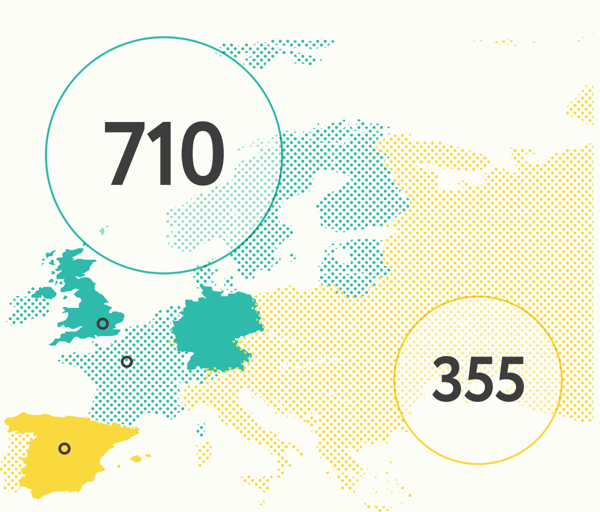


Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

Europe snapshot

West & Northern Europe | South & Eastern Europe

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



Countries with the most think tanks by region

184 Germany
149 UK
49 Spain

Cities with the most think tanks

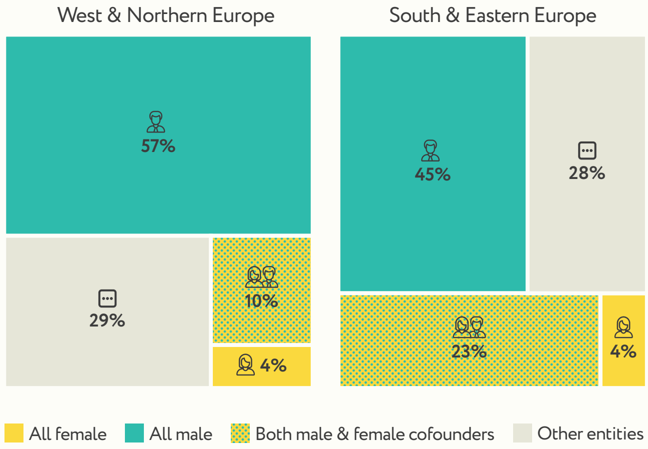
113 London
80 Paris
27 Madrid

OLDEST THINK TANKS FOUNDED IN

1830 [DENMARK]

1895 [CZECH REPUBLIC]

GENDER OF FOUNDER



MOST PRESSING POLICY ISSUES

West & Northern Europe:
- Environment/energy issues (energy & climate change)
- International affairs (EU integration, cooperation & Russia–Ukraine war).

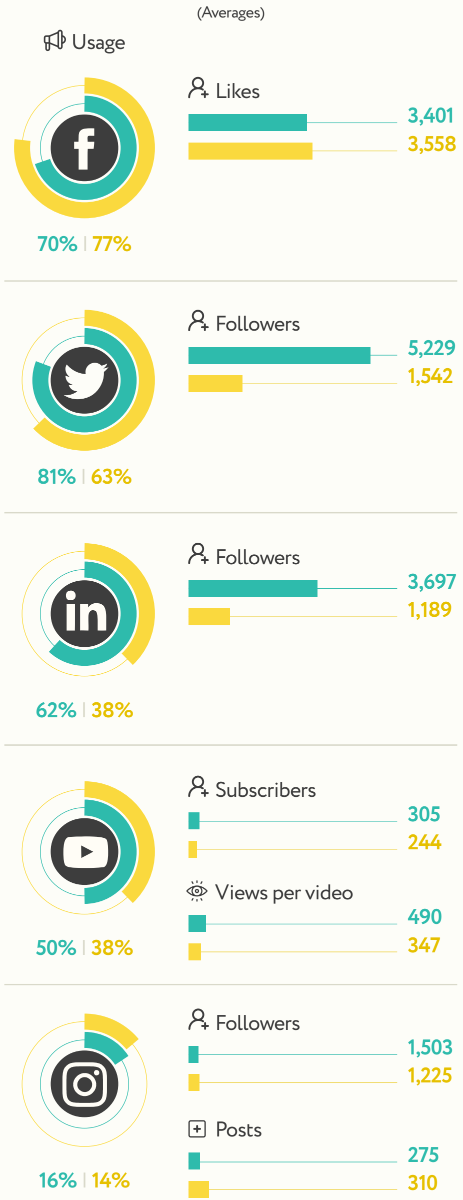
South & Eastern Europe:
- International relations (geopolicies)
- Environment/energy issues (energy crisis & green transitions)

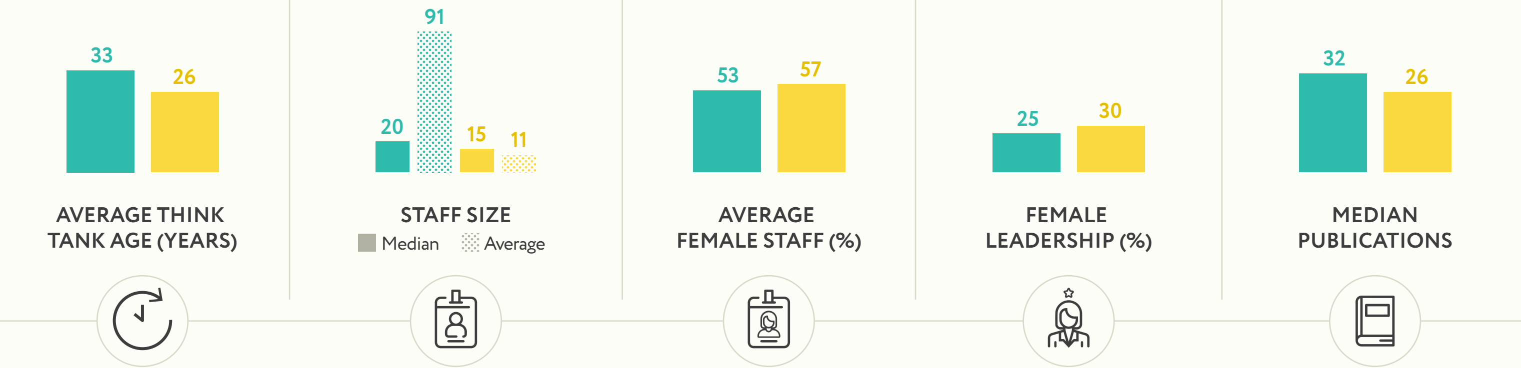
KEY CHALLENGES

West & Northern Europe:
- Fundraising
- Expanding reach & visibility
- Quality of public debate

South & Eastern Europe:
- Fundraising
- Political uncertainty
- Quality of public debate

SOCIAL MEDIA CHANNELS

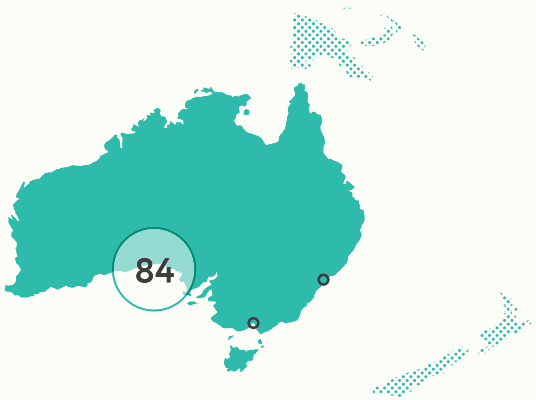




Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

Oceania snapshot

THINK TANKS IN THE OPEN THINK TANK DIRECTORY



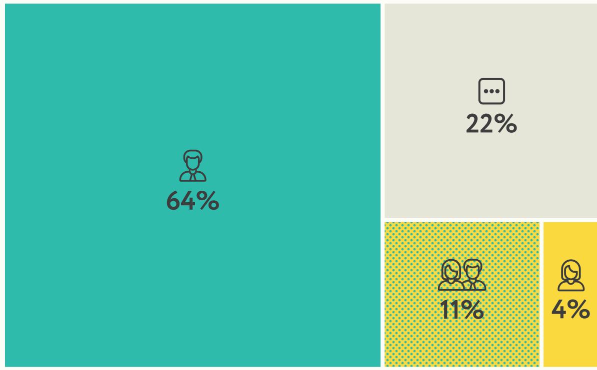
Country with the most think tanks

62 Australia

Cities with the most think tanks

17 Melbourne
17 Sydney

GENDER OF FOUNDER



All female | All male | Both male & female cofounders | Other entities

OLDEST THINK TANK FOUNDED IN

1852 [AUSTRALIA]

MOST PRESSING POLICY ISSUES

- International affairs
- Economics
- Peace and security

KEY CHALLENGES

- Fundraising
- Quality of public debate
- Expanding reach & visibility

AVERAGE THINK TANK AGE (YEARS)	MEDIAN STAFF SIZE	AVERAGE STAFF SIZE	AVERAGE FEMALE STAFF (%)	FEMALE LEADERSHIP (%)	MEDIAN PUBLICATIONS
29	14	168	61	25	10

SOCIAL MEDIA CHANNELS

(Averages)

Usage

- Facebook: 75% — Likes 5,185
- Twitter: 81% — Followers 3,565
- LinkedIn: 50% — Followers 3,436
- YouTube: 39% — Subscribers 218; Views per video 535
- Instagram: 17% — Followers 1,018; Posts 212

Data is based on 3,140 active think tanks in the Open Think Tank Directory and 234 respondents to the OTT think tank survey.

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Credits

Copy-editing and project management:
Inkwellcommunications.org

Design and typesetting:
Magda Castría for Inkwellcommunications.org

Advice and commentary:
Louise Ball & Enrique Mendizabal.

Regional expertise and sense-making:
Beth Orton, Donald Houessou, Gambhir Bhatta, Magdalena Rathe, Nora Latifi Jashari, Patrick Obunga, Rocio Guijarro Saucedo & Serge Loode.