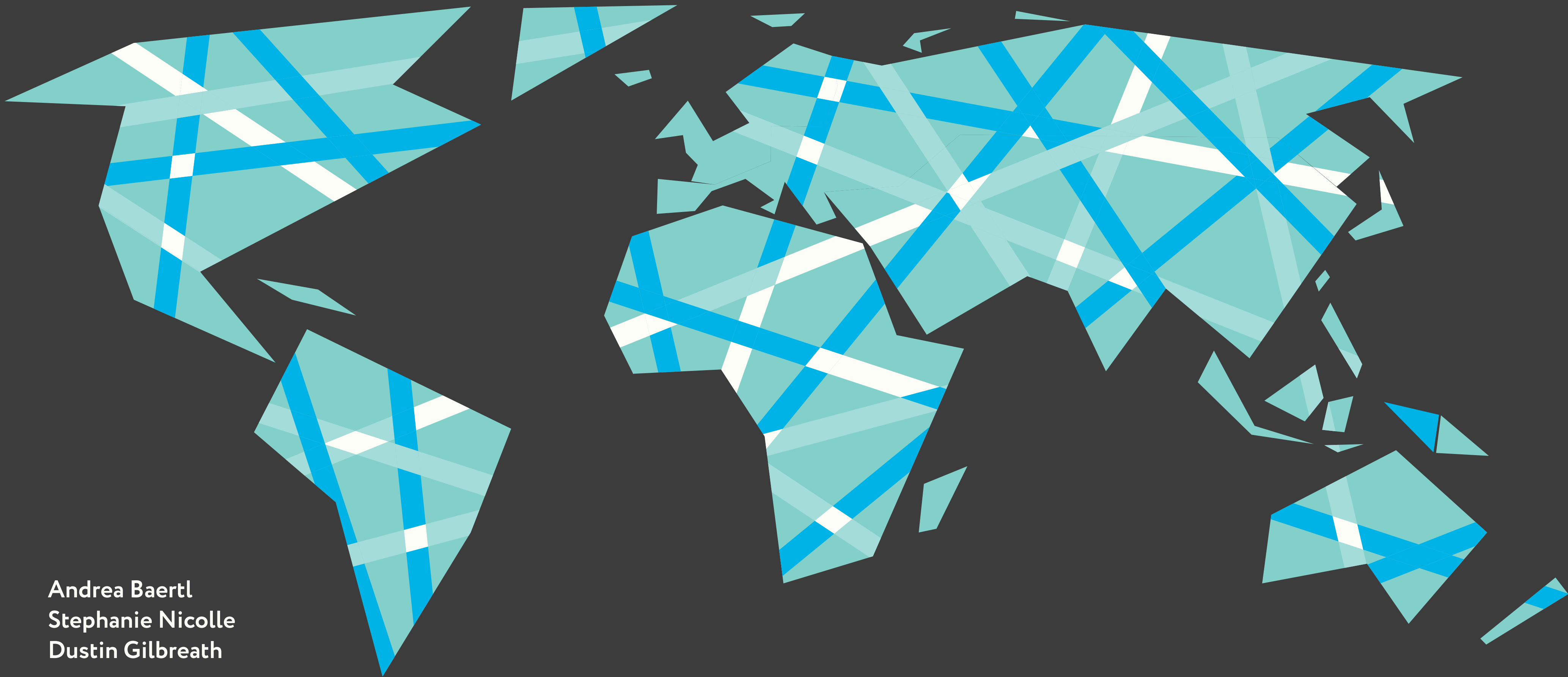
# THINK TANK STATE OF THE SECTOR 2023

Open Think Tank DIRECTORY



Andrea Baertl
Stephanie Nicolle
Dustin Gilbreath

OCTOBER 2023

# THINK TANK STATE OF THE SECTOR 2023

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? Is it getting harder or easier for think tanks to operate? Are think tanks planning to grow? 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, and now provides On Think Tanks with long term programme support; 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 3,700 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 makes 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.

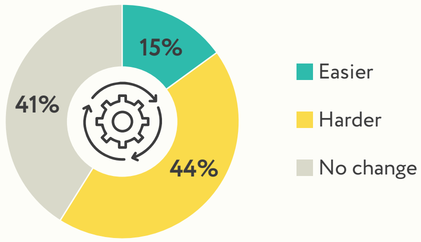
# Contents

# Think tank state of the sector 2023 I Highlights

## 44% of think tanks globally say it is getting harder to operate

And that rises to over 50% in Africa and Latin America & the Caribbean.

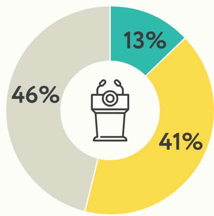
**Operational context over the past year**




## Pessimism over the political context increases

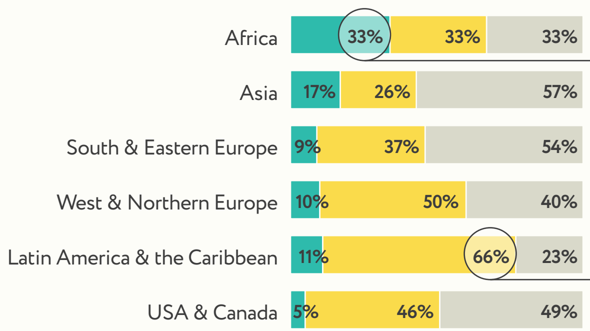
41% of those surveyed observed a worsening political context over the last 12 months.
And 51% foresee further decline in the year ahead – a rise from 39% in last year's report.

**Political context over the past year**




Improved Worsened No change

**Political context over past year by region**




**Responses from African thinktankers are most optimistic of all the regions, same as last year.** However, more respondents in the region predicted a worsening political context in the coming year than they did last year. More African thinktankers also reported a worsening in the legal context compared to respondents in other regions.

**For the second year in a row, Latin American & Caribbean think tanks gave the most pessimistic answers of all the regions.** They also reported one of the biggest declines in media freedom and legal changes affecting think tanks.

## Money troubles persist

**Funding context outlook**

| 2022 | 2023 | 2024 |
|---|---|---|
| Will worsen | Worsened | Will worsen |


→ Last year, 29% of respondents predicted that the funding context would worsen. This year, 34% told us it had indeed got worse, and 50% predicted even further worsening in the year ahead.

→ West & Northern Europe and Asia are most concerned about the funding outlook in their respective regions. In Europe, this is in part due to reduced government funding.
In Asia, increased government control is a driving factor.

→ Scarcity of core funding, achieving financial sustainability and diversifying funding sources while staying aligned to long-term priorities and research agendas were among the biggest challenges reported by think tanks globally.

## Yet 49% of think tanks plan to grow

→ **Just 2% expect to downsize and 48% plan to stay the same.** Planned growth is consistent with last year, suggesting an overall positive trend.

→ Older think tanks (founded before 2000) are much more likely to report planned growth (53% vs 13%).

→ Think tanks' growth plans don't appear to be influenced by their perceptions of the political context. But they are influenced by the funding context. Those who predict an improvement in the latter largely plan to grow their organisations, while those who predict deterioration mostly plan to stay the same size.

## The most pressing policy issues according to think tanks globally are…

**Trade/economics/finance (22%)**
Top priority for Asian think tanks; less so for Europeans and, in contrast to last year, mentioned by very few African thinktankers.

**Governance (21%)**
A high priority in Africa, but less so than last year.

**International affairs/development (21%)**
Top priority in West & Northern Europe (although mentions of the Russia–Ukraine war have decreased) and lower priority in Africa and Latin America & the Caribbean.

## The biggest challenges facing think tanks are…

**Fundraising & financial issues**
This came out top for nearly all regions, the exception being South & Eastern Europe. Thinktankers cited reduced funding opportunities; navigating funder interests, requirements and agendas; and operational costs as specific challenges.

**Governance & management**
More thinktankers in West & Northern Europe cited this as the biggest challenge facing their organisations, followed by those in South & Eastern Europe. Globally, most thinktankers mentioned the challenges of hiring and maintaining staff and dealing with organisational growth and development.

## Female-led, smaller, and younger think tanks have a more negative outlook

→ More male respondents and respondents from male-led think tanks report plans to grow and an improved political and funding context compared to female respondents and respondents from female-led think tanks. There's also a higher sense of apprehension and uncertainty among younger think tanks, which also tend to have a lower turnover and smaller staff size.

## Thinktankers want to strengthen their competencies in…

| | |
|---|---|
| Africa | Management & Leadership |
| Asia | Human Resources |
| Europe | Communications |
| Latin America & the Caribbean | Research; Networking & Engagement; Strategy |
| USA & Canada | Management & Leadership; Strategy |

# About the report

The **Think tank state of the sector** is an annual report providing an overview of the think tank sector across the world. The 2023 report is the fourth publication in the series.[3]

The report draws on our annual survey of global think tanks,[4] and data from the Open Think Tank Directory. It provides a descriptive overview of how think tanks see their current contexts (political, funding, media, legal, overall operations) and how they forecast the future; the key challenges they are facing; the competencies they need to work on; and the policy issues they are paying attention to.

The report does not aim to provide a deep explanatory analysis of its findings; rather, it presents a rich and useful overview of the think tank sector across the world. We invite readers to explore the insights and share their own perspectives, analyses, and explanations of our findings, either on our social media channels, by writing an article for OTT, or by joining one of the events at which we will be presenting the report.

3. Past reports are available here.
4. See the survey in Annex 1.

## Data

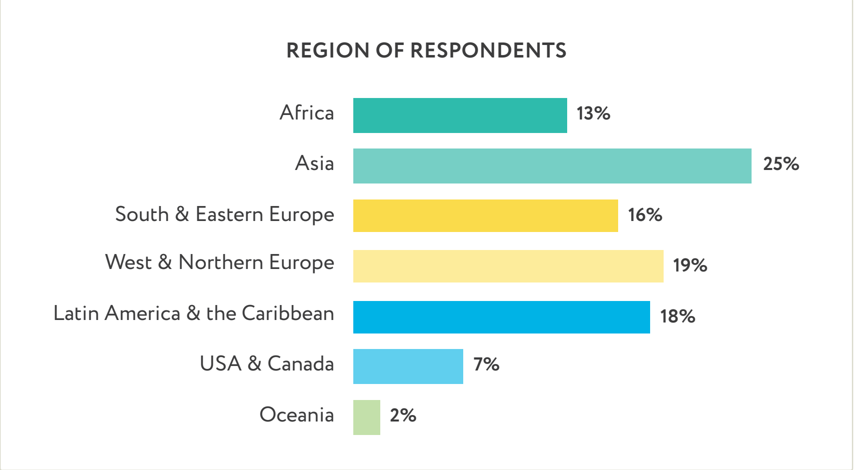
The 2023 annual think tank survey was sent out to all contacts at eligible organisations in the Open Think Tank Directory and shared in OTT's social media and newsletter.[5] The survey was open for two months (from 3 May to 13 July) and received 251 responses. Respondents mostly hold senior-level positions (64%) and either are involved in the governance and management of their organisations (49%) or hold a research-related role (35%).[6] This implies that the responses come from experienced thinktankers, who are knowledgeable about their organisation and its context.

Chart 1 shows responses per region. We made considerable efforts to obtain responses from a representative number of think tanks in each region, but ultimately the sample obtained does not reflect the exact distribution of think tanks in the Open Think Tank Directory (in terms of number per region, age or staff size). To make the results and analysis more representative, we weighted the data using the Open Think Tank Directory as a reference.[7] This resulted in a (well-informed) weighted, convenience sample.[8]

This year, the data for Europe was strong enough to be able to separate it into two subregions, allowing for a more nuanced analysis. Unfortunately, we once again did not get enough responses from Oceania to be able to confidently include them in the charts; however, whenever possible, we have offered a qualitative analysis of their responses in the report's narrative.

Similarly, responses from the USA & Canada, although sufficient for inclusion in the charts, were found to have a very large margin of error.[9] Therefore, we have refrained from making strong statements about these results and we urge readers to interpret them with care.

*Chart 1*




*n=251*
*Note: These are unweighted results.*

Responses have been analysed and compared by the following variables: region, seniority of respondent, organisational area of respondent, reported gender of respondent, turnover of organisation, founding date of organisation, and business model. *Region* consistently emerged as a key variable with which to assess differences and contextualise the findings; therefore a regional analysis is given for each question alongside an overview of the answers. The other variables are only mentioned within the report when differences were found.[10]

5. Organisations were not eligible for inclusion in the sample if they were defunct (i.e., no longer active) or deemed to be 'boundary' organisations – that is, organisations that carry out some form of research to inform public policy, but not as the central focus of its priorities and activities.
6. See Annex 2 for details of respondents' personal and organisational profiles.
7. The weighting considered the interaction between a think tank's region; the age of the think tank (founded before 2000; 2000 or after; or at an unknown date); and size in terms of employee count (20 or fewer; 21 or more; or unknown employee count). These variables were selected as they have been correlated with responses in past waves of the study, and overrepresentation by region was anticipated due to differential levels of awareness of On Think Tanks in different regions.
8. To our knowledge, the Open Think Tank Directory is the most comprehensive database of think tanks across the world. But it is important to note that it does not claim to be a complete list of ALL think tanks worldwide, and it is known to underrepresent think tanks in the USA and China (the countries with the most think tanks). Nevertheless, it does feature a good sample, one that is continuously updated as new think tanks are added, defunct ones are taken out, and data points are expanded. Thus, while the data is not perfect, its analysis nonetheless offers an interesting overview of the trends and patterns in the sector.
9. See Annex 3 for a table listing margins of error for each of the comparison variables.
10. The database and all analyses can be accessed here.

↑ Table of contents

# Growth forecast

# Growth forecast

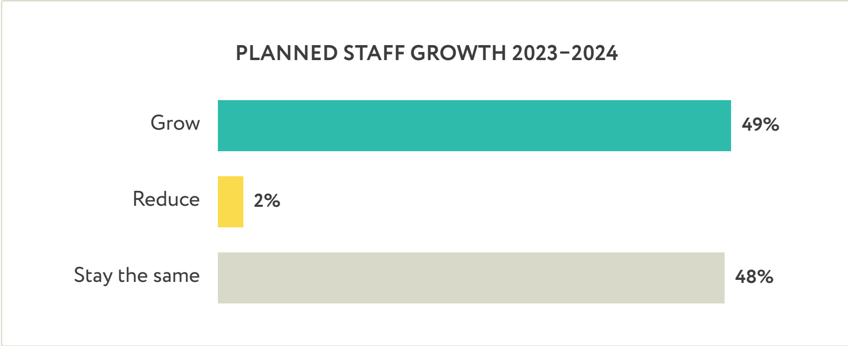
The think tank sector's growth plans (measured in terms of staff size) remain stable and with a positive trend. Respondents' organisations are either planning to grow in staff size (49%) or planning to stay the same (48%), while only a very small group is planning to downsize (2%).

**SURVEY QUESTION**
**In terms of staff, is your think tank planning to grow (increase its staff numbers), reduce or stay the same in the year ahead?**

Compared to last year's report, growth plans seem to be consistent with no major changes apparent. Last year, 46% of think tanks planned to grow, while 51% planned to stay the same.

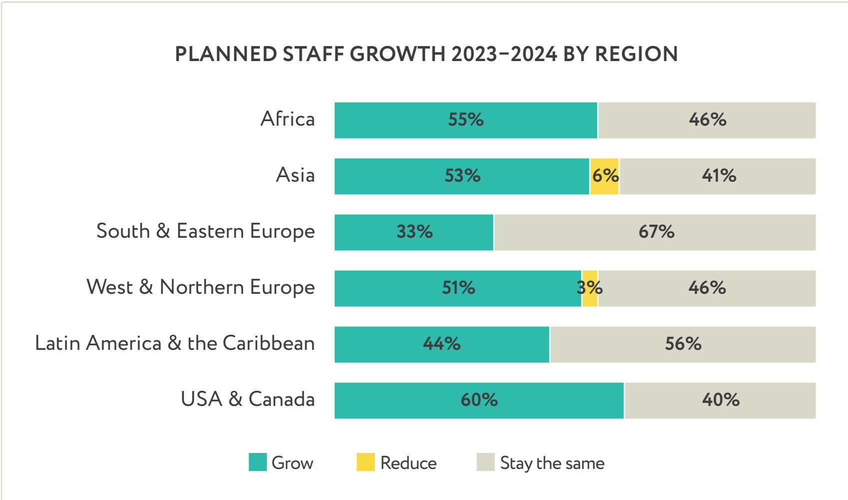
Overall, the results show a somewhat positive trend and forecast, indicating that despite the challenges and uncertainties it faces, the sector overall will continue to grow.

*Chart 2*




*n=187*
*Note: 63 respondents said that they did not know or could not say whether their organisation's staff size was going to grow, reduce or stay the same. The total for the chart shown (187) does not include these responses.*

*Chart 3*




*n=187*

↑ Table of contents

### *Grow*

The reasons respondents gave for the growth of their organisation are many but are best grouped into two categories: *proactive* or *reactive* growth. Growth as a forward-looking strategy (proactive) emerged as the most prominent reason, with organisations focusing on enhancing effectiveness, forming alliances, and increasing staff numbers to augment capacity, increase visibility and credibility, secure new projects, and engage with new stakeholders. Many organisations are also driven by the prospect of new projects, aiming to leverage these opportunities for expansion. Meanwhile, the other group showed a more reactive response towards growth, mentioning the need (and desire) to meet increasing demand for specialised services and expertise due to fundraising successes, as well as not being able to meet their current workload with existing staff numbers. Although the question focussed on growth measured in terms of staff numbers, a few respondents also mentioned planned geographical and thematic expansion. The reasons for growth cited by thinktankers were similar across the world, and no significant differences emerged between regions.

> ***'We believe that our organisation will grow in the near future, due to our strategic redirection process. We are focused on attracting more allies and collaborators who have the capabilities and resources to help us fulfil our mission. We believe that this strategy will allow us to increase our visibility and reputation and, in turn, allow us to participate in larger-scale projects'.*** **Colombian respondent**

### *Stay the same*

Funding emerged as a pivotal factor influencing think tanks' decision to remain the same size for the coming year. Many think tanks are cautious about expanding due to uncertain funding landscapes, reflecting their strategic approach to sustainability. The context also plays a role in decision-making around expansion, with some organisations referring to geopolitical factors affecting their operations and limiting their scope for growth. Although respondents were able to articulate the reasons for their think tanks' plan to remain the same size, most answers suggested that growth aspirations are in fact still present, but the capacity to realise them is lacking, depending heavily on financial circumstances and the ability to attract and manage skilled personnel. However, some organisations, particularly in South & Eastern Europe (the region with the highest response rate in the 'remain the same' category), reported that they consider their current team size adequate for their activities and emphasised the importance of consolidating recent growth before embarking on further expansion.

> ***'[Our organisation] has already grown in past years. [We have] decided to consolidate this growth rather to continue growing'.*** **Serbian respondent**

### *Reduce*

The few think tanks (2%; n=187) that are planning to reduce in size mentioned funding uncertainties and constraints, completion of major projects, limited funding opportunities, and political constraints. It is notable that most organisations planning to shrink are in Asia; in Pakistan, in particular, responses evidenced strong pessimism about the funding scenario.[11]

### *Don't know*

A significant group (63 respondents) said that they did not know whether their organisation was planning to grow or not. Reasons given for this answer expressed uncertainty brought about by political and civic space changes, organisational restructuring, or a lack of capacity to scale up. Most who responded in the 'don't know' category were mid- or entry-level thinktankers, but there were also senior-level staff and board members who were unsure or unable to comment on growth plans. All responses in this category ('don't know') have been taken out of the charts for clarity.

11. One outlier is a respondent from West & Northern Europe, who mentioned reduction plans being made due to a staff member going on maternity leave.

↑ Table of contents

## Differences

| GENDER OF RESPONDENT | GENDER OF LEADER |
|---|---|
| → More male respondents reported that their organisation is planning to grow (48% vs 26% female respondents) | → More thinktankers from female-led organisations reported not knowing whether they were going to grow (48 % vs 14%)<br>→ More thinktankers from male-led organisations reported that their organisation is planning to grow (47% vs 26%) |
| **FINANCIAL TURNOVER Above or below USD 500k** | **DATE FOUNDED Before or after 2000** |
| → A higher percentage of smaller organisations are planning to grow compared to larger organisations (46% vs 25%) | → More older organisations are planning to grow compared to younger ones (53% vs 13%) |
| **ORGANISATIONAL AREA OF RESPONDENT** | **SENIORITY OF RESPONDENT** |
| → Communications staff were the least likely to report growth plans (only 17% did) | → Board members were the most likely to report that their organisation planned to grow (64% respondents who are board members gave this answer) |

*No significant differences were found by business model.*

### Box 1. Gender of respondent: Understanding the potential reasons for differences in responses

Throughout the survey we found that male respondents had a more positive assessment of their organisation's funding and political context compared to female respondents and more males than females reported organisational growth plans. To understand this, we must first look at the makeup of the data.

The survey had more male than female respondents (57% vs 43%), but they were not evenly spread across the different comparison variables. The differences, albeit small in some cases, are interesting:

- **Organisational area:** More women respondents are in communications roles (13% vs 7 %); more men in governance and management (51% vs 48%); and more men in research (37% vs 33%).
- **Seniority:** More male respondents are board members (11% vs 7%); more men are in senior-level positions (67% vs 61%); and substantially more women are in mid-level positions (30% vs 18%).
- **Turnover:** There is a very a small tendency for male respondents to be part of organisations with a turnover of more than USD 500k (55% vs 53%).
- **Founding date of organisation:** There is a very a small tendency for male respondents to be part of organisations founded before 2000 (34% vs 31%).
- **Region:** The survey had considerably more male (than female) respondents in Africa, Asia (particularly South & South-Eastern Asia) and West & Northern Europe.
- **Gender of leader:** Men are more likely to be part of male-led organisations than female-led ones; 76% of men in the survey belong to male-led organisations, while only 42% of women who responded are part of male-led organisations.

The above indicates a trend whereby men in the sample are likely to hold more senior positions, to be from larger, older, and higher-turnover organisations, and – most significantly – to be part of male-led organisations.

This latter characteristic could be a key factor behind the differences in responses, as an analysis of the Open Think Tank Directory shows that organisations with male leaders have higher turnover, are older, and employ fewer women in senior positions. Alternatively, it may be the case that male respondents are simply more confident (or at least say they are) about their ability to fundraise/deal with problems, while women are perhaps more cautious on average.

In summary, and at this stage, we can only describe the data and trends we find; we invite the sector to join the discussion and continue unpacking this trend with us.

↑ Table of contents

# How is the political context changing?

# How is the political context changing?

## Overall

Respondents' overall assessment of the political landscape is marked by a prevailing sense of pessimism. A substantial 41% of respondents reported observing a worsening of the political context over the past year. This negative perception was echoed by the majority of respondents (51%) who anticipate a continuation of this trend over the next 12 months.

**SURVEY QUESTIONS**
**Reflecting on the last 12 months, did the political context in your country change? How do you foresee the political context in your country in the year ahead?**

In contrast, there was a smaller but notable group of respondents that did report perceiving positive changes. Approximately 13% of participants have noted improvements in the political environment over the previous year, with an equal 13% expressing cautious optimism for sustained advances in the year ahead.

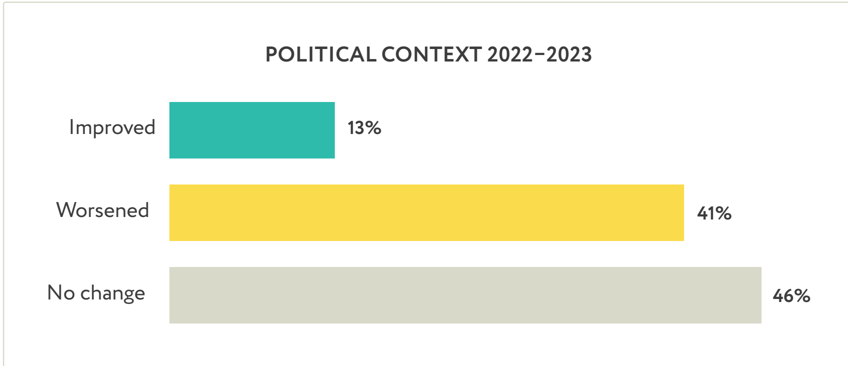
Despite this minority perception, there does on the whole appear to be an increase in the expectation of a bleaker future compared to last year's report (39% of think tanks anticipated worsening conditions last year compared to 51% this year). However, it is important to note that these responses are not directly comparable, because this year, unlike last year, we did not provide an option to report/forecast a mixture of both positive and negative changes.

Comparing assessments of the political context over the past year with respondents' expectations for the future (as depicted in Charts 6 and 7), an expected pattern emerges whereby those who hold a positive view of the past foresee a brighter future, or, at least, expect things to stay the same. Conversely, those who have observed a decline in conditions to date anticipate a continuation of the negative trend, and finally, those who have seen no change anticipate a generally stable political context ahead.

Surprisingly, there are only relatively minor differences in organisations' growth plans in relation to their forecasts for the political context. It seems, therefore, that organisations' growth plans are not significantly influenced by their expectations about the political environment.

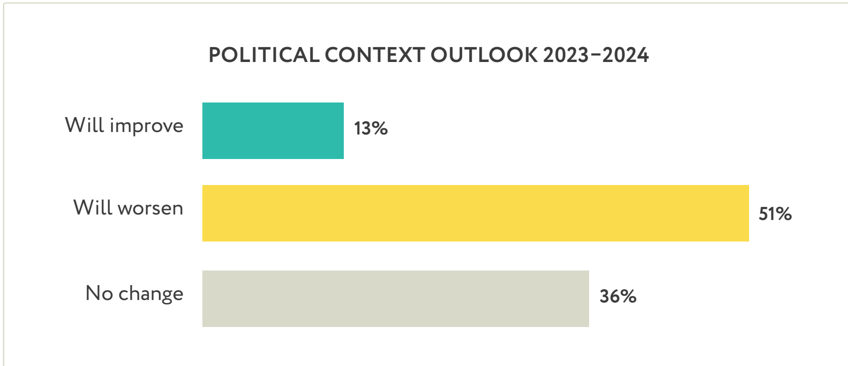
However, it is not surprising that none of the organisations with plans to downsize are anticipating an improvement in the political context, and, furthermore, those who reported a positive assessment of last year's political climate are more inclined to have plans for growth.

*Chart 4*




*n=250*

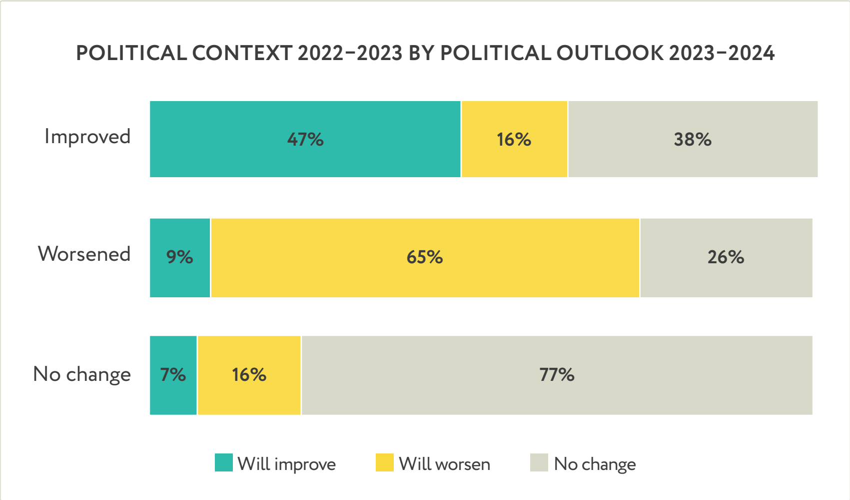
*Chart 5*




*n=250*

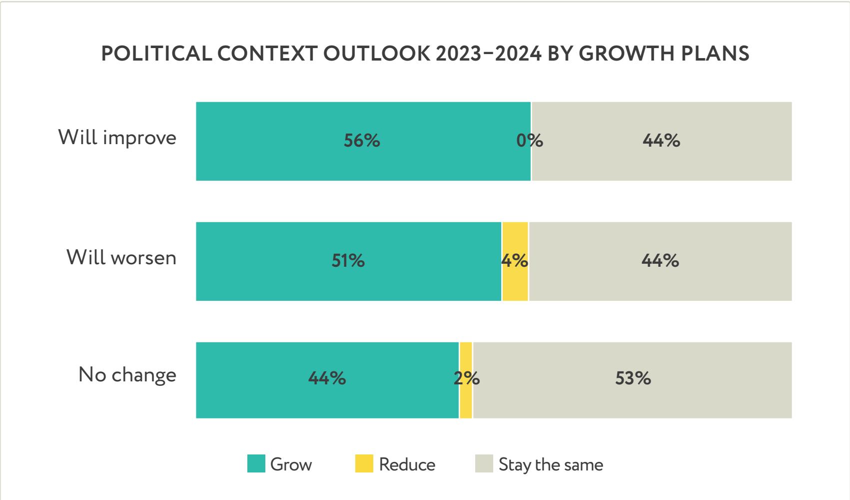
↑ Table of contents

*Chart 6*




*n=249*

*Chart 7*




*n=187*

### *Worsened/will worsen*

The context-dependent nature of these questions makes it difficult to draw overarching global conclusions; however, in general, those reporting and predicting a worsening/negative political context are citing concerns over growing far-right influence, polarisation, and authoritarian tendencies. These issues are seen as threats to political stability and discourse. Worries about democratic erosion, challenges to civil liberties, and economic crises loom large. The potential for unresolved conflicts, amplified by upcoming elections, raises fears of instability. Geopolitical tensions are also a point of concern and their implications for political stability are acknowledged within thinktankers' responses.

### *Improved/will improve*

Some respondents who reported/anticipated positive changes to the political context credited their optimism to a newly elected government that they expected to bring enhanced political stability; others cited reduced protests and raised expectations for better governance and policy reforms. The role of smooth electoral transitions in facilitating effective governance was also highlighted. Additionally, the shift towards data-driven decision-making, coupled with an increased focus on think tanks and research institutions, was identified as a positive trend by some. Looking forward, the optimists among the respondents emphasised small signs of progress and positive trends – often linked to opportunities stemming from upcoming elections and government reforms – that they expected to contribute to an improved political context.

### *No change*

Respondents who anticipate no changes to the political context largely share the negative sentiments of those who expect conditions to worsen. Their outlook is characterised by scepticism about significant change, often rooted in an assessment of unaddressed challenges and an enduring status quo.

↑ Table of contents

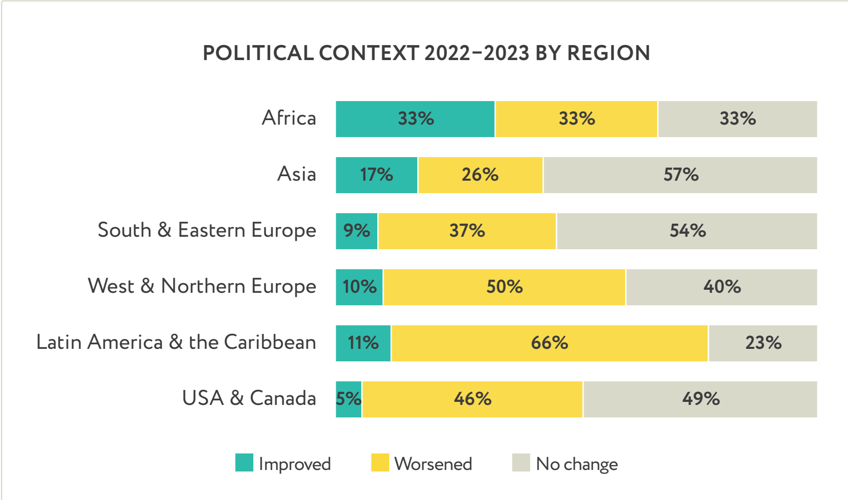
## Regional analysis[12]

Any assessment of political context is, as its name implies, deeply contextual and representative only of a specific situation within a given timeframe.[13] Statements in this section aim to provide as much detail as possible given the limitations as well as the characteristics of this report. This is by no means a comprehensive study of each region, and far from a detailed country-by-country analysis.

African thinktankers have maintained the most positive outlook for the second consecutive year, although a shift towards pessimism is evident, with nearly half of respondents anticipating a worsening political context. Meanwhile, thinktankers in Latin America & the Caribbean consistently – and again for the second year in a row – reported deteriorating political contexts in the highest numbers, paired with an expectation of no change in the near future. European regions showed divergent trends: respondents from West & Northern Europe reported a decline in conditions – particularly attributed to concerns over far-right influence – while South & Eastern Europe's unchanging, negatively perceived political context points towards a predicted worsening.

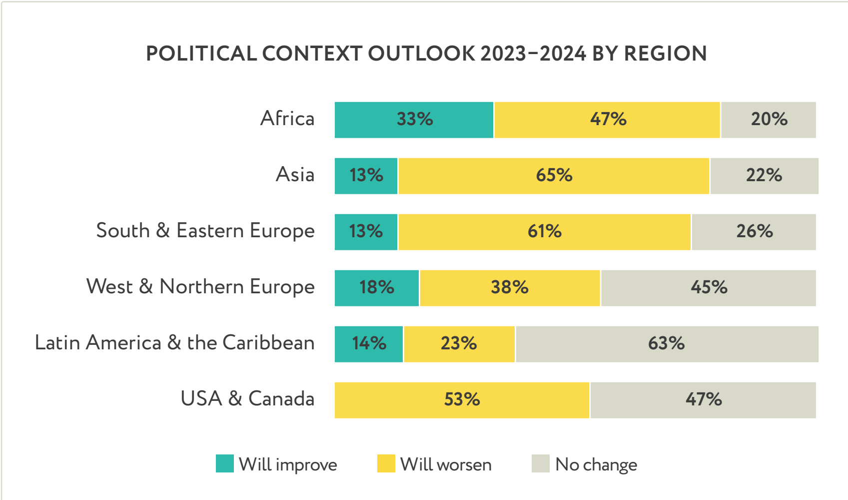
Similar patterns emerged in Asia, where a static, negatively perceived political landscape is projected to deteriorate even further. Charts 8 and 9 provide a more detailed look at the regional survey findings on political context.

*Chart 8*




*n=250*

*Chart 9*




*n=250*

12. A list of respondents' countries can be seen in Annex 4.
13. The survey collected responses between May and July 2023.

↑ Table of contents

### *Africa*

Compared to their counterparts in other regions of the world, African thinktankers expressed the most positive impressions about changes in the political context over the last year (33% reported an improvement), and projected the same optimism for the coming year. However, the overall perspective within Africa was balanced, with exactly the same share of responses (33%) falling into the 'worsened' and 'no change' categories respectively. Looking to the year ahead, a sombre outlook prevails, with almost half (47%) foreseeing a worsening of the political context.

African respondents (mostly those in Kenya, Nigeria and Somalia) mentioned a number of factors that have had – or are expected to have – a positive effect on the political context, including the impact of new government leadership, engagement with research institutions, and proactive public participation. Others mentioned positive contextual changes due to political transitions, elections, and reforms initiated by new governments. While acknowledging the challenges, respondents reported that these changes are leading to informed decision-making.

Conversely, the factors cited as having a negative influence on the political context (mostly by thinktankers in South Africa, Uganda and Zimbabwe) were economic challenges (inflation, unemployment, resource scarcity); social unrest; governance issues; concerns about elections and their aftermath, including tensions, contestations, and the potential for instability; and constraints on civil society and freedom of expression.

> ***'A more progressive government was sworn. The new government has more demand and use for data and research evidence to inform government decisions. This is coupled with public participation'.*** **Kenyan respondent**
>
> ***'There has been a worsened level of dictatorship in Uganda, with contraction in civil society space, and limited freedom of expression coupled with an overall violation of human rights'.*** **Ugandan respondent**

### *Asia*

Asian thinktankers also reported a mainly unchanging (negative) political context over the last year and were the largest group of respondents to predict a worsening for the year ahead (65%). Their responses revealed a noticeable concern towards rising authoritarianism, with governments suppressing civil society, media, and opposition voices, and cooperating less with think tanks. This erosion of democratic norms raises concerns about the future of free expression and individual rights. The war between Russia and Ukraine is also being felt in the region as a source of political instability, alongside other regional conflicts that affect decision-making and policy outcomes. Elections, regional conflicts, and geopolitical instability all contribute to the complex political landscape and this concerning forecast.

> ***'Instead of targeting external threats, the government openly attacks democratic institutions – CSOs, media, the opposition and even Western strategic partner countries that undermine threat perception in society'.*** **Georgian respondent**

### *West & Northern Europe*

Europeans, and particularly those in West & Northern Europe, reported a decline in their political context, with 50% of respondents indicating that the political context has worsened over the last year. The specific concerns cited by West & Northern European thinktankers centred on the rise of the far-right and political polarisation; apprehensions about upcoming elections, including the potential for instability and infighting and challenges in forming governments due to polarisation; geopolitical tensions; economic challenges; climate change concerns; and the diminishing credibility of the policymaking process and the potential impact of think tanks.

**Thinktankers in West & Northern Europe are concerned about the challenges that climate change policies face due to the rise of far-right and conservative parties. Ongoing crises fuel populism and divert resources from climate initiatives, while political polarisation and distrust intensify climate debates.**

↑ Table of contents

### *South & Eastern Europe*

South & Eastern European thinktankers reported an unchanged (negative) political context over the last year, coupled with a forecasted worsening ahead. Common concerns cited included continued attacks on civil society; corruption; erosion of public trust in institutions; continued geopolitical tensions and war; electoral dynamics; and the rise of far-right parties and the spread of extreme ideologies, causing polarisation and reshaping political discourse. Finally, electoral dynamics were also said to be driving changes in the political context.

> *'[We are seeing] hostility towards civil society, with the introduction of regulations that limit the work of civil society organisations'.* Italian respondent

### *Latin America & the Caribbean*

The region with the highest share of thinktankers reporting worsened political contexts was Latin America & the Caribbean (66%); these respondents also anticipated that this would not change in the coming year (63%). This overall negative assessment of the political context reflects the spiralling feelings of the region over the unchanging political (social and economic) turmoil of the last couple of years. The explanations given for the negative assessment were many: political instability and polarisation, particularly linked to electoral processes and the uncertainty they generate; governance challenges; the absence of programmatic agreements or proposals from the government and opposition parties to address critical problems; changes and challenges to civil society organisations (stigmatisation of CSOs, co-optation of the opposition, and limitations on public discourse); economic challenges; and the continued weakening of institutions. Overall, the responses depict a region grappling with a wide array of challenges, from governance and economic issues to democratic institutions and international influences. These challenges collectively contribute to a complex and often uncertain political context in Latin America & the Caribbean.

> *'The political situation has worsened due to serious setbacks in democracy and is turning into an authoritarian regime. The checks and balances system has disappeared, and civic space has shrunk at a fast pace. The government controls the different institutions and concentrates all the power'.* El Salvadoran respondent

## Differences

#### GENDER OF RESPONDENT

- More male respondents reported an improvement from last year's political context (22% vs 5% of female respondents)
- More female respondents reported no change from last year's political context (57% vs 36%)
- There is a slight trend for female respondents to give a more negative forecast of the political context ahead (58% of female respondents vs 44% of male respondents expect a worsening context)

#### GENDER OF LEADER

- Respondents from organisations led by men were more likely to report a positive change over the past year (19% vs 7% from female-led organisations)
- Respondents from male-led organisations were also more likely to predict no change in the year ahead (44% vs 20%)
- More respondents from female-led organisations forecasted a worsening political future (64% vs 45%)

#### FINANCIAL TURNOVER
**Above or below USD 500k**

- There is a slight trend for more respondents from larger organisations to perceive an improvement in their political context (14% vs 8% from smaller organisations)
- More respondents from smaller organisations reported a worsening of the political context (54% vs 39%)

#### DATE FOUNDED
**Before or after 2000**

- Respondents from older organisations showed both more positive assessments of the previous year's political context (16% from older organisations vs 7% from younger organisations reported an improvement) **and** more negative assessments of the same (47% vs 27% reported a worsening context)
- The majority (66%) of respondents from younger organisations reported seeing no change in political context

*No significant differences were found by organisational area of respondent, seniority of respondent, or business model.*

↑ Table of contents

### Box 2. Differences in outlook by gender of leader

Throughout the survey, we consistently found differences in responses between thinktankers from male- versus female-led organisations. Some key differences include:

- Respondents from organisations led by men were more likely to report a positive change in their political context over the past year (19% male-led vs 7% female-led).*
- Respondents from male-led organisations were also more likely to predict no change in the year ahead (44% vs 20%).
- More respondents from female-led organisations forecasted a worsening political future (64% vs 45%).
- More thinktankers from female-led organisations reported that they did not know whether their organisation was going to grow (48 % vs 14%).
- More thinktankers from male-led organisations reported that their organisations were planning to grow (47% vs 26%).
- Thinktankers in organisations with a male leader had a more positive more positive assessment of last year's funding context (20% vs 6%) as well as a positive forecast of the funding context for the year ahead (24% vs 16%).
- More thinktankers from female-led organisations reported financial and fundraising challenges (70% vs 43%).
- More thinktankers from male-led organisations reported governance and management challenges (50% vs 31%).
- Respondents from organisations led by women mostly reported no change in the difficulty of operating a think tank, while there was more diversity in the answers of respondents from organisations led by men, who reported both easier (20% vs 12%) **and** worse conditions (45% vs 31%), although the differences were not statistically significant.

These findings indicate a trend for thinktankers from female-led organisations to hold an overall gloomier assessment and forecast of their context. To contextualise this, however, we also need to look at the makeup of the sample data.

- **Turnover:** There are more female-led (vs male-led) organisations in the sample with a turnover of less than USD 500k (52% vs 42%).
- **Founding date of organisation:** Female-led organisations in the sample are younger; 74% of female-led organisations in the sample were founded after 2000, while 65% of male-led organisations were older by the same measure.
- **Region:** Overall, the sample consists of a higher number of male-led organisations (62%), but some regions differ greatly from this average. In Africa, male-led organisations account for a significantly larger share of the sample (86%) while in Latin America & the Caribbean, more organisations than average are female-led (51%).

In Box 1, we mentioned that the Open Think Tank Directory shows that organisations with male leaders tend to have a higher turnover, to be older, and to employ fewer women in senior positions. So what we are seeing is an interplay of variables within the findings – the overlap between the size and age of the organisation and the gender of its senior staff members – and how that could be affecting the way organisations perceive and deal with challenges.

* Within this box, all percentages in brackets from this point represent organisations led by one gender versus organisations led by the opposite gender.

↑ Table of contents

# How is the funding context changing?

# How is the funding context changing?

## Overall

**SURVEY QUESTIONS**
**Reflecting on the last 12 months, did the think tank funding context in your country change?**
**How do you foresee the funding context in your country in the year ahead?**

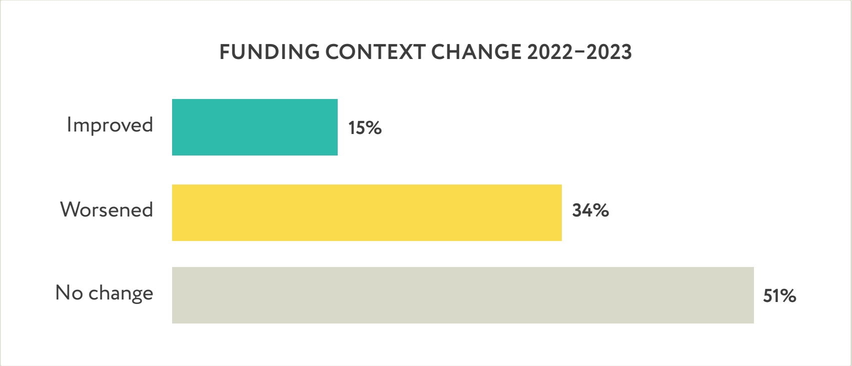
Like the political context, thinktankers' overall assessment of the sector's funding landscape is also marked by a continued sense of concern. The majority of respondents (51%) reported no significant changes over the last year but also (50%) expect a worsening funding scenario in the year ahead. There is a notable increase in concerns around funding conditions for think tanks compared to 2022. Last year, only 29% of respondents anticipated a worsening of the funding context in the year ahead; in the current survey, the share of respondents holding this view has increased to 50%.[14]

In the 2022 report, 15% of respondents expected an improvement in the funding context for 2022–2023, which exactly matches the 15% reporting an actual improvement over that period. Notably, compared to the 2022 survey, there is also a slight increase in optimism about the year ahead, with 21% of respondents now envisioning a positive outlook.

As in the assessment of the political context, an expected pattern emerges when comparing respondents' perceptions of the funding context over the past year with their expectations for the future (Chart 12): those who hold a positive view of the past foresee a brighter future, or at the very least expect things to stay the same. Likewise, those who observed a decline in funding conditions over the past year anticipate even worse conditions in the year ahead.

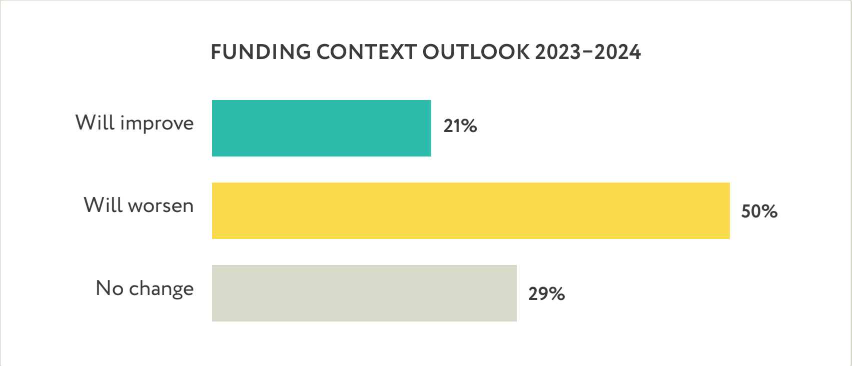
Unlike the findings comparing political context with growth plans, the survey revealed that organisations' plans *are* somewhat influenced by their expectations for the funding context (Chart 13). Most of those that expect an improvement are also planning to grow, while those that expect a worsening funding context mostly plan to stay the same size.

*Chart 10*




*n=250*

*Chart 11*

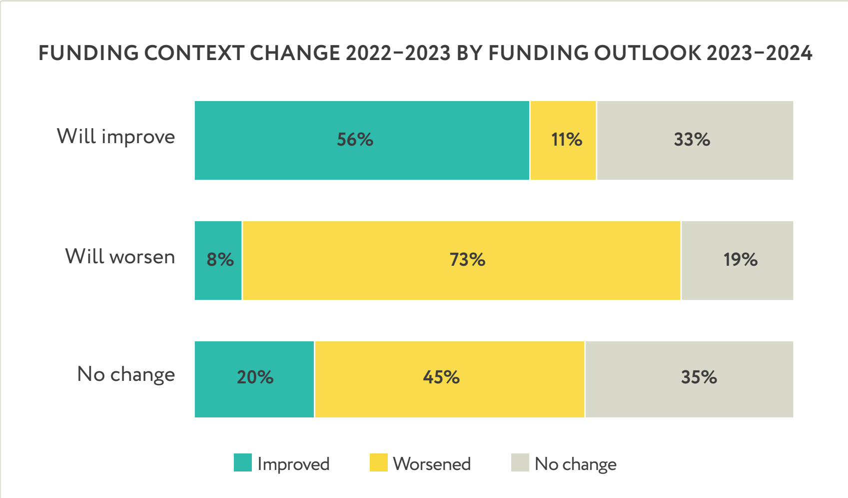



*n=250*

14. Last year, we included an additional response option encompassing both positive and negative changes. This makes direct comparisons complex and results should be interpreted with caution.

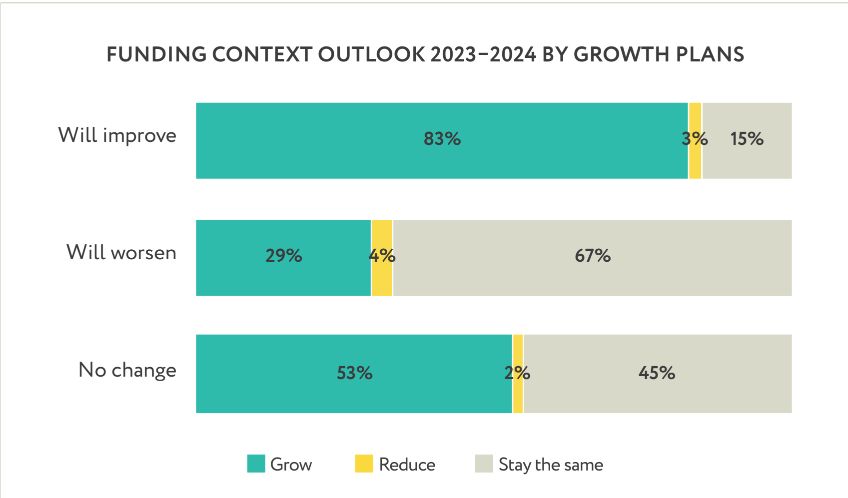
↑ Table of contents

*Chart 12*




*n=249*

*Chart 13*




*n=187*

### *Improved/will improve*

Respondents who reported improvements in the funding sector over the past year cited better economic conditions within their countries that have led to a broader reactivation of funding and increased support from external and domestic funders. Others reported that enhanced relationships with decision-makers, who are now recognising the value of think tanks, as well as improved collaborations with other civil society organisations, have enabled better fund acquisition and management. Finally, respondents mentioned that donors' heightened interest in certain issues or in response to particular crises have made funds more available for certain countries and organisations.

Looking ahead to the 2023-2024 forecast, some thinktankers cited technological advances as prompting governments to recognise the need for research support, while others pointed to a rise in domestic philanthropy due to improved economic conditions.

**Changes in donor priorities are both a welcome and an unwanted situation. On one hand, they can enable a rapid response to emerging crises, allowing think tanks to address pressing issues promptly. However, these shifts can also divert resources from ongoing challenges that require sustained attention and funding. Striking the right balance between immediate and long-term, persistent problems is crucial. Adaptability and strategic planning become essential to navigate this dynamic landscape.**

### *Worsened/will worsen*

The factors mentioned as causing the worsening of the funding sector over the past year included government regulations (for foreign contributions and laws governing NGOs, particularly in Central Asia); economic conditions; and global events that shifted funds and changed donor priorities. The reasons cited for expecting a worsening context over the year ahead were similar, with respondents anticipating that economic difficulties will continue to affect their domestic funding sector. They also mentioned shifting priorities for international funders and increasing competition for scarce resources among think tanks.

### *No change*

Very few reasons were given by respondents who said that the funding context had not or would not change.

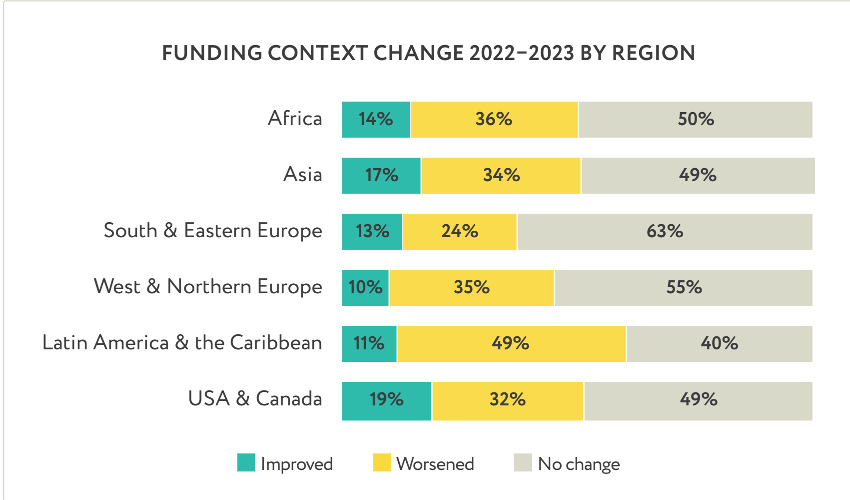
↑ Table of contents

## Regional analysis

The regional analysis broadly aligns with the global overview, with a few exceptions. Fewer thinktankers in South & Eastern Europe reported a worsening funding context compared to the global average, while in Latin America & the Caribbean, thinktankers' perceived worsening of the funding context exceeded the global average. Again, and consistent with last year's findings, African thinktankers are more optimistic than any other region. And finally, a slight trend emerged suggesting that Asian and South & Eastern European think tankers are becoming more pessimistic compared to their responses last year.[15]

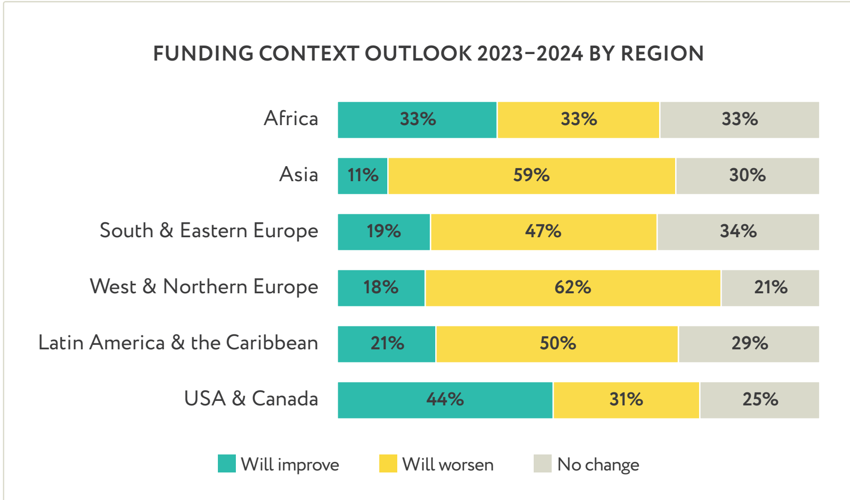
A comparison of the 2022 results and this year's findings shows that across all regions fewer respondents expected an improvement to come in the year after the 2022 survey than actually reported an improvement when they looked back at that period in the latest survey. Meanwhile, the opposite was true for those who forecasted worsening conditions, with this year's results showing that the reality of the funding context was worse than expected.

*Chart 14*




*n=250*

*Chart 15*




*n=250*

15. Comparisons to the 2022 report must be made carefully, as the 2023 survey did not include the option to report a mixture of both positive and negative changes.

↑ Table of contents

### *Africa*

The trend for worse-than-expected funding conditions over the past year, discussed above, is particularly salient among African thinktankers. In 2022, 29% of respondents predicted there would be an improvement in the funding context, whereas in the current survey only 14% reported that an improvement had taken place.

Those who both reported and forecasted an improvement attributed it to shifting perceptions of think tanks and a growth in the demand for evidence-based decision-making leading to increased support from government and private-sector organisations. The anticipated increase in funding for the year ahead was driven by expectations of economic and demographic growth, improved civic space, post-election funding shifts, and heightened awareness of the importance of evidence-based research.

The reasons cited by respondents who reported a worsened and worsening context included a perception of diminished funding streams, with funds diverted to pressing global issues; ongoing conflicts in Africa; competition with international think tanks; changes in funding architecture; and political situations that affect fund allocation.

> ***'The funding streams have significantly diminished, with funds being presumably diverted to other pressing issues…'.*** **Kenyan respondent**
>
> ***'The situation in the country is improving; the importance of the work of think tanks is being acknowledged by the government'.*** **Tanzanian respondent**

### *Asia*

Thinktankers in Asia are the most pessimistic, with 59% expecting a worsening funding context (and only 11% predicting an improvement). This is a significant change from last year, when only 18% expected the funding landscape to get worse. The key factors driving the negative perception are increased government control; political instability; government pressure on, or rejections of, donors; distrust of civil society organisations; and economic issues that negatively affect funding.

> ***'The government puts pressure on foreign donors'.*** **Asian respondent (country omitted)**

> ***'Most donors narrowed down the fields/sectors for research, mainly following certain trends (e.g., energy transition or climate change adaptation/resilience)'.*** **Indonesian respondent**

### *West & Northern Europe*

West & Northern European thinktankers also share this increased sentiment of pessimism, with 62% expecting a negative funding context to get even worse. The prevailing pessimism in West & Northern Europe is a key difference from the 2022 report, in which Europeans were less concerned about future funding. Several respondents cited reductions and changes in government funding as a reason for their negative assessment. Connected to this, others quoted economic factors and recessions affecting funding and shrinking budgets.

> ***'It appears to me that the funding landscape has slightly worsened because of the other fiscal demands in the country. From what I have heard from organisations that demand more than we do on government funding, funding has stagnated, which normally means that projects cannot be renewed or new projects launched'.*** **German respondent**

### *South & Eastern Europe*

Respondents from South & Eastern Europe were less likely to report a worsened or worsening funding landscape, with most responding that it had not changed at all. From an overall assessment of their responses, we infer that this lack of change relates to a currently difficult context, and that respondents are also pessimistic about the future. The reasons these respondents gave for their pessimism included economic challenges that will limit funding; struggles within organised civil society in general; lack of interest from governments; and more funding availability to larger institutions, causing challenges for smaller ones (this subregion has a higher proportion of lower-turnover organisations than West & Northern Europe).

> ***'There is very limited funding for think tanks in the country and unfortunately I believe this will continue to be the case'.*** **Bulgarian respondent**

↑ Table of contents

***Latin America & the Caribbean***

Consistent with the 2022 report, more thinktankers from Latin America & the Caribbean (49% in the 2023 survey) perceived a worsening funding context compared to the global average (34%). Reasons cited for this pessimistic trend highlighted that several Latin American countries fall under the middle-income bracket; international funders are moving away from the region but the countries' economies are not strong enough to support domestic funding. Some mentioned that the political turmoil and challenges of working with the government limit the funding coming from that source; others highlighted a reduction in the budgets for science, technology, and innovation and a general lack of support for the work of think tanks. It was also mentioned that funders tend to support work that is more similar to consultancy (also with very tight budgets) rather than providing programme or core support.

> *'International funding is decreasing in Peru, a trend that started some years ago. We are moving forward creating new areas that will support self-funding in the medium run (public opinion and consultancy, mainly)'.* Peruvian respondent

### Box 3. The challenges of smaller and younger organisations

There is a prevailing sense of apprehension and uncertainty among younger think tanks, which also tend to have a lower turnover. Organisations with longer histories might have established networks, more stable funding relationships, and a track record that influences their more balanced expectations. Conversely, newer think tanks might be navigating a more challenging environment, leading to higher levels of pessimism about the funding landscape.

This trend echoes what we found in the 2022 report, where smaller organisation also reported greater change (either positive or negative) in their funding contexts.

Smaller think tanks are less prepared to navigate economic shifts, as their smaller-scale operational structure relies on more frequent fundraising, often for projects of shorter duration. Consequently, even minor fluctuations in the funding landscape could disproportionately impact them, in contrast to organisations with high turnovers that often enjoy backing from substantial funders and donors.

However, and in spite of these challenges, the survey results indicate that a higher percentage of smaller organisations are planning to grow compared to their larger counterparts (46% vs 25%).

## Differences

**GENDER OF RESPONDENT**

- Male respondents had a slightly more positive view of the funding context over the past year (25% vs 4% women respondents reported an improvement) and also of the forecast for the year ahead (29% vs 14%)
- More female respondents reported no change to the funding context over the past year to (63% vs 39%) and a more negative expectation of the future (64% vs 35% of male respondents predicted worsening conditions)

**GENDER OF LEADER**

- Thinktankers in organisations with a male leader had a more positive assessment of last year's funding context (20% vs 6%) as well as a more positive forecast of the funding context compared to respondents from women-led organisations (24% vs 16%)

**FINANCIAL TURNOVER**
**Above or below USD 500k**

- Thinktankers from larger organisations (turnover above USD 500k) were more likely to report fewer changes in the funding context (either positive or negative) than those from smaller organisations

**DATE FOUNDED**
**Before or after 2000**

- Thinktankers from organisations founded before 2000 have a more positive outlook overall
- More thinktankers from older organisations perceived an improvement in the funding context over the past year (22% vs 4% from younger organisations)
- Respondents from younger organisations mostly anticipate a worsening of the funding context (71% vs 37% from older organisations)

*No significant differences were found by organisational area of respondent, seniority of respondent, or business model.*

↑ Table of contents

# How is media freedom and the legal context changing?

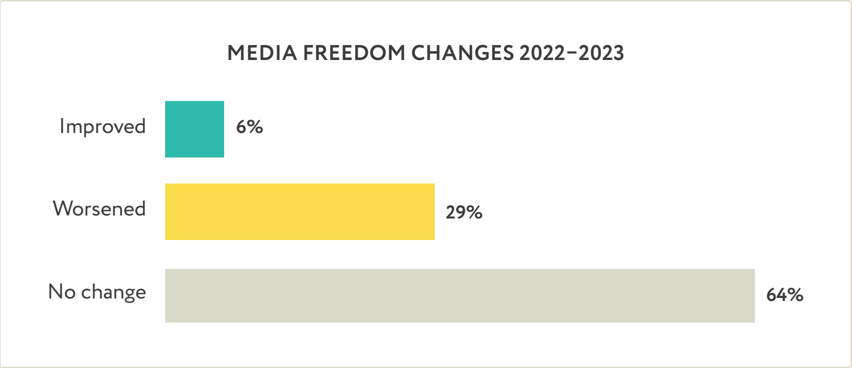
# How is media freedom and the legal context changing?

Across the world there has been mostly no change to the media freedom and legal context in which think tanks are operating. There is, however, more concern about a deteriorating media landscape than about the legal context (Charts 16 and 17). It is important to note that *No change* does not convey whether the context is positive or negative, just that there have been no changes to it.

**SURVEY QUESTIONS**
**Reflecting on the last 12 months, has the media in your country changed?**
**Reflecting on the last 12 months, has the legal framework for think tanks in your country experienced any changes?**

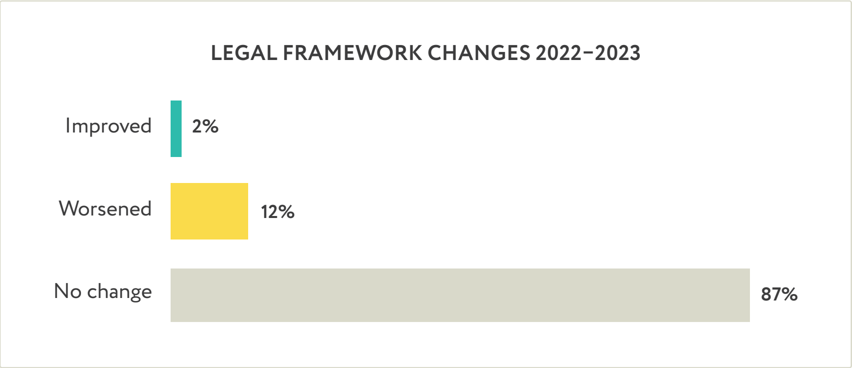
As expected, regional analysis shows significant differences across the world. While respondents from some regions expressed optimism, most reported seeing an unchanging media landscape and some others showed significant concerns about deteriorating media freedom. Perceptions of the legal landscape are more varied; respondents from some regions reported a worsening legal context, which evidences new pressures or restrictions being imposed on the sector.

*Chart 16*




*n=250*

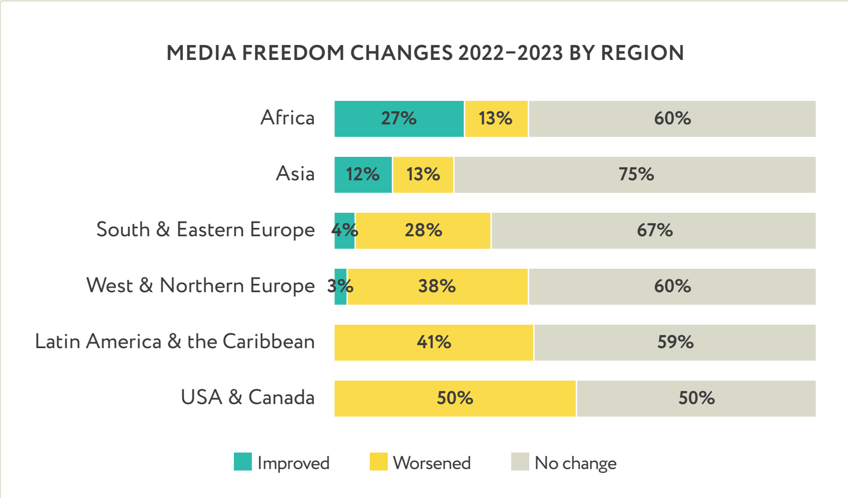
*Chart 17*




*n=250*

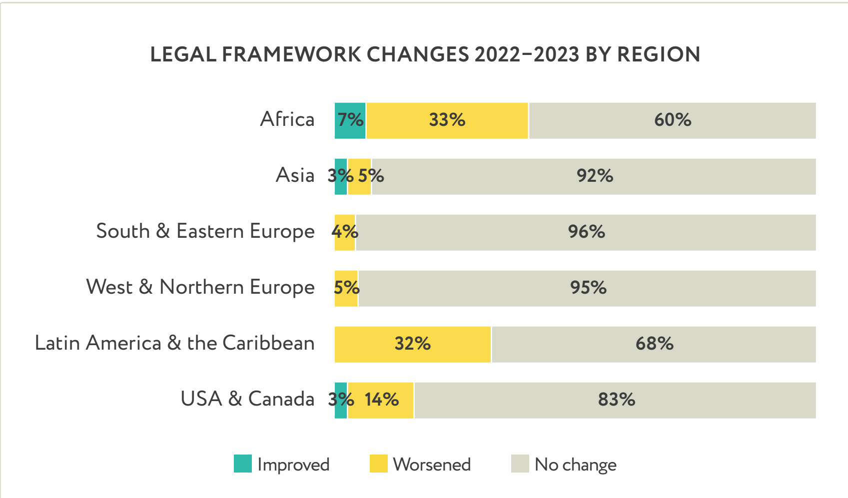
↑ Table of contents

*Chart 18*




*n=250*

*Chart 19*




*n=250*

***Africa:*** More African thinktankers reported improvements in media freedom (27%) compared to respondents from other regions, which is consistent with African thinktankers' overall positive evaluation of their political and funding contexts. However, more African thinktankers reported worsening in the legal framework (33%) compared to respondents from other regions. This contrasts with the positive evaluation of the media and political context among African respondents.

***Asia:*** On the question of media freedom, a modest degree of optimism is shared among Asian thinktankers, with 12% noting an improvement and 75% reporting no change. Most of the respondents (92%) also reported no change in their legal framework.

***Europe:*** Across European regions, most respondents reported no change in either media or legal landscape, but a notably higher proportion reported worsening conditions (28% and 38%, respectively) compared to improvement (4% and 3%). The legal framework remains consistent, underscoring the stable environment in which think tanks operate across European subregions.

***Latin America & the Caribbean:*** Consistent with the worsening political and funding landscape in Latin America & the Caribbean, this region also reported worsening in both media freedom and the legal context (41% and 32% respectively). This suggests concerns about the constraints faced by think tanks in terms of legal regulations.

***USA & Canada:*** The legal context remains stable (83% reported no change) but most respondents reported a worsening in media freedom.

↑ Table of contents

# What are the most pressing policy issues for think tanks?

# What are the most pressing policy issues for think tanks?[16]

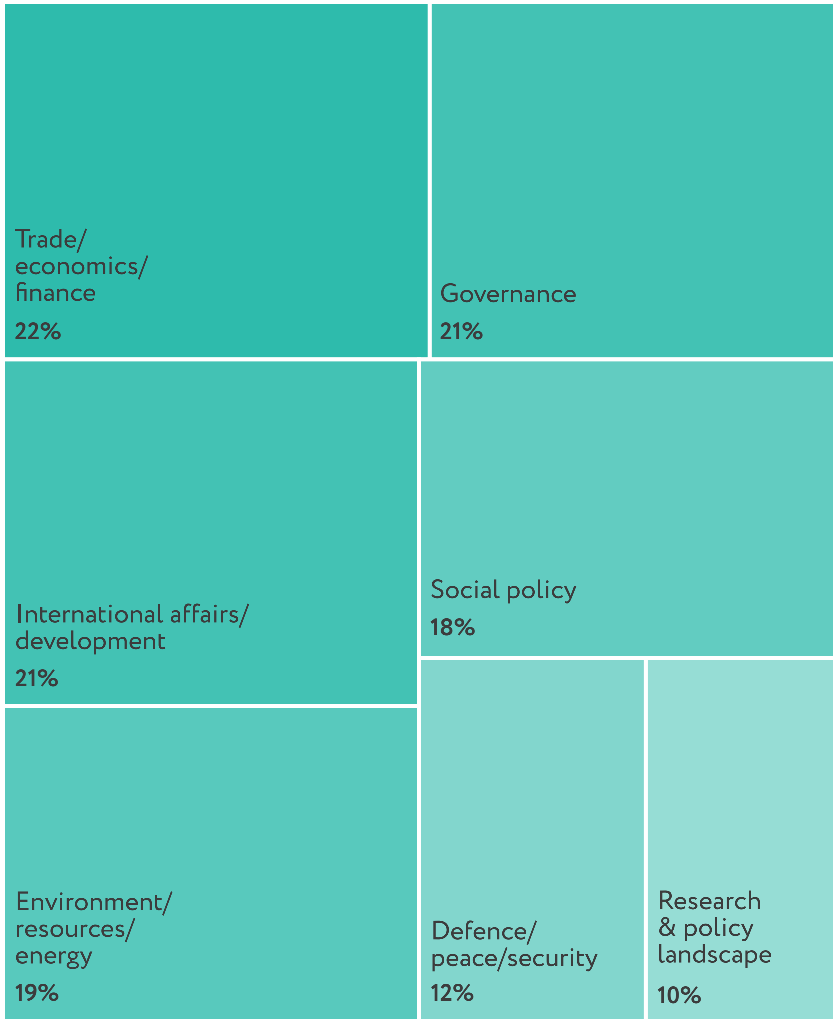
## Overall

Overall, the key policy areas have not changed much from last year; issues within the fields of trade/economics/finance; governance; environment/resources/energy; and international affairs/development remain at the forefront. However, there has been a reduction in the number of respondents citing defence/peace/security topics (and fewer mentions of the Russia-Ukraine war). There have also been some slight changes to the specific issues identified as key within each of these broad topics.

**SURVEY QUESTION**
**What do you see as the most pressing policy issues that research can help to address in your country?**

*Chart 20*

KEY POLICY ISSUES




*n=250*
*Note: Topics with less than 10% of responses have not been included in the chart. These are food/agriculture (1%); law/justice/human rights (3%); media/culture/sport (2%); private sector development (3%); transport/infrastructure/urban (1%); education (3%); gender (4%); health(5%); and science/technology/innovation (6%).*

16. This survey question was open ended, meaning respondents wrote their ideas and recommendations directly into the survey. Individual responses were then analysed and categorised using the State of the Sector topic breakdown.

↑ Table of contents

Policy issues within ***trade/economics/finance*** are considered a significant challenge worldwide (22%, almost the same as last year). Respondents specifically highlighted the issue of economic growth, followed at some distance by fiscal policies and trade issues. Fiscal policy and debt management issues, although still mentioned, featured less prominently than last year.

***Governance*** issues (21%) emerged as a crucial concern across the globe (same as last year), encompassing topics like democracy (challenges to it and supporting strengthening processes), corruption, transparency, state effectiveness, public institution strengthening and reform, and citizen participation. Although elections and the challenges that they pose for good governance were mentioned in responses to the political and funding context questions, they were not widely cited as key policy issues.

The topic of ***international affairs/development*** (21%) continues to feature prominently on research agendas, but it was cited as an area of focus slightly fewer times compared to last year; in particular, there were noticeably fewer mentions of the Russia–Ukraine war and crisis (a concern mostly raised by European think tanks). Respondents who reported undertaking research in this area mentioned the topics of migration and refugee crises, but also foreign policy and inter-state relationships. Connectivity, EU accession, and integration and development cooperation policy were also cited to a lesser degree. There were also fewer mentions of sustainable development (as an international dynamic).

The pressing need to address environmental challenges is evident from thinktankers' responses, and although slightly less prominent than last year, ***environment/resources/energy*** is still a top concern (19%). Thinktankers primarily cited climate change (crisis and policies), sustainability, and energy (sustainable and renewable) and water security resource management as issues that necessitate research-driven solutions to address the problems faced by their countries. Disaster risk management and preparedness was considerably less prominent among responses this year.

***Social policy*** issues (18%) continue to feature prominently this year and underscore the importance of equitable societal development. Inequality, poverty, social protection, and labour informality are key areas where research can help create policies that foster equal opportunities and well-being for all members of society. Housing issues, which were not mentioned last year, were also cited by many in this year's survey. Conversely, neither employment and working conditions nor the issue of an aging population appeared in this year's results, despite featuring prominently last year.

The number of respondents citing issues related to ***defence/peace/security*** (12%) has seen the highest reduction compared to last year. Thinktankers who did report research in this area predominantly cited social cohesion, citizen security, and dealing with political polarisation as particular issues of focus. Defence issues, which were a key priority last year, were hardly mentioned this year; this was also the case with the Russia–Ukraine war.

***Research & policy landscape*** issues (10%) were mentioned by a small, but significant, group of respondents, who highlighted the importance of strengthening data and evidence use for policy decisions.

↑ Table of contents

## Regional analysis

An analysis of regional answers shows how thinktankers' perceptions of key issues differ across the world (Table 1).

*Table 1*

| -16% | -6% | Global | +6% | +16% |
|---|---|---|---|---|
| -- | - | = | + | ++ |

| Key policy issues | Global | Africa | Asia | South & Eastern Europe | West & Northern Europe | Latin America & the Caribbean | USA & Canada |
|---|---|---|---|---|---|---|---|
| Trade/economics/finance | 22% | -- | ++ | - | - | = | = |
| Governance | 21% | ++ | = | = | = | = | - |
| Environment/resources/energy | 19% | = | - | - | + | = | ++ |
| International affairs/development | 21% | - | = | = | ++ | - | = |
| Social policy | 18% | - | - | + | - | + | + |
| Research & policy landscape | 10% | = | + | = | = | = | = |
| Defence/peace/security | 12% | = | - | = | = | ++ | = |

*Note: = represents 5% or less difference from global average; + and - represent a difference of between 6% and 15% from global average; ++ represents 16% or more difference from global average.*

***Trade/economics/finance*** was reported as being the highest priority among Asian thinktankers, but less so among Europeans (both regions) and, surprisingly, was mentioned by very few African thinktankers. These results contrast significantly with last year's report, when African respondents identified trade and economic issues as their second topmost priority.

***Governance*** issues emerged as the key priority among African thinktankers this year (it was also a prominent issue in 2022), with respondents citing general governance issues as well as corruption and the need to strengthen public institutions and rebuild public trust in democracy. For Latin American & Caribbean thinktankers, governance is still a priority but to a lesser extent than last year; responses continue to highlight corruption, electoral processes, transparency, and civic education.

***Environment/resources/energy*** issues emerged as a key focus in the USA & Canada, as well as West & Northern Europe, and of lower priority in Asia and South & Eastern Europe. Interestingly, this policy issue was not cited as a high priority in the USA & Canada last year (although sampling issues make analysis and comparisons difficult). It was also one of the highest priorities in Europe last year; this year it is a priority for thinktankers in West & Northern Europe, who cited climate change, energy security (related to reliance on Russian gas), environmental protection, renewable energy, and food security as key issues of focus.

***International affairs/development***, although relatively important for most regions, was of higher priority for think tanks in West & Northern Europe than in any other region (this trend continues from 2022, although the Russia–Ukraine war was mentioned considerably less within this year's responses). Key priorities cited for this topic included strengthening international cooperation and managing a changing geopolitical scenario (both the question of how to shape it and the implications of change).

***Defence/peace/security*** issues emerged as the top concern for Latin American & Caribbean thinktankers (a significant change from the 2022 report). Respondents reported focusing specifically on citizen security, rising internal violence, the creation of safer communities, and displacement and migration – which represent potential sources of conflict if not addressed adequately.

↑ Table of contents

# What are the biggest challenges facing think tanks?

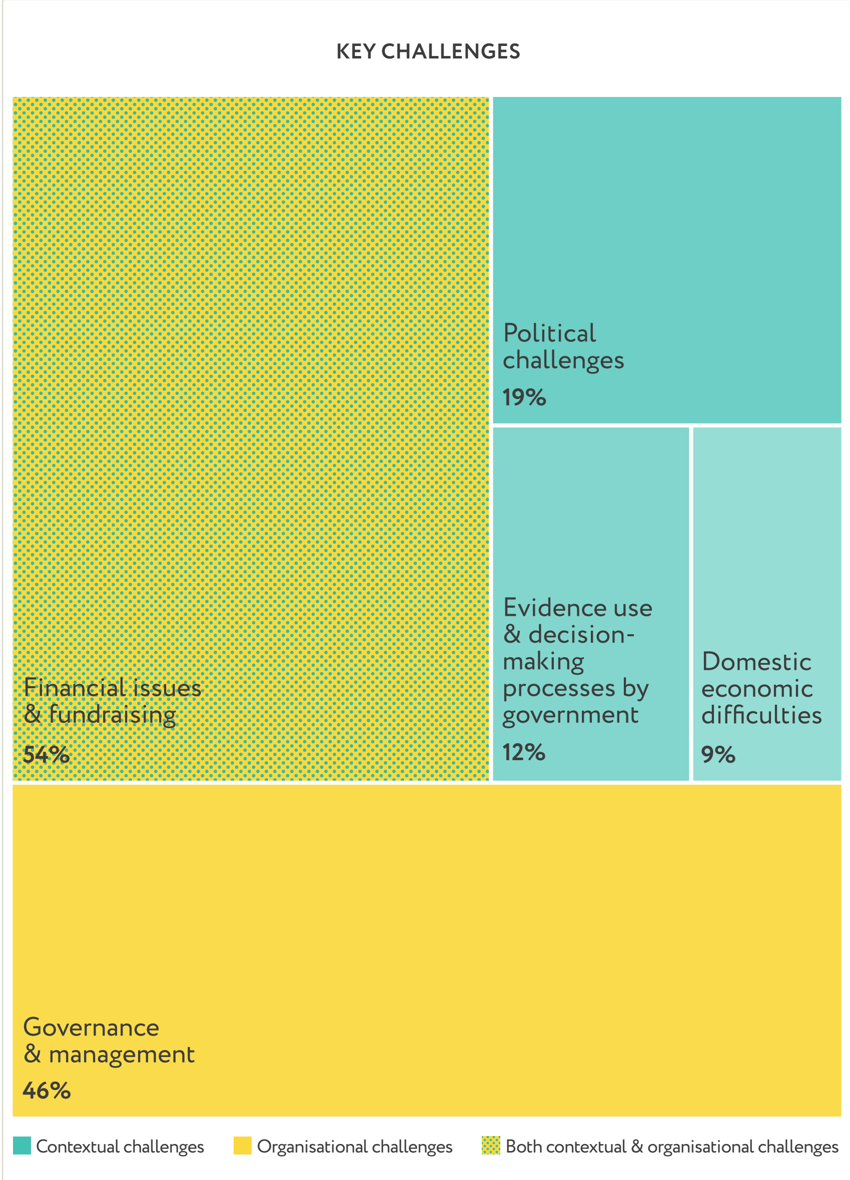
# What are the biggest challenges facing think tanks?

## Overall

Financial issues and fundraising continue to be most important challenge for think tanks (54%), followed by governance and management challenges (46%). Additionally, respondents cited political challenges (19%), evidence use and decision-making processes by government, and domestic economic difficulties.[17] Overall, the biggest challenges that think tanks face are exogenous, contextual factors that lie outside their direct sphere of influence but nonetheless impact the think tank's ability to achieve its goals.

**SURVEY QUESTION**
**What are the key challenges your organisation has faced over the last 12 months?**

*Chart 21*




*n=250*
*Note: Topics with less than 9% have not been included in the chart. The topics not included are: safety & security (7%), legal (4%), media (6%) and technological (less than 1%).*

17. Contrary to last year's survey, this was an open-ended question inviting respondents to share the key challenges that their organisation has faced over the last 12 months. Responses were then analysed and categorised; the newly created categories were then incorporated into the database.

↑ Table of contents

***Financial issues & fundraising*** continue to be primary concerns for thinktankers (54%) for the second year in a row. Specifically, respondents cited challenges in funding acquisition and the lack of core funding available; ensuring financial sustainability and navigating budget cuts; diversifying funding sources and aligning funding availability with long-term priorities and research agenda; managing bid-writing and short-term projects; increased competition; and building internal fundraising capacity.

***Governance & management*** issues were mentioned by nearly half of the respondents (46%), with human resources highlighted as a key area by most. Specific issues mentioned within this category included hiring, retaining and managing staff; challenges around renumeration, with highly skilled staff often leaving for jobs in more lucrative sectors; and higher workloads than staff can manage. Other problem areas cited were staff capabilities and knowledge; adapting to changes in organisational strategy; leadership; dealing with the aftermath of the pandemic; balancing growth and efficient operations; managing partnerships; streamlining internal coordination and decision-making; communicating brand identity and impact; and addressing reputational risks.

> *'[Challenges include] having enough resources to cope with the level of work. Growth and expansion mean more operational support is needed. Change in culture from start-up to growing think tank'.* USA respondent

***Political challenges*** that were highly prominent last year continue to be important but have been cited in lower numbers this year (19%). This might be due to the differences in the type of question, so we do not want to make direct comparisons. Specific issues mentioned within this category include political instability and uncertainty; government changes; polarisation; and repressive and restrictive political contexts (e.g., government officials using state-controlled media to label think tanks as spies or critics, or restrictive laws that pose a threat to civil society).

> *'The rapidly changing political environment [is a challenge], which forces us to usually reconsider our time schedules and the items of our research projects'.* Spanish respondent

***Evidence use & decision-making processes*** was mentioned by a group of respondents (12%), who pointed to challenges related to building a common understanding of the value of evidence use. They highlighted the difficulties of building relationships/partnerships with actors in the policy ecosystem (including governments, the private sector, policymakers) and working with them to increase the use of evidence in decision-making. This also implies that researchers need to strengthen their understanding of policymaking processes and realities.

***Domestic economic difficulties*** were identified as a challenge by a small proportion of thinktankers (9%). These respondents specifically cited national economic crises – recession, inflation, and the rising cost of living – as creating uncertainty about the economic trajectory of their respective countries. These issues are also driving the funding and political challenges seen in earlier sections. Although closely related to the financial and fundraising challenges faced by think tanks on an organisational level, we have defined this as a standalone category to highlight that economic instability or financial constraints within the broader domestic environment can impact the sector's operations and effectiveness.

These multifaceted challenges underscore the intricate nature of think tank operations, the importance of sustainable funding options, and the need for strategic approaches that bolster resilience, adaptability, and the effective pursuit of research and advocacy objectives.

↑ Table of contents

## Regional analysis

Thinktankers across the world share similar challenges, particularly financial and fundraising issues. However, there are significant regional variations, as shown in Table 2.

*Table 2*

| -16% | -6% | Global | +6% | +16% |
|---|---|---|---|---|
| -- | - | = | + | ++ |

| Key challenges | Global | Africa | Asia | South & Eastern Europe | West & Northern Europe | Latin America & the Caribbean | USA & Canada |
|---|---|---|---|---|---|---|---|
| Domestic economic difficulties | 9% | = | = | + | = | - | - |
| Evidence use & decision-making processes by government | 12% | + | = | - | = | + | - |
| Political challenges | 19% | = | ++ | = | = | + | = |
| Financial issues & fundraising | 54% | + | = | -- | = | ++ | + |
| Governance & management | 46% | - | - | + | ++ | = | = |

*Note: = represents 5% or less difference from global average; + and - represent between 6% and 15% difference from global average; ++ and -- represent 16% or more difference from global average.*

***Financial issues & fundraising*** challenges are prominent globally, with almost every region citing this as their top concern. Latin America & the Caribbean and the USA & Canada stand out as having particularly high levels of concern, while South & Eastern European respondents expressed relatively less apprehension.

***Governance & management*** challenges were reported widely across Europe (both West & Northern Europe and South & Eastern Europe). Responses suggest that the space for engagement between think tanks and policymakers and politicians is getting narrow, and that government actors value 'politics' more than 'facts'.

***Evidence use & decision-making*** within governments is a challenge mostly reported by African and Latin American & Caribbean thinktankers, highlighting their concern over the state of evidence use in their countries and how decision-makers take decisions. Respondents mentioned that they are finding it difficult to engage with policymakers or to persuade them to make evidence-informed decisions, and that decision-makers are focusing on political survival or personal interests.

Conversely, Asian thinktankers overwhelmingly reported ***political challenges*** as the key problem facing their organisations. Many responses emphasised the intensifying political environment marked by increased polarisation, attempts to curtail opposition and critical voices, and the challenges posed by the ruling government's attempts to restrict civil society and think tanks through regulation or legislation. Some respondents mentioned receiving threats and attacks on their work, including fact-checking activities, and attempts to discourage engagement and label them as spies. The presence of a hostile political climate is leading to challenges in engagement, collaboration, and advocacy.

↑ Table of contents

## Differences

| GENDER OF LEADER | DATE FOUNDED Before or after 2000 | BUSINESS MODEL |
|---|---|---|
| → More thinktankers from female-led organisations reported financial and fundraising challenges compared to respondents from male-led organisations (70% vs 43%)<br><br>→ More thinktankers from male-led organisations reported governance and management challenges (50% vs 31%) | → More thinktankers from younger organisations reported financial and fundraising challenges compared to those from older organisations (61% vs 47%)<br><br>→ More thinktankers from older organisations reported political challenges (28% vs 10%) | → More thinktankers from non-profit organisations reported financial and fundraising challenges compared to respondents from organisations with other business models (63% vs 31%)<br><br>→ More thinktankers from organisations of all types **except** non-profit reported governance and management challenges compared to those from non-profit organisations (63% vs 40%)<br><br>→ More thinktankers from non-profit organisations reported political challenges compared to those from organisations with other business models (25% vs 3%) |

*No significant differences were found by organisational area of respondent, seniority of respondent, gender of respondent, or turnover.*

↑ Table of contents

# What competencies do think tanks want to invest in?

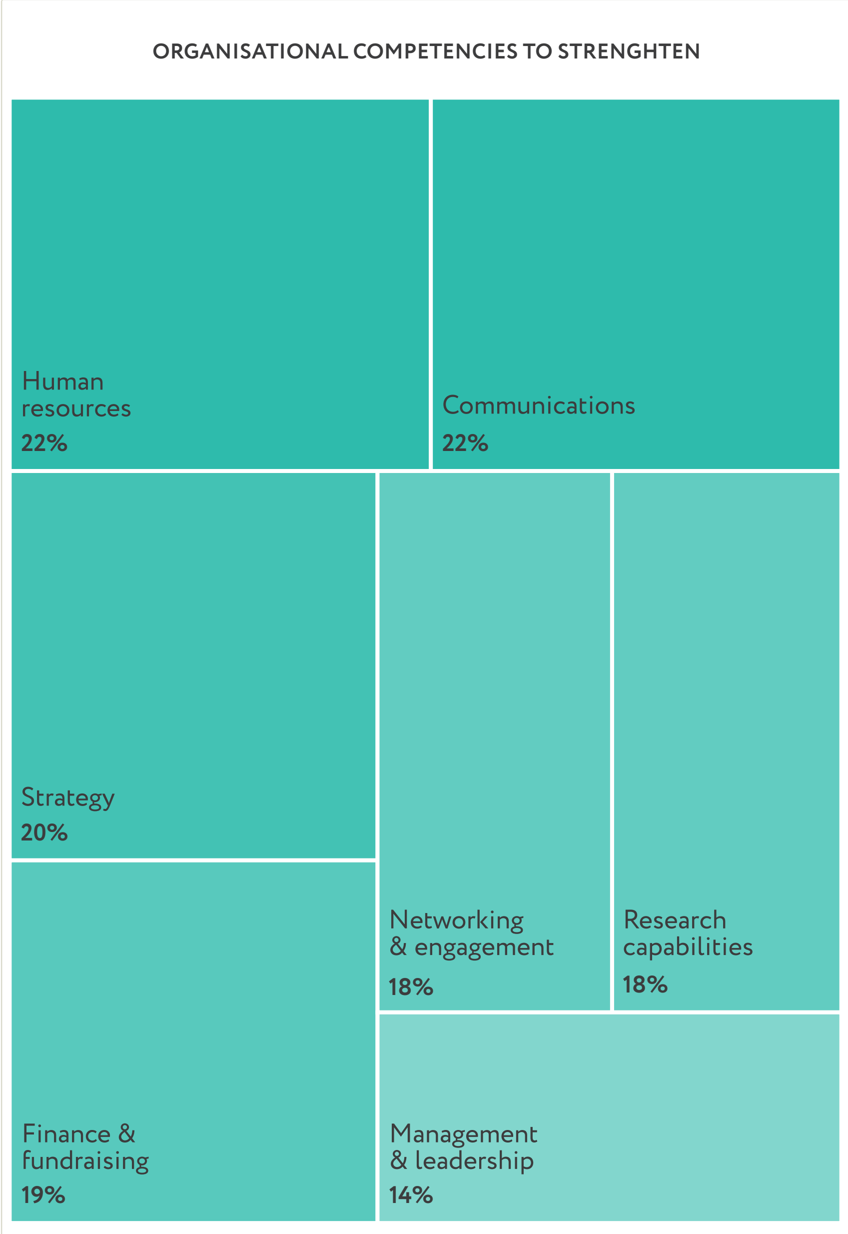
# What competencies do think tanks want to invest in?

## Overall

There are seven key competencies that thinktankers see the need for their organisation to invest in and work on to deal with both the context and the challenges they face.[18] These are: human resources; communications; strategy; finance and fundraising; networking and engagement; research capabilities; and management and leadership skills. Overall, the responses were a balanced mix, with no area standing out above the others.

**SURVEY QUESTION**
**Which organisational competencies does your organisation need to invest in to deal with its context and challenges?**

*Chart 22*




*n=250*

18. This question was approached differently in this year's survey. Instead of offering a list of options to respondents, we asked for an open-ended response and then categorised and analysed the individual responses. This provides a different, and perhaps more nuanced, view of the organisational competencies that thinktankers feel the need to strengthen.

↑ Table of contents

***Human resources:*** In line with the challenges identified in the previous section, respondents emphasised the need to strengthen their human resources function, particularly around recruiting and retaining staff. The need to work on staff was mentioned consistently in relation to all organisational areas and staff levels, but there was a particular reference to building up the expertise of mid- to senior-level staff (programme directors, business developers, researchers, advocacy positions, etc.).

***Communications:*** Thinktankers consistently emphasised the importance of communications to achieve their goals. They highlighted the need to work on communication and marketing strategies and to enhance their digital and social media presence. Others mentioned the need to work on effective messaging, to make their content more accessible, and to improve their ability to influence public debates.

***Strategy***: Given the challenges outlined in the sections discussing political context, organisational growth, and challenges, it is fitting that respondents identified strategy as a key competency. Thinktankers prioritise strategic thinking and planning; improving skills in decision-making and problem-solving; improving contextual understanding; and particularly adaptability in the face of constant change.

***Networking & engagement***: Building strategic partnerships and engaging with political actors also stand out as priority competencies. The responses emphasised the importance of networking, partnerships, and engagement for think tanks; particularly the need for strategic networking and alliances and building relationships with similar organisations and key stakeholders. Improving engagement with government officials, political parties, and other stakeholders is seen as essential, along with fostering trust and awareness of evidence-based ideas. Expanding networks and establishing dialogues are common goals to enhance influence and impact.

***Finance & fundraising:*** Already identified as a key challenge, finance and fundraising also emerged as one of the key competencies that think tanks need to work on. Thinktankers emphasised the need to enhance their capacity to secure diverse funding, with some respondents citing an interest in working more with the private sector. The focus was not only on fundraising skills but also how to *manage* finances effectively and thereby strengthen the business. Some respondents linked their need to improve marketing and communication skills with their fundraising skills.

***Research capabilities:*** Respondents also mentioned the need to strengthen and expand their research capabilities. They seek to invest in overall research skills, data-driven analysis, and quantitative solutions. Some particularly mentioned improving the relevance of their research and the ability to identify policy research needs, while others cited an interest in being better able to customise their research capabilities.

***Management & leadership:*** In line with the challenges identified and discussed in the previous section, a group of respondents cited management and leadership – including overall leadership skills, team and project management, and improving organisational processes – as key competencies that their organisations needed to work on.

Other competencies mentioned by less than 5% of respondents include: monitoring, evaluation and learning; credibility/intellectual integrity; and technology (acquisition and use, cyber security, adoption of AI tools). It is interesting that technology did not feature more prominently in responses to this question, as the digital landscape is evolving rapidly and thinktankers have cited this as a key concern in other fora.

↑ Table of contents

## Regional analysis

The regional analysis of the data showed substantive differences in responses across the world (Table 3).

*Table 3*

| -16% | -6% | Global | +6% | +16% |
|---|---|---|---|---|
| -- | - | = | + | ++ |

| Key competencies | Global | Africa | Asia | South & Eastern Europe | West & Northern Europe | Latin America & the Caribbean | USA & Canada |
|---|---|---|---|---|---|---|---|
| Human resources | 22% | - | ++ | - | = | - | - |
| Communications | 22% | - | -- | ++ | + | = | + |
| Strategy | 20% | - | + | = | - | + | ++ |
| Finance & fundraising | 19% | = | -- | + | = | = | - |
| Networking & engagement | 18% | + | - | = | - | + | + |
| Research capabilities | 18% | + | = | = | - | + | + |
| Management & leadership | 14% | ++ | = | - | = | - | ++ |

*Note: = represents 5% or less difference from global average; + and - represent between 6% and 15% difference from global average; ++ and -- represent 16% or more difference from global average.*

***Africa***: Respondents from Africa highlighted their interest in improving management and leadership skills, research capabilities, and networking and engagement. Responses particularly mentioned improving organisational and financial management, team management, and collaboration and engagement (strategic partnerships). African thinktankers also cited the need to improve their use and understanding of technology to stay ahead.

> ***'In today's rapidly changing world, organisations must invest in digital transformation, data-driven decision-making, collaboration, sustainability, and adaptability to stay ahead of the competition and thrive. By utilising technology to improve processes, products, and services, organisations can identify trends, make better predictions, and build stronger relationships'.*** **Somalian respondent**

***Asia***: Human resources emerged as a key competency at a global level, but this result seems to be mostly driven by Asian thinktankers, whose answers predominantly featured investing in recruitment, staff capacity building, and staff retention. To a lesser degree, Asian respondents also mentioned needing to adapt to evolving contexts and regulatory challenges, foster strategic collaborations and strengthen research programmes.

***West & Northern Europe***: Although a slight majority of answers from this region mentioned communication-related competencies, responses varied widely overall, pointing to a diverse set of priorities and challenges.

***South & Eastern Europe***: Thinktankers in South & Eastern Europe primarily cited the need to improve communication skills, followed by finance and fundraising skills. Although to a lesser extent than was the case in West & Northern Europe, thinktankers in this region revealed a diversity of needs rather than a single key priority. Responses included competencies related to hiring and retaining researchers and mobilisation experts; improving communications and marketing; addressing regulatory challenges; and refining organisational vision and leadership.

↑ Table of contents

***Latin America & the Caribbean***: Strategy, networking, and engagement and research capabilities emerged as the key competencies thinktankers in Latin America & the Caribbean want to improve on. Like African thinktankers, respondents from this region also highlighted the need to work on improving their respective organisation's use of technology. Overall, responses called for improved funding strategies, technology adoption and strategic adaptation, and staff development.

***USA & Canada***: Strategy and management and leadership emerged as the key priorities for thinktankers in this region; responses focused on understanding contexts and improving internal capacity to respond to challenges. Key areas cited also include teamwork, fundraising, partnerships, and digital media utilisation.

***Oceania***: The few responses from Oceania emphasised the need for competencies related to digital audience engagement, streamlining operations, and enhancing management infrastructure. Additionally, thinktankers in this region underscored the importance of academic appointments and engaging effectively with policy contexts.

The diverse range of competency-related priorities disclosed by respondents is evidence that challenges are multifaceted and require tailored strategies. While some competencies were shown to demand universal attention – such as networking, human resources, and communication – others exhibited regional variations depending on the local context, the organisation's research priorities, or the issues that the organisation is engaged in addressing.

↑ Table of contents

# Is it getting harder or easier for think tanks to operate?

# Is it getting harder or easier for think tanks to operate?

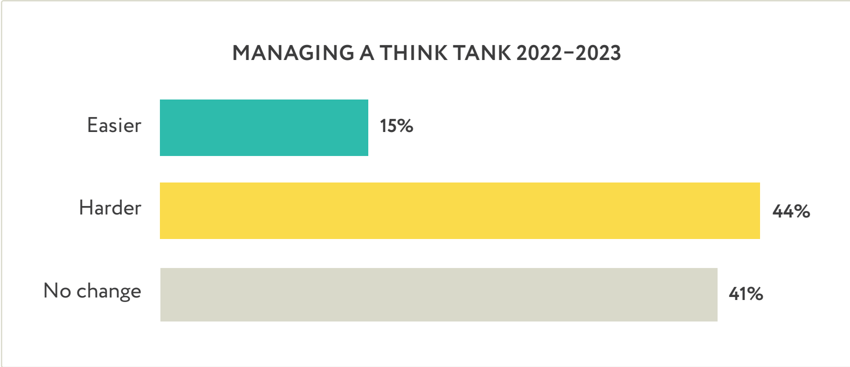
Over the past year, think tanks have encountered mixed challenges in their operational landscapes. At the global level, 44% reported that it is getting harder to operate versus just 15% who said they are finding it easier. The remaining 41% reported no change.

**SURVEY QUESTION**
**Overall, and reflecting on the last 12 months, would you say that it has become easier or harder for your think tank to operate?**

As with previous questions, a regional breakdown provides a more nuanced perspective. Overall, the regional results generally follow the global trend, but with a few exceptions.

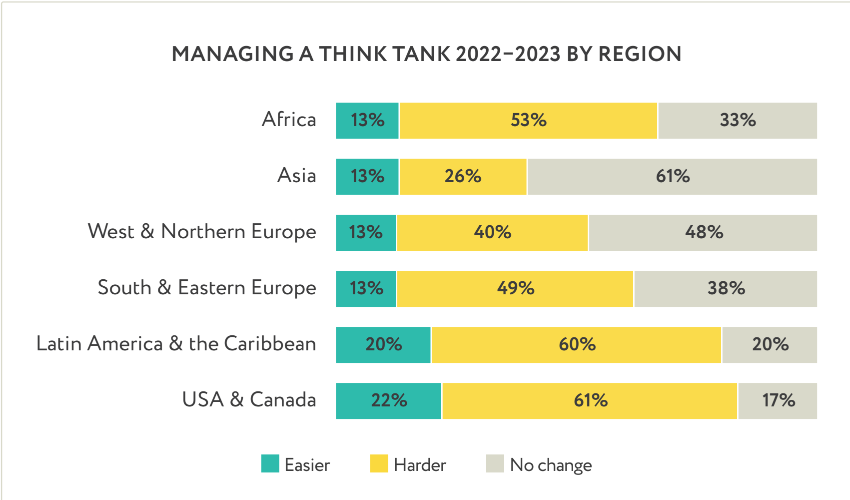
More Latin American & Caribbean (60%) and African (53%) think tanks reported increased challenges in running their operations over the past year. Asia revealed a different pattern, being the region with the lowest percentage (26%) of respondents reporting increased operating difficulties. The majority of Asian thinktankers stated that conditions remained unchanged. It is essential to clarify that 'no change' does not imply that conditions are favourable – just that they have not changed for either the better or the worse. In fact, our analysis of responses throughout the survey indicated that 'no change' in reality means a continuously precarious situation.

*Chart 23*




*n=250*

*Chart 24*




*n=250*

↑ Table of contents

## Differences

| GENDER OF LEADER | ORGANISATIONAL AREA OF RESPONDENT |
|---|---|
| → Respondents from organisations led by women mostly reported no change in the ease or otherwise of operating a think tank.<br>→ There was more diversity in answers from respondents whose organisations are led by men; the majority of these thinktankers reported either easier (20% vs 12% of respondents from women-led organisations) or worse conditions (45% vs 31%) – although the differences are not statistically significant. | → A large percentage of respondents with roles in governance and management (54%) said that they had found it harder to operate a think tank over the last year.<br>→ Researchers and communications staff mostly reported no change (over 60% in each area gave this response). |

*No significant differences were found by seniority of respondent, turnover, business model, date founded, or gender of respondent (males show a slight tendency to report an easier operating environment, but the data is not clear).*

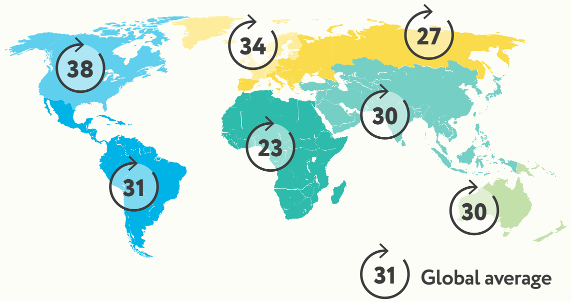
↑ Table of contents

# Data snapshots

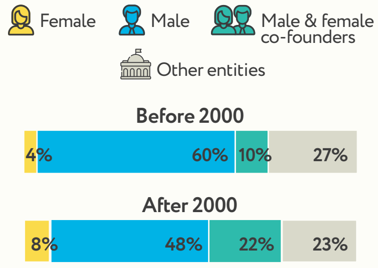
# Global

## SECTOR OVERVIEW

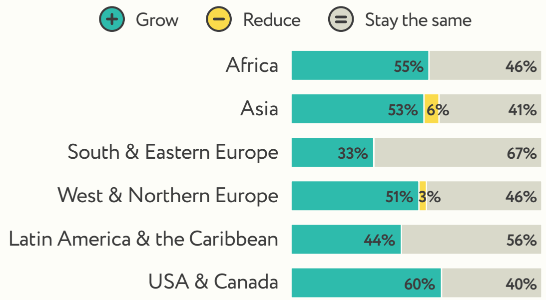
### AVERAGE THINK TANK AGE (YEARS)




### YEAR FOUNDED BY GENDER




### EXPECTED STAFF GROWTH




### DESIRED COMPETENCIES

- **Human resources** (staff retention and recruitment)
- **Communications** (communication and marketing strategies, and enhanced digital presence)
- **Finance & fundraising** (fundraising skills and managing finances)
- **Research capabilities** (research skills and research relevance)
- **Networking & engagement** (building partnerships, engaging politicians, and forming alliances)
- **Strategy** (strategic thinking and planning, problem-solving, and adapting to change)
- **Management & leadership** (leadership skills, project management, and enhancing organisational processes)

### KEY POLICY ISSUES

**Last year**

- **International affairs** (foreign policy, EU integration, and Ukraine–Russia war)
- **Environment/natural resources/energy** (climate, energy, and disaster management)
- **Peace/security/defence** (national security and peacebuilding)

**Year ahead**

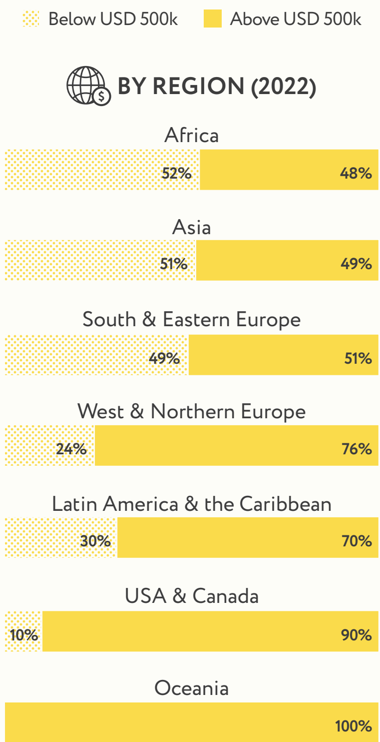
- **Trade/economics/finance** (economic growth, trade issues, and inflation)
- **Governance** (democracy, corruption, strengthening institutions, and civic participation)
- **International affairs** (migration, refugee situation, and foreign policy)

### KEY CHALLENGES

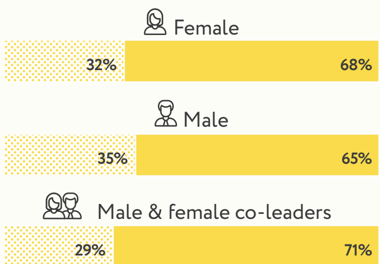
- **Financial issues & fundraising** (acquiring funds, lack of core funding, and budget cuts)
- **Governance & management** (limited human resources, staff capabilities, and adapting to change)

## FINANCIAL TURNOVER

### BY REGION (2022)

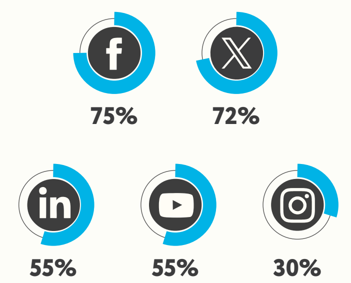



### BY LEADER'S GENDER (2022)

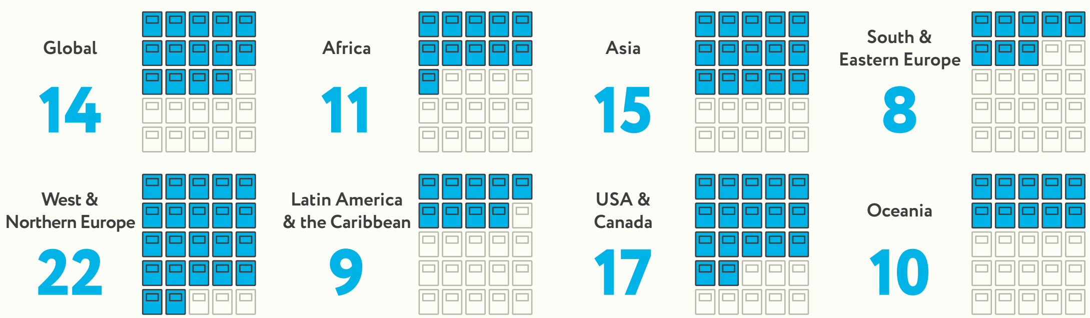



## COMMUNICATIONS

### SOCIAL MEDIA PRESENCE




### MEDIAN PUBLICATIONS




Data is based on the Open Think Tank Directory and 251 responses to the 2023 OTT think tank survey. Sample size varies for each chart: age: n=2,962; year founded by gender: n=1,789; financial turnover: n=231; publications: n=1,717.

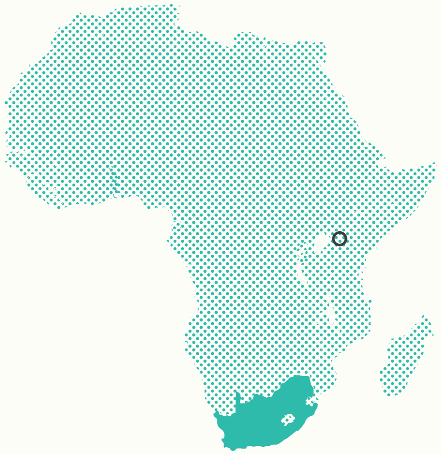
# Africa

Africa Global

AVERAGE THINK TANK AGE (YEARS)

23

31



COUNTRIES WITH THE MOST THINK TANKS

**42 South Africa**

CITIES WITH THE MOST THINK TANKS

**31 Nairobi**

**53%** Said their operational context has become harder in the last year

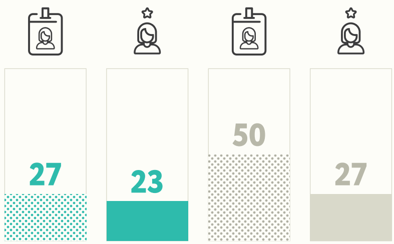
MEDIAN STAFF SIZE

17

19

AVERAGE FEMALE STAFF (%)

FEMALE LEADERSHIP (%)

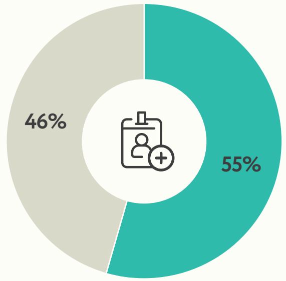



MEDIAN PUBLICATIONS

11

14

## EXPECTED STAFF GROWTH




Grow Reduce Stay the same

## DESIRED COMPETENCIES

→ **Management & leadership**
(organisational and financial management, team management and strategic partnerships)

## KEY POLICY ISSUES

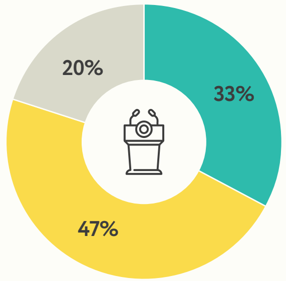
→ **Governance**
(corruption, strengthening institutions, and strengthening public trust)

## KEY CHALLENGES

→ **Financial issues & fundraising**
(fundraising, project-based funding, and limited funds)

→ **Evidence use & decision-making**
(engaging with policymakers and increasing evidence-informed decisions)

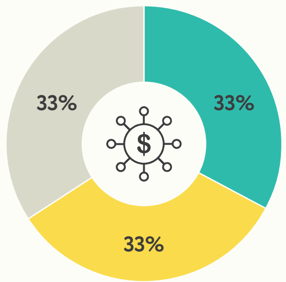
## POLITICAL CONTEXT OUTLOOK




Will improve Will worsen No change

**33%** Reported a worsening legal context

## FUNDING CONTEXT OUTLOOK




Will improve Will worsen No change

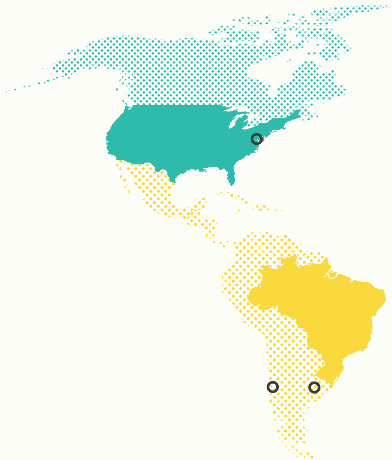
Data is based on 230 African think tanks in the Open Think Tank Directory and 33 responses from African thinktankers to the 2023 OTT think tank survey.

# Americas

USA & Canada | Latin America & the Caribbean | Global

## AVERAGE THINK TANK AGE (YEARS)

38 | 31 | 31



### COUNTRIES WITH THE MOST THINK TANKS

460 USA
71 Brazil

### CITIES WITH THE MOST THINK TANKS

154 Washington, D.C.
46 Buenos Aires
46 Santiago de Chile

61%
60%

Said their operational context has become harder in the last year

### MEDIAN STAFF SIZE

21 18
19

### AVERAGE FEMALE STAFF (%)
### FEMALE LEADERSHIP (%)

| | USA & Canada | Latin America & the Caribbean | Global |
|---|---|---|---|
| Average female staff (%) | 51 | 72 | 50 |
| Female leadership (%) | 35 | 37 | 27 |

### MEDIAN PUBLICATIONS

17 9
14

## EXPECTED STAFF GROWTH

Grow | Reduce | Stay the same

**USA & Canada**

60% | 40%

**Latin America & the Caribbean**

44% | 56%

### DESIRED COMPETENCIES

→ Management & leadership
(teamwork, and improving internal capacity to respond to challenges)

→→ Strategy
(context adaptation)

→ Networking & engagement
(strengthening institutional partnerships)

→ Research capabilities
(staff development)

### KEY POLICY ISSUES

→ Environment/resources/ energy
(climate change and renewable energy)

→ Defence/peace/security
(citizen security, violence, and creating safer communities)

### KEY CHALLENGES

→→ Financial issues & fundraising
(fundraising and limited funding)

→ Political challenges
(polarisation, curtailing critical voices, and restrictions to civil society and think tanks)

→ Evidence use & decision-making processes
(enhance evidence-informed decisionmaking in government)

50%
41%

Reported a worsening media context

## POLITICAL CONTEXT OUTLOOK

Will improve | Will worsen | No change

**USA & Canada**

53% | 47%

**Latin America & the Caribbean**

14% | 23% | 63%

## FUNDING CONTEXT OUTLOOK

Will improve | Will worsen | No change

**USA & Canada**

44% | 31% | 25%

**Latin America & the Caribbean**

21% | 50% | 29%

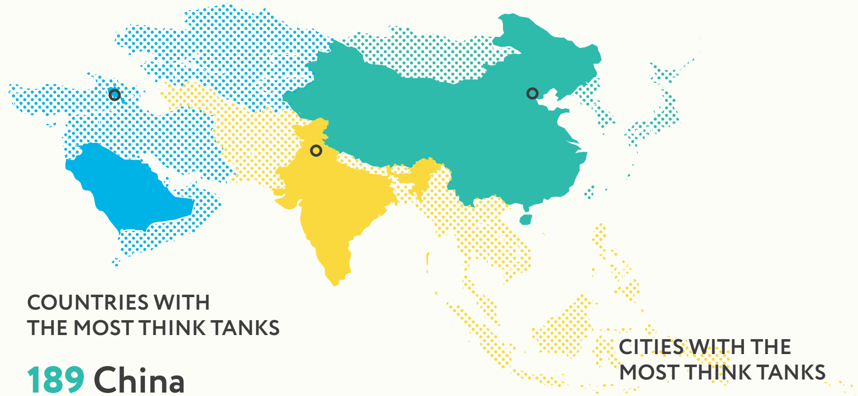
Data is based on 530 active US & Canadian think tanks and 453 active Latin American & Caribbean think tanks in the Open Think Tank Directory and 16 and 46 responses (respectively) to the 2023 OTT think tank survey.

# Asia

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

## AVERAGE THINK TANK AGE (YEARS)

34 28 23 31



### COUNTRIES WITH THE MOST THINK TANKS

189 China
82 India
34 Saudi Arabia
33 Armenia

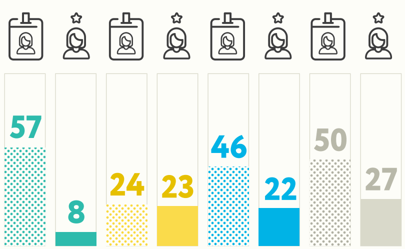
### CITIES WITH THE MOST THINK TANKS

60 Beijing
49 New Delhi
30 Yerevan

### MEDIAN STAFF SIZE

67 22
12 19

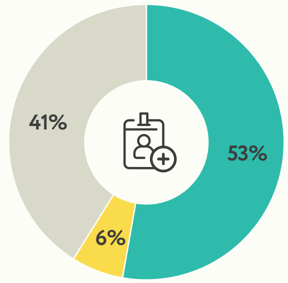
### AVERAGE FEMALE STAFF (%)
### FEMALE LEADERSHIP (%)




### MEDIAN PUBLICATIONS

17 15
12 14

## EXPECTED STAFF GROWTH




Grow | Reduce | Stay the same

## DESIRED COMPETENCIES

→ **Human resources**
(staff hiring and retention, and capacity building)

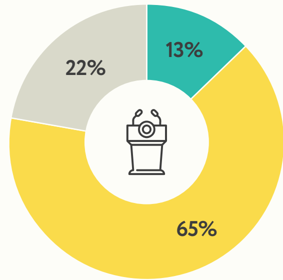
## KEY POLICY ISSUES

→ **Trade/economics/finance**
(economic reform and economic policies)

## KEY CHALLENGES

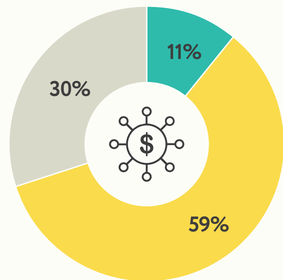
→ **Political challenges**
(political polarisation, restricted civic space, and policies curtailing think tank activities)

## POLITICAL CONTEXT OUTLOOK




Will improve | Will worsen | No change

## FUNDING CONTEXT OUTLOOK




Will improve | Will worsen | No change

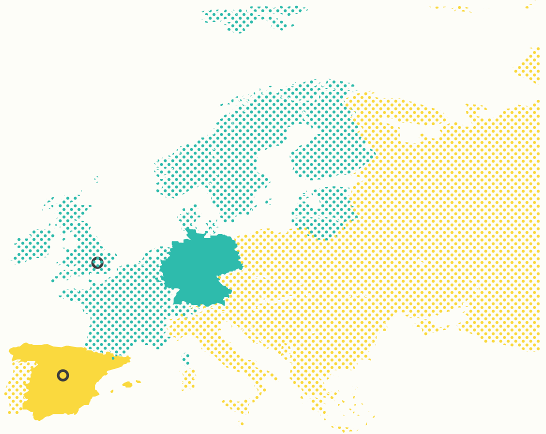
Data is based on 363 active Eastern Asian think tanks, active 295 South & South-Eastern Asian think tanks, and 248 active West & Central Asian think tanks in the Open Think Tank Directory and 62 responses from Asian thinktankers to the 2023 OTT think tank survey.

# Europe

West & Northern Europe | South & Eastern Europe | Global

## AVERAGE THINK TANK AGE (YEARS)

34 | 27 | 31



### COUNTRIES WITH THE MOST THINK TANKS

188 Germany
56 Spain

### CITIES WITH THE MOST THINK TANKS

113 London
30 Madrid

## 40% 49%

Said their operational context has become harder in the last year

## MEDIAN STAFF SIZE

22 12
19

## AVERAGE FEMALE STAFF (%)

## FEMALE LEADERSHIP (%)

52 | 29 | 52 | 29 | 50 | 27

## MEDIAN PUBLICATIONS

22 8
14

## EXPECTED STAFF GROWTH

Grow | Reduce | Stay the same

West & Northern Europe: 51% | 3% | 46%

South & Eastern Europe: 33% | 67%

## DESIRED COMPETENCIES

→ Communications
(improving communications and marketing)

## KEY POLICY ISSUES

→ International affairs
(strengthening international cooperation and the changing geopolitical climate)

→ Environment/resources/energy
(climate change, energy security and environmental protection)

→ Social policy
(social protection, inequality, and poverty reduction)

## KEY CHALLENGES

→ Governance & management
(engaging policymakers and politicians, staff turnover, organisational growth, and organisational strategies)

→ Governance & management
(engaging policymakers and politicians)

→ Domestic economic difficulties
(inflation and the rising cost of living)

## 38%

Reported a worsening media context

## POLITICAL CONTEXT OUTLOOK

Will improve | Will worsen | No change

West & Northern Europe: 18% | 38% | 45%

South & Eastern Europe: 13% | 61% | 26%

## FUNDING CONTEXT OUTLOOK

Will improve | Will worsen | No change

West & Northern Europe: 18% | 62% | 21%

South & Eastern Europe: 19% | 47% | 34%

Data is based on 719 active West & Northern European think tanks and 369 active South & Eastern European think tanks in the Open Think Tank Directory and 48 and 41 responses (respectively) to the 2023 OTT think tank survey.

# Oceania

Oceania Global

COUNTRIES WITH THE MOST THINK TANKS

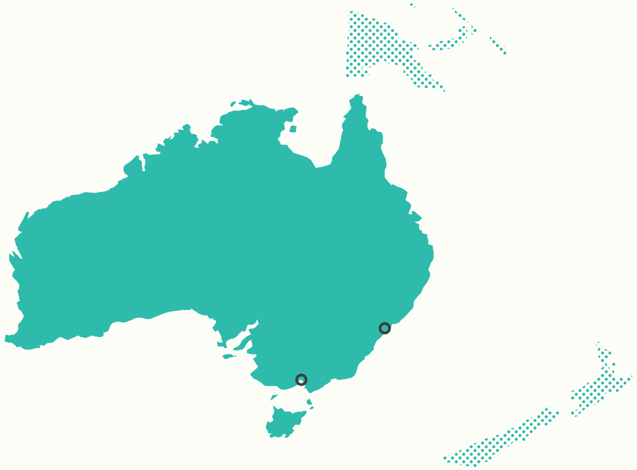
**63** Australia

CITIES WITH THE MOST THINK TANKS

**17** Sydney
**17** Melbourne

AVERAGE THINK TANK AGE (YEARS)

30 31



## DESIRED COMPETENCIES

- Leveraging international & national partnerships
- Digital audience engagement

## EXPECTED STAFF GROWTH

Mixed responses

- Those planning to grow intend to hire specialised staff and undertake new projects
- Those planning to downsize aim to concentrate on their core competencies

## KEY POLICY ISSUES

- Economic issues
- Foreign policy
- International trade policy

## POLITICAL CONTEXT OUTLOOK

- Positive assessment of 2022–2023 period due to government changes and sympathetic view of collaborations with think tanks
- Negative forecast for the year ahead, with some reporting ineffective governance and possible political polarisation

MEDIAN STAFF SIZE

16
19

AVERAGE FEMALE STAFF (%)
FEMALE LEADERSHIP (%)

53 26 50 27

MEDIAN PUBLICATIONS

10
14

## KEY CHALLENGES

- Reduced internal funding
- Tightening international laws
- Staff retention
- Increased pace of delivery
- Changes in online audience engagement

## FUNDING CONTEXT OUTLOOK

Mixed responses

- Those with a positive outlook perceived their research topics as being in alignment with the national agenda
- Those with a negative outlook anticipated a worsening economic context due to changes in trade policies

Data is based on 85 active Oceanian think tanks in the Open Think Tank Directory, 4 responses to the 2023 OTT think tank survey, and qualitative insights based on those responses.

# Annexes

# Annex 1. Survey

## PERSONAL AND ORGANISATIONAL PROFILE

1. **Which of the following best describes the division/area you work in within your organisation?**

   Select the most suitable answer from the options given below.

   - Research (e.g. analyst, research coordinator, research fellow)
   - Governance & management (e.g. director, board member, manager)
   - Communications ( e.g. communications head, editor, communicator)
   - Other organisational divisions (e.g. Finance, HR, IT)
   - External engagement (e.g. advisor, consultant)

2. **Which of the following best describes your position within your organisation?**

   Select the most suitable answer from the options given below.

   - Board member (e.g. president of the board, member)
   - Senior level (e.g. CEO, director, senior executive)
   - Mid-level (e.g. project manager, research analyst)
   - Entry level (e.g. junior manager, project officer)

3. **What is your gender?**
   - Male
   - Female
   - N/A

4. **In which country is your organisation based?**

5. **What is the gender of the leader/director/chief executive?**
   - Male
   - Female
   - Both (if a joint leadership)
   - N/A

6. **How is the organisation registered?**
   - For-profit
   - Government
   - Non-profit
   - University institute/centre
   - Other

7. **When was the organisation founded?**
   - Founded in or before 2000
   - Founded after 2000

8. **What was the organisation's turnover in 2022?**

   Amount of money received/generated by the organisation in the last year (in USD; converted using the official exchange rate on 31 Dec 2022).

   - Less than 500k
   - Over 500k
   - N/A

↑ Table of contents

## SURVEY QUESTIONS

1. **Reflecting on the last 12 months, did the think tank funding context in your country change? If so, how?**
   - No change
   - It has worsened
   - It has improved
2. **What are the key reasons that make you say that the funding context in your country worsened/improved?**
3. **Reflecting on the last 12 months, did the political context in your country change? If so, how?**
   - No change
   - It has worsened
   - It has improved
4. **What are the key reasons that make you say that the political context in your country worsened/improved?**
5. **Reflecting on the last 12 months, has the media in your country changed? (Media freedom, plurality, quality of the debate, etc.)**
   - No change
   - It has worsened
   - It has improved
6. **Reflecting on the last 12 months, has the legal framework for think tanks in your country experienced any changes?**
   - No change
   - It has worsened
   - It has improved
7. **What are the key challenges your organisation has faced over the last 12 months?**

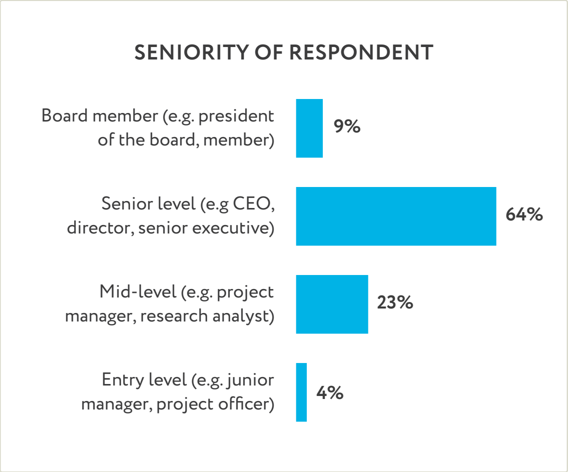
   Please list both internal and external challenges.
8. **Overall, and reflecting on the last 12 months, would you say it has become easier or harder for your think tank to operate?**
   - No change
   - Harder
   - Easier
9. **How do you foresee the funding context in your country in the year ahead?**
   - No change
   - Negative, the context will worsen
   - Positive, the context will improve
10. **What are the key reasons that make you think that the funding context in your country will worsen/ improve?**
11. **How do you foresee the political context in your country in the year ahead?**
    - No change
    - Negative, the context will worsen
    - Positive, the context will improve
12. **What are the key reasons that makes you say that the political context in your country will worsen/ improve?**
13. **What organisational competencies does your organisation need to invest in to deal with its context and challenges?**
14. **In terms of staff, is your think tank planning to grow (in terms of increased staff numbers), reduce, or stay the same in the year ahead?**
    - Grow
    - Reduce
    - Stay the same
    - Don't know/can't say
15. **Why do you think your organisation will grow/reduce/stay the same?**

    What is the biggest contribution factor for the growth or reduction (in staff numbers) within your think tank?
16. **What do you see as the most pressing policy issues that research can help to address in your country?**

↑ Table of contents

# Annex 2. Personal and organisational profiles of respondents

*Chart 25*

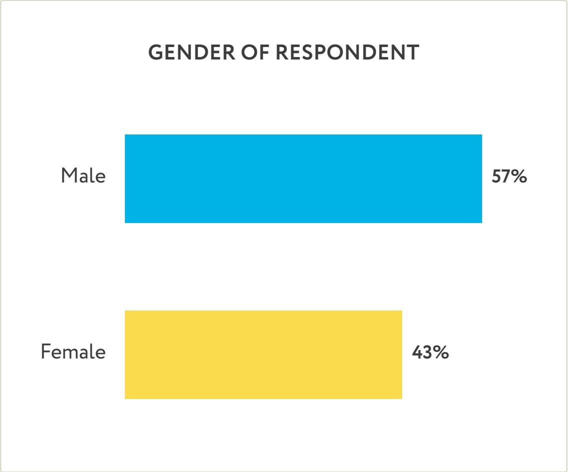



*n=251*
*Note: These are unweighted results.*

*Chart 26*

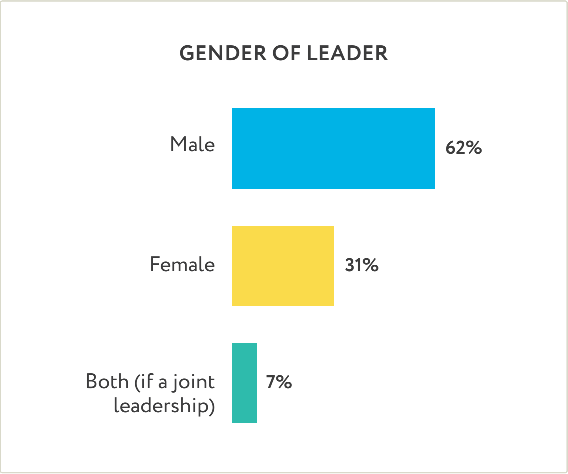

*n=251*
*Note: These are unweighted results.*

*Chart 27*



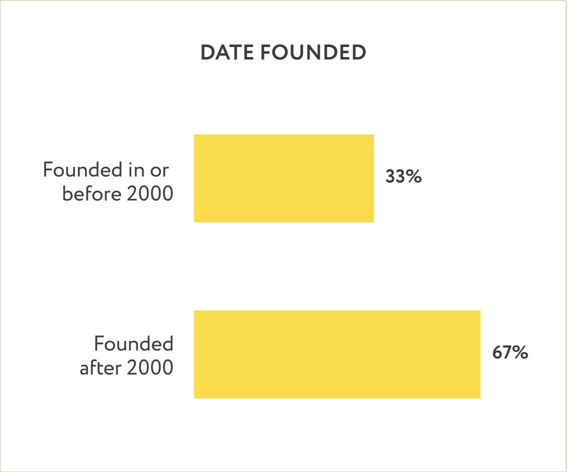

*n=251*
*Note: These are unweighted results.*

*Chart 28*



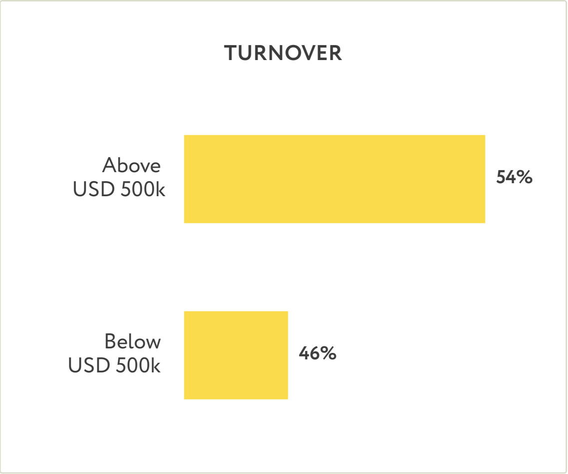

*n=241*
*Note: These are unweighted results.*

*Chart 29*




*n=232*
*Note: These are unweighted results.*

*Chart 30*




*n=181*
*Note: These are unweighted results.*

↑ Table of contents

# Annex 3. Margins of error for comparison variables

| | | Frequency | Margin of error |
|---|---|---|---|
| **Overall** | Overall | 250 | 6.0% |
| **Region** | Africa | 33 | 17.0% |
| | Asia | 62 | 12.3% |
| | South & Eastern Europe | 41 | 15.2% |
| | West & Northern Europe | 48 | 14.0% |
| | Latin America & the Caribbean | 46 | 14.4% |
| | USA & Canada | 16 | 24.4% |
| | Oceania | 4 | 49.0% |
| **Organisational area of respondent** | Communications | 24 | 19.9% |
| | Governance & management | 124 | 8.6% |
| | Other | 15 | 25.3% |
| | Research | 88 | 10.3% |
| **Seniority of respondent** | Board | 23 | 20.4% |
| | Entry/mid-level | 67 | 11.9% |
| | Senior | 161 | 7.5% |
| **Gender of respondent** | Female | 107 | 9.3% |
| | Male | 144 | 8.0% |
| **Turnover** | Unknown turnover | 70 | 11.6% |
| | Below USD 500k | 83 | 10.6% |
| | Above USD 500k | 98 | 9.8% |
| **Founding date** | Unknown founding date | 19 | 22.4% |
| | Founded pre-2000 | 156 | 7.7% |
| | Founded post-2000 | 76 | 11.1% |
| **Business model** | Alternative business model | 56 | 13.0% |
| | Non-profit | 195 | 6.8% |
| **Gender of leader** | N/A | 10 | 31.0% |
| | Both (joint leaders) | 17 | 23.7% |
| | Female | 75 | 11.2% |
| | Male | 149 | 7.9% |

↑ Table of contents

# Annex 4. Respondents' countries

| Africa | 33 |
|---|---|
| Benin | 1 |
| Ethiopia | 1 |
| Ghana | 1 |
| Guinea-Bissau | 1 |
| Kenya | 4 |
| Morocco | 1 |
| Nigeria | 5 |
| Senegal | 1 |
| Somalia | 4 |
| South Africa | 2 |
| Swaziland | 1 |
| Tanzania | 3 |
| Tunisia | 1 |
| Uganda | 3 |
| Zambia | 1 |
| Zimbabwe | 3 |

| Asia | 62 |
|---|---|
| China | 1 |
| Hong Kong | 1 |
| Japan | 2 |
| South Korea | 1 |
| Bangladesh | 1 |
| Cambodia | 1 |
| India | 9 |
| Indonesia | 3 |
| Lao People's Democratic Republic | 1 |
| Malaysia | 6 |
| Myanmar | 1 |
| Nepal | 3 |
| Pakistan | 4 |
| Philippines | 1 |
| Singapore | 1 |
| Sri Lanka | 3 |
| Thailand | 2 |
| Afghanistan | 1 |
| Armenia | 6 |
| Azerbaijan | 3 |
| Georgia | 4 |
| Israel | 1 |
| Jordan | 1 |
| Kazakhstan | 1 |
| Lebanon | 1 |
| Qatar | 1 |
| Turkey | 2 |

| South & Eastern Europe | 41 |
|---|---|
| Bosnia and Herzegovina | 1 |
| Bulgaria | 2 |
| Croatia | 1 |
| Czech Republic | 1 |
| Greece | 1 |
| Hungary | 2 |
| Italy | 4 |
| Kosovo | 2 |
| Macedonia | 3 |
| Moldova | 1 |
| Poland | 2 |
| Portugal | 1 |
| Romania | 3 |
| Serbia | 5 |
| Slovakia | 1 |
| Spain | 10 |
| Ukraine | 1 |

| West & Northern Europe | 48 |
|---|---|
| Austria | 1 |
| Belgium | 8 |
| Denmark | 3 |
| Estonia | 1 |
| Finland | 1 |
| France | 4 |
| Germany | 5 |
| Ireland | 1 |
| Lithuania | 1 |
| Luxembourg | 1 |
| Netherlands | 4 |
| Norway | 2 |
| Switzerland | 1 |
| United Kingdom | 15 |

| Latin America & the Caribbean | 46 |
|---|---|
| Argentina | 2 |
| Bolivia | 3 |
| Brazil | 5 |
| Chile | 2 |
| Colombia | 6 |
| Costa Rica | 1 |
| Curacao | 1 |
| Dominican Republic | 1 |
| Ecuador | 1 |
| El Salvador | 2 |
| Guatemala | 2 |
| Haiti | 1 |
| Honduras | 1 |
| Jamaica | 1 |
| Mexico | 6 |
| Panama | 1 |
| Paraguay | 2 |
| Peru | 3 |
| Uruguay | 3 |
| Venezuela | 2 |

| USA & Canada | 17 |
|---|---|
| Canada | 2 |
| United States of America | 15 |

| Oceania | 4 |
|---|---|
| Australia | 4 |

↑ Table of contents

## Credits

Editing and proofreading:
Sophie Gillespie

Design and typesetting:
Magda Castría

Advice and commentary:
Louise Ball, Emma Broadbent
& Enrique Mendizabal

Production coordination:
Syranno Baines

A global consultancy
and platform for change