The Open Think Tank Directory

Think Tank Survey 2021

On Think Tanks

February 2022

Think Tank State of the Sector

2020–2021

Contents

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Introduction

The Think Tank State of the Sector

The Think Tank State of the Sector publication provides an overview of the think tank sector worldwide. It includes: a main publication that describes the characteristics of think tanks worldwide in 2020-2021 (based on data from the Open Think Tank Directory [OTTD]); four regional briefs to offer a more nuanced view of think tanks in four different continents (also based on data from the OTTD); and this report, which explores how policy research centres, think tanks and those related to think tanks and evidence-informed policy see the current context, the key challenges faced and the main issues to address.

The On Think Tanks sector surveys

The On Think Tanks sector surveys help gain an understanding of how policy research centres, think tanks and those related to think tanks and evidence-informed policy see the current context, the key challenges faced and the main issues to address. This 2021 initiative built on the 2020 survey on the impact of COVID-19, which gave a rapid overview of how think tanks were affected by the pandemic and how they responded to the early months of the crisis. We will be carrying out a yearly survey to track changes in the sector and to address any topical issues that arise.

Methodology and sample

The survey was sent out to all organisations in the OTTD (for which an email address is registered) in May 2021. The closing date for submitting answers was 7 June 2021. In total, 69 individuals participated in the survey. The survey was anonymous, and respondents were not asked to disclose their names nor their organisations, but were asked the country they were based in, their role within the organisations and some questions on the size of their organisations. Most of the 69 respondents are part of their respective organisations' senior leadership (37%), followed by researchers (27%)(Chart 1). Respondents primarily work in Latin America & the Caribbean (21%), South & South-Eastern Asia (19%) and South & Eastern Europe (18%) (Chart 2). Most of the organisations where participants work have a staff size of up to 10 (33%) or 11-20 (28%).

Chart 1.

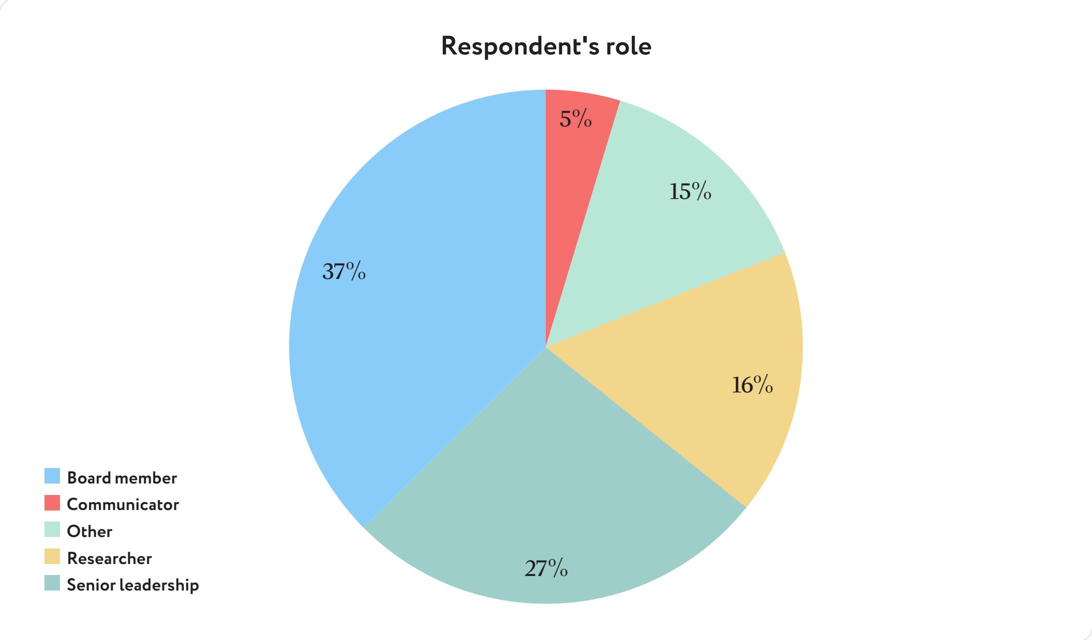


Chart 2.

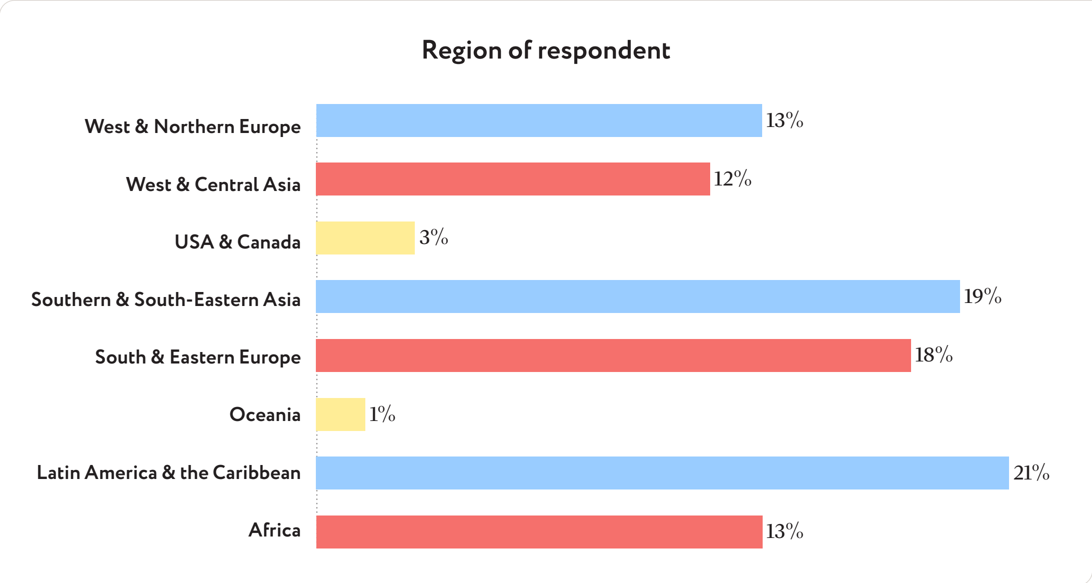
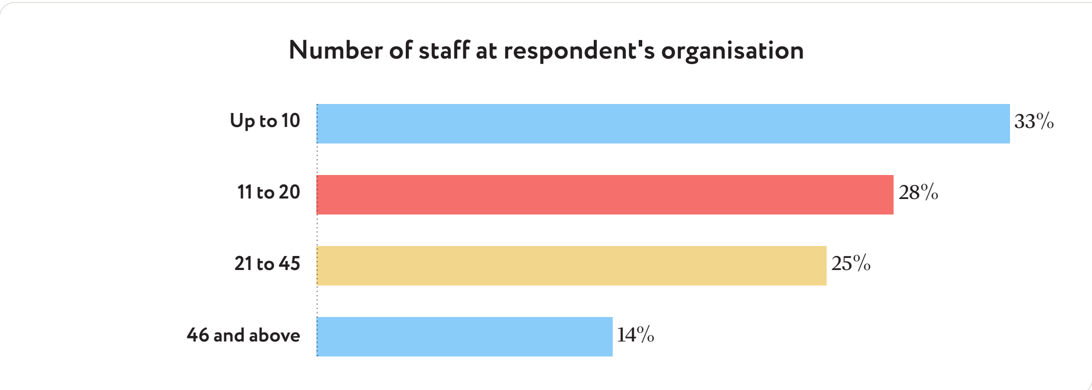


Chart 3.



2

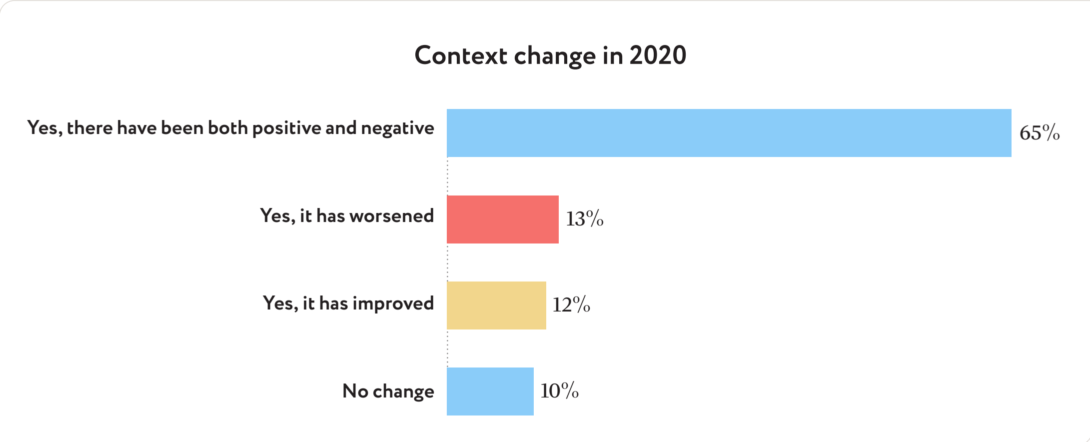
Context change – 2020

Reflecting on 2020, most of the respondents (65%) said that there have been both positive and negative changes in the context in which their organisations operate.

Survey question:

Reflecting on 2020, has the context in which your organisation operates changed?

Chart 4.



n: 69.

Organisations with 11–20 staff members had more mixed views on the context than those of other sizes, and this size group also had the highest percentage of negative views, with 21% of organisations of this size answering that the context had worsened (Table 1). Organisations with 11–20 staff are just under the median size of organisations worldwide (see main report) and so are on the smaller side, but their staff numbers are still high enough to suggest a relatively structured organisation. This could have made it harder for them to adjust to the changes that COVID-19 brought, yet they were not large enough to have the reserves or structural organisational protections to help them weather the year 2020.

Table 1.

Change in context in which the organisation operates, by number of staff

	Up to 10	11 to 20	21 to 45	46 and above	Total
No change	9%	21%	0%	10%	10%
Yes, it has improved	17%	16%	6%	0%	12%
Yes, it has worsened	13%	21%	12%	0%	13%
Yes, there have been both positive and negative changes	61%	42%	82%	90%	65%

n: 69

3

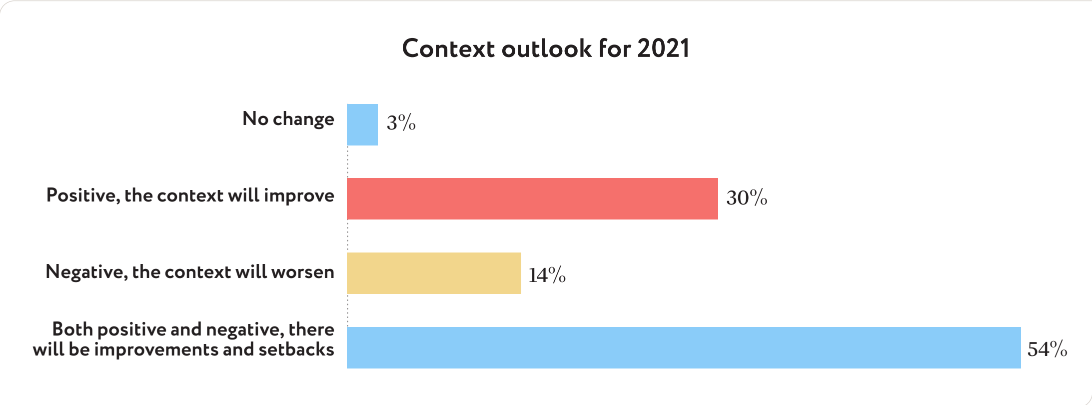
Context outlook – 2021

Survey question:

Reflecting on 2020, has the context in which your organisation operates changed?

A little over a quarter of respondents (30%) expected the context to improve in 2021, but the majority (54%) anticipated that while some aspects will improve there will still be some setbacks (Chart 5). Organisations with 11 staff members or more had a more mixed outlook (i.e. both positive and negative), while small organisations with up to 10 staff members had more positive expectations (Table 2). Perhaps they perceive that their smaller size gives them more flexibility to respond to changes and hence they have a more positive outlook.

Chart 5.



n: 69

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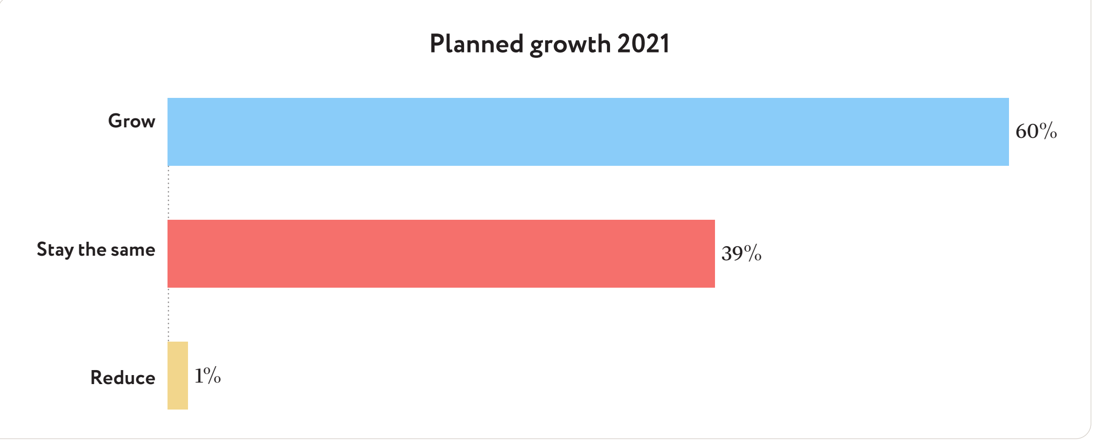
Planned growth – 2021

Most organisations in the sample (60%) planned to grow in 2021. Chart 6 shows that only 1% (two respondents) anticipated that their organisation will be reduced. Perhaps organisations are hoping and planning for growth to make up for the difficulties that 2020 brought.

Survey question:

Reflecting on 2020, has the context in which your organisation operates changed?

Chart 6.



n: 67

Organisations with fewer than 46 staff have a positive growth outlook, noting that the organisation will grow, while big organisations with 46 staff or more anticipate that the organisation will stay the same.

5

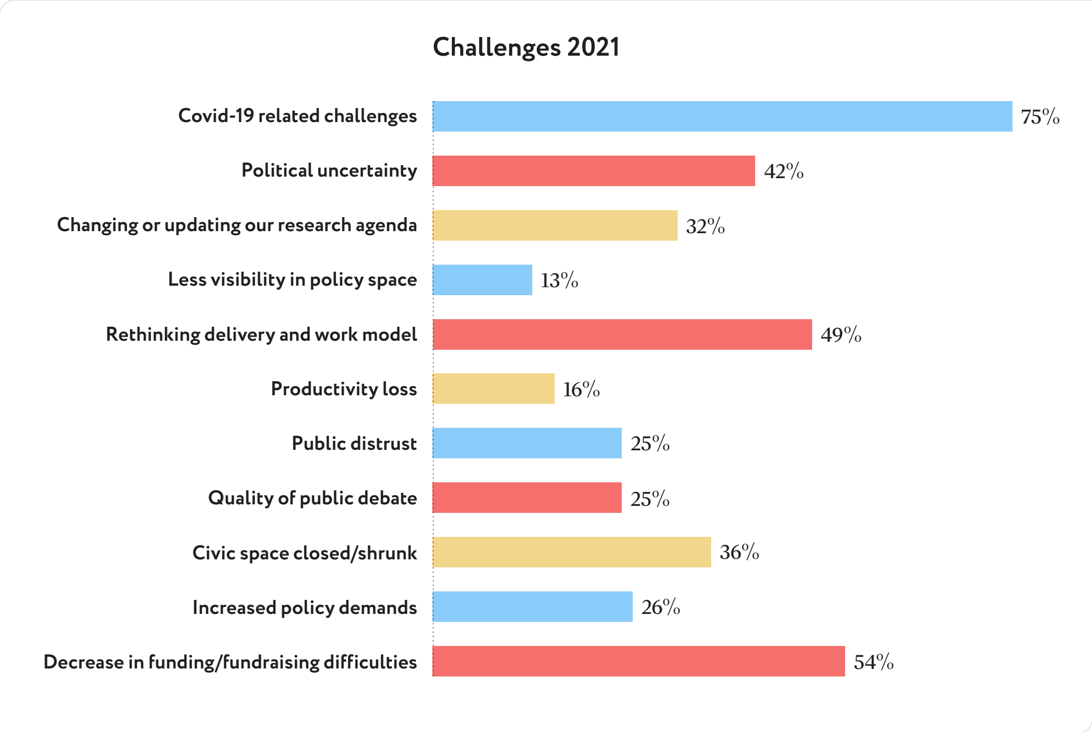
Key challenges – 2021

Survey participants were asked about the key challenges that they think their organisation will face or is currently facing in 2021 (Chart 7). Most respondents identified COVID-19-related challenges (75%), decreases in funding (54%) and needing to rethink their organisation's delivery and model (49%) as the key challenges.

Survey question:

Reflecting on 2020, has the context in which your organisation operates changed?

Chart 7.



n: 69

Most regions identified COVID-19-related challenges as the key challenge they face, except for organisations in Latin America, which rated COVID-19 challenges second highest after political uncertainty. It is interesting to note that although it came in as the third biggest challenge across the world, rethinking their delivery and work model is not one of the three key issues identified by organisations in Europe. This is inconsistent with the general trend, whereby this challenge was ranked highly by think tanks in other regions, and might indicate that funding sources and means of operation of European think tanks have not been as affected by COVID-19.

Organisations with fewer than 45 staff identified COVID-19-related challenges as their key concern. On the other hand, larger organisations with 46 or more staff said that needing to rethink their organisation's delivery and model is their main challenge.

Main issues – 2021 onwards

Survey question:
Reflecting on 2020, has the context in which your organisation operates changed?

Responses were grouped into topics of interest and organisational concerns. The five key topics of interest are governance (43.7%), trade/economics/finance (23.9%), COVID-19 (18.3%), international affairs (18.31%) and environment/natural resources/energy. Governance areas of interest include democracy, citizen participation, transparency and accountability; the trade/economics/finance category primarily focuses on economic recovery; the key COVID-19-related issue is impact on society, including education and employment; international affairs covers regional development and foreign policy; and environment/natural resources/energy focuses on energy policy and climate change. A summary of all topics of interest identified are summarised in Table 2.

Table 2.

Topics of interest in 2021 onwards		
Topics	**Freq.**	**Percent**
Governance	31	44%
Trade/Economics/Finance	17	24%
COVID-19	13	18%
International affairs	13	18%
Environment/Natural Resources/Energy	11	15%
Defense/Peace/Security	8	11%
Education	8	11%
Human rights	6	8%
Health	6	8%
Gender	6	8%
Migration	6	8%
Social policy and development	6	8%
Digital transformation	5	7%
Media and information	4	6%
Science and technology	1	1%
Cybersecurity	1	1%
Transport and infrastructure	1	1%
Food and agriculture	1	1%
WASH	1	1%

Although the question focuses on the key areas of interest that the organisation will pursue from 2021 onwards, some of the responses related to organisational issues including sustainability of the organisation (including resource mobilisation); expanding reach and visibility; adapting HR to context (operations); strategic planning; cooperation and partnerships; and organisational strengthening.

The Open Think
Tank Directory

https://onthinktanks.org/
open-think-tank-directory

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