STATE OF THE SECTOR

RESILIENCE AND IMPACT IN A POLITICALLY SHIFTING WORLD

THE ON THINK TANKS
STATE OF THE SECTOR
REPORT 2024

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INTRODUCTION

This On Think Tanks publication provides an annual overview of the think tank sector worldwide. It is based on data from a global survey of think tanks, this year conducted on behalf of On Think Tanks (OTT) by Once Once, using the Open Think Tank Directory database and information provided by 21 partner organisations. For the first time, this year's survey allowed respondents to remain anonymous at an organisational level.

The 2024 report offers insights into the characteristics, structure, staffing, income, and geographical scope of participating think tanks. It also examines a number of political and funding contexts to understand how these factors influence think tanks' organisational independence and levels of policy impact. For example, we explore how different political regimes and degrees of polarisation affect think tanks' research and outreach efforts, and assess think tanks' priorities, agendas, and capacity to influence policy outcomes within different contexts.

We also investigate think tanks' engagement with emerging trends such as artificial intelligence (AI) and diversity, equity, and inclusion (DEI), examining whether there are significant differences in the adoption of these approaches within high- and low-income countries, and whether they are viewed as opportunities or challenges by think tanks.

Readers will find some of the survey results to be counterintuitive – and some may attribute these contradictions to a non-representative sample. However, the key value of this survey data and its publication lies in the accompanying opportunity we provide for actors within the ecosystem to discuss and debate its findings. This publication should be seen as a tool in a wider process, whereby actors are invited to compare their local realities with the global data, generate nuanced analysis and learning, and discuss questions that are critical for their sustainability and future success.

To facilitate this objective, this 2024 edition includes a new section featuring analyses and insights from our local partners, providing critical context to the global data findings. These partner organisations share their impressions and perspectives based on the survey data relevant to their respective national or regional contexts.

And you, too, can use the open data from the survey to carry out your own analysis, and to compare your local situation with the global landscape. We invite you to explore this report, download the data, and take part in the wider learning process. Finally, if you are a think tank, we encourage you to register in our global directory. The more organisations that register, the more representative we can make our future State of the Sector reports.

Explore the report, survey data, and our local partner insights online

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; a mapping of think tanks in key markets for the Bill and Melinda Gates Foundation in 2021-2022 allowed us to gain insights on more think tanks; 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 and OTT Consulting 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 on more than 3,800 organisations from around the world.

The directory supports the sector's transparency, and enables think tanks and those in the evidence-informed policy world to find and connect with one another. Think tanks can use it to identify potential partners, and funders to identify potential grantees – and it also provides a useful resource for those who study think tanks. The full database is public and can be downloaded 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 clearly identifiable organisations with the (main) mission of undertaking research, generating knowledge and/or using evidence-informed arguments to inform and/or influence policies on matters of public interest – and their 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', or not accepted.

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 datapoints being expanded. Hence, while the data is not perfect, its analysis offers an interesting overview of the trends and patterns in the sector.

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THINK TANK SECTOR HIGHLIGHTS 2024

Data is based on 297 responses to the 2024 OTT think tank survey

1. THINK TANK LANDSCAPE

SIZE, BUDGET & FUNDING

Think tanks are predominantly small

+60%

Budgets under USD 500k

Funding is primarily domestic

Fewer than 20 paid staff members

AGE

The majority (34%) were established between

2010-2019

LEADERSHIP

Predominantly male leaders, with academic backgrounds

Female leadership is more common in Latin America & the Caribbean

STAFF

Majority are **graduate professionals** over 35-years old

LEGAL STRUCTURE & FUNCTIONS

- Mostly registered as **non-profits**
- Typical structure includes **communications** and **governance** functions
- Few have specialised teams in **MEL** or **fundraising**

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2. POLITICAL CONTEXT

POLITICAL REGIMES

Think tanks are concentrated in electoral democracies

- Think tanks in democratic countries do not report higher levels of independence than those in autocracies
- Think tanks in less democratic contexts report similar challenges in operating and reaching policymakers

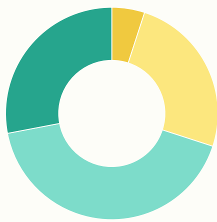
POLITICAL POLARISATION

36% say polarisation affects their research and operations

- Think tanks in Latin America & the Caribbean, non-EU Europe & the Caucasus, and the Anglosphere report the highest levels of political polarisation and the greatest obstacles to convening diverse policy actors
- Polarisation hinders cross-political engagement (39%) and limits diverse funding (29%)
- Think tanks in more polarised environments report lower levels of independence

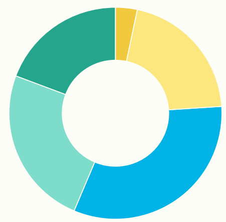
SURVEY SAMPLE BY POLITICAL REGIME

- **5%** Closed autocracy
- **25%** Electoral autocracy
- **42%** Electoral democracy
- **28%** Liberal democracy



THINK TANKS AFFECTED BY POLITICAL POLARISATION

- **3%** Very much
- **21%** Significantly
- **32%** Moderately
- **24%** Slightly
- **19%** Not at all



OUTLOOK

Think tanks in wealthier, democratic countries are more pessimistic; only 21% expect favourable political outcomes in the next 12 months

MENA and sub-Saharan African think tanks are the most optimistic, while European (EU & EFTA) and Latin American & Caribbean think tanks are the most pessimistic

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Data is based on 297 responses to the 2024 OTT think tank survey

3. FUNDING MODELS

FUNDING SOURCES

+60% International
FOR THINK TANKS IN **LOW- AND LOWER-MIDDLE-INCOME** COUNTRIES

70% Domestic
FOR THINK TANKS IN **HIGH-INCOME** COUNTRIES

Think tanks relying on **project-based funding** depend more on **international development agencies**, while those with a larger proportion of **core funding** have a more **diverse range of sources**

BUDGET SIZE

Higher-income countries tend to host think tanks with larger budgets

The smaller the budget, the larger an organisation's reliance on a single donor. Think tanks with smaller budgets and more project-based funding report spending more time maintaining their reputation and securing funding than those with larger, more flexible resources

STAFFING AND COSTS

Think tanks with **core funding** typically have larger long-term contracted staff and face fewer issues covering indirect costs

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4. RESEARCH PRIORITIES AND IMPACT

POLICY IMPACT

77% Think tanks report having an impact on policy through formal and informal channels

FACTORS INFLUENCING POLICY IMPACT

Structured teams, larger long-term contract staff, higher budgets, media engagement, and low political polarisation

TARGET AUDIENCES

Public sector (36%)

General population and community-orientated organisations (20%)

Research community (20%)

TOP GLOBAL POLICY ISSUES

Economic policy

Governance

TOP INFLUENCERS ON RESEARCH AGENDAS

Government bodies (29%)

Policymakers (23%)

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5. CHALLENGES AND EMERGING TRENDS

TOP GLOBAL CHALLENGES

Adaptability (73%)

New funding sources (59%)

Leadership transitions (44%)

Staff shortages*

*A particular issue for mid-sized organisations

DESIRED COMPETENCIES TO IMPROVE

Fundraising abilities (66%)

Research capacity (37%)

Communications skills (37%)

DIVERSITY, EQUITY, AND INCLUSION (DEI)

Emerging as a crucial focus; initiatives in this area are more common in well-funded organisations from high- and upper-middle-income countries that employ younger staff members

ARTIFICIAL INTELLIGENCE (AI)

Recognised as a future driver of think tank operations (research production, communications, and operations). Adoption is still in early stages across all subregions

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ABOUT THE REPORT

ABOUT THE REPORT

On Think Tanks' annual State of the Sector Report provides a comprehensive assessment of the think tank landscape worldwide. This 2024 edition is the fifth publication in the series. Drawing on survey responses from nearly 300 organisations across 95 countries, it offers a comparative perspective on the key factors shaping think tanks' sustainability, impact, and prospects for the future.

In an era marked by complex policy challenges, political and economic instability, and rapid technological change, think tanks can play a vital role as knowledge brokers for evidence-informed decision-making. Yet, they also face significant issues – from financial precarity and political polarisation to the imperative to adapt to new ways of working and engaging with their audiences.

The data within this report represents a snapshot of think tanks around the world, providing an overview of the sector's key trends, challenges, and innovations across five critical dimensions:

1. **Think tank landscape:** An overview of the size, scope, and diversity of the sector, including variations in organisational models, leadership profiles, and geographic focus across regions.

2. **Political context:** An examination of how degrees of democracy, political polarisation, and government receptivity to evidence affect think tanks' ability to conduct research, convene diverse stakeholders, and inform policy debates.

3. **Funding models:** An analysis of how funding sources, modalities, and constraints shape think tanks' operating models, research agendas, and sustainability, with a particular focus on how these vary across regions.

4. **Research priorities and impact:** An exploration of the key policy issues and audiences that think tanks prioritise; the strategies and channels they use to achieve policy influence; and the challenges of measuring and communicating impact.

5. **Challenges and emerging trends:** A synthesis of the most pressing operational and strategic challenges facing think tanks, from talent retention and leadership transitions to the imperative to mainstream diversity, equity, and inclusion (DEI), as well as emerging developments such as artificial intelligence (AI).

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.

Explore the On Think Tanks State of the Sector Report 2024 for insights on think tanks' challenges, innovations, and global impact. Join the conversation!

A BRIEF NOTE ON METHODOLOGY

Regular readers of the On Think Tanks State of the Sector Report may notice that this 2024 edition takes a slightly different approach from that of previous years. In particular, while regional differences remain a central feature of the analysis in this report, the categorisation and grouping of the various geographic regions is significantly different.

Our analysis uses a number of defined geographic subregions that are loosely based on the UN SDG Indicators Regional Groupings, with important modifications designed specifically for this report. The core objective in this design was to balance several factors that affect how think tanks operate – including geography, national income, development challenges, political and institutional traditions, cultural links, and so on.

The main difference in this year's regional groupings is the presence of an "Anglosphere" category, comprising the US, Canada, the UK, Australia, and New Zealand. There is therefore no North America category in this year's report, and the UK is grouped with the other Anglosphere countries instead of Europe. The reasons for grouping English-speaking countries in this way include the number of responses received; as well as the presence of distinct cultural links and shared political and institutional traditions. The effects of these factors on how think tanks operate and are funded within these five countries differentiates them from other, more geographically aligned groupings – such as the EU in the case of the UK.

Another key difference is the splitting of the European region into two separate subregions: the EU & EFTA (Norway and Switzerland) and non-EU Europe & the Caucasus (including Turkey for reasons to do with its political and funding environment).

Within the Asia region, Central Asia and South Asia each form separate subregions in this year's report, while East & South-East Asia were merged due to a relative lack of responses. Northern Africa has been grouped with the Middle East to form the MENA subregion, and sub-Saharan Africa forms a separate subregion covering the rest of the continent.

As Australia and New Zealand are included in the Anglosphere, and no think tanks from elsewhere in Oceania were present in the sample, that region is not featured in this year's report.

For the purpose of our analysis, we also classified countries according to their level of economic development (low, lower-middle, upper-middle, or high income) and their type of political regime (close autocracy, electoral autocracy, electoral democracy, or liberal democracy) as defined by the World Bank and VDem Project reports respectively. Coming from well-validated outside sources, these categories provide a rough but defendable way to classify the context in which think tanks operate.

More detail on other aspects of the methodology can be found in Appendix 1.

KEY FINDINGS

KEY FINDINGS

An overview of the sector's key trends, challenges, and innovations across five critical dimensions

THINK TANK LANDSCAPE

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- The global think tank sector is diverse in terms of size, focus, and organisational model, with the majority operating on an annual budget of less than USD 500,000 and with fewer than 20 paid staff members.
- Leadership demographics vary significantly by region, with women overrepresented in Latin American & Caribbean think tanks and underrepresented elsewhere, and leaders drawn disproportionately from academia in most regions, except the Anglosphere.
- Most think tanks are legally registered as non-profits and maintain a core set of functional capacities such as communications and governance, but few incorporate specialised staff for areas like monitoring, evaluation, and learning (MEL) and fundraising.

POLITICAL CONTEXT

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- According to the answers given by think tanks in our survey, think tanks in less democratic countries do not experience any higher degree of operational difficulty, any additional barriers in reaching policymakers, nor any greater challenges arising from political polarisation, compared to their peers in more democratic contexts.
- Think tanks in Latin America & the Caribbean, non-EU Europe & the Caucasus, and the Anglosphere report the highest levels of political polarisation and the greatest obstacles to convening diverse policy actors.
- Perceived operating constraints and optimism about the policy environment vary significantly by region, with Middle East & North African (MENA) and sub-Saharan African think tanks being the most positive and those in Europe and Latin America & the Caribbean the most pessimistic.

FUNDING MODELS

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- In terms of funding models, there is a stark divide between wealthier and less wealthy contexts, with think tanks in high-income countries relying predominantly on domestic sources of finance, while those in low- and middle-income countries are heavily dependent on international donors.
- Core funding is associated with greater organisational stability and staff retention, but is scarce outside of high-income contexts and often entails greater dependence on fewer sources. Most think tanks in lower-income countries operate primarily on short-term project grants from international sources.
- Over-reliance on a single funding source is a risk factor for think tanks across economic contexts, but is particularly acute in upper-middle-income countries in the MENA, South Asia, and non-EU Europe & the Caucasus regions.

RESEARCH PRIORITIES AND IMPACT

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- Economic policy and governance are the top research priorities for most think tanks, but there is significant regional variation, with international relations dominating in the EU & EFTA region, governance in sub-Saharan Africa, environmental issues in East & South-East Asia, and peace and security in non-EU Europe & the Caucasus.
- Most think tanks see governments as their primary audience, but also invest significantly in engaging with civil society, the media, and academia.
- Policy impact is pursued through a mix of formal and informal channels. Events, media engagement, and advisory services are viewed as particularly important levers of influence, although these vary greatly depending on the type and volume of funding available to think tanks.

CHALLENGES AND EMERGING TRENDS

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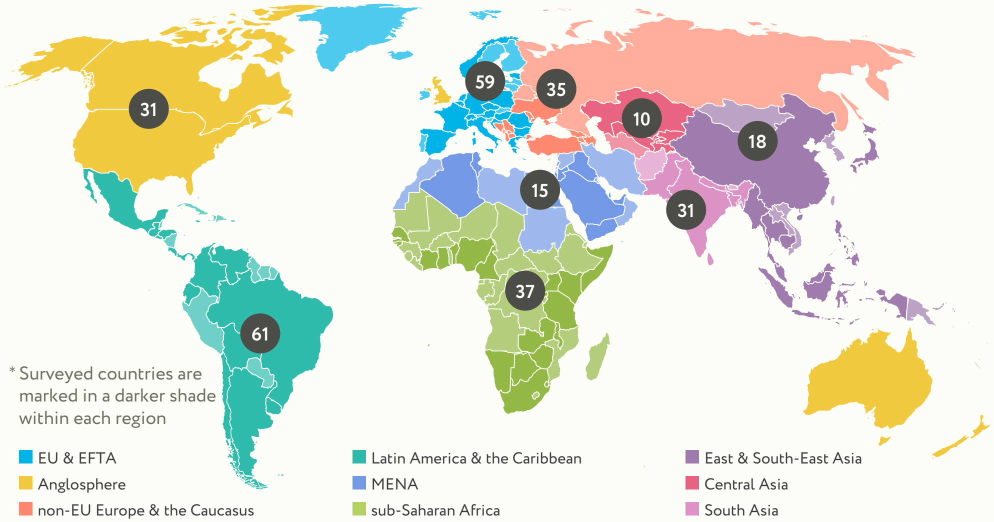
- Funding constraints, staff turnover, and political uncertainty are the most cited operational challenges, with smaller and younger think tanks being most vulnerable.
- Think tanks perceive their most acute capacity gaps to be in the areas of fundraising, research quality, and communications; respondents also identified MEL and DEI as increasingly important competencies and that these need to be developed.
- Technology is seen as a key driver of future think tank business models and impact. AI in particular is expected to transform research production, communications, and operations, but adoption is still nascent and uneven.

1. THINK TANK LANDSCAPE

Data is based on 297 responses to the 2024 OTT think tank survey

SURVEY SAMPLE BY SUBREGION



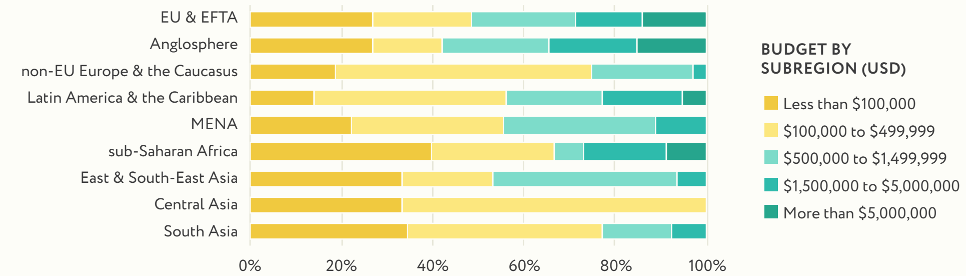
BUDGET STATISTICS

+60% of think tanks operate on budgets below USD 500k

sub-Saharan Africa has the highest percentage with the lowest budgets, below USD 100k

Higher-income countries host those with larger budgets

EU & EFTA and the Anglosphere have the most think tanks with budgets over USD 5M



AGE

34% established between 2010 and 2019
15% before 1990
13% from 2020 onwards

Older think tanks are concentrated in the MENA and EU & EFTA regions; younger ones are more common in Central Asia

LEADERSHIP

Predominantly male leaders, with academic backgrounds

Female leadership is more common in Latin America & the Caribbean

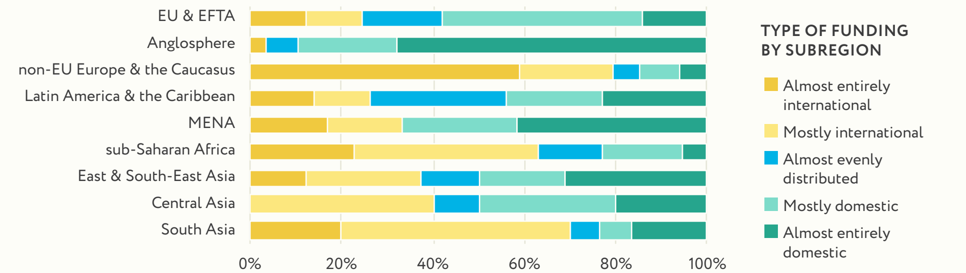
FUNDING SOURCES BY SUBREGION

52% Mostly/almost entirely **project-based**

18% Entirely **core funding**

International-funding dominant
sub-Saharan Africa, South Asia, non-EU Europe & the Caucasus

Domestic-funding dominant
EU & EFTA, Anglosphere, MENA



PAID STAFF SIZE

65% **of think tanks have fewer than 20 paid staff members**

TOP SUBREGION WITH 0 PAID STAFF
sub-Saharan Africa (19%)

TOP SUBREGIONS WITH +50 PAID STAFF
East & South-East Asia (18%)
EU & EFTA (16%)

DEMOGRAPHICS

71% Post-graduate degree holders

59% Long-term contracted staff

51% Young staff (under 35 years)

SUBREGIONAL COMPARISON

Data is based on 297 responses to the 2024 OTT think tank survey

GLOBAL	SUBREGIONAL DIFFERENCES	GLOBAL	SUBREGIONAL DIFFERENCES	GLOBAL	SUBREGIONAL DIFFERENCES
MOST COMMON GENDER AMONG LEADERS **Male**	**Female** Latin America & the Caribbean	CORE OR PROJECT-BASED FUNDING **Mixed**	**Mostly project-based** Central Asia, East & South-East Asia, MENA, and sub-Saharan Africa **Almost entirely international** non-EU Europe & the Caucasus	PERCEPTION OF FUTURE POLITICAL SITUATION **Unfavourable**	**Favourable** MENA
LEADER'S PROFESSIONAL BACKGROUND **Academia**	**Third sector: CSOs, advocacy, charities** Anglosphere	DURATION OF FUNDING **1 to 2 years**	**6 months to 1 year** South Asia **2 to 4 years** sub-Saharan Africa	USE OF AI FOR RESEARCH **Occasionally**	**Rarely** Anglosphere **Frequently** Central Asia
MOST COMMON FUNDING SOURCE **Mostly domestic**	**Mostly international** Central Asia, South Asia, and sub-Saharan Africa **Almost entirely international** non-EU Europe & the Caucasus	WHO SETS THE AGENDA? **Government bodies**	**Policymakers** East & South-East Asia, and MENA **Funders** non-EU Europe & the Caucasus, Southern Asia and sub-Saharan Africa	IMPACT OF AI **Positive**	**Neutral** Anglosphere and South Asia

THINK TANK LANDSCAPE

The On Think Tanks State of the Sector Report 2024 provides a comprehensive snapshot of the current landscape, challenges, and opportunities facing think tanks worldwide. Drawing on survey responses from 297 organisations across 95 countries, it examines how factors like funding, political context, impact orientation, and organisational capacity shape think tanks' sustainability and influence. By analysing these issues through a comparative lens, the report offers valuable insights – both for individual think tanks aiming to enhance their effectiveness, and for the sector at large to strengthen its role in evidence-informed policymaking. It is hoped that the reflections prompted by this report will ensure that think tanks can continue to serve as vital knowledge brokers in an era of complex policy challenges, political polarisation, and social change.

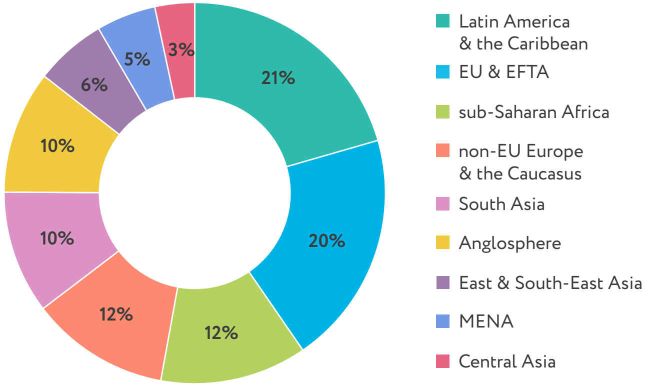
The organisations that responded to this survey represent a broad geographic spread, as shown by the subregional breakdown in Graph 1.1.

Respondent think tanks also varied in terms of overall budget size, as shown in Graph 1.2. Although there is a reasonable spread across the sample, thinks tanks with smaller budgets predominate, with more than 60% reporting an income of less than USD 500,000 per year.

→ The State of the Sector Report 2024 draws on responses from 297 think tanks across 95 countries, revealing that over 60% operate with annual budgets under USD 500,000

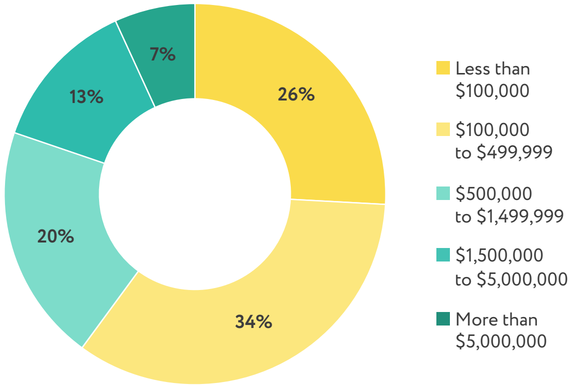
1.1 OTT STATE OF THE SECTOR 2024 SURVEY SAMPLE, BY SUBREGION

Survey sample: 297



1.2 THINK TANKS' ANNUAL BUDGET (USD)

Survey sample: 297



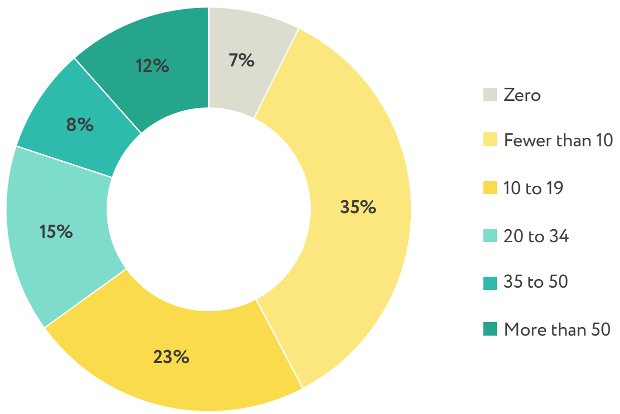
In terms of staff size, the sample is again reasonably spread but skewing somewhat to the smaller side. Graph 1.3 shows that over half of the think tanks surveyed have fewer than 20 employees, with 7% reporting they have no paid staff at all.

A sizeable majority (58%) of the think tanks surveyed are led by men, and most leaders overall come from a background in academia or the third sector (see Graph 1.6).

Interestingly, some of these patterns vary greatly by region; for example, Latin American & Caribbean think tanks report the largest number of female leaders (57%), while the latter are a minority in all other regions (see Graph 1.5). However, we found no significant patterns connecting the gender of think tanks' leaders to budget size or national income levels. In terms of leaders' professional backgrounds, Graph 1.6 shows that academics dominate in all subregions (especially MENA and East & South-East Asia), except for the Anglosphere, where leaders from political backgrounds and the private sector are just as common. This is important as it may speak to both a different political tradition and a different relationship between the world of think tanks and other spheres of society within this region.

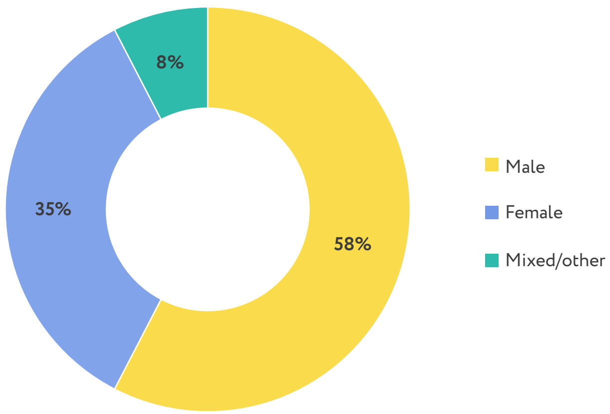
1.3 THINK TANKS' STAFF SIZE (PAID MEMBERS OF STAFF)

Survey sample: 297



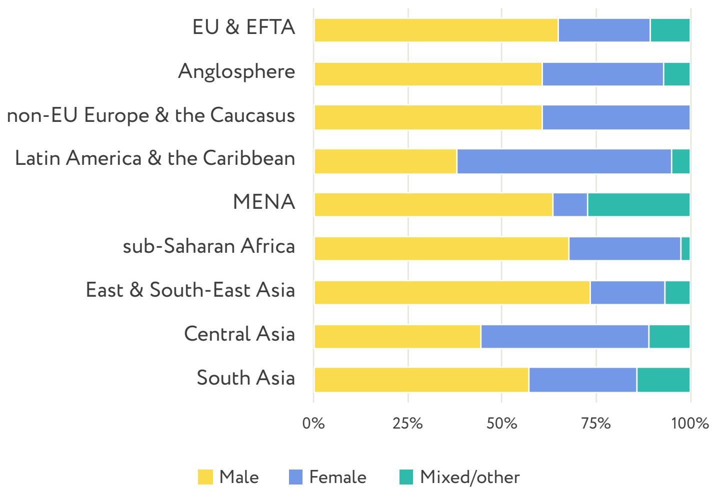
1.4 THINK TANK LEADERS, BY GENDER

Survey sample: 297



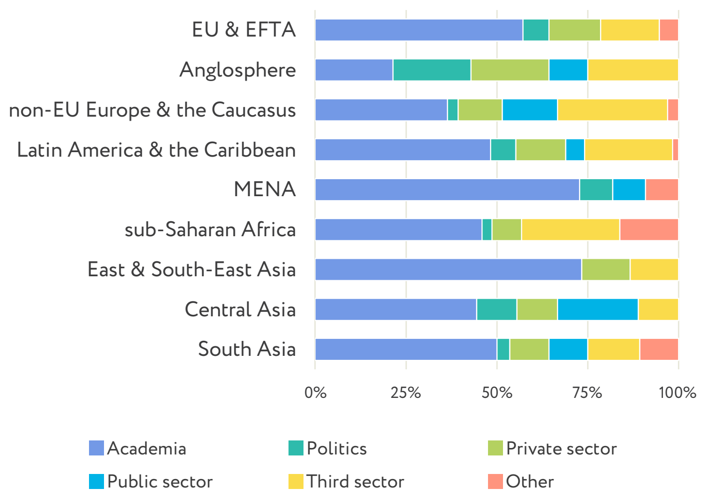
1.5 LEADER'S GENDER, BY SUBREGION

Survey sample: 297



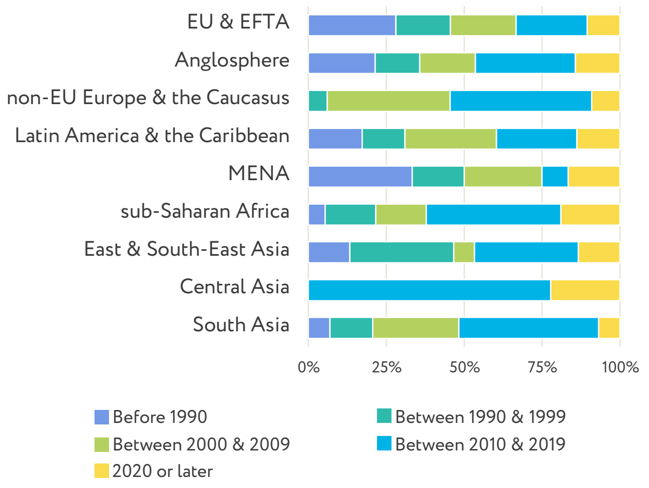
1.6 LEADER'S PROFESSIONAL BACKGROUND, BY SUBREGION

Survey sample: 297



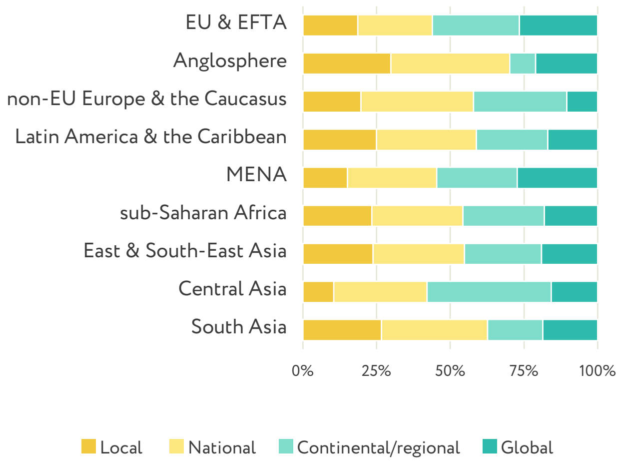
1.7 DATE OF FOUNDATION, BY SUBREGION

Survey sample: 297



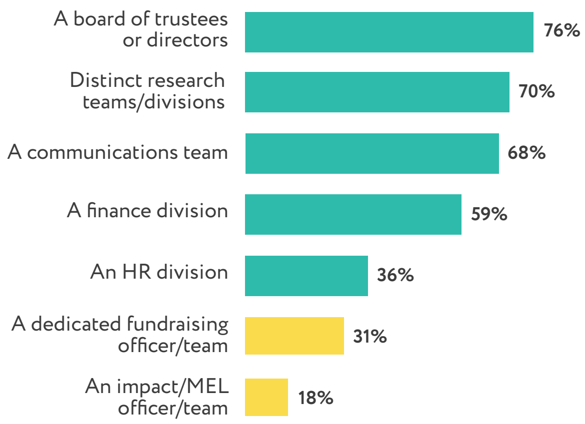
1.8 THINK TANKS' GEOGRAPHICAL SCOPE, BY SUBREGION

Survey sample: 297



1.9 INTERNAL ORGANISATION/DEPARTMENTAL DIVISIONS ("DOES YOUR THINK TANK HAVE ...?")

Survey sample: 297



In our sample, the oldest think tanks tend to be concentrated in the EU & EFTA, the Anglosphere, and the MENA subregions, while younger think tanks are found mainly in the Central Asia, South Asia, and non-EU Europe & the Caucasus subregions (see Graph 1.7). The latter also tend to be those that receive the highest proportion of their funding from international sources (see Graph 3.3).

There are also fascinating patterns connecting the geographical level at which a think tank tends to work (i.e. locally, nationally, regionally, or globally), and the subregion where it is itself located (see Graph 1.8). As would be expected, a majority of think tanks operate at a national level, but that percentage is lower in the EU & EFTA region (59%). In addition, in the Anglosphere, only a very small number of think tanks operate at the regional level (16%), followed only by South Asia (45%). Interestingly, think tanks in the EU & EFTA (63%) and MENA (60%) regions are most likely to operate at a global level, while those in non-EU Europe & the Caucasus (23%) and Central Asia (30%) are least likely to do so.

Other important findings include that a large majority of think tanks in our sample, irrespective of subregion or national income level, tend to be registered as non-profits (78%), followed by those that are part of universities (8.7%). Meanwhile, Graph 1.9 shows how the respondent think tanks organise themselves internally, according to the presence of various departments or divisions. Less than 20% report having an impact/MEL officer, and just 31% a dedicated fundraising team, while a large majority have a board of trustees/directors (76%) and a communications team (68%). These patterns vary greatly by the size of the think tank, but not by its subregion.

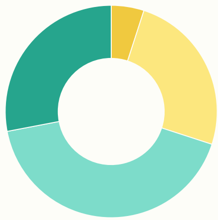
- **A large majority of think tanks are registered as non-profits (78%)**
- **Only 31% have a dedicated fundraising team**
- **Less than 20% have a dedicated impact/MEL officer**

2. POLITICAL CONTEXT

Data is based on 297 responses to the 2024 OTT think tank survey

SURVEY SAMPLE BY POLITICAL REGIME

- **5%** Closed autocracy
- **25%** Electoral autocracy
- **42%** Electoral democracy
- **28%** Liberal democracy



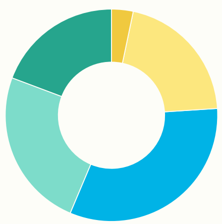
RESEARCH INDEPENDENCE

65% of think tanks report conducting and publishing independent research

- Think tanks in democratic countries do not report higher levels of independence than those in autocracies
- Think tanks in Central Asia feel especially restricted
- Think tanks reported to be completely restricted are found in MENA, non-EU Europe & the Caucasus, and the EU & EFTA

THINK TANKS AFFECTED BY POLITICAL POLARISATION

- **3%** Very much
- **21%** Significantly
- **32%** Moderately
- **24%** Slightly
- **19%** Not at all



POLITICAL POLARISATION: OVERVIEW

20% report difficulties in engaging across political lines

LEAST POLARISED REGIONS: EASIER TO ENGAGE ACROSS POLITICAL LINES

MENA (67%)
sub-Saharan Africa (57%)

MOST POLARISED REGIONS: HARDEST TO ENGAGE ACROSS POLITICAL LINES

Non-EU Europe & the Caucasus (31%)
Latin America & the Caribbean (27%)
Anglosphere (22%)

More polarised environments are associated with less independence

IMPACT OF POLITICAL POLARISATION

36% Research & operations (global)

40% Research & operations in Central Asia, Latin America & the Caribbean, and non-EU Europe & the Caucasus

36% Collaboration & research with policy experts

29% Securing diverse funding

FUNDING SOURCES BY POLITICAL REGIME

Domestic-funding dominant
Liberal democracies (70%)
Closed autocracies (69%)

International-funding dominant
Electoral democracies (52%)
Electoral autocracies (51%)

CHALLENGES IN ESTABLISHING THINK TANKS

- 43% believe it is hard or really hard to start a think tank in their country; correlates more with national income than level of democracy
- Respondents in wealthier nations perceive greater difficulty in establishing think tanks compared to those in low-income countries

POLITICAL OUTLOOK

37% globally expect unfavourable outcomes in the next 12 months

Europe, the Anglosphere, and Latin America & the Caribbean are the least optimistic about the future political situation

Wealthier countries and those in liberal democracies tend to be more pessimistic about the future.
Only 21% of think tanks in these regions expect favourable political outcomes in the next 12 months

The MENA region and sub-Saharan Africa exhibit the highest degree of optimism compared to other regions

POLITICAL CONTEXT

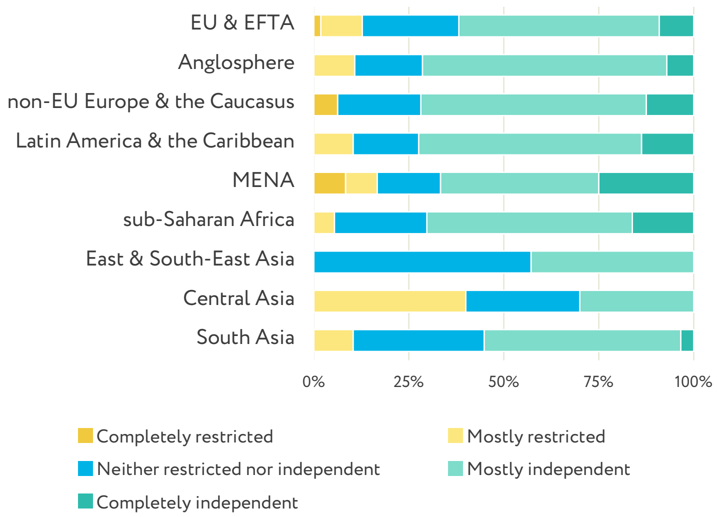
One of the key characteristics of think tanks is that their shape and how they function depends on the political context in which they operate. They can be based in either full or fledgling democracies; in countries where policy advice is either subject to heavy censorship or mostly free – and all of this and more will affect how they organise themselves and how they seek to inform policy.

The majority of think tanks in our sample come from countries with electoral democracies (42%), followed by those from liberal democracies (28%). A quarter come from countries with electoral autocracies, and a small minority (5%) from closed autocracies.[1]

In their responses to our survey, close to 65% of think tanks declared that they are able to conduct research mostly or completely independently, while 10% reported being restricted or mostly restricted in doing so. Interestingly, however, there are no noticeable differences in this self-reported ability (or lack thereof) to conduct independent research across the VDem categories – although this may be due to response bias (even though the survey is anonymous).

In terms of subregions, however, a clear pattern emerges. As Graph 2.1 shows, a large proportion (40%) of think tanks in Central Asia report being mostly restricted in their research, while those declaring themselves completely restricted tend to be located in the MENA and non-EU Europe & the Caucasus regions.

2.1 **DECLARED FREEDOM TO CONDUCT RESEARCH INDEPENDENTLY, BY SUBREGION**
Survey sample: 297

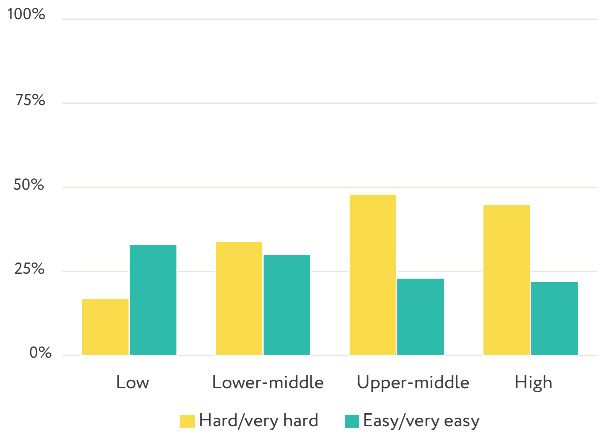


→ 40% of think tanks in Central Asia report being 'mostly restricted' in their research, while 'completely restricted' think tanks are reported mainly by respondents in MENA and non-EU Europe & the Caucasus

1. According to the VDem Varieties of Democracy typology.

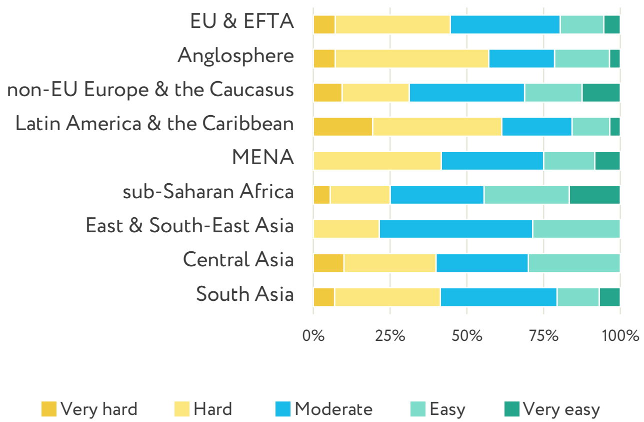
2.2 EASE OF SETTING UP A THINK TANK, BY NATIONAL INCOME

Survey sample: 297



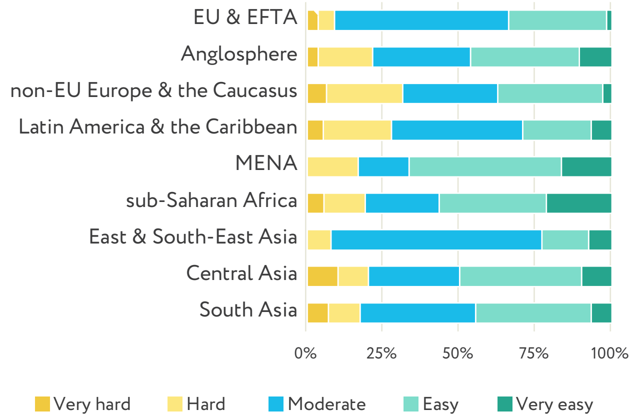
2.3 EASE OF SETTING UP A THINK TANK, BY SUBREGION

Survey sample: 297



2.4 EASE OF ENGAGING WITH PEOPLE OF DIFFERENT POLITICAL AFFILIATIONS, BY SUBREGION

Survey sample: 297



This does not necessarily correlate, however, with how easy or difficult it seems to be to set up a think tank. In total, 43% of think tanks in our sample consider it to be hard or really hard to start a think tank in their country, but this is not significantly correlated with a country's degree of democracy. It is, in fact, more correlated with national income levels – but in the opposite way than one would expect: respondents in wealthier nations seem to consider it harder to set up think tanks than those in poorer countries (see Graph 2.2). This is possibly due to the latter's access to international funding, or because the think tank landscape is less established in poorer countries, and therefore perceived as being more open to newcomers.

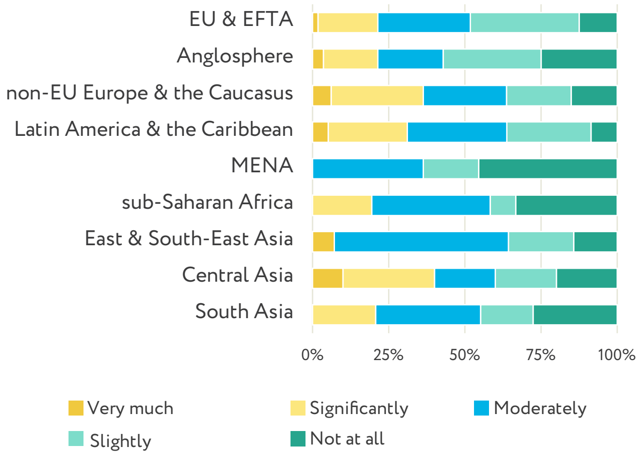
In terms of region, as shown in Graph 2.3, sub-Saharan Africa appears to be the easiest region to set up a think tank, while Latin America & the Caribbean and the Anglosphere are seen as the hardest.

Another crucial issue that may affect the work of think tanks is that of political polarisation.[2] We asked questions related to this subject in different ways. First, we asked how easy respondents found it to engage with people of different political affiliations. This provides a clear, concrete indicator of the degree of political polarisation respondents experience within their respective contexts (see Graph 2.4). The MENA and sub-Saharan Africa regions seem to be least politically polarised using this metric, with 67% and 57%, respectively, declaring it to be easy or very easy to reach out to people from across the aisle. Meanwhile, non-EU Europe & the Caucasus, Latin America & the Caribbean, and the Anglosphere seem to find this type of cross-party engagement the hardest, with 31%, 27%, and 22%, respectively, declaring it to be hard or very hard. This is an interesting finding: political polarisation measured through this variable does not seem to correlate at all with degree of democracy, and only lightly with national income (with wealthier nations experiencing higher degrees of polarisation).

2. For the purposes of this survey, we define political polarisation as the division of a society into contrasting political groups with divergent ideological and policy preferences, leading to an increase in ideological distance and animosity between these groups (Iyengar et al., 2019, 'The origins and consequences of affective polarization in the United States'. *Annual Review of Political Science*, 22, 129–146). This polarisation makes it difficult for individuals or organisations to engage with those from the opposing group.

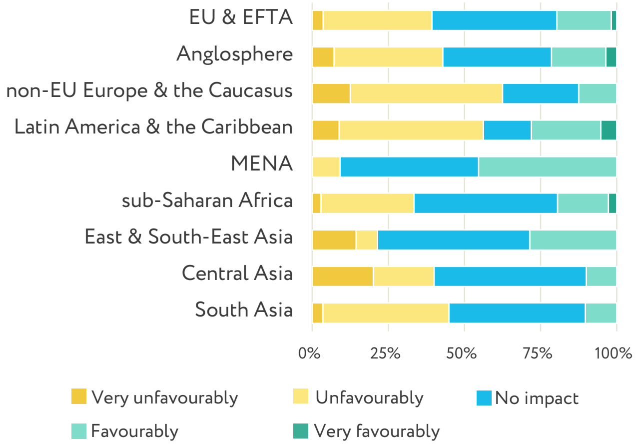
2.5 DEGREE TO WHICH WORK IS AFFECTED BY POLITICAL POLARISATION, BY SUBREGION

Survey sample: 297



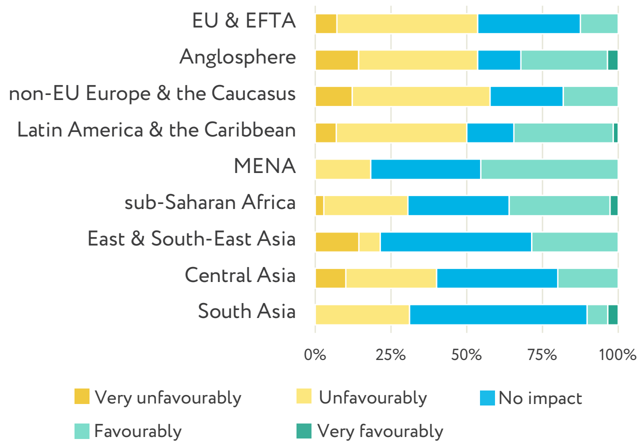
2.6 MANNER IN WHICH THE POLITICAL SITUATION IN THE PAST 12 MONTHS AFFECTED THINK TANKS' WORK, BY SUBREGION

Survey sample: 297



2.7 EXPECTATIONS OF HOW THE POLITICAL SITUATION WILL AFFECT THINK TANKS' WORK IN THE NEXT 12 MONTHS, BY SUBREGION

Survey sample: 297



These results match with respondents' answers to a related question, on the degree to which political polarisation has affected their work (see Graph 2.5). Again, Latin America and the Caribbean and the non-EU Europe & the Caucasus regions are among those where political polarisation had the most impact on their work, with the interesting addition of Central Asia, where 40% declared a significant effect.

In terms of how think tanks are affected by their respective national political situations, the Latin America & the Caribbean and the non-EU Europe & the Caucasus regions once again seem to tend towards a more pessimistic outlook; while across all Asian subregions, sub-Saharan Africa, and the MENA region the political situation appears to have mostly no impact (with the latter even reporting a favourable one).

When it comes to how think tanks perceive this changing in the future, the data reveals an even starker contrast. Europe as a whole, the Anglosphere, and Latin America & the Caribbean are by far the least optimistic about how the political situation in their countries will affect their work over the next 12 months. This contrasts with responses from most of the rest of the world, particularly the MENA region and sub-Saharan Africa, which show a certain degree of optimism in this respect.

Overall, these results show that there is little correlation between a country's income and degree of democracy, and how its think tanks view their national political situation and level of political polarisation. If anything, the results skew towards the opposite of what one would expect – with wealthier, more democratic nations tending to be both more polarised and more pessimistic.

→ Wealthier, more democratic countries tend to report higher levels of polarisation and a more pessimistic outlook than lower-income, less democratic nations

3. FUNDING MODELS

Data is based on 297 responses to the 2024 OTT think tank survey

TYPE OF FUNDING

Think tanks in wealthier countries with larger budgets are more likely to access core funding, leading to a higher proportion of long-term staff

CHALLENGES

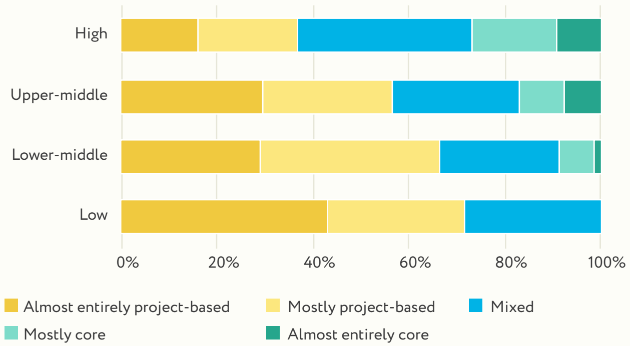
Think tanks with smaller budgets and more project-based funding spend more time on reputation management and securing funding than those with larger, more flexible resources

FUNDING SOURCES BY INCOME

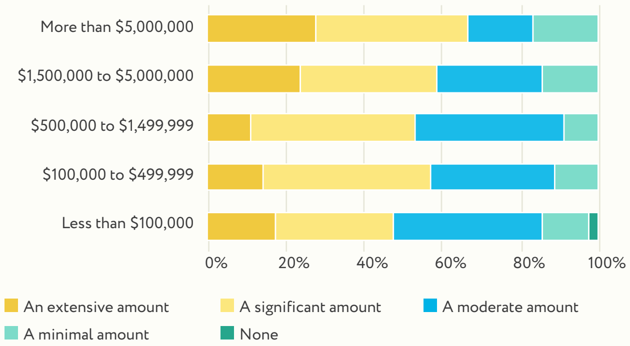
Domestic-funding dominant
High-income countries (nearly 70%)

International-funding dominant
Low-and lower-middle-income countries (+60%)

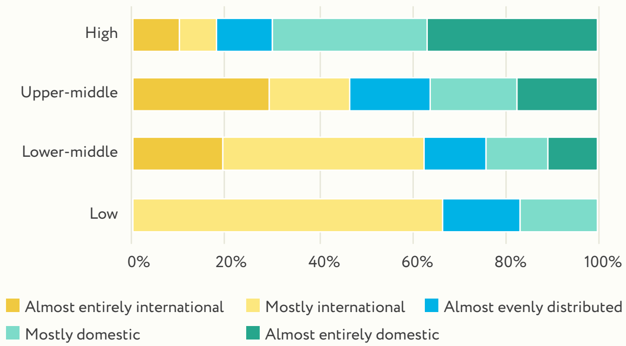
FUNDING MODALITY (CORE/PROJECT BASED), BY NATIONAL INCOME



TIME AND RESOURCES SPENT MAINTAINING REPUTATION, BY BUDGET (USD)



DOMESTIC/INTERNATIONAL FUNDING MIX, BY NATIONAL INCOME



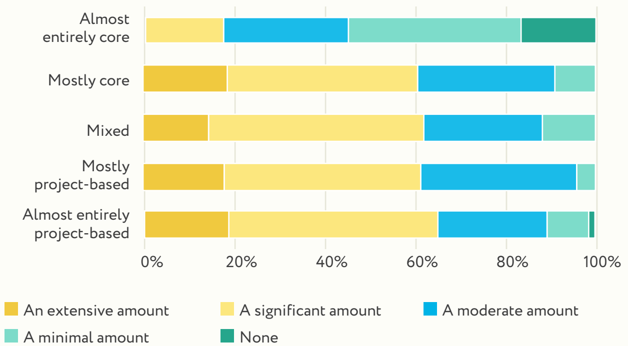
PROJECT-BASED FUNDING

- More common, particularly in low- and lower-middle-income countries
- 44% struggle to cover indirect costs such as admin or office overheads
- More dependent on international development agencies

CORE FUNDING

- More common in high- and upper-middle-income countries
- Stable staffing: tend to have larger teams, with long-term contracted staff (at least 2 years)
- Greater diversity of funding sources

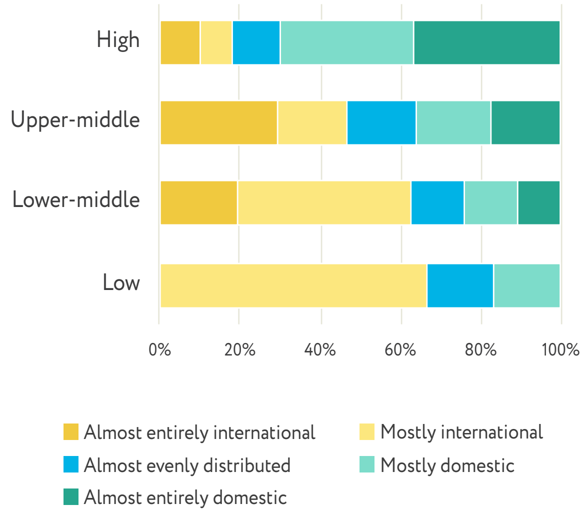
TIME AND RESOURCES SPENT MAINTAINING BUDGET, BY FUNDING MODALITY



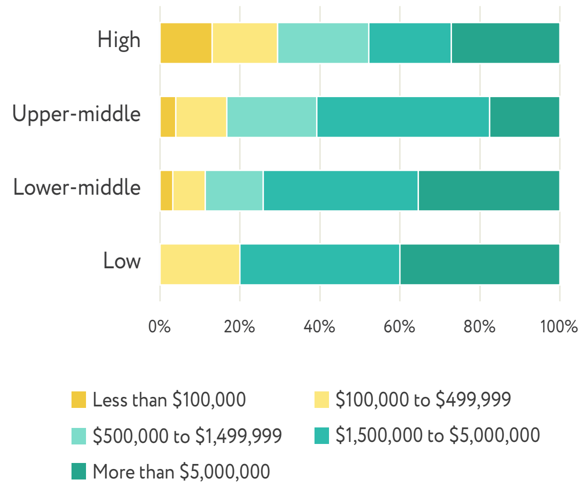
Think tanks in **wealthier countries** see a greater proportion of funding coming from individuals, private corporations, and governments

Think tanks in **less wealthy countries** depend on funding from international development entities and the sale of consultancy services

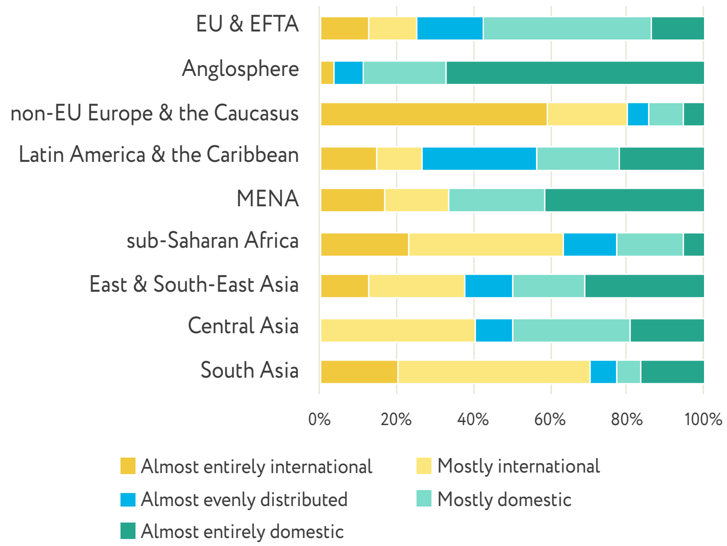
3.1 DOMESTIC/INTERNATIONAL FUNDING MIX, BY NATIONAL INCOME
Survey sample: 297



3.2 THINK TANK ANNUAL BUDGET (USD), BY NATIONAL INCOME
Survey sample: 297



3.3 DOMESTIC/INTERNATIONAL FUNDING MIX, BY SUBREGION
Survey sample: 297



FUNDING MODELS

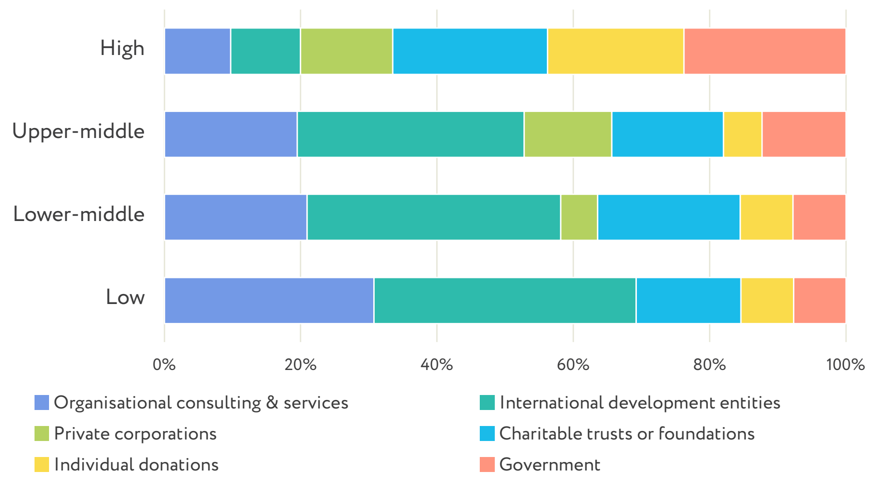
The type of funding that a think tank can access is a particularly key dimension of its organisational independence – that is, its ability to set its own research agenda, maintain autonomy in its operations, foster organisational resilience, and draw its own conclusions free from outside influence.[3]

The survey responses provide interesting results around think tanks' access to different funding types and sources. As Graph 3.1 shows, there is a strong correlation between a country's national income status – as defined by the World Bank – and the extent to which its think tanks depend on international funding. Over 60% of funding for think tanks from low- and lower-middle-income countries comes from international sources, while for think tanks in high-income nations, close to 70% of funding is domestic in origin. Graph 3.2 also shows that, as would be expected, higher-income countries tend to host think tanks with larger budgets – although a significant number of these think tanks still function on less than USD 100,000 per year.

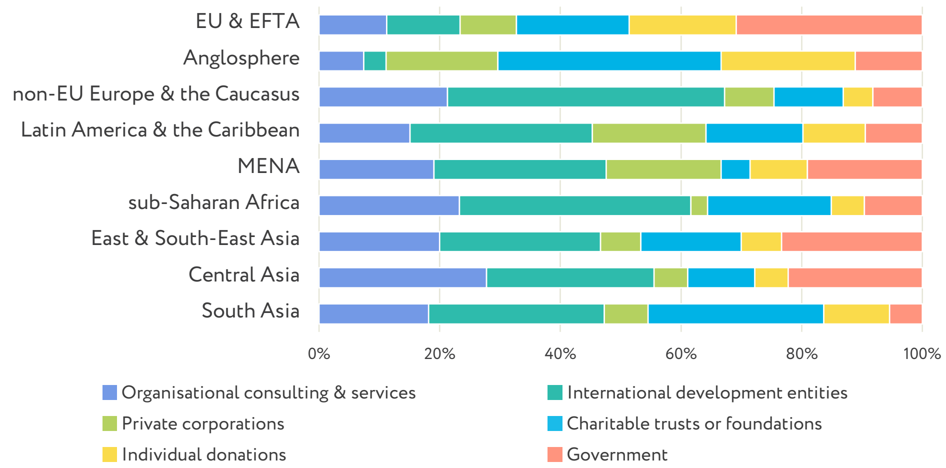
In terms of subregions, EU & EFTA, Anglosphere, and MENA countries provide the most domestic funding, while think tanks based in sub-Saharan Africa, South Asia, and non-EU Europe & the Caucasus depend to the greatest degree on international funding (see Graph 3.3). The latter subregion is particularly interesting for its very high level (59%) of almost entirely international funding, suggesting that this may be a region of particular focus for international funders (such as the EU). Meanwhile, results from Latin America & the Caribbean and the rest of Asia show a mixed funding profile.

3. Abelson, D. (2002) *Do Think Tanks Matter? Assessing the Impact of Public Policy Institutes*. Montreal: McGill-Queen's University Press.

3.4 SOURCES OF FUNDING, BY NATIONAL INCOME
Survey sample: 297



3.5 SOURCES OF FUNDING, BY SUBREGION
Survey sample: 297



Survey responses on the category of think tank funding sources also coalesce into noteworthy patterns, around both the host country's geographical location and its national income levels. Think tanks in less wealthy nations depend to a greater degree on international development entities and the sale of consultancy services, which may speak to a need for both outside support and self-reliance in the face of less generous public and private sectors. Meanwhile, wealthier countries see a greater proportion of think tank funding coming from individuals, private corporations, and government sources (see Graph 3.4). Interestingly, however, there are important variations across subregions, which may be due to differences in political, institutional, and philanthropic traditions. For instance, think tanks in the Anglosphere see much less funding from government sources compared to their counterparts in the EU & EFTA region; instead, the former receive much more from charitable trusts – even though levels of development are generally comparable across these two regions.

→ **Think tanks in less wealthy nations rely more on international funding and the sale of consultancy services**

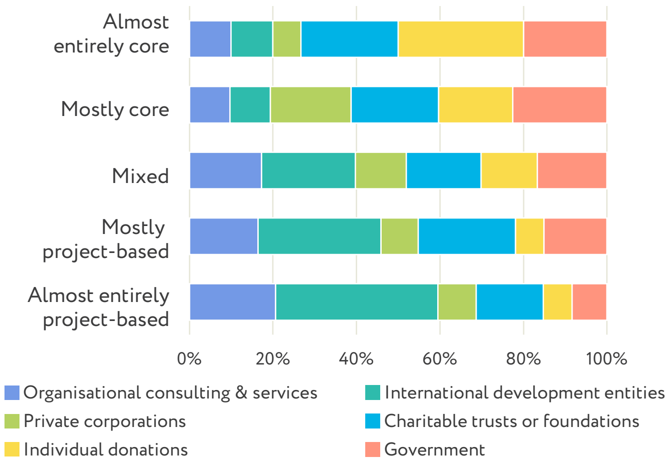
→ **In wealthier nations, think tank funding is more likely to come from individuals, corporations, and government sources**

An important aspect of think tank funding is its modality: whether it is granted in the context of a fixed-term project or as 'core' funding to support the organisation as a whole. As would be expected, different sources of funding will favour differing modalities. Graph 3.6 shows that think tanks whose funding is almost entirely project-based tend to depend to a greater degree on funding from international development agencies, while think tanks with a larger proportion of core funding tend to have a wider diversity of sources. This is consistent with the previous analysis, as core funding – while a minority overall – is most common in wealthier countries (see Graph 3.7).

Importantly, among those think tanks that depend mostly on project-based funding, close to 44% report that they find it 'hard' or 'very hard' to cover indirect costs (i.e., costs associated with the running of the organisation itself, such as admin or office overhead expenses). These results are crucial as they highlight important inequalities in the conditions attached to think tank funding, and, by extension, their functioning). Think tanks with larger budgets, which tend to be based in wealthier countries, are more likely to have access to core funding, which in turn is correlated with a greater proportion of long-term staff, defined as those with contracts of at least two years (see Graphs 3.8 and 3.9).

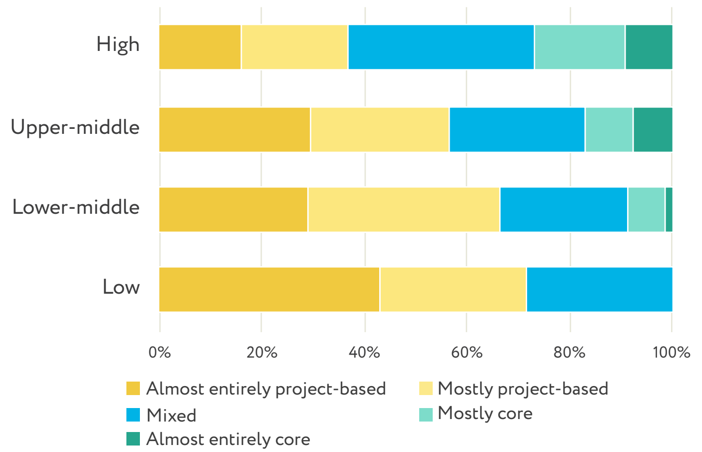
3.6 FUNDING MODALITY (CORE/PROJECT BASED), BY MAIN SOURCE OF FUNDING

Survey sample: 297



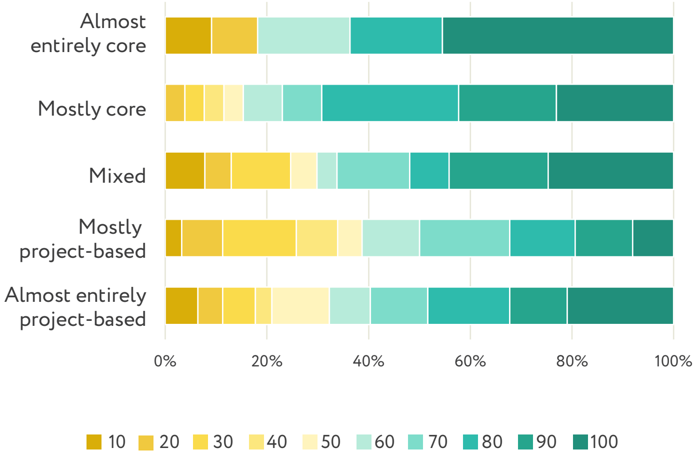
3.7 FUNDING MODALITY (CORE/PROJECT BASED), BY NATIONAL INCOME

Survey sample: 297



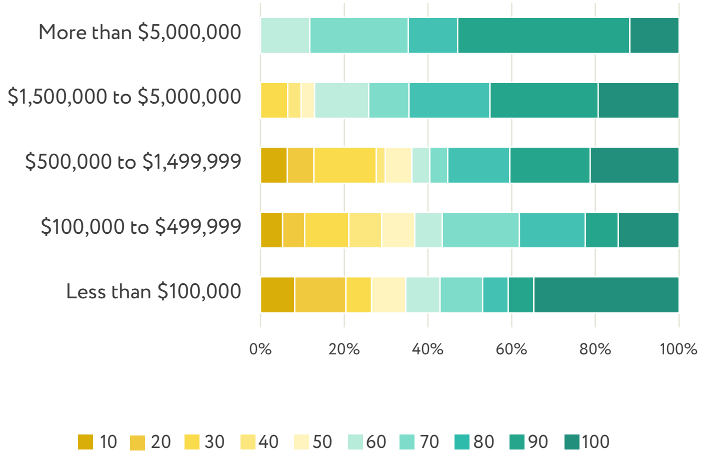
3.8 PERCENTAGE OF STAFF WITH LONG-TERM CONTRACTS, BY FUNDING MODALITY

Survey sample: 297



3.9 PERCENTAGE OF STAFF WITH LONG-TERM CONTRACTS, BY TOTAL BUDGET (USD)

Survey sample: 297



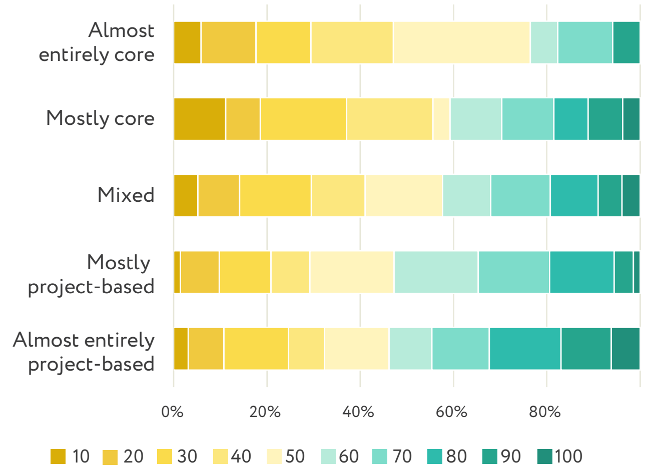
Think tanks with a larger proportion of project-based funding and lower budgets, meanwhile, tend to have a larger percentage of staff under the age of 35 (see Graphs 3.10 and 3.11). This speaks to an important challenge. All things considered, it may imply that think tanks with less secure funding face difficulties in retaining more experienced staff; but also that the same less-well-provisioned organisations depend to a large degree on younger think-tankers with shorter-term contracts.

Not only that, but think tanks with lower budgets tend to have a less diversified funding portfolio. We asked think tanks what percentage of their funding depends on their largest single donor. As Graph 3.12 shows, the smaller the overall budget, the larger an organisation's reliance on that single source of funds.

However, and interestingly, this does not necessarily correlate in the way one would expect to the modality of the funding. The greater the proportion of core funding, the higher a think tank's dependence on fewer sources (see Graph 3.13); this implies that, although there are many advantages to receiving non-restricted funding, it comes with the risk of over-reliance on just a few sponsors.

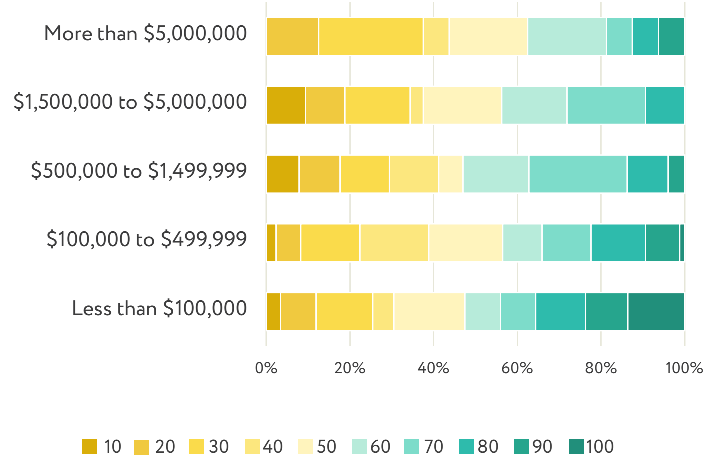
3.10 PERCENTAGE OF STAFF UNDER THE AGE OF 35, BY FUNDING MODALITY

Survey sample: 297



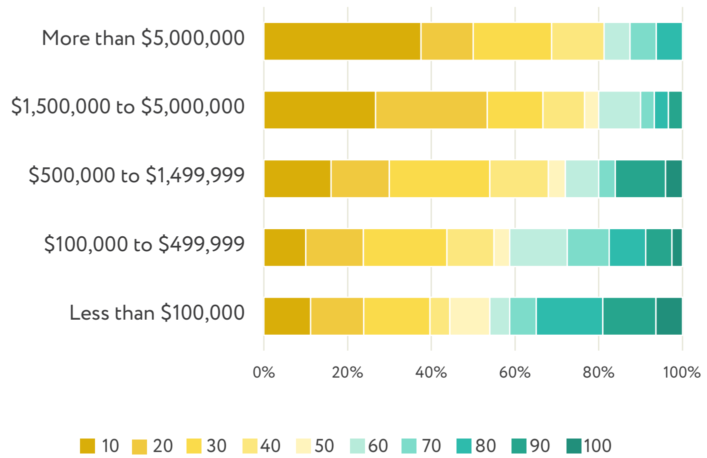
3.11 PERCENTAGE OF STAFF UNDER THE AGE OF 35, BY TOTAL BUDGET (USD)

Survey sample: 297



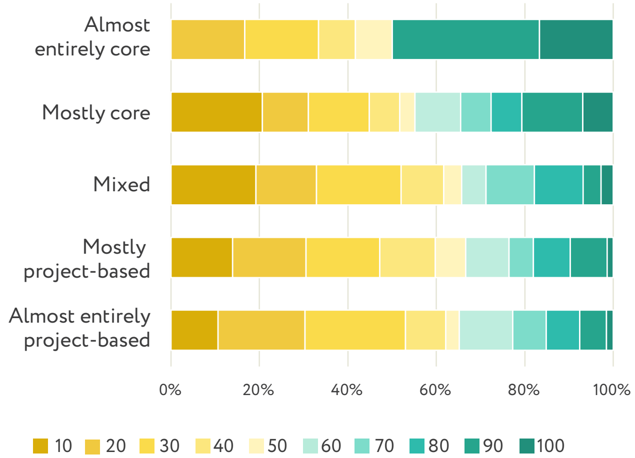
3.12 PERCENTAGE OF BUDGET THAT DEPENDS ON LARGEST SINGLE DONOR, BY TOTAL BUDGET (USD)

Survey sample: 297



3.13 PERCENTAGE OF FUNDING FROM LARGEST SINGLE DONOR, BY FUNDING MODALITY

Survey sample: 297

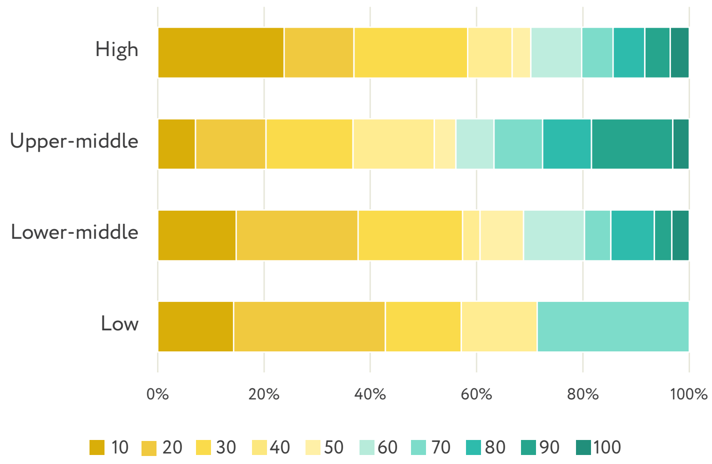


Also interesting is the way in which this pattern varies by national income and region. A greater reliance on fewer donors is not found in either the wealthier or the least wealthy nations, but rather in upper-middle-income countries, and especially those in the MENA region and Central and South Asia (see Graphs 3.14 and 3.15). These findings suggest that think tanks in middle-income countries – though certainly much better provisioned than those from less wealthy nations – depend on fewer funders.

Think tanks with larger budgets report that their incomes have increased by a greater degree over the last 12 months, while those who started with smaller budgets have seen less growth over the same period (see Graph 3.16). However, the correlation between a think tank's subregion or national income status and their reported income changes over the past year is murkier. According to Graph 3.17, think tanks in non-EU Europe & the Caucasus and sub-Saharan Africa reported the greatest increases to their incomes, while East & South-East Asian think tanks reported the largest decreases.

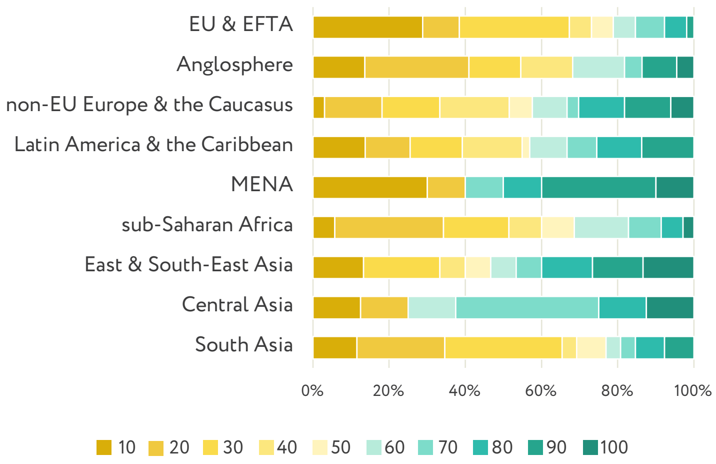
3.14 PERCENTAGE OF FUNDING FROM LARGEST SINGLE DONOR, BY NATIONAL INCOME

Survey sample: 297



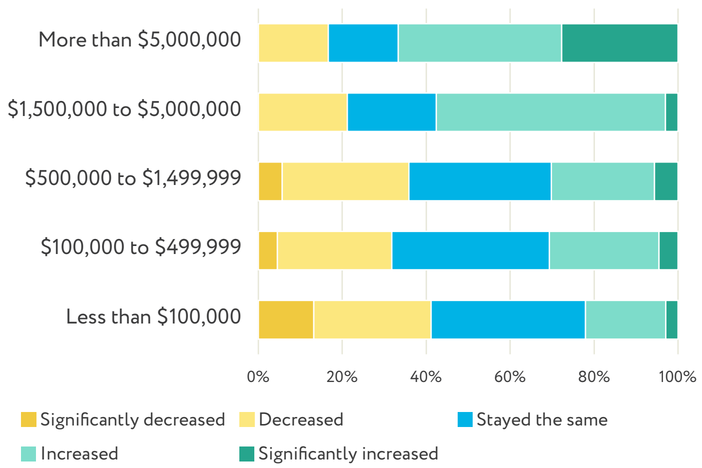
3.15 PERCENTAGE OF FUNDING FROM LARGEST SINGLE DONOR, BY SUBREGION

Survey sample: 297



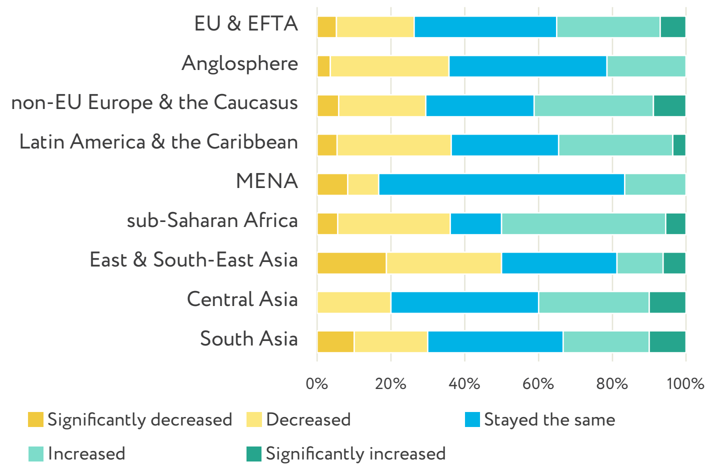
3.16 INCOME CHANGE IN LAST 12 MONTHS, BY OVERALL BUDGET (USD)

Survey sample: 297



3.17 INCOME CHANGE IN LAST 12 MONTHS, BY SUBREGION

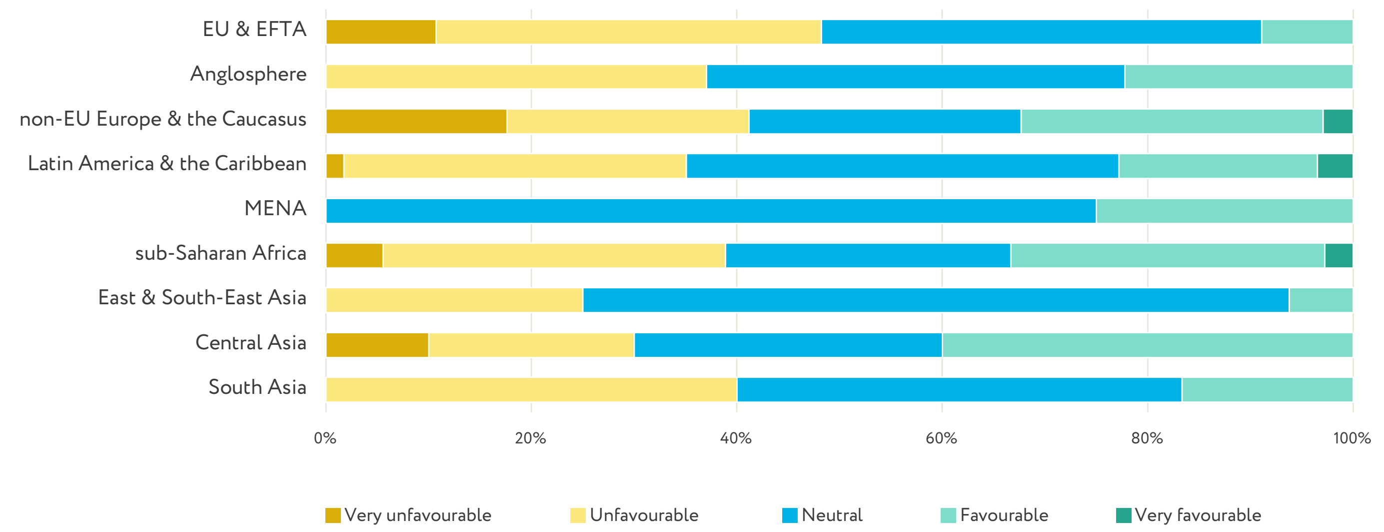
Survey sample: 297



Nevertheless, respondents' answers as to whether or not their think tank's income had increased or decreased to any degree over the previous year do not seem to necessarily correlate with their responses when it comes to expectations for the year ahead. Overall, around 33% of think tanks within our survey sample reported that they anticipate their organisational income to decrease in 2025. Interestingly, the organisations that responded in this way included – to a disproportionate degree – those that are based within the wealthy countries of the EU & EFTA region. This further underscores the finding that an organisation's sense of optimism or pessimism in terms of the outlook for the overall funding environment over the following year (see Graph 3.18) is not, in this sense, significantly correlated with either its own existing, overall budget, or the national income of the country in which it operates.

3.18 PROSPECT FOR NEXT YEAR'S FUNDING ENVIRONMENT, BY SUBREGION

Survey sample: 297



→ 33% of think tanks expect to see declining income in 2025, particularly in the wealthy EU & EFTA subregion

→ Optimism or pessimism about future income is not closely tied to either national income or think tank budget

4. RESEARCH PRIORITIES AND IMPACT

Data is based on 297 responses to the 2024 OTT think tank survey

THINK TANKS' POLICY IMPACT: ORGANISATIONAL AND EXTERNAL FACTORS

Negative relation · Indirect relation · Positive relation · No relation

- CORE FUNDING
- STRUCTURED TEAM
- LONG-TERM CONTRACTED STAFF
- BUDGET
- TYPE OF FUNDING (INTERNATIONAL)
- DEMOCRACY
- NATIONAL INCOME
- MEDIA RECEPTIVENESS
- POLITICAL POLARISATION

TOP INFLUENCERS ON RESEARCH

Government bodies (29%)
Policymakers (23%)
Funders*

* In non-EU Europe & the Caucasus, South Asia, and sub-Saharan Africa, **funders** are most likely to shape the research agenda

ORGANISATIONAL FACTORS

Higher numbers of long-term contracted staff correlates with increased policy impact

High policy impact is reported by 83% of think tanks with **structured teams**, but only by 57% of less structured organisations

POLICY IMPACT BY FUNDING

Think tanks with **higher annual budgets** are more likely to report a **policy impact** compared to those with smaller budgets

International-funding dominant
90% POLICY IMPACT

Domestic-funding dominant
85% POLICY IMPACT

EXTERNAL FACTORS

Think tanks in less polarised contexts report the highest levels of policy impact (90%)

Those in highly polarised environments report a lower level of policy impact (75%)

TOP GLOBAL POLICY ISSUES

Economic policy
Governance

POLICY IMPACT

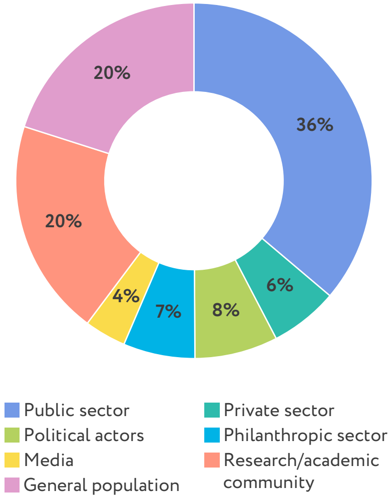
77% **of think tanks report having an impact on policy in the last 5 years**

Political regime type does not influence impact, although closed autocracies report lower policy impact

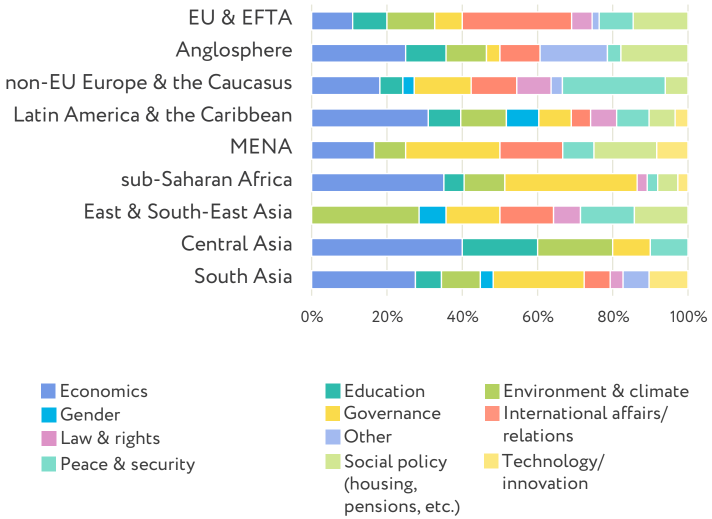
KEY POLICY ISSUES BY REGION

Anglosphere	Central Asia	East & South East Asia	EU & EFTA	Latin America & the Caribbean	MENA	Non-EU Europe & the Caucasus	South Asia	Sub-Saharan Africa
ECONOMICS	ECONOMICS	ENVIRONMENT & CLIMATE	INTERNATIONAL AFFAIRS/ RELATIONS	ECONOMICS	GOVERNANCE	PEACE & SECURITY	ECONOMICS	ECONOMICS, GOVERNANCE

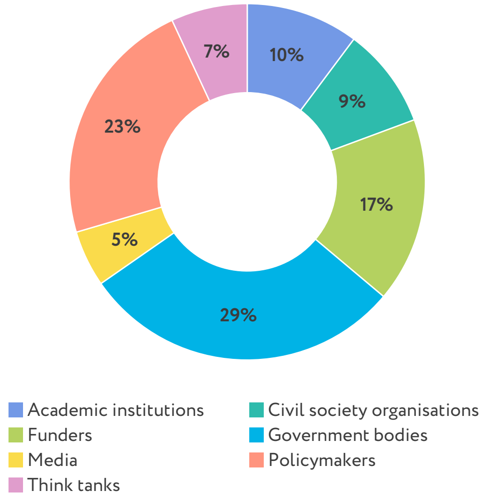
4.1 MAIN AUDIENCES FOR THINK TANKS
Survey sample: 297



4.2 KEY RESEARCH PRIORITIES, BY SUBREGION
Survey sample: 297



4.3 RESPONSES TO THE QUESTION 'WHO SETS THE RESEARCH AGENDA IN YOUR COUNTRY?'
Survey sample: 297



RESEARCH PRIORITIES AND IMPACT

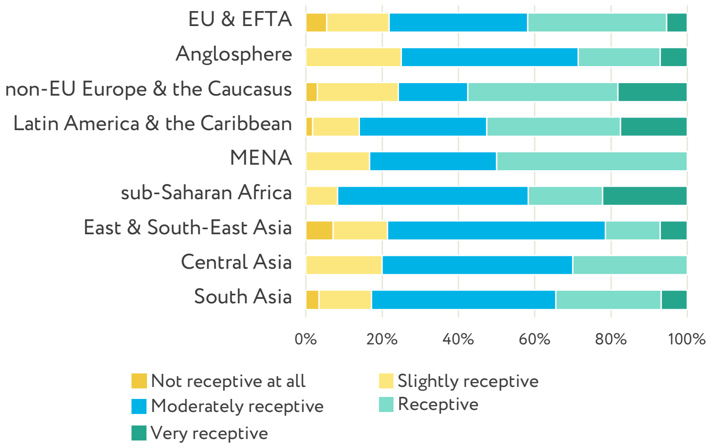
The survey provides a number of interesting insights into how think tanks seek to achieve policy influence and impact. As shown in Graph 4.1, the main audience for the majority (36%) of think tanks is the public sector, followed by the general population & community-orientated organisations and the research community (each 20%). While government remains the primary target for think tanks, many organisations also prioritise public engagement and making a contribution to the broader knowledge ecosystem.

In terms of priority issues, there are both commonalities and differences across subregions (see Graph 4.2). Economics predominates in most areas (23% of total), followed by governance (15%), international affairs/relations (12%), and environmental & climate issues (11%). However, in the EU & EFTA subregion, international affairs/relations takes precedence; respondents from non-EU Europe & the Caucasus report prioritising peace & security; governance leads in MENA and sub-Saharan Africa; and environmental issues are the top reported concern in East & South-East Asia.

A key factor shaping think tanks' research priorities is the question of who sets the agenda. As Graph 4.3 shows, most think tanks in our survey report that government bodies (29%) and policymakers (23%) have the most influence in terms of deciding what gets researched. Interestingly, this power over agenda setting appears to be quite consistent across the variables of national wealth, although the influence exerted over think tanks by their funders tends to be inversely correlated to national income.

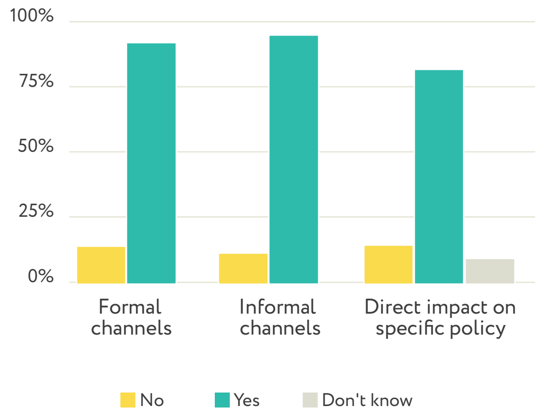
4.4 MEDIA RECEPTIVENESS TO THINK TANKS' WORK, BY SUBREGION

Survey sample: 297



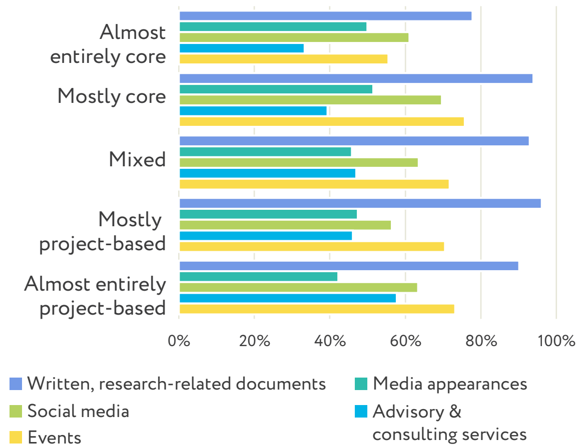
4.5 'DOES YOUR THINK TANK USE FORMAL/INFORMAL CHANNELS FOR POLICY INFLUENCE' & 'HAS IT MADE A DIRECT POLICY IMPACT IN PAST 5 YEARS?'

Survey sample: 297



4.6 MAIN PRODUCTS, BY FUNDING MODALITY

Survey sample: 297



The receptiveness of the media is another important factor in determining a think tank's level of policy impact. Here, think tanks in non-EU Europe & the Caucasus and Latin America & the Caribbean report the highest degree of media receptibility, followed by those in the EU & EFTA (see Graph 4.4). This is intriguing, as think tanks in these regions also reported high levels of political polarisation and pessimism about the future – implying that these factors do not detract from how receptive the media is to their work.

We also asked think tanks to self-assess their policy impact over the past five years.[4] A vast majority of respondents reported they had been able to successfully access policymakers through a number of channels, both formal (e.g., expert commissions, parliamentary advice) and informal (e.g., direct contact). To a lesser degree, respondents also reported that they had been able to directly contribute to a specific policy outcome (see Graph 4.5). Given the number of positive responses, there seems to be little correlation between these answers – and what they tell us about a think tank's successful policy impact – and the organisation's budget or size.

Finally, we asked think tanks about their main output, or products, which is crucial to understanding their avenues of influence. A large majority reported that written, research-related documents, such as policy briefs, are their main output – although this was not the case to the same degree for think tanks that receive almost entirely core, as opposed to project-based, funding. For think tanks that do receive mainly project-based funding, the most common product cited by respondents was advisory and consulting services.

→ **Think tanks in non-EU Europe & the Caucasus and Latin America & the Caribbean report the highest degree of media receptiveness**

→ **A large majority reported that written, research-related documents, such as policy briefs, are their main output**

4. A timeframe of five years was selected in order to control for changes in government.

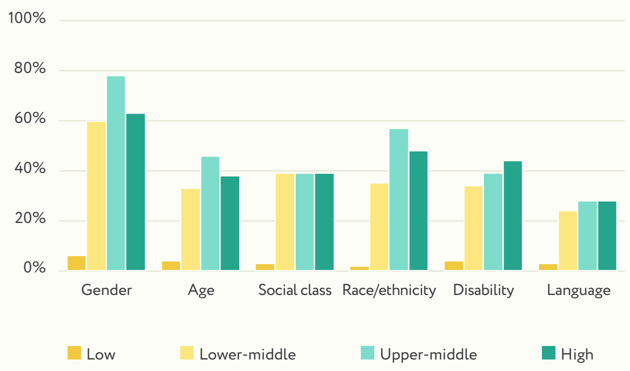
5. CHALLENGES AND EMERGING TRENDS

Data is based on 297 responses to the 2024 OTT think tank survey

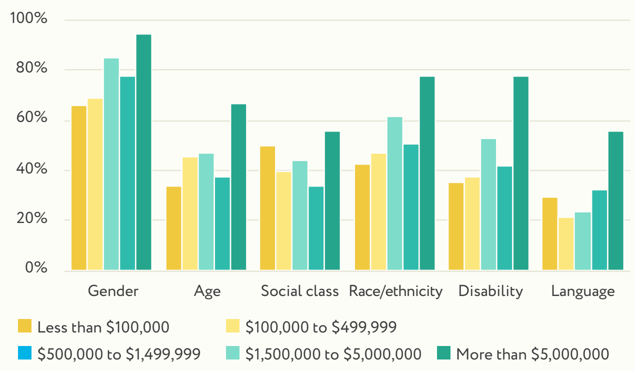
DIVERSITY, EQUALITY, AND INCLUSION INITIATIVES (DEI)

Think tanks with better resources in high- and upper-middle-income countries are more likely to implement DEI initiatives within their operations

DEI INITIATIVES, BY NATIONAL INCOME



DEI INITIATIVES, BY BUDGET (USD)



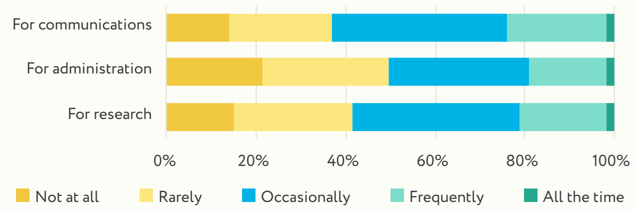
- Think tanks in South Asia are more actively engaged in DEI efforts compared to those in the MENA region
- A positive correlation exists between having a younger staff and the presence of DEI policies related to age and gender. Larger teams of young staff are more likely to implement such policies

- 38% of think tanks focused on gender issues report strong DEI policies; none report a complete absence
- 33% of education-focused think tanks have high levels of DEI policies, while 10% report having none
- Think tanks that focus on economics and governance are more likely to identify gaps in DEI policies

ARTIFICIAL INTELLIGENCE (AI)

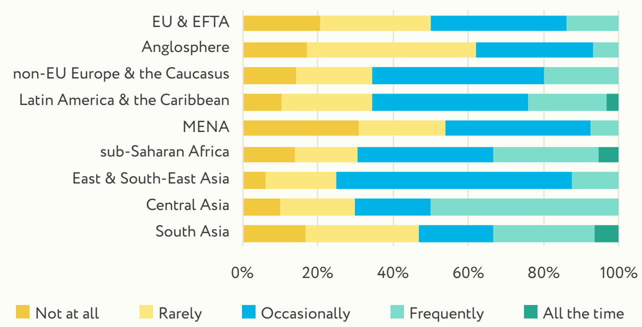
55% **of think tanks believe AI can have a positive impact**

USE OF AI



- AI adoption for research, administration, and communications remains low, with only occasional use in most think tanks worldwide
- AI is mostly used for communications tasks

USE OF AI FOR RESEARCH, BY SUBREGION



- There is no evident link between national income or region and the use of AI for research, communications, or administration
- There is no evident link between younger staff and the use of AI for research, communications, or administration

KEY CHALLENGES

73% Adapting to changing circumstances

59% Securing new funding sources

44% Leadership difficulties

41% Staff turnover

DESIRED COMPETENCIES

66% Fundraising skills

37% Research capabilities

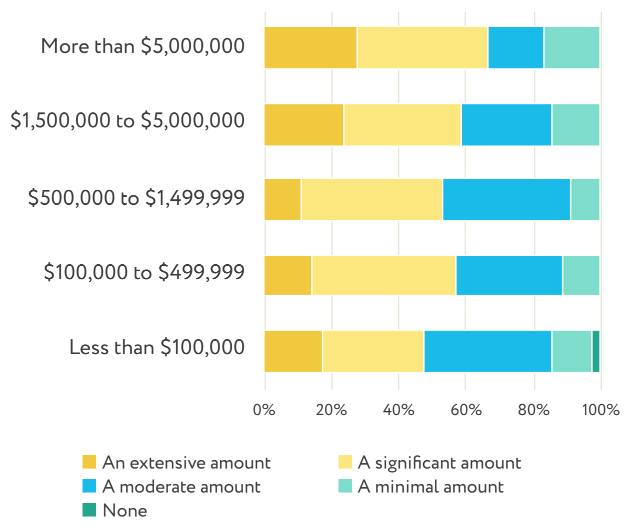
37% Communications

33% Adaptability

Research capacity is a particularly salient issue in sub-Saharan Africa and Central Asia, while fundraising is the main capacity challenge in wealthier countries

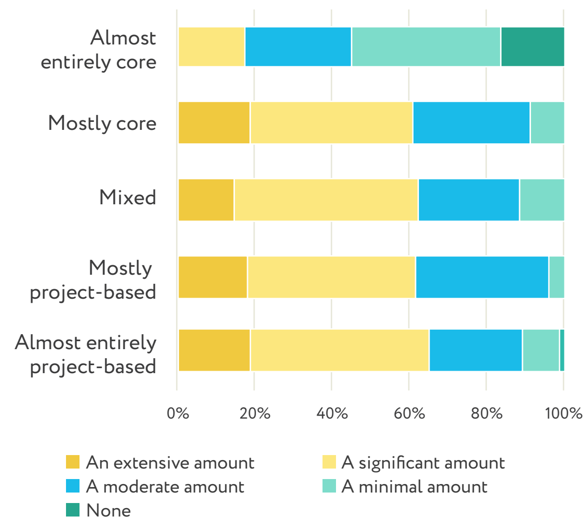
5.1 TIME AND RESOURCES SPENT MAINTAINING REPUTATION, BY BUDGET (USD)

Survey sample: 297



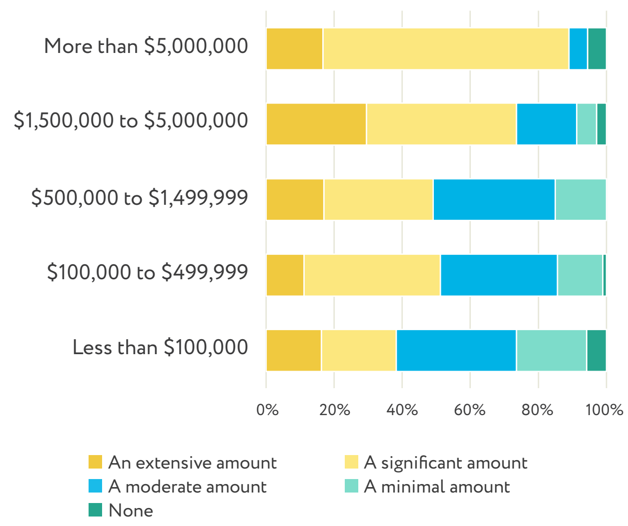
5.2 TIME AND RESOURCES SPENT MAINTAINING BUDGET, BY FUNDING MODALITY

Survey sample: 297



5.3 TIME SPENT INTERVENING IN THE POLICY PROCESS, BY BUDGET (USD)

Survey sample: 297



CHALLENGES AND EMERGING TRENDS

The final section of the survey highlights several key challenges facing think tanks, and how they vary according to a number of organisational and contextual factors.

One critical issue for think tanks is the prioritisation of time and resources. Think tanks with smaller budgets and predominantly project-based funding report spending more time maintaining their reputation and securing funding than those with larger and more flexible resource bases (see Graphs 5.1 and 5.2). This suggests that financially insecure organisations struggle to balance activities directed towards research and impact with the necessary, but time-consuming, effort of sustaining themselves. Relatedly, the data shows that policy interventions take up more staff time in better-resourced think tanks (see Graph 5.3), implying that financial constraints can hamper not just sustainability but also policy influence.

→ Think tanks with smaller budgets and predominantly project-based funding report spending more time maintaining their reputation and securing funding

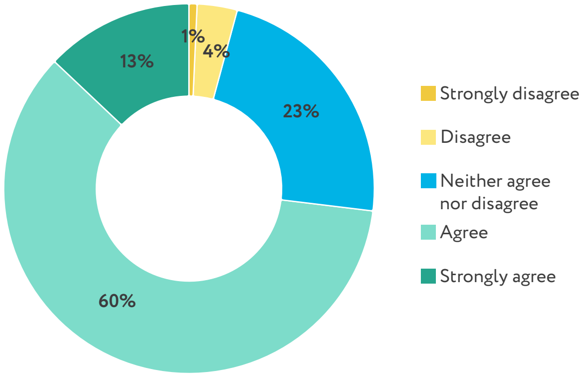
When asked about their ability to adapt to the challenges they are currently facing, most think tanks were optimistic. Over 73% either agree or strongly agree that they will be able to confront such challenges (see Graph 5.4). However, digging deeper reveals specific issues: handling leadership transitions is a significant challenge for at least 44% of think tanks, and staff shortages are another issue – particularly for mid-sized organisations and those in South Asia and sub-Saharan Africa (see Graph 5.5). This is likely due to both financial constraints and fierce competition for talent in those markets.

Perhaps unsurprisingly, shortages of new sources of funding are another crucial hurdle for think tanks, with 59% either agreeing or strongly agreeing that they are currently facing such a challenge. These pressures, however, are felt most acutely by smaller think tanks, especially in less wealthy countries (see Graphs 5.6 and 5.7).

- **Over 73% either agree or strongly agree that they can satisfactorily adapt to meet their challenges**
- **59% report that they are currently facing shortages of new sources of funding**

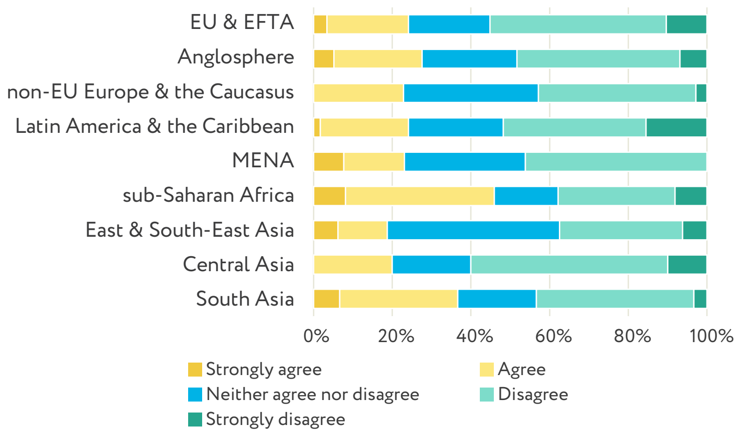
5.4 RESPONSES TO THE STATEMENT: 'OUR ORGANISATION HAS A SATISFACTORY ABILITY TO ADAPT TO THE CHALLENGES IT IS CURRENTLY FACING'

Survey sample: 297



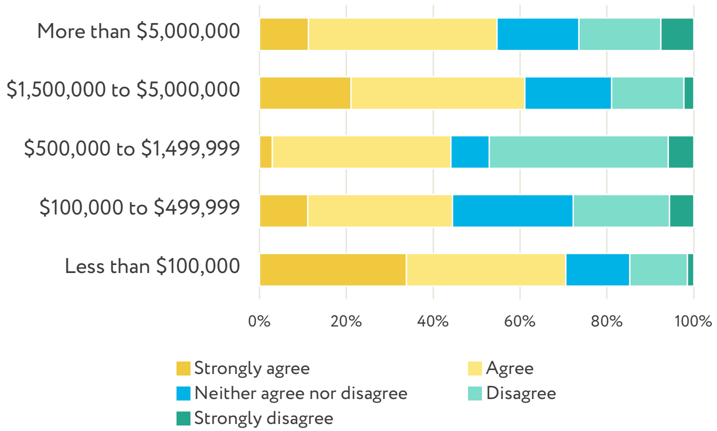
5.5 RESPONSES TO THE STATEMENT: 'A SHORTAGE OF STAFF WITH THE NECESSARY SKILLS IS A SIGNIFICANT CHALLENGE FOR OUR ORGANISATION', BY SUBREGION

Survey sample: 297



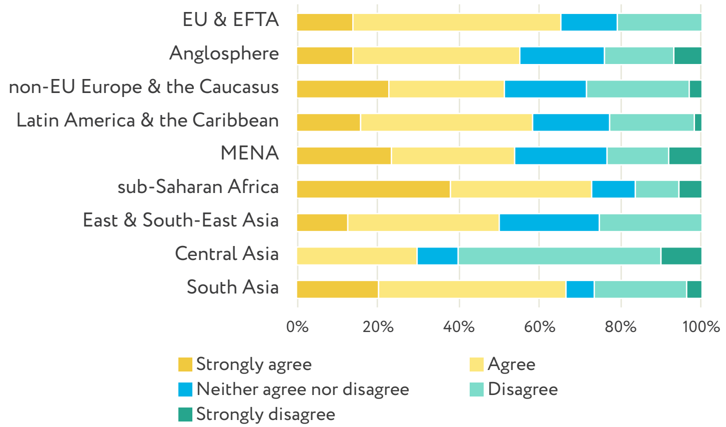
5.6 AGREEMENT WITH STATEMENT 'OUR ORGANISATION IS CURRENTLY FACING CHALLENGES DUE TO A SHORTAGE OF NEW FUNDING SOURCES', BY BUDGET (USD)

Survey sample: 297



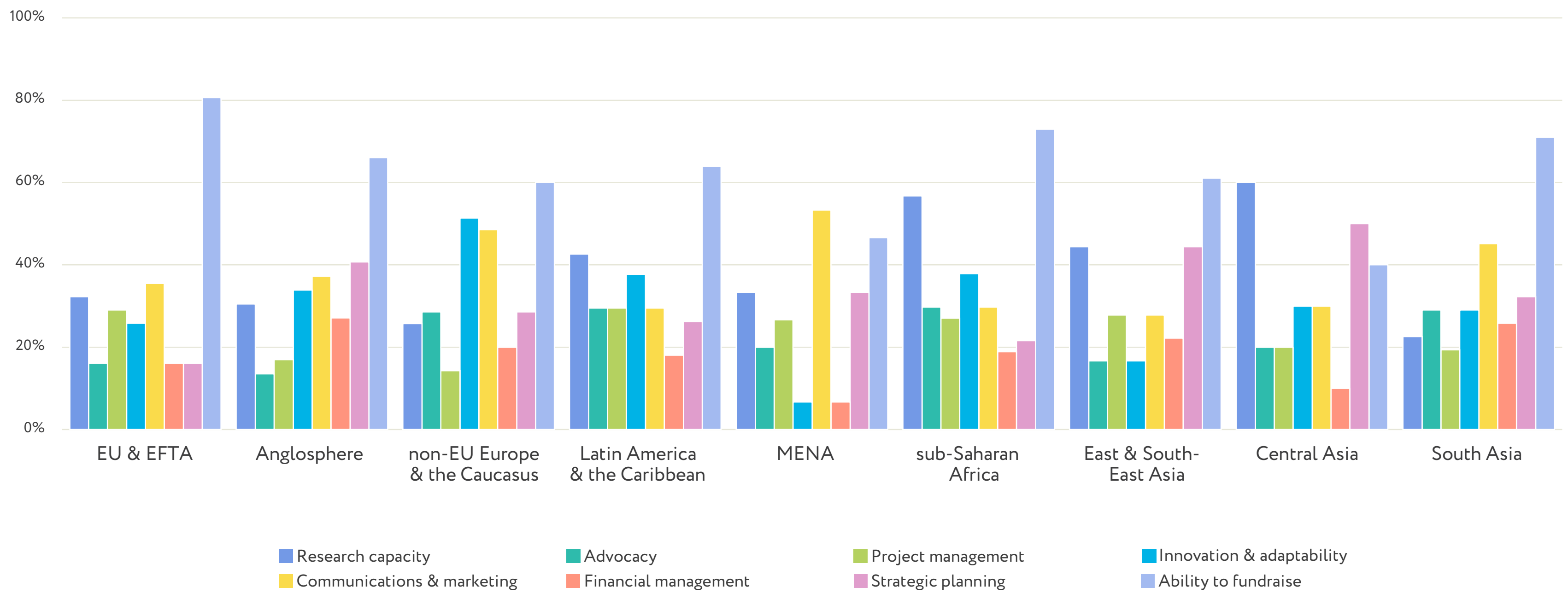
5.7 AGREEMENT WITH STATEMENT 'OUR ORGANISATION IS CURRENTLY FACING CHALLENGES DUE TO A SHORTAGE OF NEW FUNDING SOURCES', BY SUBREGION

Survey sample: 297



5.8 PRIORITY CAPACITY-BUILDING NEEDS, BY SUBREGION

Survey sample: 297



When it comes to how think tanks perceive their capacity-building needs, fundraising ability tops the list by some distance (66%) in most subregions, except for MENA and Central Asia. This is followed by a need for both further research capacity and better communications and marketing (37% each). Graph 5.8 shows that research capacity is a particularly salient issue in sub-Saharan Africa and Central Asia, and that the majority of the capacity needs reported in wealthier nations relate to fundraising.

→ Fundraising ability tops the list of capacity-building needs at 66%

→ Further research capacity and better communications and marketing are both needed by 37% of respondent think tanks

The survey also looked at two emerging issues: diversity, equity and inclusion (DEI) and artificial intelligence (AI). In broad terms, better-resourced think tanks and those in higher-income countries are more likely to have DEI initiatives in place (see Graphs 5.9 and 5.10). However, this is not consistent across subregions or national development status, with, for instance, think tanks in South Asia appearing much more likely to engage in DEI efforts than those in the MENA region. This suggests that organisational capacity and cultural context shape the ability to prioritise these issues. Overall, gender seems to be at the forefront of these initiatives, even in subregions with relatively little uptake of DEI as a whole.

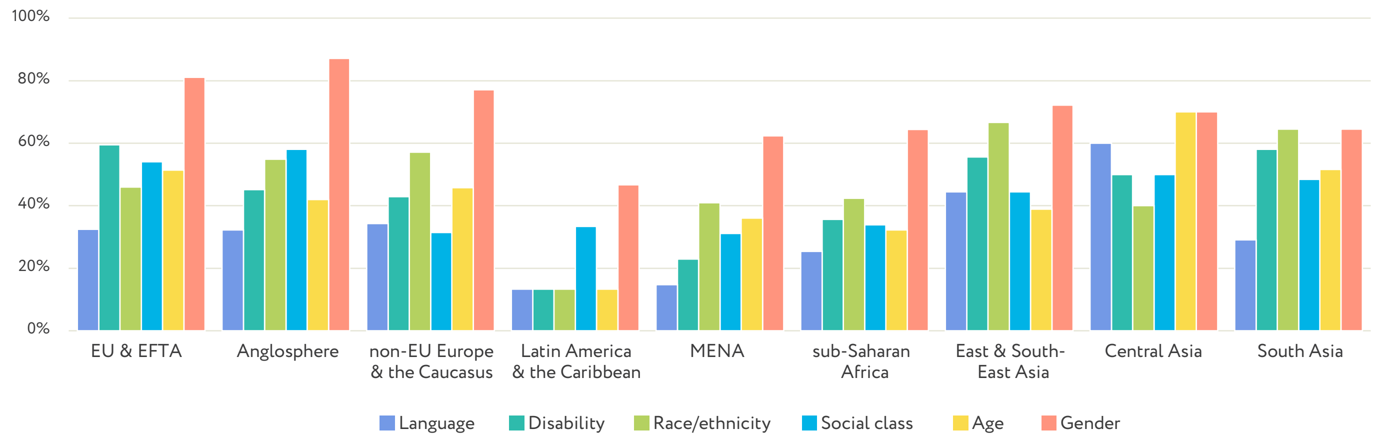
- **Better-resourced think tanks and those in higher-income countries are more likely to have DEI initiatives in place**
- **Think tanks in South Asia appear much more likely to engage in DEI efforts than those in the MENA region**

5.9 DEI INITIATIVES, BY BUDGET (USD)

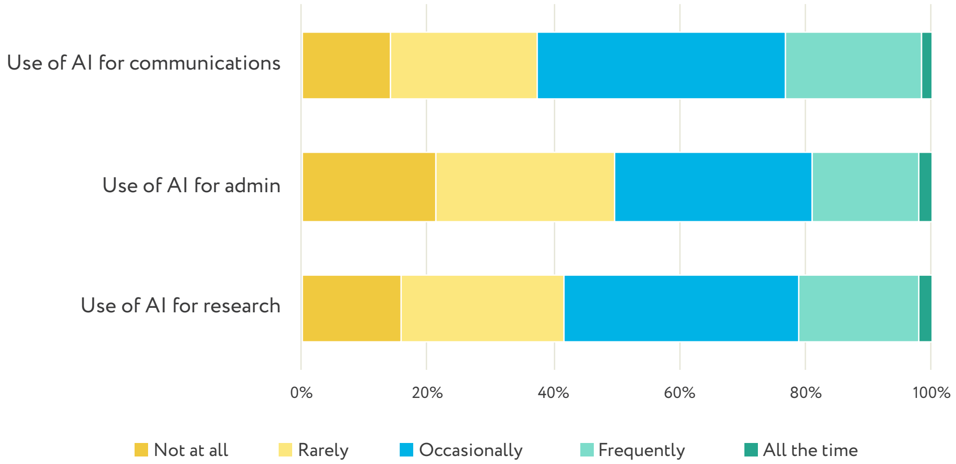
Survey sample: 297

5.10 FOCUS OF DEI INITIATIVES, BY SUBREGION

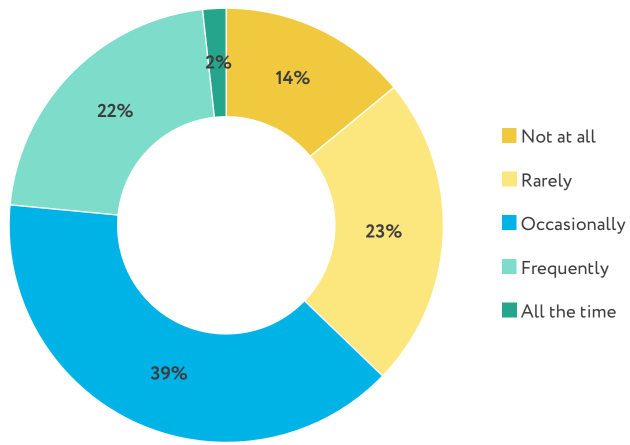
Survey sample: 297



5.11 USE OF AI FOR RESEARCH, ADMINISTRATION, AND COMMUNICATION
Survey sample: 297



5.12 OVERALL IMPACT OF AI ON THINK TANKS' WORK
Survey sample: 297



AI use is still relatively low across think tanks functions like research, admin, and communications (see Graph 5.11). However, a significant minority of respondents see AI as a gamechanger (see Graph 5.12), implying that it may become a key differentiator in think tanks' operating models and impact propositions going forward.

Overall, the sector shows optimism in relation to the role of AI and reports a high (though variable) commitment to the application of DEI initiatives within their organisations. These challenges reinforce a key theme of the whole report: while think tanks across regions share many common issues – from funding constraints to talent gaps to the urgency of adapting to huge global challenges – the way in which these manifest depends significantly on different organisational and contextual factors.

- **AI use is still relatively low across think tanks in functions like research, admin, and communications**
- **The sector shows optimism regarding the role of AI and reports a high commitment to the application of DEI initiatives**

CONCLUDING REMARKS

CONCLUDING REMARKS

The On Think Tanks State of the Sector Report 2024 paints a picture of a global think tank community that is diverse, dynamic, sensitive to change, and deeply engaged in shaping policy debates and decisions across a wide range of contexts and issues. We found organisations of varying sizes, budget levels, and focus areas operating in vastly different regions and political contexts. This diversity is reflected in the leadership and staffing of think tanks, although notable disparities still persist in terms of gender and background.

At the same time, the report also underscores the significant challenges facing today's think tanks. Funding constraints, political polarisation, and technological change are testing the resilience and relevance of even the most established organisations. In an era of growing misinformation and mistrust, the credibility and independence of think tanks cannot be taken for granted. Furthermore, many think tanks, particularly in lower-income contexts, remain heavily dependent on short-term, project-based international funding, which can undermine their financial stability, research independence, and ability to invest in core organisational capacities. Further still, the rise of artificial intelligence is poised to disrupt think tanks' operating models and engagement strategies in the coming years – and while some organisations are beginning to experiment with these tools, the sector has yet to grapple fully with their many implications.

Sustaining and amplifying think tanks' ability to impact will require an awareness of how their organisational structures and the way they are funded affect their resilience and the products and ideas they are likely to create. Importantly, this report highlights the significance of investing in core capacities, which is not always possible in all funding environments.

Sustaining and amplifying think tanks' impact requires awareness of how funding and organisational structures affect their resilience and the products they create.

Flexible and sustainable funding models are essential for long-term development and innovation.

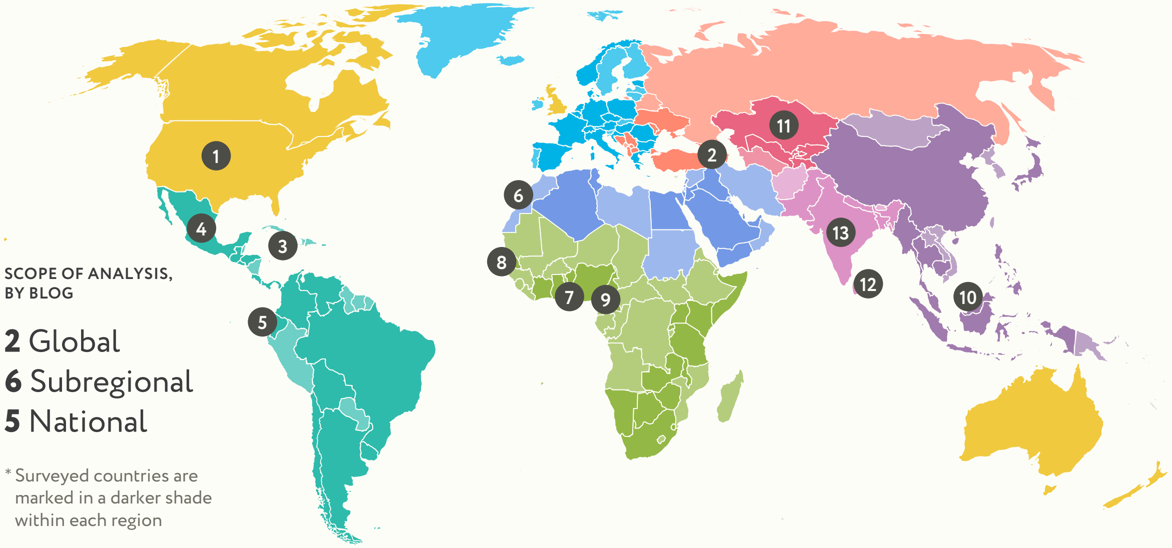
Ultimately, this report is a call to action, for funders, policymakers, and think tanks themselves, to strengthen the sector's resilience for the years ahead. This will require more flexible and sustainable funding models that enable think tanks to invest in long-term institutional development and innovation.

REGIONAL PERSPECTIVES: INSIGHTS FROM PARTNERS

REGIONAL PERSPECTIVES: INSIGHTS FROM PARTNERS

Data is drawn from 13 partner blogs worldwide, based on 297 responses to the 2024 OTT think tank survey

BLOG AUTHORS BY SUBREGION



SCOPE OF ANALYSIS, BY BLOG

2 Global
6 Subregional
5 National

* Surveyed countries are marked in a darker shade within each region

	BLOG AUTHOR (ORGANISATION)	COUNTRY	BLOG ANALYSIS SCOPE
1	Results for Development/ Governance Action Hub	USA	Global
2	APRI (Armenia)	Armenia	Armenia
3	CAPRI	Jamaica	Global comparison with CAPRI
4	Ethos	Mexico	Mexico
5	Grupo FARO	Ecuador	Latin America & the Caribbean
6	Policy Center for the New South	Morocco	MENA
7	ACED	Benin	Africa
8	IPAR	Senegal	sub-Saharan Africa
9	Nkafu Policy Institute	Cameroon	Cameroon
10	IDEAS Malaysia	Malaysia	Malaysia
11	CAPS Unlock	Kazakhstan	Central Asia
12	Centre for a Smart Future	Sri Lanka	South Asia
13	CSTEP	India	India

KEY ISSUES BY SUBREGION: BLOG ANALYSIS OVERVIEW

MAIN TOPICS ANALYSED

1. **Funding models**
2. **Political landscape**
3. **Policymaking & impact**
4. **Growth opportunities**
5. **Stakeholder engagement**
6. **Independence**

EU & EFTA

No blog contributions from this region

ANGLOSPHERE

→ Political landscape
→ Policymaking & impact
→ Growth opportunities

Think tanks need to expand impact measurement, considering their role in fostering dialogue

NON-EU EUROPE & THE CAUCASUS

→ Funding models
→ Political landscape
→ Growth opportunities

Armenian think tanks face funding and capacity issues, highlighting a need for greater institutionalisation

LATIN AMERICA & THE CARIBBEAN

→ Funding models
→ Political landscape
→ Policymaking & impact

Sustainable core funding is crucial for think tank independence and to reduce reliance on project-based models

MENA

→ Funding models
→ Political landscape
→ Stakeholder engagement
→ Policymaking & impact

Think tanks in MENA play a critical policy role, though country-level funding disparities pose challenges

SUB-SAHARAN AFRICA

→ Funding models
→ Political landscape
→ Independence
→ Policymaking & impact
→ Stakeholder engagement

Think tanks bridge research and public understanding despite institutional and financial challenges

EAST & SOUTH-EAST ASIA

→ Funding models
→ Stakeholder engagement
→ Growth opportunities

Malaysian think tanks navigate financial and policy challenges, with lessons from Poland and Argentina

CENTRAL ASIA

→ Funding models
→ Political landscape
→ Growth opportunities

Despite limited funding and political constraints, Central Asian think tanks show potential for regional development

SOUTH ASIA

→ Funding models
→ Political landscape
→ Stakeholder engagement
→ Policymaking & impact

Key concerns include funding, political polarisation, and donor influence affecting think tank operations

REGIONAL PERSPECTIVES: INSIGHTS FROM PARTNERS

For this edition we partnered with 21 organisations from different regions of the world. These partners were instrumental in shaping the 2024 report: they helped us to pilot the survey, reached out to their peers, and analysed survey data from their respective national and regional perspectives. Based on these findings, 13 of our partner organisations have also produced insightful blogs, providing critical and fascinating local context to the global data. This section shares summaries of these blogs, the full versions of which are available on the OTT website.

ANGLOSPHERE

ORGANISATION	**Results for Development/ Governance Action Hub**
COUNTRY	USA
ANALYSIS SCOPE	Global
AUTHOR	Dr Mario Picon, Director; Natida Nivasnanda, Senior Program Associate
LINK TO BLOG	**Managing the political environment: Rethinking the role and strategies of a think tank**
BLOG SUMMARY	Governance Action Hub's blog provides a global analysis of the think tank sector. Beyond operational challenges, their findings reveal that the primary risks facing think tanks stem from the political landscape. Polarisation affects think tanks in multiple ways, from limiting their ability to engage with diverse audiences to restricting access to varied funding sources. Polarisation and other political environmental factors limit the capacity of think tanks to reach a more diverse audience and collaborate. These insights indicate that think tanks need to adopt innovative strategies and approaches to navigate these challenges, enabling them to engage a wider range of stakeholders in a divided landscape.

NON-EU EUROPE & THE CAUCASUS

ORGANISATION	**Applied Policy Research Institute (APRI) Armenia**
COUNTRY	Armenia
ANALYSIS SCOPE	Armenia
AUTHOR	Davit Antonyan, Associate Fellow
LINK TO BLOG	**Armenia in focus: The effect of polarisation on think tanks in small states**
BLOG SUMMARY	The Applied Policy Research Institute of Armenia's blog analyses the think tank sector in Armenia in the wake of the country's increasing political polarisation. OTT's research revealed that Armenian think tanks often face several challenges in providing quality, evidence-based, and nonpartisan analysis. The two primary challenges, research capacity and funding, spotlight the main issue: the need for greater institutionalisation. While the identified challenges align with global findings on the problems faced by think tanks, they are a particularly hampering factor in a small emerging democracy such as Armenia, where they exacerbate the difficulty of maintaining a healthy, independent think tank ecosystem amid strong political polarisation.

LATIN AMERICA & THE CARIBBEAN

ORGANISATION	**Caribbean Policy Research Institute (CAPRI)**
COUNTRY	Jamaica
ANALYSIS SCOPE	Global comparison with CAPRI
AUTHOR	Diana Thorburn, Director of Research
LINK TO BLOG	**How free are Caribbean think tanks? Insights from the State of the Sector survey**
BLOG SUMMARY	The Caribbean Policy Research Institute's (CAPRI) blog compares the organisation with the broader global think tank sector. OTT's research revealed that CAPRI operates in a relatively open political environment compared to think tanks in other regions. Only 11% of survey respondents, including CAPRI, stated that they had complete independence in the conducting and publishing of research. This insight suggests that CAPRI is in a privileged position and should continue to actively protect and safeguard its independence. The survey findings offer valuable reflection points as CAPRI advances its mission to provide high-quality, impactful research that informs public policy in Jamaica and contributes to Caribbean development.

ORGANISATION	**Ethos**
COUNTRY	Mexico
ANALYSIS SCOPE	Mexico
AUTHOR	Javier González, Institutional Development Director
LINK TO BLOG	**Think tanks in Mexico: Between fragility and adaptation to change**
BLOG SUMMARY	Ethos's blog analyses the think tank sector in Mexico. OTT's research revealed that 83% of Mexican think tanks in the sample foresee the national political context continuing to negatively impact their operations in the near future. The ongoing relevance and legitimacy of these think tanks will increasingly depend on their ability to uphold principles of truth, objectivity, independence, long-term vision, and political neutrality. Despite the adverse environment, most think tanks remain committed to their core mission of contributing to decision-making. Notably, 100% of Mexican survey respondents have been involved in policy-making through official engagements, advisory roles, and collaborative initiatives, while 83% have participated through informal channels, such as one-on-one conversations or engagement with grassroots organisations. These findings suggest that maintaining the credibility of think tanks through evidence-based, technically supported arguments will be crucial for demanding government accountability – especially at a time when political dialogue in Mexico is at historically low levels.

LATIN AMERICA & THE CARIBBEAN

ORGANISATION	Grupo FARO
COUNTRY	Ecuador
ANALYSIS SCOPE	Latin America & the Caribbean
AUTHOR	María Caridad Ortiz, Evaluation and Research Director
LINK TO BLOG	Core funding vs. project-based funding: Implications for think tanks in Latin America & the Caribbean
BLOG SUMMARY	Grupo FARO's blog article analyses the think tank sector in Latin America & the Caribbean from a funding perspective. Their research revealed that a dependence on project-based funding is hindering the long-term sustainability of think tanks in the region. According to the survey findings, only 20.7% of Latin American & Caribbean think tanks primarily receive core funding, while 48.3% rely on project-based funding. Additionally, short-term funding of just one to two years duration is prevalent. These insights suggest that a lack of sufficient and stable resources complicates ongoing operations for think tanks, hindering their ability to adapt to rapid changes in the political and social context. In addition, transparency about funding sources is a crucial component of the conversation as it helps build public trust. When think tanks disclose their donors and sources of income, citizens can assess the independence and credibility of their research.

MENA

ORGANISATION	Policy Center for the New South
COUNTRY	Morocco
ANALYSIS SCOPE	MENA
AUTHOR	Bilal Mahli, International Relations Specialist, Department of Research in International Relations
LINK TO BLOG	Challenges and opportunities for think tanks in the MENA region: Navigating a complex landscape
BLOG SUMMARY	The Policy Center for the New South's blog analyses the think tank sector in the Middle East and North Africa (MENA) region. OTT's research revealed that funding disparities across countries significantly impact think tanks' sustainability. Survey respondents from countries like Iraq and Tunisia operate with annual budgets under USD 100,000, limiting their capacity for long-term research, while those in countries like Qatar benefit from much larger budgets of up to USD 5 million. Meanwhile, the survey findings show that 80% of MENA think tanks organise public events, and 20% now feature mixed-gender leadership teams, signalling a shift towards inclusivity. These insights suggest that while MENA think tanks are playing a critical role in the policy-influence field, sustainable funding and digital engagement are essential for their future growth and impact.

SUB-SAHARAN AFRICA

ORGANISATION	African Center for Equitable Development (ACED)
COUNTRY	Benin
ANALYSIS SCOPE	Africa
AUTHOR	Ariel Hardy Houessou, Knowledge Translation Specialist; Rodrigue Castro Gbedomon, Research and Learning Director; Fréjus Thoto, Executive Director
LINK TO BLOG	**Exploring the challenges of African think tanks in supporting development policies**
BLOG SUMMARY	The African Center for Equitable Development's (ACED) blog argues that African think tanks play a crucial role in supporting sustainable development on the continent, by informing policy formulation and implementation. However, these organisations face the challenge of operating within a complex and ever-changing socio-political environment, which makes their work more difficult. For African think tanks to succeed in shaping policy and promoting sustainable development, they must tackle key challenges that impact their capacity, legitimacy, and credibility.

ORGANISATION	Initiative Prospective Agricole et Rurale (IPAR)
COUNTRY	Senegal
ANALYSIS SCOPE	sub-Saharan Africa
AUTHOR	Diatou Ndiaye, Project Manager
LINK TO BLOG	**The contribution of sub-Saharan African think tanks to public policies and societal debates**
BLOG SUMMARY	IPAR's blog analyses the think tank sector in sub-Saharan Africa. OTT's research revealed that while think tanks in sub-Saharan Africa make significant contributions to public policy and societal debates, they face considerable challenges, including institutional, political, strategic, and financial constraints. Additionally, an over-reliance on short-term funding limits these think tanks' opportunities for long-term strategic planning. These insights suggest that continued support and strengthening of think tanks and their regional cooperation efforts are critical to ensuring these organisations can continue to provide rigorous analysis and promote evidence-based decision-making in sub-Saharan Africa.

SUB-SAHARAN AFRICA

ORGANISATION	Nkafu Policy Institute
COUNTRY	Cameroon
ANALYSIS SCOPE	Cameroon
AUTHOR	Dr Adeline Mbounka Nembot, Senior Policy Analyst, Economic Affairs Division
LINK TO BLOG	Cameroonian stakeholders: Are think tanks worth the hype?
BLOG SUMMARY	While think tanks in Cameroon have the potential to be catalysts for change, an ability to effectively engage with stakeholders is crucial to ensuring their relevance. The think tank landscape is relatively new in Cameroon, with most organisations having been established only within the last decade. This blog assesses the engagement of Cameroonian think tanks with their local stakeholders, finding a mixed picture. While think tanks in Cameroon engage only moderately with government bodies and academic institutions, they have made progress in the use of social media and in engaging with individuals with different political affiliations. The blog argues that to improve their engagement, think tanks in Cameroon need to develop strategies to build stronger relationships with government and academia. They also need to increase their collaboration with civil society organisations and further leverage social media to promote their work and engage with stakeholders. Finally, they need to promote inclusiveness and diversity in their work.

EAST & SOUTH-EAST ASIA

ORGANISATION	Institute for Democracy and Economic Affairs (IDEAS) Malaysia
COUNTRY	Malaysia
ANALYSIS SCOPE	Malaysia
AUTHOR	Ryan Panicker, Assistant Manager of Advocacy and Events (Communications)
LINK TO BLOG	Learning from global success: Strategies for Malaysian think tanks to boost their impact
BLOG SUMMARY	OTT's survey shows that Malaysian think tanks are facing increasing financial challenges and evolving policy complexities, with 58% of respondents reporting a worsening funding environment. However, global success stories offer valuable lessons for this region; for example, Poland's Centre for Eastern European Studies (CEES) navigated political instability by focusing on transparency and partnerships, while Argentina's Fundación IDEA enhanced influence through interactive communication strategies. For Malaysian think tanks, adaptability, communication, and local partnerships are key strategies for ensuring and maintaining relevance. IDEAS has embraced these principles by working across political divides, boosting social media presence, and promoting transparency through the My Open Budget Initiative. As Malaysia prepares to implement a regulatory framework for social media in 2025, think tanks should advocate for an environment that fosters open dialogue. By learning from international examples and adapting strategies locally, this blog argues that Malaysian think tanks can overcome their challenges and amplify their impact in shaping policy.

CENTRAL ASIA

ORGANISATION	CAPS Unlock
COUNTRY	Kazakhstan
ANALYSIS SCOPE	Central Asia
AUTHOR	Tlegen Kuandykov, Program Coordinator
LINK TO BLOG	Think tanking in Central Asia: The ecosystem of constraint
BLOG SUMMARY	CAPS Unlock's blog analyses the think tank sector in Central Asia. The research revealed that the current think tank funding model in Central Asia involves significant trade-offs and poses constant risks, particularly in an environment where academic and political freedoms are constrained. Over the past three decades, the authoritarian political landscape in Central Asia has severely restricted these freedoms, which in turn has hampered the operations of think tanks across the region. This blog explores how some think tanks have adapted by focusing on less contentious topics, and how this in itself has led to challenges in securing funding, restricted strategic planning, and heightened existential threats. Yet despite the challenging environment, think tanks in Central Asia have the potential to become important actors, shaping policy discussions and providing nuanced insights on critical regional issues. As the region faces complex challenges, the importance of its think tank sector is expected to grow, emphasising the need for robust analysis, innovative ideas, and well-crafted policies.

SOUTH ASIA

ORGANISATION	Centre for a Smart Future
COUNTRY	Sri Lanka
ANALYSIS SCOPE	South Asia
AUTHOR	Centre for a Smart Future
LINK TO BLOG	Five takeaways on the funding landscape in Sri Lanka and South Asia
BLOG SUMMARY	This blog offers five key takeaways on the funding landscape in Sri Lanka and South Asia: 1) Improving fundraising ability is a key priority in terms of skill strengthening for the region's think tanks. 2) Half of the eight participating Sri Lankan think tanks are currently facing challenges due to a shortage of new funding sources; this is also the case for 20 out of the 29 respondents in the wider South Asian region. 3) Half of the participating Sri Lankan think tanks believe that the research and policy agenda in Sri Lanka is driven by funders. 4) Most of the participating think tanks from Sri Lanka and across South Asia receive funding that is *almost entirely* or mostly project based. 5) Think tanks surveyed *across* the region consider the funding base and diversity of funders to be a key indicator of their organisation's impact, and report spending a moderate or significant amount of time maintaining their budget and income.

SOUTH ASIA

ORGANISATION	Center for Study of Science, Technology and Policy (CSTEP)
COUNTRY	India
ANALYSIS SCOPE	India
AUTHOR	Merlin Francis, Senior Manager (Communications); Neeti Hardas, Intern
LINK TO BLOG	Indian think tanks report: A global comparison
BLOG SUMMARY	CSTEP's blog article analyses the think tank sector in India. The research revealed a primarily mixed and project-based funding context for Indian think tanks, and identified the challenges that this presents for their organisational sustainability. According to the Indian think tanks surveyed, the majority of their funding comes from charitable institutions and foundations, with a typical duration of 1–2 or 2–4 years – and nearly half of the Indian respondents reported that it is difficult to cover their organisation's indirect costs. Yet despite these funding challenges, 90% of surveyed Indian think tanks feel confident in their ability to adapt. Looking ahead, this blog argues, Indian think tanks must secure core funding in order to achieve more long-term viability and innovation. By building up greater adaptability, the Indian think tank sector can convert challenges such as AI into potential growth, and develop innovative, technology-based solutions to resolve national developmental challenges.

BLOG AUTHORS:

ACED, APRI, CAPRI, CAPS Unlock, Centre for a Smart Future, CSTEP, Ethos, Governance Action Hub at the Results for Development, Grupo Faro, IDEAS Malaysia, IPAR, Nkafu Policy Institute, Policy Center for the New South

PARTNER ORGANISATIONS:

ACED (Benin), APRI (Armenia), CAPRI (Jamaica), CAPS Unlock (Kazakhstan), CEBRI (Brazil), CIPPEC (Argentina), Centre for the Study of the Economies of Africa (Nigeria), Centre for a Smart Future (Sri Lanka), CSTEP (India), Ethos (Mexico), Governance Action Hub at the Results for Development (US), Grupo Faro (Ecuador), IDEAS Malaysia (Malaysia), IDM Albania (Albania), IPAR (Senegal), KUSOM Policy Lab (Nepal), Middle East Council on Global Affairs (Qatar), Nkafu Policy Institute (Cameroon), Policy Center for the New South (Morocco), SAIIA (South Africa), SDPI (Pakistan)

APPENDICES

APPENDIX 1: METHODOLOGY

The OTT State of the Sector report 2024 is based on an email survey of think tanks worldwide, conducted between 4 June and 18 July 2024. The survey was developed and administered by Once Once and OTT using Alchemer software, and all data collected was completely anonymous.

SURVEY DEVELOPMENT

The survey instrument was designed to capture key information on think tanks' operating environments, organisational capacities, policy engagement strategies, and funding models, among other topics. It was informed by a review of existing literature on think tank performance and sustainability, as well as input from OTT's network of think tank partners and experts. The survey was piloted with a sample of 23 think tanks between 13 and 24 May 2024, and refined based on feedback received.

SAMPLING

The survey was distributed to a contact list of 2,404 individuals representing think tanks across all regions. These contacts had been harvested from OTT's existing networks and databases, as well as through targeted outreach to think tanks and funders. The sample was designed to include think tanks of different sizes, types, and locations. However, as with any opt-in survey, there is potential for selection bias. Organisations that are more connected to OTT's networks could potentially be overrepresented in the sample, as could those that are more comfortable with online surveys.

DATA COLLECTION

Contacts received personalised emails containing unique survey links, and several rounds of reminders were sent to encourage their response. In total, 390 survey responses were received; however, a programming error resulted in 28 surveys missing country of origin data, so these responses were excluded from analysis. An additional 65 surveys with largely empty responses were also disregarded. Therefore, a total of 297 valid survey responses were included in the final analysis.

SURVEY INSTRUMENT

The survey comprised 54 questions and took an average of 20 minutes to complete. Questions covered a range of topics including organisational demographics, funding sources and models, policy engagement strategies and impact, organisational capacities and constraints, leadership and staff characteristics, and perceived operating environment. The majority of questions were closed-ended, using Likert scales or categorical response options.

DATA ANALYSIS

Survey data was analysed using descriptive statistics and cross-tabulations to identify overall trends and patterns by region and other key variables. Where relevant, the statistical significance of differences between groups was assessed using standard inferential tests (e.g. chi-squared for categorical data). Open-ended responses were coded thematically to identify common challenges, strategies, and examples. All analysis was conducted using R.

LIMITATIONS

Firstly, the sample, while relatively large and diverse, is not necessarily representative of the full global think tank population, due to the opt-in nature of the survey and potential coverage gaps in OTT's contact database. Second, all data is self-reported and thus may be subject to response bias – although the anonymity of the survey helps mitigate this risk.

APPENDIX 2: THE ON THINK TANKS STATE OF THE SECTOR SURVEY 2024

PRODUCTS AND INDICATORS

1. Please choose the most common products [your organisation] creates
   - ❑ Advisory and consulting services
   - ❑ Written and broadcast media appearances (e.g. radio, written press, TV)
   - ❑ Policy briefs and other written research-related documents
   - ❑ Public events/educational events/ conferences, etc.
   - ❑ Social media content (e.g .infographics, blogs, posts on social media, podcasts)

2. Select the 2 main target audiences/users of [your organisation]'s products
   - ❑ General population and/or community oriented organisations
   - ❑ Research/academic community
   - ❑ Media

IMPACT INDICATORS

3. How important is media presence and citations as a key indicator of [your organisation]'s impact?
   - ❍ Not important at all
   - ❍ Slightly important
   - ❍ Moderately important
   - ❍ Important
   - ❍ Very important

4. How important are social media engagement metrics as a key indicator of [your organisation]'s impact?
   - ❍ Not important at all
   - ❍ Slightly important
   - ❍ Moderately important
   - ❍ Important
   - ❍ Very important

5. How important is the funding base and diversity of funders as a key indicator of [your organisation]'s impact?
   - ❍ Not important at all
   - ❍ Slightly important
   - ❍ Moderately important
   - ❍ Important
   - ❍ Very important

POLICY IMPACT

6. In the last 5 years, has [your organisation] been involved in policy-making through formal channels such as official engagements, advisory roles, collaborative initiatives, etc?
   - ❍ No
   - ❍ Yes

7. In the last 5 years, has [your organisation] been involved in policy-making though informal channels such as one-to-one conversations, phone calls with key policy-makers, influencing base organisations, etc?
   - ❍ No
   - ❍ Yes

8. Has [your organisation] directly contributed to a specific public policy in the last 5 years?
   - ❍ Yes
   - ❍ No
   - ❍ Don't know

RESOURCE ALLOCATION

9. How much time and resources does [your organisation] dedicate to establishing and/or publicising its reputation as experts?
   - ❍ No resources
   - ❍ A minimal amount
   - ❍ A moderate amount
   - ❍ A significant amount
   - ❍ An extensive amount

10. How much time and resources does [your organisation] dedicate to media visibility and social media engagement?
    - ❍ No resources
    - ❍ A minimal amount
    - ❍ A moderate amount
    - ❍ A significant amount
    - ❍ An extensive amount

11. How much time and resources does [your organisation] dedicate to increasing or maintaining the organisation's budget and income?
    - ❍ No resources
    - ❍ A minimal amount
    - ❍ A moderate amount
    - ❍ A significant amount
    - ❍ An extensive amount

12. How much time and resources does [your organisation] dedicate to following and intervening on the policy process?
    - ❍ No resources
    - ❍ A minimal amount
    - ❍ A moderate amount
    - ❍ A significant amount
    - ❍ An extensive amount

INTERNAL ORG DYNAMICS

13. Does [your organisation] have explicitly written diversity, equity and inclusion (DEI) policies addressing the following areas? (select all that apply)
    - ❑ Gender
    - ❑ Age
    - ❑ Social class
    - ❑ Race/ethnicity
    - ❑ Disability
    - ❑ Language

14. To what extent do you agree with the following statement? The Board of Directors is actively involved in the operations of our organisation
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

15. What percentage of the staff at [your organisation] is under 35-years old?

    0% 100%

16. What percentage of the staff at [your organisation] has long-term contracts (2 years or more)?

    0% 100%

17. What percentage of the staff at [your organisation] has post-graduate degrees (masters or above)?

    0% 100%

18. How many paid members of staff does your think tank currently have?
    - ❍ Zero
    - ❍ Fewer than 10
    - ❍ 10 to 19
    - ❍ 20 to 34
    - ❍ 35 to 50
    - ❍ More than 50

19. How many unpaid members of staff does your think tank currently have, excluding board members?
    - ❍ Zero
    - ❍ Fewer than 10
    - ❍ 10 to 19
    - ❍ 20 to 34
    - ❍ 35 to 50
    - ❍ More than 50

CHALLENGES AND NEEDS

20. Our organisation has a satisfactory ability to adapt to the challenges it is currently facing
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

21. Handling transitions in leadership is a significant challenge for our organisation
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

22. There is a critical shortage of staff with the necessary skills within [your organisation]
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

23. Our organisation is currently facing challenges due to a shortage of new funding sources
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

24. The departure of staff members poses a current challenge for our organisation
    - ❍ Strongly disagree
    - ❍ Disagree
    - ❍ Neither disagree nor agree
    - ❍ Agree
    - ❍ Strongly agree

CAPACITY NEEDS

25. Now we want to understand the areas where think tanks see potential for growth in their organisational skills. Please select up to three areas where strengthening skills would benefit [your organisation] the most:
    - ❑ Strategic planning
    - ❑ Financial management
    - ❑ Innovation and adaptability
    - ❑ Communication and marketing
    - ❑ Research capacity
    - ❑ Advocacy
    - ❑ Project management
    - ❑ Ability to fundraise

AI

26. How much does [your organisation] use or plan to use AI for research?
    - ❍ Not at all
    - ❍ Rarely
    - ❍ Occasionally
    - ❍ Frequently
    - ❍ All the time

27. How much does [your organisation] use or plan to use AI for administrative tasks?
    - ❍ Not at all
    - ❍ Rarely
    - ❍ Occasionally
    - ❍ Frequently
    - ❍ All the time

28. How much does [your organisation] use or plan to use AI for communications and marketing?
    - ❍ Not at all
    - ❍ Rarely
    - ❍ Occasionally
    - ❍ Frequently
    - ❍ All the time

29. What kind of impact, overall, does [your organisation] believe AI will have on think tanks?
    - ❍ No impact
    - ❍ Very negative
    - ❍ Negative
    - ❍ Neutral
    - ❍ Positive
    - ❍ Very positive

FUNDING

30. Is [your organisation]'s funding primarily core or project-based? (Core funding is funding that is directly targeted to the organisation itself (e.g. administrative costs) while project-based funding is aimed at the fulfillment of a specific fixed-term project)
    - ❍ Almost entirely core
    - ❍ Mostly core
    - ❍ Mixed
    - ❍ Mostly project-based
    - ❍ Almost entirely project-based

31. How easy is it for [your organisation] to cover indirect costs? (Indirect costs are those not explicitly covered in funding contracts)
    - ❍ Very hard
    - ❍ Hard
    - ❍ Moderate
    - ❍ Easy
    - ❍ Very easy

32. What is the typical length of funding provided to your think tank?
    - ❍ 6 months or less
    - ❍ 6 months to 1 year
    - ❍ 1 to 2 years
    - ❍ 2 to 4 years
    - ❍ 4 years or more

33. Please select [your organisation]'s two most important funding sources
    - ❑ Organisational consulting and services
    - ❑ International development entities
    - ❑ Private corporations
    - ❑ Charitable trusts or foundations
    - ❑ Individual donations
    - ❑ Government

34. What percentage of [your organisation]'s total funding is provided by your largest single donor?

    0% 100%

FUNDING CONTEXT

35. Does [your organisation]'s funding come from domestic or international sources?
    - ❍ Almost entirely domestic
    - ❍ Mostly domestic
    - ❍ Almost evenly distributed
    - ❍ Mostly international
    - ❍ Almost entirely international

36. How has the total level of funding for your organisation changed in the past year?
    - ❍ Significantly decreased
    - ❍ Decreased
    - ❍ Stayed the same
    - ❍ Increased
    - ❍ Significantly increased

37. How favourable will the funding environment be for think tanks in the next 12 months in your country?
    - ❍ Very unfavourable
    - ❍ Unfavourable
    - ❍ Neutral
    - ❍ Favourable
    - ❍ Very favourable

ORGANISATIONAL CONTEXT

38. How would you rate the level of independence that think tanks in [your country] have to conduct and publish research without external influence?
    - Completely restricted
    - Mostly restricted
    - Neither restricted nor independent
    - Mostly independent
    - Completely independent

39. How easy is it for a think tank to start operating in [your country]?
    - Very hard
    - Hard
    - Moderate
    - Easy
    - Very easy

40. How receptive is [your country]'s media to the work of think tanks?
    - Not receptive at all
    - Slightly receptive
    - Moderately receptive
    - Receptive
    - Very receptive

41. How easy is it for your think tank to engage individuals with different political affiliations in [your country]?
    - Very hard
    - Hard
    - Moderate
    - Easy
    - Very easy

POLITICAL CONTEXT

42. In your opinion, how has the political situation over the past 12 months impacted think tanks in [your country]?
    - Very unfavourable
    - Unfavourable
    - Neutral
    - Favourable
    - Very favourable

43. In your opinion, how will the political situation in the next 12 months impact think tanks in [your country]?
    - Very unfavourable
    - Unfavourable
    - Neutral
    - Favourable
    - Very favourable

RESEARCH AGENDA POLICY ISSUES

44. Would you say the research and policy agenda in [your country] is driven more or primarily by:
    - Think tanks
    - Government bodies
    - Civil society organisations
    - Media
    - Academic institutions
    - Funders
    - Policymakers

45. Please select the main policy issue that [your organisation] believes should be prioritised in [your country]
    - International affairs/relations
    - Economics
    - Gender
    - Education
    - Social policy (housing, pensions, etc.)
    - Technology/innovation
    - Peace and security
    - Law and rights
    - Governance
    - Environment and climate
    - Other

POLARISATION

46. To what extent has political polarisation impacted your ability to do research and operate?
    - Not at all
    - Slightly
    - Moderately
    - Significantly
    - Very much

47. Please select from the following options the most important way in which political polarisation has affected your organisation
    - Disseminate research and interact with diverse audiences
    - Collaborate and present your research with policy experts across the political spectrum
    - Impacted your ability to secure funding from different sources
    - Impacted your ability to access the media

PROFILE

48. When was [your organisation] founded?
    - Before 1990
    - Between 1990 and 1999
    - Between 2000 and 2009
    - Between 2010 and 2019
    - 2020 or later

49. How is [your organisation] registered in [your country]?
    - University/institute
    - Other
    - Government
    - Non-profit
    - For-profit

50. [Your organisation] works at the: (select all that apply)
    - ❑ Local level (cities, communities, districts)
    - ❑ National level
    - ❑ Continental/regional level
    - ❑ Global level

51. Does [your organisation] have: (select all that apply)
    - ❑ A dedicated fundraising executive or team
    - ❑ A board of trustees or directors
    - ❑ A communications team
    - ❑ An impact/MEL officer
    - ❑ A finance division
    - ❑ An HR division

52. What is the gender of the executive director/chief executive officer?
    - ❍ Female
    - ❍ Male
    - ❍ Mixed gender co-leadership
    - ❍ Other

53. What is the main professional background of the executive director/chief executive officer?
    - ❍ Academia
    - ❍ Politics
    - ❍ Public sector
    - ❍ Private sector
    - ❍ Third sector (CSOs, advocacy, charitable)
    - ❍ Other (please specify)

54. How much money did [your organisation] receive or generate in the last year?
    - ❍ Less than USD $100,000
    - ❍ USD$100,000 to $499,999
    - ❍ USD$500,000 to $1,499,999
    - ❍ USD$1,500,000 to USD$5,000,000
    - ❍ More than USD$5,000,000

APPENDIX 3: LIST OF COUNTRIES BY REGION AND SUBREGION

The following list sets out the 193 member states of the United Nations and their respective geographical regions, alongside the subregional classifications assigned for the purposes of this report. Our classifications were loosely based on this document from the UN. A filterable version of this list is available here.

	COUNTRY	REGION	SUBREGION
1	Antigua and Barbuda	Latin America & the Caribbean	Latin America & the Caribbean
2	Argentina	Latin America & the Caribbean	Latin America & the Caribbean
3	Bahamas	Latin America & the Caribbean	Latin America & the Caribbean
4	Barbados	Latin America & the Caribbean	Latin America & the Caribbean
5	Belize	Latin America & the Caribbean	Latin America & the Caribbean
6	Bolivia (Plurinational State of)	Latin America & the Caribbean	Latin America & the Caribbean
7	Brazil	Latin America & the Caribbean	Latin America & the Caribbean
8	Chile	Latin America & the Caribbean	Latin America & the Caribbean
9	Colombia	Latin America & the Caribbean	Latin America & the Caribbean
10	Costa Rica	Latin America & the Caribbean	Latin America & the Caribbean
11	Cuba	Latin America & the Caribbean	Latin America & the Caribbean
12	Dominica	Latin America & the Caribbean	Latin America & the Caribbean
13	Dominican Republic	Latin America & the Caribbean	Latin America & the Caribbean
14	Ecuador	Latin America & the Caribbean	Latin America & the Caribbean
15	El Salvador	Latin America & the Caribbean	Latin America & the Caribbean
16	Grenada	Latin America & the Caribbean	Latin America & the Caribbean
17	Guatemala	Latin America & the Caribbean	Latin America & the Caribbean
18	Guyana	Latin America & the Caribbean	Latin America & the Caribbean
19	Haiti	Latin America & the Caribbean	Latin America & the Caribbean
20	Honduras	Latin America & the Caribbean	Latin America & the Caribbean
21	Jamaica	Latin America & the Caribbean	Latin America & the Caribbean

	COUNTRY	REGION	SUBREGION
22	Mexico	Latin America & the Caribbean	Latin America & the Caribbean
23	Nicaragua	Latin America & the Caribbean	Latin America & the Caribbean
24	Panama	Latin America & the Caribbean	Latin America & the Caribbean
25	Paraguay	Latin America & the Caribbean	Latin America & the Caribbean
26	Peru	Latin America & the Caribbean	Latin America & the Caribbean
27	Saint Kitts and Nevis	Latin America & the Caribbean	Latin America & the Caribbean
28	Saint Lucia	Latin America & the Caribbean	Latin America & the Caribbean
29	Saint Vincent and the Grenadines	Latin America & the Caribbean	Latin America & the Caribbean
30	Suriname	Latin America & the Caribbean	Latin America & the Caribbean
31	Trinidad and Tobago	Latin America & the Caribbean	Latin America & the Caribbean
32	Uruguay	Latin America & the Caribbean	Latin America & the Caribbean
33	Venezuela (Bolivarian Republic of)	Latin America & the Caribbean	Latin America & the Caribbean
34	Australia	Oceania	Anglosphere
35	Canada	North America	Anglosphere
36	New Zealand	Oceania	Anglosphere
37	United Kingdom	Europe	Anglosphere
38	United States	North America	Anglosphere
39	Angola	Africa	sub-Saharan Africa
40	Benin	Africa	sub-Saharan Africa
41	Botswana	Africa	sub-Saharan Africa

	COUNTRY	REGION	SUBREGION
42	Burkina Faso	Africa	sub-Saharan Africa
43	Burundi	Africa	sub-Saharan Africa
44	Cabo Verde	Africa	sub-Saharan Africa
45	Cameroon	Africa	sub-Saharan Africa
46	Central African Republic	Africa	sub-Saharan Africa
47	Chad	Africa	sub-Saharan Africa
48	Comoros	Africa	sub-Saharan Africa
49	Congo	Africa	sub-Saharan Africa
50	Côte d'Ivoire	Africa	sub-Saharan Africa
51	Democratic Republic of the Congo	Africa	sub-Saharan Africa
52	Djibouti	Africa	sub-Saharan Africa
53	Equatorial Guinea	Africa	sub-Saharan Africa
54	Eritrea	Africa	sub-Saharan Africa
55	Eswatini	Africa	sub-Saharan Africa
56	Ethiopia	Africa	sub-Saharan Africa
57	Gabon	Africa	sub-Saharan Africa
58	Gambia	Africa	sub-Saharan Africa
59	Ghana	Africa	sub-Saharan Africa
60	Guinea	Africa	sub-Saharan Africa
61	Guinea-Bissau	Africa	sub-Saharan Africa
62	Kenya	Africa	sub-Saharan Africa
63	Lesotho	Africa	sub-Saharan Africa
64	Liberia	Africa	sub-Saharan Africa
65	Madagascar	Africa	sub-Saharan Africa
66	Malawi	Africa	sub-Saharan Africa
67	Mali	Africa	sub-Saharan Africa

	COUNTRY	REGION	SUBREGION
68	Mauritania	Africa	sub-Saharan Africa
69	Mauritius	Africa	sub-Saharan Africa
70	Mozambique	Africa	sub-Saharan Africa
71	Namibia	Africa	sub-Saharan Africa
72	Niger	Africa	sub-Saharan Africa
73	Nigeria	Africa	sub-Saharan Africa
74	Rwanda	Africa	sub-Saharan Africa
75	Sao Tome and Principe	Africa	sub-Saharan Africa
76	Senegal	Africa	sub-Saharan Africa
77	Seychelles	Africa	sub-Saharan Africa
78	Sierra Leone	Africa	sub-Saharan Africa
79	Somalia	Africa	sub-Saharan Africa
80	South Africa	Africa	sub-Saharan Africa
81	South Sudan	Africa	sub-Saharan Africa
82	Togo	Africa	sub-Saharan Africa
83	Uganda	Africa	sub-Saharan Africa
84	United Republic of Tanzania	Africa	sub-Saharan Africa
85	Zambia	Africa	sub-Saharan Africa
86	Zimbabwe	Africa	sub-Saharan Africa
87	Algeria	Africa	MENA
88	Egypt	Africa	MENA
89	Libya	Africa	MENA
90	Morocco	Africa	MENA
91	Sudan	Africa	MENA
92	Tunisia	Africa	MENA
93	Bahrain	Asia	MENA

	COUNTRY	REGION	SUBREGION
94	Iran (Islamic Republic of)	Asia	MENA
95	Iraq	Asia	MENA
96	Israel	Asia	MENA
97	Jordan	Asia	MENA
98	Kuwait	Asia	MENA
99	Lebanon	Asia	MENA
100	Oman	Asia	MENA
101	Qatar	Asia	MENA
102	Saudi Arabia	Asia	MENA
103	Syrian Arab Republic	Asia	MENA
104	United Arab Emirates	Asia	MENA
105	Yemen	Asia	MENA
106	Austria	Europe	EU & EFTA
107	Belgium	Europe	EU & EFTA
108	Bulgaria	Europe	EU & EFTA
109	Croatia	Europe	EU & EFTA
110	Cyprus	Europe	EU & EFTA
111	Czech Republic	Europe	EU & EFTA
112	Denmark	Europe	EU & EFTA
113	Estonia	Europe	EU & EFTA
114	Finland	Europe	EU & EFTA
115	France	Europe	EU & EFTA
116	Germany	Europe	EU & EFTA
117	Greece	Europe	EU & EFTA
118	Hungary	Europe	EU & EFTA
119	Iceland	Europe	EU & EFTA

	COUNTRY	REGION	SUBREGION
120	Ireland	Europe	EU & EFTA
121	Italy	Europe	EU & EFTA
122	Latvia	Europe	EU & EFTA
123	Liechtenstein	Europe	EU & EFTA
124	Lithuania	Europe	EU & EFTA
125	Luxembourg	Europe	EU & EFTA
126	Malta	Europe	EU & EFTA
127	Norway	Europe	EU & EFTA
128	Poland	Europe	EU & EFTA
129	Portugal	Europe	EU & EFTA
130	Romania	Europe	EU & EFTA
131	Slovakia	Europe	EU & EFTA
132	Slovenia	Europe	EU & EFTA
133	Spain	Europe	EU & EFTA
134	Sweden	Europe	EU & EFTA
135	Switzerland	Europe	EU & EFTA
136	The Netherlands	Europe	EU & EFTA
137	Albania	Europe	non-EU Europe & the Caucasus
138	Andorra	Europe	non-EU Europe & the Caucasus
139	Armenia	Asia	non-EU Europe & the Caucasus
140	Azerbaijan	Asia	non-EU Europe & the Caucasus
141	Belarus	Europe	non-EU Europe & the Caucasus
142	Bosnia and Herzegovina	Europe	non-EU Europe & the Caucasus
143	Georgia	Asia	non-EU Europe & the Caucasus
144	North Macedonia	Europe	non-EU Europe & the Caucasus
145	Moldova	Europe	non-EU Europe & the Caucasus

	COUNTRY	REGION	SUBREGION
146	Monaco	Europe	non-EU Europe & the Caucasus
147	Montenegro	Europe	non-EU Europe & the Caucasus
148	Russian Federation	Europe	non-EU Europe & the Caucasus
149	San Marino	Europe	non-EU Europe & the Caucasus
150	Serbia	Europe	non-EU Europe & the Caucasus
151	Turkey	Asia	non-EU Europe & the Caucasus
152	Ukraine	Europe	non-EU Europe & the Caucasus
153	Kazakhstan	Asia	Central Asia
154	Kyrgyzstan	Asia	Central Asia
155	Tajikistan	Asia	Central Asia
156	Turkmenistan	Asia	Central Asia
157	Uzbekistan	Asia	Central Asia
158	Afghanistan	Asia	South Asia
159	Bangladesh	Asia	South Asia
160	Bhutan	Asia	South Asia
161	India	Asia	South Asia
162	Maldives	Asia	South Asia
163	Nepal	Asia	South Asia
164	Pakistan	Asia	South Asia
165	Sri Lanka	Asia	South Asia
166	Brunei Darussalam	Asia	East & South-East Asia
167	Cambodia	Asia	East & South-East Asia
168	China	Asia	East & South-East Asia
169	Democratic People's Republic of Korea	Asia	East & South-East Asia

	COUNTRY	REGION	SUBREGION
170	Indonesia	Asia	East & South-East Asia
171	Japan	Asia	East & South-East Asia
172	Lao People's Democratic Republic	Asia	East & South-East Asia
173	Malaysia	Asia	East & South-East Asia
174	Mongolia	Asia	East & South-East Asia
175	Myanmar	Asia	East & South-East Asia
176	Philippines	Asia	East & South-East Asia
177	Republic of Korea	Asia	East & South-East Asia
178	Singapore	Asia	East & South-East Asia
179	Thailand	Asia	East & South-East Asia
180	Timor-Leste	Asia	East & South-East Asia
181	Viet Nam	Asia	East & South-East Asia
182	Fiji	Oceania	Melanesia
183	Papua New Guinea	Oceania	Melanesia
184	Solomon Islands	Oceania	Melanesia
185	Vanuatu	Oceania	Melanesia
186	Kiribati	Oceania	Micronesia
187	Marshall Islands	Oceania	Micronesia
188	Micronesia (Federated States of)	Oceania	Micronesia
189	Nauru	Oceania	Micronesia
190	Palau	Oceania	Micronesia
191	Samoa	Oceania	Polynesia
192	Tonga	Oceania	Polynesia
193	Tuvalu	Oceania	Polynesia

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