



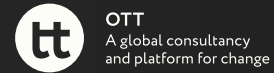
STATE OF
THE SECTOR

Trust in Evidence

IN CHALLENGING
TIMES

THE ON THINK TANKS
STATE OF THE SECTOR
REPORT 2025

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REPORT 2025



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ACKNOWLEDGMENTS

We are very grateful to those that make the Open Think Tank Directory and this report possible; to users of the directory and the report for making our work relevant; to our extended network of friends, colleagues, and funders for helping us collect and make sense of the data; and to think tanks themselves for engaging with us and responding to our consultations – especially our 25 partners, who are contributing to ensure higher representation at the subregional level and enriching the global analysis with their local insights.

FUNDING

The development and maintenance of the Open Think Tank Directory and the annual State of the Sector Report 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 to the On Think Tanks programme with long-term 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; US State Department in Panama 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, updating, and analysis of the Open Think Tank Directory – and the development of the annual State of the Sector Report – possible.



THE OPEN THINK TANK DIRECTORY

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. 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. You can explore the directory [here](#).

Defining which organisations are to be included in the Open Think Tank Directory is a difficult task, as think tanks themselves are difficult to define. For the Open Think Tank Directory, we have defined think tanks as a diverse group of knowledge and engagement organisations that undertake research, generate knowledge, and use evidence-informed arguments to inform and/or influence policy and its outcomes.

The directory has been compiled and is updated using a mixed approach: web searches on Google to find existing think tank lists and organisations; suggestions by country and regional experts or partners; 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.



Is your organisation in the directory?

REGISTER HERE

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About the Report

The On Think Tanks State of the Sector Report 2025 offers an overview of how think tanks across the globe are navigating an increasingly polarised environment, and a comprehensive snapshot of the sector's current condition and future prospects. Now in its sixth edition, this year's report draws on survey responses from 333 think tanks, in 102 countries. It also incorporates insights from the On Think Tanks (OTT) Open Think Tank Directory – covering more than 3,800 organisations worldwide – and sensemaking discussions with thinktankers in OTT's global community.

The research for this edition follows the methodology we introduced in last year's report, allowing for robust cross-year comparisons. It also introduces new variables: this year, we asked think tanks whether research evidence is highly valued in their national contexts, and, for the first time, we included a detailed section about staff salaries by role, offering new insights into compensation structures and internal equity.

SURVEY DESIGN

The [survey](#) comprised 74 questions, covering key dimensions of the think tank landscape, such as operating environment, organisational capacity, funding models, internal dynamics, and more. Most questions were closed-ended (multiple-choice or Likert scale), while a few open-ended questions were included to capture qualitative insights.

The survey design was informed by relevant literature, and the questions were piloted with 10 think tanks from 14 to 19 March 2025.

DATA COLLECTION [SURVEY CODING SHEET](#)

The survey was conducted using Alchemer and was open between 19 March and 19 May 2025. It was distributed to a list of over 3,000 contacts representing think tanks across all global regions. This list was drawn from the OTT Open Think Tank Directory, supplemented with additional contacts provided by our partner organisations.

A total of 335 responses were received, of which two were excluded because the responding organisations did not meet our definition of a think tank.¹ The final [dataset](#) comprises 333 valid responses, from organisations across 102 countries.

GEOGRAPHIC AND CONTEXTUAL CLASSIFICATIONS

For regional analysis, the report categorised respondents into nine [geographic subregions](#), following the same approach as last year's edition: the Anglosphere, the EU & European Free Trade Area (EFTA), non-EU Europe & the Caucasus, East & South-East Asia, South Asia, Central Asia, the Middle East & North Africa (MENA), sub-Saharan Africa, and Latin America & the Caribbean.²

Think tanks were also classified at country level, by national income (using the [World Bank](#) groupings: low income, lower-middle, upper-middle, high income), and political regime type (using the [V-Dem "Regimes of the World"](#) typology: closed autocracy, electoral autocracy, electoral democracy, liberal democracy).

DATA ANALYSIS

All data were processed using R. Descriptive statistics and cross-tabulations were used to explore trends across subregions, national-income levels, and organisational-level variables. Where relevant, differences between groups were tested for statistical significance using standard inferential methods (e.g., chi-square tests for categorical variables and logistic regressions). Open-ended responses were coded using AI.

LIMITATIONS

While the sample is large and diverse, it is not fully representative of the global think tank population due to the opt-in nature of the survey and potential gaps in OTT's contact database. All data are self-reported, and therefore responses may be subject to bias or incompleteness.

- ¹ We define think tanks as a diverse group of knowledge and engagement organisations that undertake research, generate knowledge, and use evidence-informed arguments to inform and/or influence policy and its outcomes. They can also perform a range of other functions, including influencing the public agenda, monitoring the implementation of specific policies, and suggesting or advocating for policy changes.
- ² These subregions are based on the UN SDG Indicators Regional Groupings, with modifications introduced in 2024 and maintained in this edition. The classification balances factors such as geography, national income, political and institutional traditions, and cultural links to better reflect the diverse environments in which think tanks operate.

The Anglosphere (US, Canada, UK, Australia, and New Zealand) replaces a traditional North America grouping and treats the UK separately from the EU, due to shared institutional characteristics among English-speaking countries. Europe is divided into EU & EFTA and non-EU Europe & the Caucasus (including Turkey), to capture key political and funding differences. In Asia, Central Asia and South Asia are treated as distinct regions, while East & South-East Asia are grouped together due to smaller sample sizes. Middle East & North African (MENA) combines Northern Africa and the Middle East, and sub-Saharan Africa comprises the rest of the continent. Oceania is not included, as no think tanks beyond Australia and New Zealand participated in the survey.

Main findings

Our analysis of the survey responses, together with data from the Open Think Tank Directory, has generated a wealth of insights into the state of the think tank sector in 2025.

This year, we have focused on 10 main findings. These are presented in this report, structured around four thematic sections as shown below:

OPERATING ENVIRONMENT

[SEE MORE+](#)

- 1 **Optimism about sector growth is declining**, particularly among think tanks in wealthier democracies and those with larger budgets. Conversely, organisations in lower-income countries and those operating in closed-autocratic regimes report higher growth expectations.
- 2 **Political polarisation is a rising challenge**, with 36% of think tanks in 2025 reporting that it affects them to a strong degree (up from 24% in 2024),³ impacting audience engagement, collaborations with experts, funding options, and media access. However, in ecosystems where research evidence is highly valued, think tanks are better able to navigate political divides – and in turn are less impacted by the challenges of polarisation.
- 3 **Policy impact is stronger** in electoral democracies and electoral autocracies than in liberal democracies or closed autocracies. Environments with a receptive media also foster higher levels of policy influence compared to those where the media is less engaged.
- 4 **Think tank agendas largely align with public concerns on economic issues**, but key gaps exist in some regions.

FUNDING AND SUSTAINABILITY

[SEE MORE+](#)

- 5 **Core funding is more common in higher-income countries**. It is highly sought after – but it is not a panacea. It is not a guarantee of institutional growth or strategic stability, nor does it significantly ease the persistent challenge of covering indirect costs for most organisations.⁴
- 6 **Domestic funding is not inherently more effective than international funding** in helping think tanks meet institutional costs; nor do domestically funded organisations necessarily find it easier to secure new funders.

3. Includes responses in the “significantly” and “very much” categories, to the question “To what extent has political polarisation impacted your organisation’s ability to do research and operate?”

4. Core funding is the financial support that covers an organisation’s essential operational costs – like salaries, rent, utilities, and administrative expenses – rather than being tied to a specific project.

INTERNAL DYNAMICS[SEE MORE+](#)**7 Salary structures reveal unequal returns.**

Leadership salaries are higher in think tanks that receive core funding, and significantly increase commensurate with an organisation's overall turnover. Entry-level pay, however, remains consistent despite these variables, and across all subregions.

8 Capacity gaps are connected to organisational structure, not size.

Think tanks lacking dedicated internal units for human resources or finance consistently report the need for capacity building in these areas. Overall, fundraising was cited as one of the most pressing capacity gaps, regardless of a think tank's size or funding structure.

INNOVATION AND INCLUSION[SEE MORE+](#)**9 AI use has significantly increased,**

with 71% of think tanks using AI tools in 2025 (up from 57% in 2024), primarily for communications and research. However, AI use is driven mainly by contextual, rather than internal organisational, factors; this may explain why a significant geographic digital divide persists – and grows.

10 Diversity, equity, and inclusion (DEI) is unevenly embedded,

with a think tank's location and main funding source (international rather than domestic) being stronger predictors of DEI engagement than its organisational size or turnover. Gender is the most common focus of an organisation's DEI policy (64%), and implementation is typically concentrated on internal governance and HR practices, with less application to research design or external activities.

While not intended as a causal or prescriptive analysis, the State of the Sector Report 2025 provides valuable evidence that we hope will inspire and inform both reflection and action. We invite think tanks, funders, and supporters of evidence-informed policy to explore these insights, engage in critical discussion, and use this report to inform strategy, collaboration, and learning.



Additional analysis and reflection are offered on OTT's website – via the dedicated [State of the Sector 2025](#) page and across its wider content.

ABOUT THE THINK TANKS IN OUR DIRECTORY*

SECTOR GROWTH

GEOGRAPHIC LOCATION

- **The EU & EFTA subregion hosts the largest concentration of think tanks in the directory (25% of the global total)**
- Central Asia is the least-represented subregion, making up 0.8% of the directory

AVERAGE THINK TANK AGE (GLOBAL)

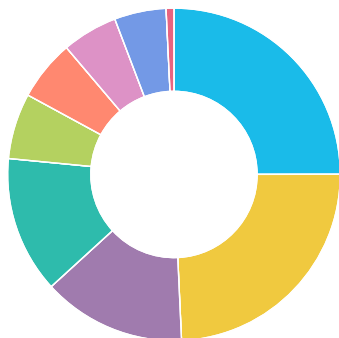
33 years



TYPE OF ORGANISATION

- **67%** non-profit
- **16%** university institute
- **8%** governmental organisation
- **5%** for-profit
- **4%** other

GLOBAL DISTRIBUTION OF THINK TANKS, BY SUBREGION



- 25%** EU & EFTA
- 24%** Anglosphere
- 14%** East & South-East Asia
- 13%** Latin America & the Caribbean
- 6%** Sub-Saharan Africa
- 6%** Non-EU Europe & the Caucasus
- 5%** South Asia
- 5%** MENA
- 1%** Central Asia

- **24%** of think tanks said it was **hard to operate** during the last year
- **46%** of think tanks said **the political situation in their country impacted them unfavourably** over the past year
- **Only 32%** of think tanks globally **expect sector growth** in the next 12 months

Think tanks in low-income countries are over twice as likely to expect sector growth compared to those in high-income countries

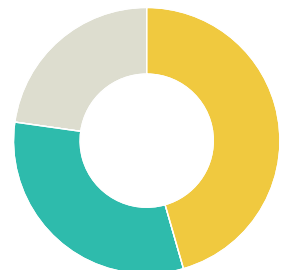
More think tanks (61%) in closed autocracies are optimistic about sector growth, compared to those in liberal democracies (22%)

When evidence is valued, growth expectations soar:

Only 13% of think tanks expect sector growth in countries where evidence is not valued – compared to 52% in countries where evidence is highly valued

THINK TANKS' EXPECTATIONS FOR SECTOR GROWTH (NEXT 12 MONTHS)

- 46%** Growth not expected
- 32%** Growth expected
- 23%** Don't know



POLITICAL POLARISATION

36%

of think tanks said political polarisation has impacted their work to a strong degree (up from 24% in 2024)

POLICY IMPACT

70%

of think tanks reported making a policy impact in the last 5 years, slightly down from 77% in 2024

Policy impact is stronger in electoral democracies and electoral autocracies

Policy impact is stronger in regions with a receptive media

1

Growth optimism wanes: Think tanks with larger budgets and those in wealthier democracies do not anticipate that the sector will grow

Growth expectations for the sector are relatively low across the board. Only 32% of surveyed organisations believe their country’s think tank sector will grow in the next 12 months, while 46% do not expect any growth, and 23% are unsure.⁵

EXPECTATIONS OF SECTORAL GROWTH, BY NATIONAL INCOME LEVEL

Think tanks in high- and upper-middle-income countries are substantially less optimistic about growth in the sector than those in lower-income contexts (Table 1). This suggests that think tanks operating with more constrained resources may see greater opportunity for expansion or transformation. At the same time, those in high-income settings may face more mature and/or saturated policy research environments, limiting their expectations for broader sectoral growth.

The same pattern holds when think tanks are asked about the growth of their own organisation – those in lower-income settings are more optimistic than their peers in higher-income countries.

TABLE 1. EXPECTATIONS OF SECTORAL GROWTH, BY NATIONAL-INCOME GROUP

Organisations that expect the think tank sector in their country to grow over the next 12 months (%)			
Low income	Lower middle	Upper middle	High income
63%	48%	27%	21%

EXPECTATIONS OF SECTORAL GROWTH, BY POLITICAL REGIME

Political contexts also shape how think tanks perceive the future. When analysed using the V-Dem “Regimes of the World” typology, a clear pattern emerges: think tanks in liberal democracies are the least optimistic about sectoral growth compared to respondents in other political contexts (Table 2).

Again, the pattern holds when it comes to growth on an organisational level expectations: think tanks operating within closed autocracies are more likely to expect their own organisation to grow in the next 12 months, compared to those in other regime types.

5. It is important to note that all findings in this report reflect the think tank sample in our survey, and are not necessarily representative of the think tank universe as a whole.

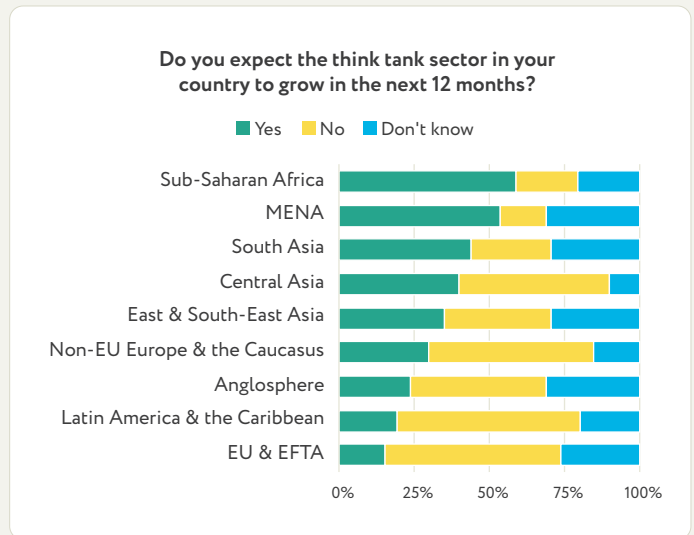
TABLE 2. EXPECTATIONS OF SECTORAL GROWTH, BY POLITICAL REGIME

Organisations that expect the think tank sector in their country to grow over the next 12 months (%)			
Closed autocracy	Electoral autocracy	Electoral democracy	Liberal democracy
61%	34%	31%	22%

EXPECTATIONS OF SECTORAL GROWTH, BY SUBREGION

At the subregional level, sub-Saharan Africa (59%) and MENA (54%) are the only categories where think tanks with optimism about sectoral growth are in the majority, while think tanks in the EU & EFTA, the Anglosphere, and Latin America & the Caribbean have the lowest expectations of growth (Figure 1). It is interesting to note that despite sub-Saharan African and South Asian think tanks being among the most affected by USAID funding cuts in early 2025 (prior to the dissemination of our survey), these are still the regions that report the highest expectations of growth – both for the sector as a whole and for their own organisations.

FIGURE 1. EXPECTATIONS OF SECTORAL GROWTH, BY SUBREGION



Survey sample: 333

DID YOU KNOW?

Despite being generally cautious about the growth of the sector as a whole, the think tanks we surveyed have much higher confidence in their own institutional future. We invite you to explore this and other insights, and investigate the factors behind them, by visiting onthinktanks.org/sos2025

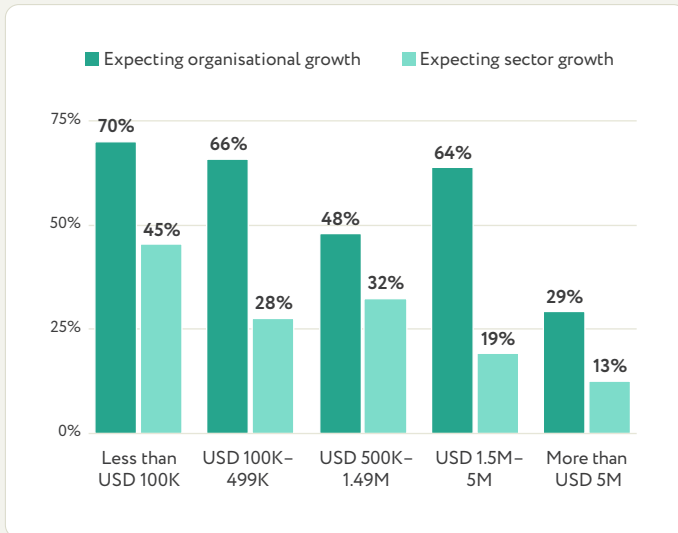
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EXPECTATIONS OF GROWTH, BY ORGANISATIONAL SIZE

When we analysed which variables might affect a think tank’s plans for growth – using high expectations of sectoral and/or organisational growth as a proxy for intentions to expand their own organisation – a particularly strong pattern appeared in relation to organisational turnover.

As Figure 2 shows, smaller think tanks – i.e., those with annual turnover under USD 100,000 – are more than twice as likely to expect growth as those with turnover above USD 5 million (70% vs 29%). This difference is statistically significant and highlights how institutional scale may affect a think tank’s plans for expansion.

FIGURE 2. EXPECTATIONS OF SECTORAL AND ORGANISATIONAL GROWTH, BY ANNUAL TURNOVER



Survey sample: 333

FIGURE 3. EXPECTATIONS OF SECTORAL/ORGANISATIONAL GROWTH, AND PERCEIVED APPRECIATION FOR RESEARCH EVIDENCE



Survey sample: 333

Like their larger counterparts, mid-sized organisations (turnover of USD 500,000–1.49 million) also report lower expectations of growth. This caution may reflect the unique challenges that medium-sized think tanks face: too small to benefit from economies of scale and too large to compete with smaller think tanks, which are often nimbler and more competitive.⁶

Other organisational variables, such as staff size, funding type (core vs project-specific funding), or main funding source (domestic vs international funders), do not significantly impact growth expectations, according to our survey data.

DOES A NATIONAL APPRECIATION FOR EVIDENCE AFFECT SECTORAL GROWTH EXPECTATIONS?

Organisations that perceive a higher appreciation for research evidence in their country are more likely to be optimistic about their own growth. When it comes to expectation for sectoral growth, there is an even starker difference: only 13% of respondents who disagree that evidence is valued in their country expect the sector to grow in the next year, versus 52% of those who strongly agree (Figure 3).

QUESTIONS FOR DISCUSSION

1. Does greater competition in saturated policy environments (e.g., the presence of consultancies, universities, advocacy groups) reduce the perceived relevance of think tanks – and space for their growth – in higher-income countries?
2. Is there a growing pessimism among think tanks in high-income democracies, driven by the rise of populist and anti-elitist sentiments that challenge their legitimacy and portray them as ideological or foreign-influenced?
3. Is the higher expectation of sector growth in lower-income countries due to the strategic role of think tanks in donor-driven development systems – where they serve as essential intermediaries in policy advice and implementation – or is there genuine local demand and support for think tanks in their own right?
4. Are positive growth expectations in lower-income countries reflective of a developmental trajectory, where think tanks are still expanding their networks, recognition, and influence in emerging policy environments?
5. What factors might explain the correlation between a higher perception of the value of research evidence within a country, and both institutional and sectoral growth expectations among think tanks?

6. Find out more about this topic here: <https://onthinktanks.org/resource/the-small-think-tank-trap/>

2

Think tanks report rising pressure from political polarisation: Most in Latin America & the Caribbean, least in MENA

Political polarisation is increasingly shaping the operational landscape for think tanks.⁷ In 2025, 36% of organisations report being “very much” or “significantly” affected by polarisation, up from 24% in 2024. This 12-point increase signals a growing challenge.

At the subregional level, respondents in the East & South-East Asia category reported the sharpest increase from last year (from 7% to 35%), followed by those in Latin America & the Caribbean (from 31% to 54%), the Anglosphere (from 22% to 41%), and sub-Saharan Africa (from 19% to 30%). These steep rises point to a deteriorating political environment for policy research.

Think tanks in the MENA region continue to report the lowest levels of impact overall, but still saw a stark rise from last year, with 15% affected this year compared to 0% in 2024.

By contrast, Central Asia saw a slight improvement since last year (from 40% to 30%), while in non-EU Europe & the Caucasus responses were relatively unchanged from 2024 (36% vs 35% in 2025; Figure 4).

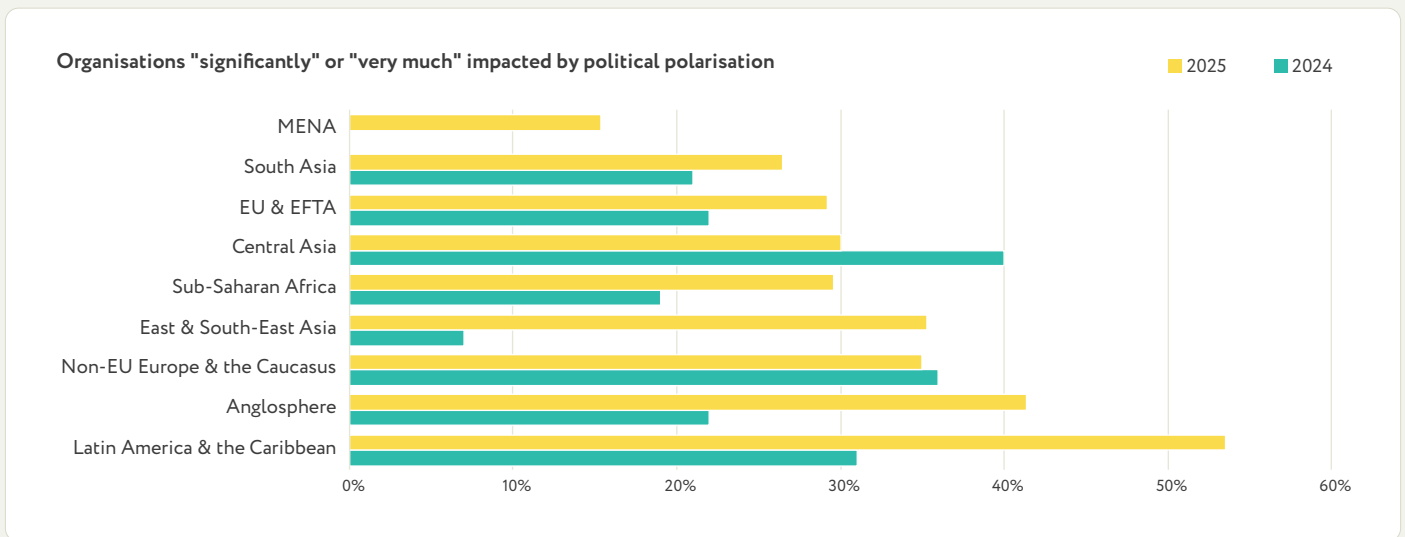
The 36% of think tanks that are very/significantly affected by polarisation reported multiple – often overlapping – impacts:

- 61% said it impacted the way they share research and engage with diverse audiences.
- 58% noted difficulties collaborating with policy experts from different political backgrounds.
- 44% found it impacted their ability to obtain funding.
- 26% reported an impact on their access to the media.
- 11% cited other effects, including staff safety concerns, reputational risks, or internal tensions.

The majority (64%) of affected think tanks reported two or more simultaneous impacts – most commonly disruptions to research dissemination and difficulties with collaboration.

We also explored how the effects of political polarisation intersect with broader, day-to-day operational challenges. Among think tanks that describe polarisation as affecting them “very much”, 37% also reported general difficulties operating over the past year – three times more than the 12% among those who felt they were “not at all” affected.

FIGURE 4. IMPACT OF POLITICAL POLARISATION (2024–2025), BY SUBREGION



Survey sample: 333

7. For the purposes of this report, 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

TRUST IN EVIDENCE HELPS MITIGATE THE EFFECTS OF POLARISATION

When we analysed the intersection of different variables in the survey data, an interesting correlation appeared between how think tanks experience the impact of political polarisation, and their perception of how research is valued within their ecosystem. Among think tanks that said research evidence is highly valued in their country (specifically, those who “strongly agree” that this is the case), only 19% reported being significantly affected by political polarisation. This figure rises to 52% among those who said they “disagree” that evidence is highly valued in their country, and even further to 60% among those who said they “strongly disagree”.

Furthermore, organisations that perceive evidence as highly valued in their country are also less likely to have faced general operational difficulties over the past year, according to our survey data. As shown in Figure 5, 50% of respondents who reported that evidence is *not* highly valued in their country (specifically, responses in the “strongly disagree” category) said that they found it either “hard” or “very hard” to operate, compared to just 12% of those in contexts that do value research evidence (based on responses in the “strongly agree” category)

Taken together, these patterns suggest that societal trust in evidence and the value of research creates an enabling environment for think tanks. Organisations in these contexts are better able to navigate political divides, which in turn cushions them from the negative impacts of polarisation, and fosters a protective ecosystem conducive to smoother operations.

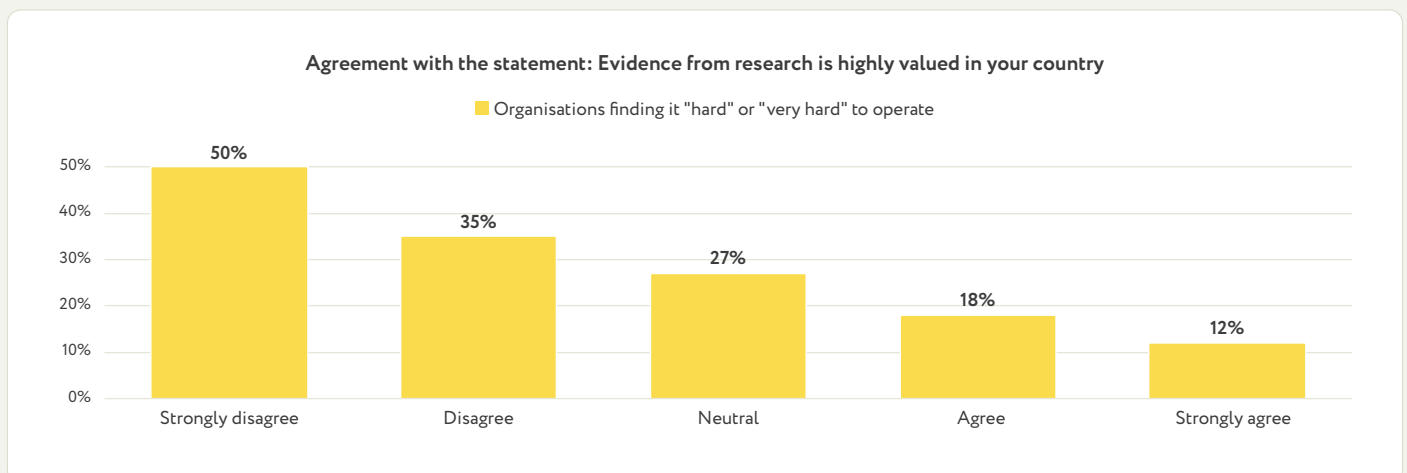
DID YOU KNOW?

Political and societal trust in evidence is not the sole preserve of democracies; our survey shows that evidence can also be highly valued in autocratic regimes. The perception that evidence is trusted, regardless of political context, can create entry points for think tanks to pursue influence and legitimacy, helping them to navigate even complex or restrictive environments. We invite you to explore this and other insights, and investigate the factors behind them, by visiting onthinktanks.org/sos2025

QUESTIONS FOR DISCUSSION

1. Does increasing political polarisation lead to pressure on think tanks – from political actors, donors, or the media – to align with specific ideological agendas, thereby reducing their institutional autonomy?
2. Is reduced funding from traditionally neutral sources pushing think tanks towards more partisan funding streams, thereby increasing their exposure to polarisation?
3. What explains the variations in the data across different subregions?
4. Are think tanks in more authoritarian regimes sheltered from the impacts of political polarisation due to the lack of ideological or electoral contestation?
5. In liberal democracies with a competitive think tank ecosystem, is there a risk of the credibility of evidence being undermined due to ideological fragmentation?

FIGURE 5. PERCEIVED VALUE OF EVIDENCE, AND OPERATIONAL DIFFICULTY



Survey sample: 333

Join the conversation! Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

3

Policy impact is strongest in both electoral democracies and electoral autocracies

A large majority of think tanks across the sample (70%) report having directly contributed to a specific public policy in the last five years. While slightly lower than last year (77%), this still reflects widespread policy engagement across the sector.

POLICY IMPACT BY SUBREGION

In our survey, most policy contributions were reported by think tanks in non-EU Europe & the Caucasus, Latin America & the Caribbean, and South Asia (Figure 6).

WHAT CONTEXTUAL FACTORS AFFECT A THINK TANK'S ABILITY TO INFLUENCE POLICY?

Policy impact by national income level

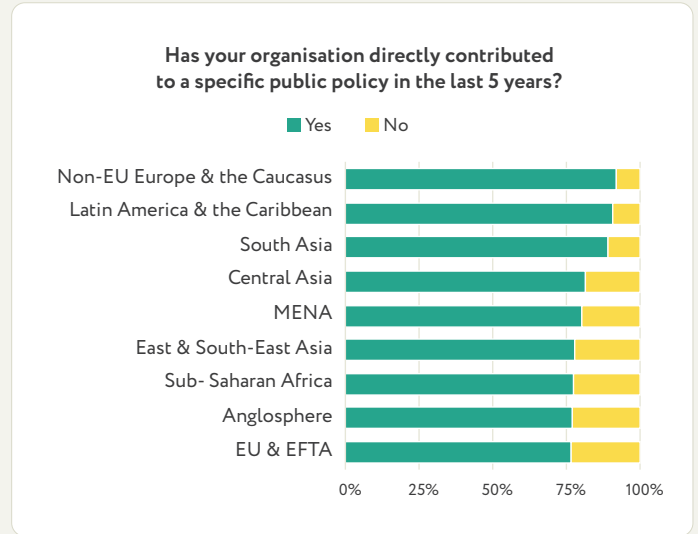
In terms of direct policy impact, organisations in low-income countries report the highest success rate (82%), followed by those in upper- and lower-middle-income settings (75% and 71% respectively). Think tanks in high-income contexts were the least likely to cite a policy impact in our survey data (62%). This relatively small difference may be related to the likelihood of there being more think tanks in higher-income contexts, thus leading to greater competition and more limited access to policymakers.

Policy impact by political and media context

Our survey shows that think tanks achieve significantly higher policy impact in countries where the media is generally receptive to their work. For example, among think tanks that said their national media is either “receptive” or “very receptive”, nearly 88% reported having had a direct influence on public policy over the last five years. In contrast, only 33% of those working in environments where they believe the media is “not at all receptive” say they have contributed directly to public policy. While this relationship is only marginally statistically significant, the contrast is stark and highlights the importance of media ecosystems as an enabler of visibility and influence.

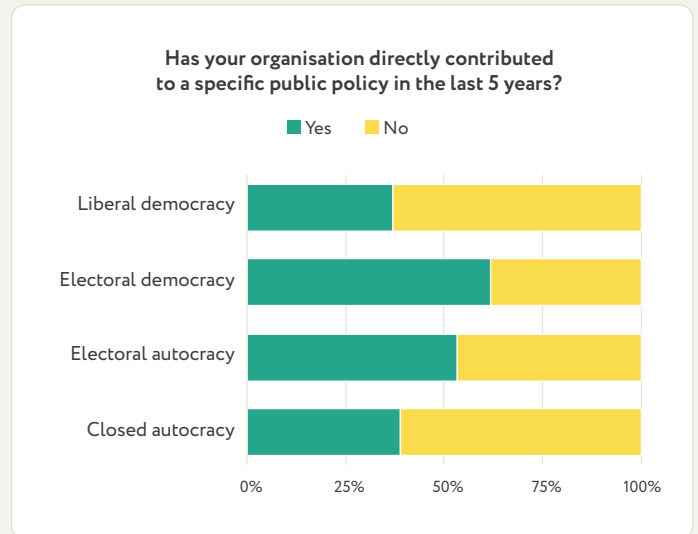
Our survey data shows high levels of self-reported policy impact, even among think tanks that describe their country’s political context as having been unfavourable (or “very unfavourable”) over the last 12 months. This may be partly explained by the different timeframes associated with the survey questions on policy impact and political context respectively: organisations were asked whether they had influenced public policy at any point during the past five years, while the question about political situations specified the last 12 months as a timeframe. This means that think tanks may be reporting impacts that do not align with more recent political shifts.

FIGURE 6. POLICY IMPACT ACROSS SUBREGIONS



Survey sample: 333

FIGURE 7. POLICY IMPACT BY POLITICAL REGIME TYPE



Survey sample: 333

We also found that reported policy impact is highest in electoral democracies and electoral autocracies. In contrast, liberal democracies and closed autocracies report lower (though still substantial) rates of impact (Figure 7). In the case of liberal democracies, this difference may be explained by higher competition and higher levels of political polarisation. For closed autocracies, the lower reported impact might relate more to restrictions on civic space and state control.

3

WHAT ORGANISATIONAL FACTORS AFFECT A THINK TANK'S ABILITY TO INFLUENCE POLICY?

To better understand what internal capacities or structures might support successful policy engagement, we expanded our analysis to explore possible correlations between a think tank's staff size, turnover, communications budget, and/or institutional structures, and its self-reported direct contributions to public policy over the past five years.

Among all the organisational predictors tested, only one variable emerged as statistically significant: organisations that maintain a dedicated monitoring, evaluation, and learning (MEL) team are roughly 2.5 times more likely to report having made a direct policy contribution, compared to their peers without such a team and with all other organisational variables constant.⁸ This suggests there could be a meaningful relationship between internal learning and assessment mechanisms and effective policy influence. However, an alternative interpretation is that think tanks with MEL teams are more likely to be able to identify, measure, and report cases of influence.

Meanwhile, other organisational factors – such as the presence of a board of trustees/directors, or specialist human resources or communications teams – do not significantly affect a think tank's level of policy influence according to our survey data, and nor do variables relating to funding source or modality.

Similarly, and somewhat surprisingly, we found there was no correlation between a think tank's communications spending and its reported policy impact.

DID YOU KNOW?

Think tanks target different audiences through a range of communication and engagement channels, outputs, and services. But not every organisation can invest in communications – when it comes to capacity in this area, size matters. We invite you to explore this and other insights, and investigate the factors behind them, by visiting onthinktanks.org/sos2025

QUESTIONS FOR DISCUSSION

1. Is the presence of a monitoring, evaluation, and learning (MEL) team a sign of enhanced organisational learning and adaptability for better policy engagement, or is the apparent correlation simply a reflection of more rigorous impact reporting?
2. Does a focus on visibility metrics – like media citations and social media engagement – lead think tanks to invest more in communications, even if this spending doesn't significantly increase their policy influence?
3. Does the political culture of a region explain variations in think tank influence better than income level or geography?
4. Are think tanks with MEL teams more likely to embrace donor language on accountability and evidence use, thus enhancing their perceived impact?
5. Do electoral democracies and electoral autocracies offer a strategic "sweet spot" for think tank influence – where political institutions are open enough to engage, but not yet saturated by entrenched interests or technocratic gatekeeping?

Join the conversation!
Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

8. Variables held constant: annual turnover; % of total budget allocated to communications; staff size; presence of other internal teams/divisions.

4

Think tank agendas largely align with public concerns, with key subregional gaps

We asked our survey respondents to identify up to three key policy issues that they believe think tanks in their country should focus on, if they could independently set the agenda. The responses reveal clear trends in terms of thematic preferences, shedding light on the topics that think tanks consider to be the most relevant and urgent in their local context.

The overall ranking of themes has remained relatively consistent over the last three years,⁹ with economics and governance once again taking the top two spots. However, international affairs/relations, which ranked third in both 2023 and 2024, was several places lower in this year’s ranking, representing a downgrading in its perceived priority (Table 3).

PRIORITY POLICY ISSUES, BY SUBREGION

While some subregions have retained their top-priority issue from 2024, others have shifted focus to reflect evolving political, social, and economic realities. Table 4 presents an overview of the top three priority issues cited by think tanks in each subregion for this year, as well as the top issue from 2024, highlighting where the agenda-setting landscape has remained stable and where it has undergone transformation.

TABLE 3. RANKING OF PRIORITY ISSUES, WITH 2025 RESPONSES (%) AND RELATIVE CHANGE FROM 2024

1 st	Economics (62%)	=
2 nd	Governance (44%)	=
3 rd	Environment & climate (36%)	↑
4 th	Education (33%)	↑
5 th	Social policy (32%)	=
6 th	Peace & security (32%)	=
	International affairs/relations (24%)	↓
7 th	Law & rights (24%)	=
	Technology/innovation (22%)	=
8 th	Gender (10%)	↓

DO THINK TANKS’ AGENDAS ALIGN WITH CITIZENS’ CONCERNS?

To answer this question, we expanded our analysis to include a number of public opinion surveys from credible, well-respected sources in the public domain. A comparative analysis of these data with the results from our think tank survey reveals both convergence and fragmentation in the priorities and agendas shaping different parts of the world (Table 5).¹⁰

TABLE 4. PRIORITY POLICY ISSUES 2024–2025, BY SUBREGION

Subregion	1 st (2025)	2 nd (2025)	3 rd (2025)	1 st (2024)	Comparison
ANGLOSPHERE	Economics	Social policy	Environment & climate	Economics	Same top priority
CENTRAL ASIA	Economics	Education	Law & rights	Economics	Same top priority
EU & EFTA	Environment & climate	Economics	Social policy International affairs/relations	International affairs/relations	Different top priority
EAST & SOUTH-EAST ASIA	Economics	Governance	Social policy International affairs/relations Peace & security	Environment & climate	Different top priority
LATIN AMERICA & THE CARIBBEAN	Economics	Governance	Education	Economics	Same top priority
MENA	Economics	Governance	Education	Governance	Different top priority
NON-EU EUROPE & THE CAUCASUS	Economics	Governance	Peace & security Law & rights	Peace & security	Different top priority
SOUTH ASIA	Governance	Economics	Environment & climate	Economics	Different top priority
SUB-SAHARAN AFRICA	Economics	Governance	Peace & security	Economics and Governance	Same top priority

9. Based on comparison with survey results in 2023 and 2024.

10. Data on think tank priorities was collected in May 2025, while the public opinion data is from various points between 2022 and 2024. While we still consider it a valid comparison, it should be noted that this slight misalignment represents a potential limitation in the analysis.

4

TABLE 5. THINK TANKS AGENDAS VS CITIZENS' CONCERNS, BY SUBREGION

Subregion	Alignment	Priority (think tanks)	Priority (public)	Public survey source
ANGLOSHERE	Aligns	Economics	Economics (inflation, cost of living)	Gallup World Poll 2023 and Ipsos 2024
CENTRAL ASIA	Aligns	Economics	Economics (unemployment, hardship)	Central Asia Barometer, Wave 12, 2022
EU & EFTA	Diverges	Environment & climate	Cost of living & energy prices	Gallup World Poll 2023 and Ipsos 2024
EAST & SOUTH-EAST ASIA	Aligns	Economics	Economics (cost of living)	Asian Barometer, Wave 6, 2023 and Gallup World Poll 2023
LATIN AMERICA & THE CARIBBEAN	Diverges	Economics	Crime & insecurity	Latinobarómetro 2023 and Barómetro de las Américas, LAPOP 2023
MENA	Aligns	Economics	Economics (unemployment, hardship)	Arab Barometer, Wave 7, 2024
NON-EU EUROPE & THE CAUCASUS	Increasing alignment	Economics	Economics (inflation, unemployment)	Balkan Barometer 2024
SOUTH ASIA	Partial divergence	Governance	Economics (inflation, wages)	Asian Barometer, Wave 6, 2023 and Ipsos 2024
SUB-SAHARAN AFRICA	Aligns	Economics	Economics (unemployment)	Afrobarometer, Round 10, 2024

QUESTIONS FOR DISCUSSION

1. Why do think tanks in the EU & EFTA prioritise climate and environment, while public opinion focuses on cost of living and energy prices? Could this emphasis be shaped by epistemic communities and elite-aligned funders, despite awareness of the public's concerns?
2. How should we interpret the gap between what think tanks in Latin America & the Caribbean identify as priority issues for their region (with economics most frequently mentioned) and the areas of greatest public concern, such as crime and insecurity?
3. Could a pluralist approach that engages diverse publics and redefines influence beyond formal decision-makers enhance the legitimacy and relevance of think tanks amid political polarisation and a fragmented funding landscape?
4. Are domestically and/or core-funded think tanks likely to be better aligned with national public concerns?

DID YOU KNOW?

According to most think tanks in our survey, local governments, policymakers, and international organisations have the most influence when it comes to setting the policy agenda. But what about citizens? We invite you to explore this and other insights, and investigate the factors behind them, by visiting onthinktanks.org/sos2025

Join the conversation!
Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

SOURCES OF FUNDING*

MOST COMMON SOURCES OF FUNDING PER SUBREGION

National foundations

- 50% Anglosphere
- 55% MENA
- 56% South Asia
- 54% non-EU Europe & the Caucasus
- 47% Latin America & the Caribbean

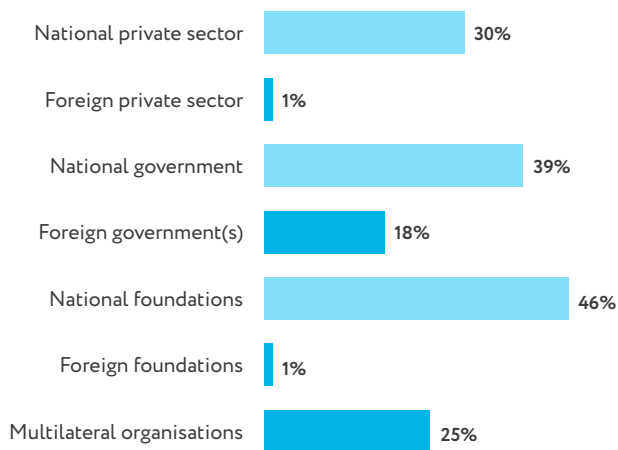
Multilateral organisations

- 45% sub-Saharan Africa

National government

- 52% East & South-East Asia
- 38% Central Asia
- 48% EU & EFTA

SOURCES OF FUNDING ACCESSED BY THINK TANKS (% OF GLOBAL TOTAL)



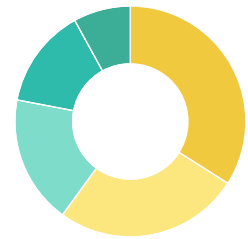
FUNDING CHALLENGES

- **Most think tanks (60–70%) are concerned about a shortage of new funding sources** – regardless of whether they rely on mainly international or domestic funding
- **Loss of funding has caused 70% of think tanks to reduce their operating expenses** and 40% to downsize their staff
- **37% of think tanks in high-income countries receive core funding**, versus only 10% in low-income ones

THINK TANK TURNOVER*

AVERAGE ORGANISATIONAL TURNOVER (% OF GLOBAL TOTAL)

- 34% Less than USD 100,000
- 26% USD 100,000–499,000
- 18% USD 500,000–1.49 million
- 14% USD 1.5 million–5 million
- 8% More than USD 5 million



60% of think tanks in the directory operate on less than half-a-million USD per year

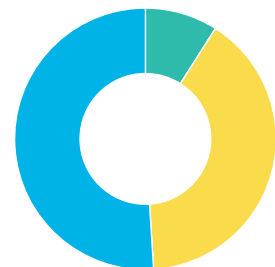
The EU & EFTA and Anglosphere subregions host over half of all think tanks with turnover above USD 1.5 million (27% and 25% respectively)

In sub-Saharan Africa and Central Asia there are almost no think tanks in this category (1% and 0% respectively)

INDIRECT COSTS

EASE OF COVERING INDIRECT COSTS

- 9% Easy
- 40% Hard
- 51% Moderate



Only 9% of organisations find it easy to cover indirect costs

Survey responses in the “easy” and “very easy” categories have been combined and are referred to here as “easy”. Similarly, responses of “hard” and “very hard” are referred to and shown in the chart as “hard”.

Think tanks that find it easy to cover indirect costs are in the minority in every subregion

In both MENA and Central Asia, not a single organisation finds covering indirect costs easy

Even among organisations that receive almost full core funding, the majority report that it is hard to cover indirect costs

5

Core funding: Highly sought after, hard to secure – and not a guarantee of organisational growth or strategic stability

Core funding is a critical concern across the sector – hard to find, and universally sought after for its perceived benefits. But how much of a lifeline is core funding, in reality, for the think tanks that manage to secure it?

PREVALENCE OF CORE FUNDING, BY NATIONAL INCOME LEVEL

Core funding is more prevalent in higher-income countries than in lower-income countries: **37% of think tanks in high-income countries report that their budget “mostly” or “almost entirely” core-funded, up from 27% in 2024.** A similar trend is visible in lower-middle-income countries, where the proportion of core-funded organisations has nearly doubled – from 9% to 16% – over the last year. By contrast, fewer than one in ten organisations in low-income countries receive core funding, with more than 60% still relying heavily on project-specific grants (Figure 8).

MAIN FUNDING TYPE, BY SUBREGION

Subregional funding profiles also vary significantly. Think tanks in the Anglosphere, EU & EFTA, and MENA subregions were most likely to report higher shares of core funding, while in South Asia, non-EU Europe & the Caucasus, and sub-Saharan Africa project-based funding proliferates (Figure 9).

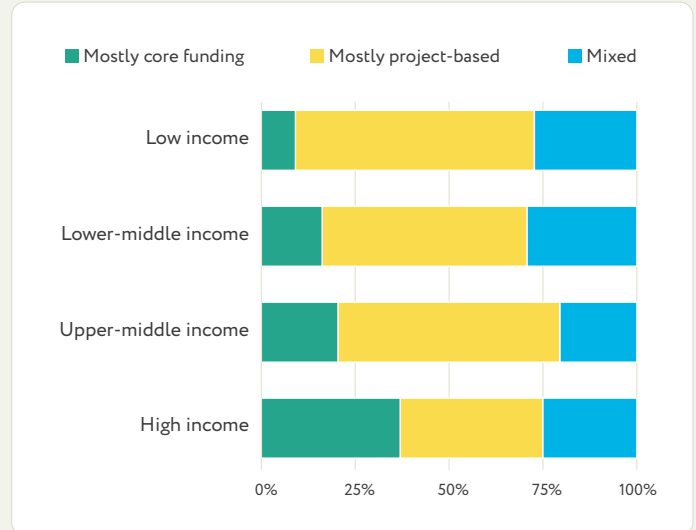
CORE FUNDING AND INDIRECT COSTS

But how does receiving core funding actually benefit a think tank? Organisations whose budgets consist primarily of core funding report higher indirect-cost rates, with a median of 30% compared to 20% for organisations that are funded on a project basis – a statistically significant difference.¹¹ This could be because organisations that receive core funding are able to commit to covering higher costs for indirect roles and functions (e.g. communications, business development, non-billable staff time, etc.).

Organisations that rely primarily on project-based funding often structure their teams around short-term contracts or consultancy models. In these cases, staff are expected to bill most of their available time to specific projects, leaving limited room for dedicated internal functions like communications, business development, or finance. As a result, such organisations tend to report lower indirect-cost rates.

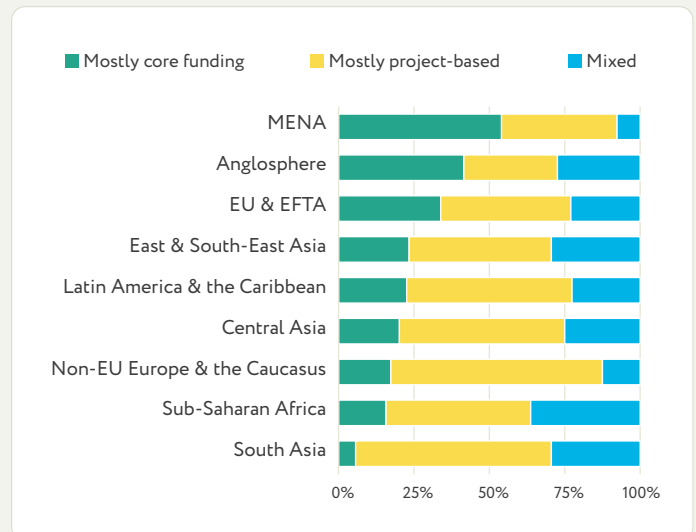
11. The indirect-cost rate is the ratio of an organisation’s indirect costs to its direct (project-specific) costs, and reflects the share of an organisation’s resources that is devoted to these essential, non-project-specific, functions.

FIGURE 8. MAIN FUNDING TYPE (CORE/PROJECT-BASED), BY NATIONAL INCOME LEVEL



Survey sample: 333

FIGURE 9. MAIN FUNDING TYPE (CORE/PROJECT-BASED), BY SUBREGION



Survey sample: 333

However, when it comes to covering these indirect costs, core-funded organisations report finding this only slightly easier than their peers without core funding, and the difference is not statistically significant. As Figure 10 shows, even among organisations that are almost entirely core funded, the majority say that covering their indirect costs is either “hard” or “very hard”. This suggests that while core funding may help with covering indirect costs, it is not a determining factor.

5

IN MOST SUBREGIONS, COVERING INDIRECT COSTS REMAINS A DIFFICULT TASK. VERY FEW ORGANISATIONS REPORT FINDING IT EASY

Covering indirect costs is a persistent challenge for most think tanks, transcending categories such as turnover and geographical location as well as the funding-type variables discussed above.

Indirect costs include essential functions such as finance, accounting, rent, leadership salaries, communications, business development, and administration. Such costs are integral to daily operations, and impossible to avoid: in a think tank, every time a researcher picks up a call from a journalist or has to deliver a presentation to a prospective funder, their time accrues as an indirect cost – as does any related expenditure, from travelling to meet the funder to paying for the telephone line, or for the software that creates the slide deck.

While think tanks report a global median indirect-cost rate of 29.5%,¹² fewer than 10% describe covering these costs as “easy” or “very easy”. Over half say it is “moderately difficult”, and nearly 40% find it “hard” or “very hard”. There is no subregion where “easy” is the view of the majority – indeed, in both MENA and Central Asia, not a single organisation gave this response.

These results point to a structural disconnect – even flexible funding is largely insufficient to cover all costs, and donor policies still fall short of what organisations need. In previous research,¹³ we found that most donors allow indirect cost ceilings of between 7% and 29%, with many clustering around 10–15% – far below the real institutional needs reported by think tanks globally. Without changes in both funding models and internal planning, financial sustainability will remain elusive for most of the sector.

12. While our survey uses a specific formula for calculating indirect-cost rates (indirect cost/direct cost), we acknowledge that think tanks may calculate it differently depending on their financial models. See Bianchi & Martinez (2024): [Indirect costs: Think tank strengthening and sustainability](#) for a discussion on the varying definitions and suggested best practice.
 13. Bianchi & Martinez (2024).

FIGURE 10. EASE OF COVERING INDIRECT COSTS, BY MAIN FUNDING TYPE (CORE/PROJECT-BASED)

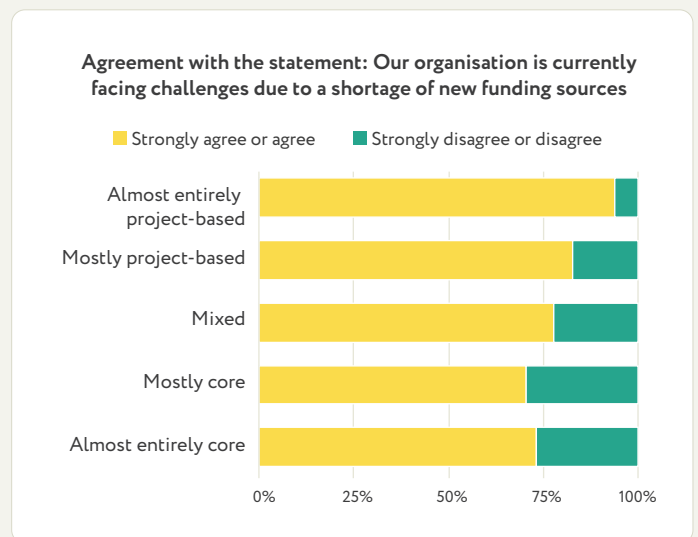


Survey sample: 333

CORE FUNDING AND ORGANISATIONAL OUTCOMES

The benefits of core funding are also limited when it comes to broader organisational outcomes: core funding does not guarantee institutional growth or stability, and there are no significant differences in terms of staff size, length of staff contracts, communications spend (as a percentage of total budget), or overall turnover compared to think tanks that are funded on a project basis.

FIGURE 11. FUNDING CHALLENGES, BY MAIN FUNDING TYPE (CORE/PROJECT-BASED)



Survey sample: 333

5

When it comes to funding challenges, the benefits of core funding also appear limited. Organisations with a larger share of core income report slightly fewer difficulties in securing new sources of funding compared to those that are mostly or entirely funded on a project-specific basis. However, these differences are not statistically significant, indicating that pressures to diversify income and secure new resources are widespread across all funding types.

| FUNDRAISING IS A KEY CAPACITY GAP

Likewise, the demand among think tanks for fundraising support is nearly universal, with no advantages apparent for core-funded organisations. Nearly two-thirds of think tanks, regardless of their funding structure, cited fundraising as an area where they would most benefit from skill-strengthening support – and while this was slightly higher among project-funded organisations (76%) than those with core funding (62%), the gap is not statistically significant. Even among organisations with the flexible resources entailed by core funding, therefore, many still identify fundraising as an area where they would benefit from support.

While fundraising was cited as the most pressing skills gap across all subregions, it was particularly high among think tanks in Latin America & the Caribbean, the EU & EFTA, and sub-Saharan Africa. The demand for fundraising support also remained steady at around 70% across organisations of all sizes and turnovers – from those with fewer than 10 staff and turnover under USD 100,000, to those with over 50 staff and multimillion-dollar turnover.

Taken together, these results suggest that the most obvious benefit of core funding is to provide think tanks with breathing room to invest in their organisations and respond to emerging needs – but it is not a panacea, and comes with no guarantee of blanket organisational expansion or financial resilience. Rather, these outcomes still depend on deliberate management choices and, often, on the donor mandates that can come with any grants, whether core or project specific.

QUESTIONS FOR DISCUSSION

1. Do informal expectations and accountability frameworks attached to unrestricted donor grants reduce the strategic flexibility core funding is meant to provide?
2. Does the emulation of foreign institutional models – without contextual adaptation – limit how think tanks in the Global South prioritise or apply core support towards internal development?
3. How do variables relating to governance structures (e.g., board composition, leadership centralisation) shape the internal allocation of core funding between strategic growth and operational maintenance?
4. Is it possible to deliver the benefits of core funding through better financial planning, budgeting, and more efficient project delivery?
5. Should think tanks, particularly those in lower-income countries, give up on the hope of securing core funding and focus instead of diversifying their sources and streams of income?

Join the conversation!
Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

6

Domestic money is not inherently more effective at supporting think tanks than international money; think tanks need smart responses to funding cuts, wherever they come from

SOURCE OF FUNDING (INTERNATIONAL/DOMESTIC), BY NATIONAL INCOME LEVELS AND SUBREGIONS

Think tanks in lower-income countries are primarily funded by international sources, whereas those in high-income countries are more likely to be funded domestically (Figure 12).

When it comes to domestic versus international funding, patterns diverge sharply across subregions. As Figure 13 shows, think tanks in the Anglosphere, MENA, and EU & EFTA rely predominantly on domestic funding. In contrast, foreign grants are the lifeblood of the sector in South Asia, sub-Saharan Africa, and non-EU Europe & the Caucasus, where roughly three-quarters of think tanks rely on international money rather than domestic funds. These findings align closely with equivalent patterns in the national income data.

It is important to note, however, that data from the MENA subregion are skewed by the Gulf countries, which are high-income and heavily resourced. This masks the fact that several low- and middle-income countries in the subregion may still rely predominantly on international funding.

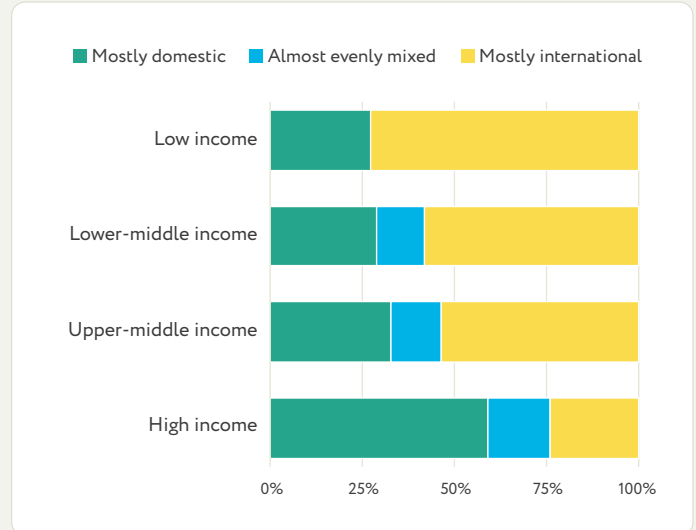
ARE THERE ANY ADVANTAGES TO DOMESTIC FUNDING?

Do domestically funded think tanks have any advantages over internationally funded ones? The data suggest not. For instance:

- Finding new funders is a concern for everyone. Most of the organisations in our survey (60-70%) said they face this challenge, regardless of whether their income is domestic or international in origin.
- Domestic money is not inherently more effective when it comes to covering indirect costs: our survey shows no strong association between a think tank’s ability to cover these costs and the origin of its main funding source(s).
- Most organisations reported stagnant or declining income over the past year, irrespective of their funding sources. While slightly more declines were noted by internationally funded organisations than by domestically funded ones, the pattern is not statistically significant.

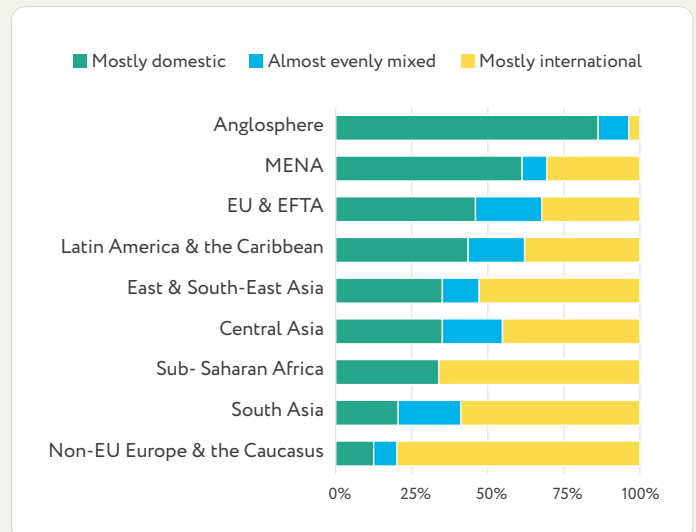
14. Find more about domestic funding and our interviews with think tank leaders here: <https://onthinktanks.org/articles/on-think-tanks-and-domestic-funding-the-series/>

FIGURE 12. SOURCE OF FUNDING (INTERNATIONAL/DOMESTIC), BY NATIONAL INCOME LEVEL



Survey sample: 333

FIGURE 13. SOURCE OF FUNDING (INTERNATIONAL/DOMESTIC), BY SUBREGION



Survey sample: 333

Yet beyond what the data show, there is qualitative and anecdotal evidence that domestic funding can be advantageous compared to reliance on international money. For instance, interviews with think tank leaders revealed that domestic funders are typically less demanding in terms of reporting requirements, more approachable, better aligned with think tanks’ agendas, and more likely to offer core funding and make longer-term commitments – even if this takes place through multiple short-term grants and projects.¹⁴

6

Moreover, with the sudden cancellation of USAID contracts ringing alarm bells across the sector, there is growing concern that international funding for think tanks in lower-income countries is unsustainable – and that efforts to replace it with domestic sources are long overdue.

DID YOU KNOW?

Most think tanks in our sample remained insulated from USAID’s sudden withdrawal. Still, our findings suggest that among those that did see an impact, this was felt most significantly in regions where think tanks rely primarily on international funding. We invite you to explore this and other insights, and investigate the factors behind them, by visiting onthinktanks.org/sos2025

QUESTIONS FOR DISCUSSION

1. Is the challenge of finding new funding sources – which is perceived similarly of both international and domestic funders – indicative of a global decline in philanthropic and governmental support?
2. Do think tanks in regions with less diversified funding ecosystems experience greater operational disruption from key donor withdrawals, regardless of their budget size?
3. Is organisational size or budget level a poor predictor of vulnerability to funding shocks compared to thematic focus and regional dynamics?
4. Does the reluctance of think tanks to pursue self-generated income suggest structural or cultural barriers to financial innovation within the sector?

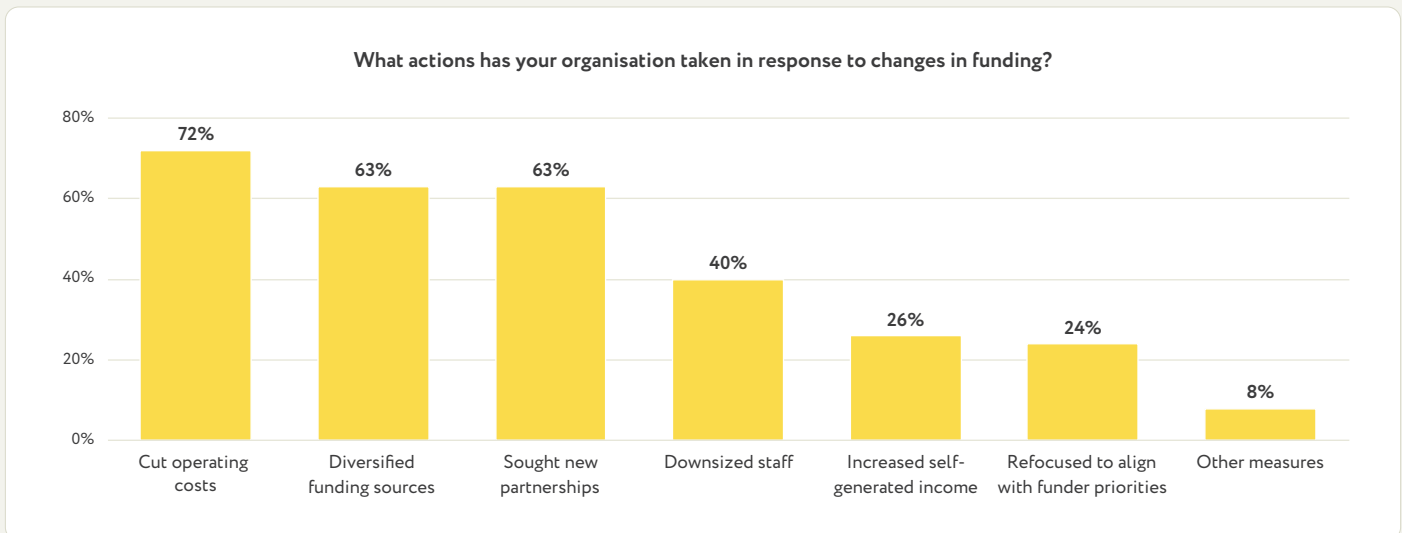
HOW DO THINK TANKS RESPOND TO FUNDING CUTS?

Our survey shows that when revenues shrink, think tanks reach first for cost-control and diversification levers: seven in ten say they cut operating expenses, and roughly two-thirds seek new funding streams or partnerships.¹⁵ Staff downsizing is a secondary, though still common, measure, as indicated by 40% of organisations.

Fewer turn to self-generated income or programme realignment in response to revenue loss, suggesting those strategies are more complicated to implement quickly or are viewed as last resorts (Figure 14).

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Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

FIGURE 14. ORGANISATIONAL RESPONSES TO FUNDING DECLINE

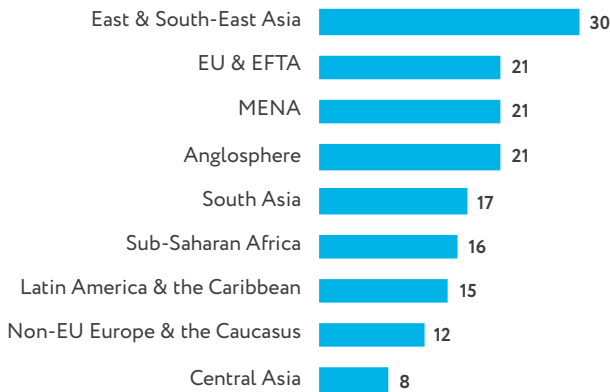


Sample: 116 based on organisations whose funding declined in the past year (total survey sample:333)

15. n=116, based on think tanks that indicated revenue decline in a previous question.

STAFFING

MEDIAN STAFF SIZE, BY SUBREGION*



Globally, think tanks employ a median average of **17 people***

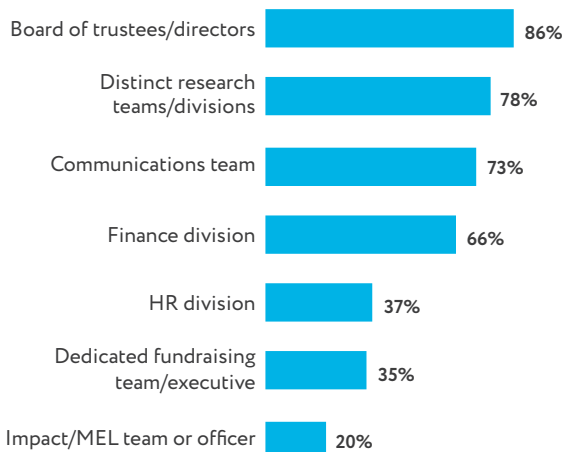
MOST REPORTED STAFF SALARY BANDS (MONTHLY)

- **Entry-level staff:** USD 1,500
- **Senior researchers:** USD 1,500–5,000
- **Leadership:** USD 1,500–5,000

- At senior levels there is a relationship between staff size and salaries, but entry-level salaries are typical across organisations of all sizes
- Leadership pay is higher in organisations with **higher turnover** and those that receive **core funding**

INTERNAL STRUCTURE

PREVALENCE OF SPECIFIC ORGANISATIONAL FUNCTIONS/TEAMS



PUBLICATIONS & SOCIAL MEDIA*

AVERAGE NUMBER OF PUBLICATIONS PER YEAR, BY SUBREGION

- **21.4** EU & EFTA
- **18.9** Anglosphere
- **16.2** East & South-East Asia
- **12.1** non-EU & the Caucasus
- **11.6** sub-Saharan Africa
- **10.3** Latin America & the Caribbean
- **9.8** MENA
- **9.4** South Asia
- **4.1** Central Asia

GLOBAL AVERAGE OF PUBLICATIONS PER YEAR



15.2

items published

MOST COMMON PUBLICATION TYPES (GLOBALLY)

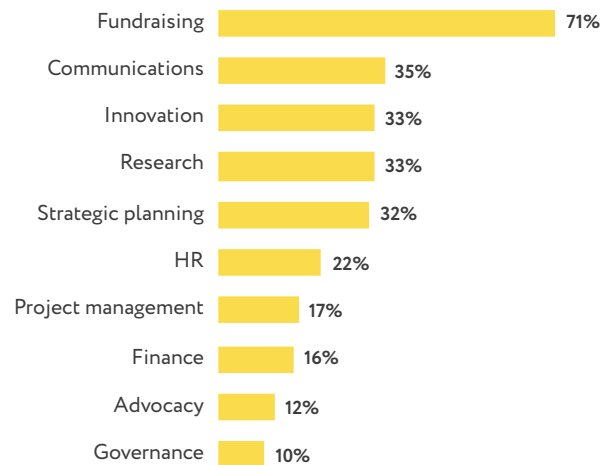
- Policy briefs** (77%)
- Full-length reports** (75%)
- Academic articles** (49%)
- Other formats** (44%)
e.g. blogs or infographics

SOCIAL-MEDIA PRESENCE (GLOBAL)

- X** (78%)
- Facebook** (74%)
- LinkedIn** (65%)
- Instagram** (44%)

CAPACITY NEEDS

AREAS IDENTIFIED AS CAPACITY STRENGTHENING NEEDS



71% of think tanks identify ability to **fundraise as a main capacity gap**, up from 66% in 2024

Think tanks without specialist HR teams are 23 percentage points more likely to identify this function as a key capacity gap

7

Unequal returns: Leadership salaries vary widely by subregion – and soar in better-resourced think tanks – but entry-level pay remains constant across the board

For the first time, the 2025 survey asked think tanks to report salary ranges for different staffing bands: entry-level positions, senior researchers, and leadership roles.

SALARY LEVELS BY SENIORITY

As expected, salaries across the sector follow a hierarchical structure. However, the data also reveal notable disparities, particularly at the top.¹⁶

- Entry-level salaries are typically within the lowest pay range (less than USD 1,500 per month),¹⁷ accounting for nearly 73% of responses to this question.
- Senior researchers’ salaries are more evenly spread, with most (45%) earning between USD 1,500 and USD 5,000 per month. A small elite, comprising around 6% of organisations, reports salaries above USD 7,000 for this role.
- Leadership salaries show the widest degree of variation, spanning all but the lowest of the six pay ranges we included in our survey question. While most organisations (29%) report paying USD 1,500–3,000 per month, 20% report paying USD 3,000–5,000, 15% report paying USD 7,000–10,000, and a few pay in excess of USD 10,000 (Figure 15).

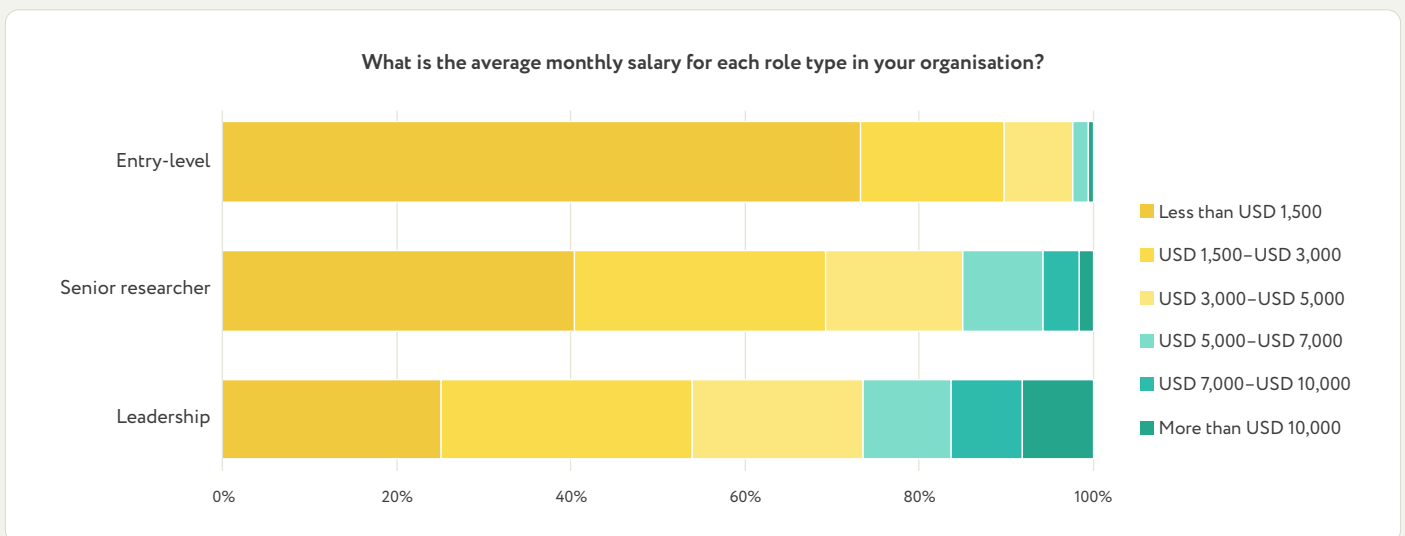
SALARY LEVELS BY ORGANISATIONAL CHARACTERISTICS

To better understand pay dynamics in the sector, we analysed how various organisational characteristics relate to salary differences across the staffing bands (entry-level, senior researchers, and leadership). We examined four key factors: leader’s gender; organisational size (measured by number of staff); annual turnover; and funding type (core vs project-based).

Our survey data show that:

- Salary outcomes do not appear to be affected by the **gender of a think tank’s leader**.
- **Organisational scale matters** – but not for everyone (Figure 16). Larger organisations (in terms of staff numbers) tend to provide better pay at senior levels:
 - Leadership salaries nearly triple from the organisation with the smallest teams (≤ 9 staff) to the largest (> 50).
 - A similar, but less pronounced, increase is observed for senior researchers.
 - Entry-level pay, however, remains flat.
- This suggests that as organisations scale, they prioritise salary increases at the top of the hierarchy.

FIGURE 15. SALARY RANGE, BY ROLE TYPE



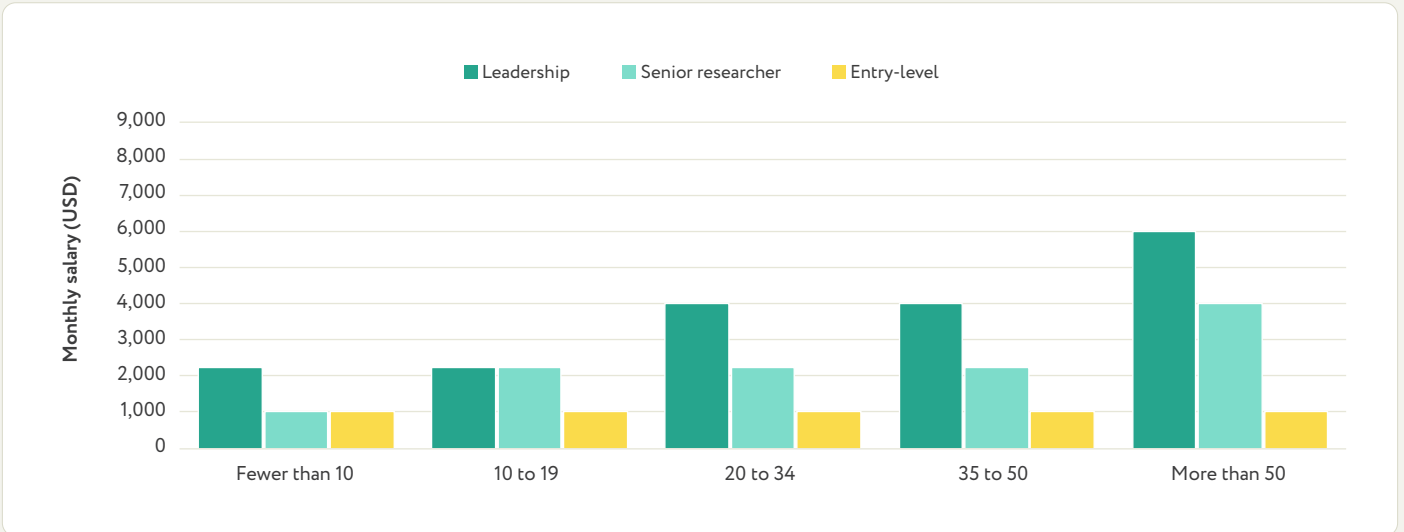
Survey sample: 333

16. As with all data presented in this report, readers are reminded that these findings are based on the think tank sample in our survey and do not necessarily reflect the wider think tank universe.

17. All values are expressed in current monetary terms (nominal) without adjusting for inflation or other factors that affect purchasing power.

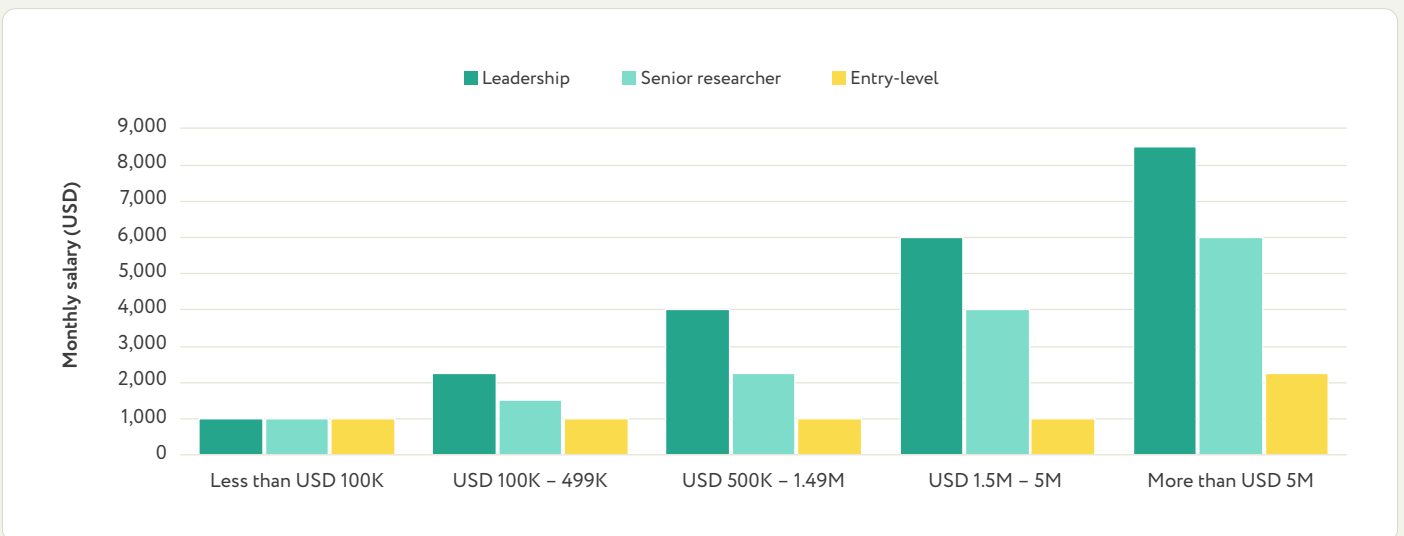
7

FIGURE 16. MEDIAN SALARY RANGE, BY ORGANISATIONAL SIZE (NUMBER OF STAFF)



Survey sample: 333

FIGURE 17. MEDIAN STAFF SALARIES, BY ORGANISATION TURNOVER



Survey sample: 333

→ **Annual turnover** is the most powerful salary driver observed in our data (Figure 17):

- Median leadership salaries jump from USD 1,000 in small-budget centres (turnover less than USD 100,000) to USD 8,500 in the top budget tier (turnover more than USD 5 million).
- For senior researchers, the median salary rises from USD 1,000 to USD 6,000 along the same trajectory.
- However, entry-level pay remains static until the top turnover tier, where it finally climbs to USD 2,250.

→ Leadership salaries are higher in think tanks that receive **core funding**, likely reflecting its role in attracting and retaining senior talent. However, the benefits of this budgetary flexibility do not trickle down to junior staff:

- Leadership pay is significantly higher in primarily core-funded organisations than in those that receive mainly project-specific funding (median salary of USD 4,000 vs USD 2,250). This gap is statistically significant.
- For senior researchers, salaries are essentially flat across both funding types; a slight variance can be seen, but this lacks statistical weight.
- Entry-level wages are uniformly low, regardless of the funding model.

7

SALARIES BY SUBREGION

Figure 18 shows disparities in median salaries across think tank roles in different subregions. At first glance, leadership compensation appears to range widely – from approximately USD 2,000 in subregions such as Central Asia to nearly USD 6,000 in the Anglosphere. Senior researchers’ salaries follow a similar pattern, though with slightly narrower margins. Entry-level salaries, by contrast, appear more consistent across subregions, clustering between USD 1,000 and 1,500.

However, it is important to note that the data are not adjusted for purchasing power parity (PPP). This means that direct comparisons across subregions may not reflect true differences in real income or living standards. Instead, the comparison in this report concerns the salary disparities *within* each subregion.

Viewed this way, the data suggest that salary gaps between leadership and junior roles are more pronounced in some subregions than others. For instance, in Latin America & the Caribbean, MENA, and East & South-East Asia, there is a steep internal pay hierarchy, with leadership salaries far outpacing those of junior staff. In contrast, subregions such as the EU & EFTA present a more compressed pay structure, offering relatively similar median salaries to both leadership and senior research staff.

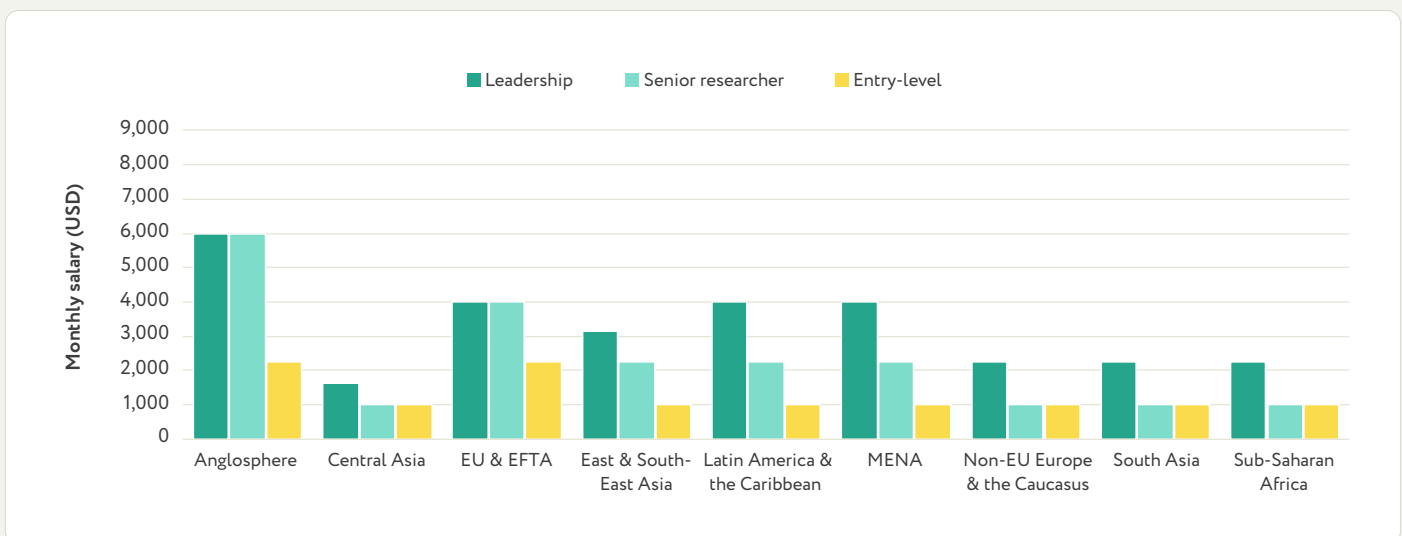
These internal dynamics may reflect variations in organisational models, labour norms, and funding structure. These factors shape how compensation is distributed across staff levels within a subregion, regardless of global income rankings.

QUESTIONS FOR DISCUSSION

1. Does access to core funding in higher-income contexts provide greater salary flexibility for leadership roles compared to project-based models?
2. Do their similar salary levels – transcending multiple organisational variables – suggest that entry-level staff are globally undervalued? Does this imply that junior roles are viewed as temporary? How is AI affecting prospects for entry-level staff in the sector?
3. Do steep salary hierarchies in subregions like Latin America & the Caribbean, MENA, and East & South-East Asia reflect elite-driven or externally funded models that prioritise leadership visibility over internal equity?
4. Is the compressed salary structure among think tanks in the EU & EFTA due to public-sector norms or university ties that favour flatter hierarchies and intellectual parity?
5. Are higher salaries in the Anglosphere linked to a commercialised model of policy advisory work influenced by market competition?

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Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

FIGURE 18. MEDIAN STAFF SALARIES, BY SUBREGION



Survey sample: 333

8

Beyond scale: Fundraising remains the most-cited capacity gap for think tanks globally – but this and other self-reported needs are connected to structural factors, not size

When we asked think tanks to identify areas and skills where they would benefit from capacity building, fundraising was once again the most-cited need, mentioned by 71% of organisations (up from 66% in 2024). Other priorities – such as strengthening communication and marketing, adaptation and innovation, and research capacity – trail at 33–35%, indicating that, although secondary, these are also persistent concerns. These patterns have remained relatively stable over the past two years.

Strategic planning remains a pressing capacity need, cited by approximately one-third of think tanks both this year and last. Human resources also stands out as a recurring challenge when it comes to skills gaps: while no data is available for 2024, over 22% of organisations indicated a lack of sufficient HR capacity in both this year’s survey and in 2023.

Meanwhile, some capacity needs were cited less frequently compared to 2024; for example, project management and financial management were mentioned by just 17% and 16% of think tanks respectively this year, compared to 23% and 20% in 2024. Similarly, advocacy, cited as a skills gap by nearly a

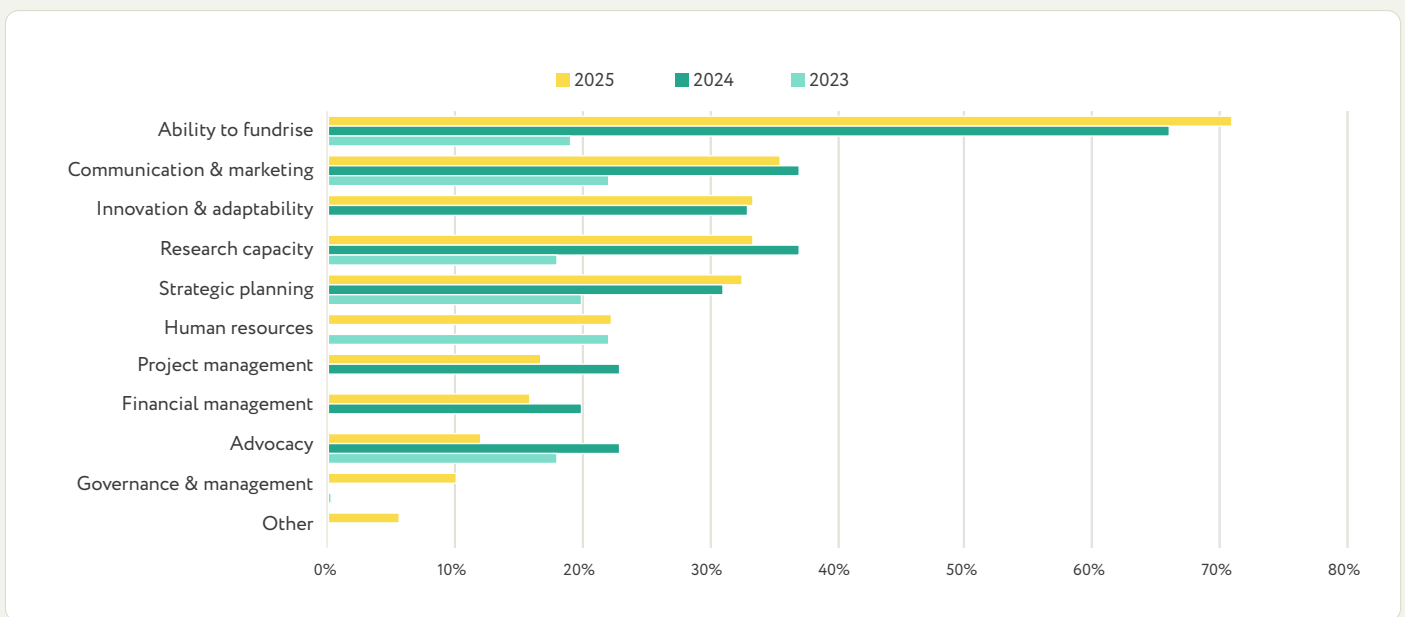
quarter of respondents in 2024, was only mentioned by 12% in 2025 (Figure 19). It is not clear whether these downward trends are indicative of improved skills/capacity in these areas, or simply reflect a shift of organisational priorities, with different needs becoming more or less pressing as internal and external contexts evolve.

Taken together, these findings suggest that the sector is increasingly preoccupied with securing funding, strengthening visibility, and building internal expertise.

The distribution of self-reported capacity needs across subregions reveals a mixture of common challenges and subregion-specific priorities. Fundraising is the most pressing need globally; research capacity and innovation/adaptability emerge as secondary, but widespread, priorities, especially in the MENA, South Asia, and Central Asia subregions. This suggests a broader need to strengthen technical expertise and adapt to changing policy environments.

Communications/marketing also features prominently in several subregions, while both governance and advocacy receive relatively little attention across the board. However, the number of think tanks reporting a need for HR support surged in the EU & EFTA and Latin America & the Caribbean – and to a slightly lesser extent in non-EU Europe & the Caucasus and Central Asia – which could be linked to institutional growth and professionalisation efforts in these organisations.

FIGURE 19. SELF-REPORTED CAPACITY-BUILDING NEEDS (2023–2025)



Survey sample: 333

8

Interestingly, neither staff size nor total annual turnover emerged as reliable predictors of think tanks’ self-identified capacity needs. This challenges the notion that larger and/or better-funded organisations are inherently more self-sufficient; instead, the data reveal that organisational capacity gaps are connected to an institution’s structural characteristics, but not to its size.

One decisive factor that emerged from our analysis was the presence, or absence, of core functional teams. Think tanks lacking dedicated units for human resources or finance consistently cite these domains as areas of need in terms of capacity and skills strengthening – highlighting a critical link between internal operating structures and organisational resilience.

For example, among organisations without a human resources unit or team, 78% identified HR as a key skills gap – 23 percentage points higher than those with such a team. Similarly, the absence of an internal finance function is associated with a 17-point increase in the need to strengthen financial management skills, and a 19-point increase in demand for capacity building around adaptation and resilience. The latter is particularly interesting, as it suggests that thin financial infrastructure may weaken an organisation’s broader capacity to navigate uncertainty and change.

Finally, we also found that NGO-style think tanks are significantly more likely to identify a need for strengthening their research capacity – perhaps reflecting their distance from academic networks and training pipelines.

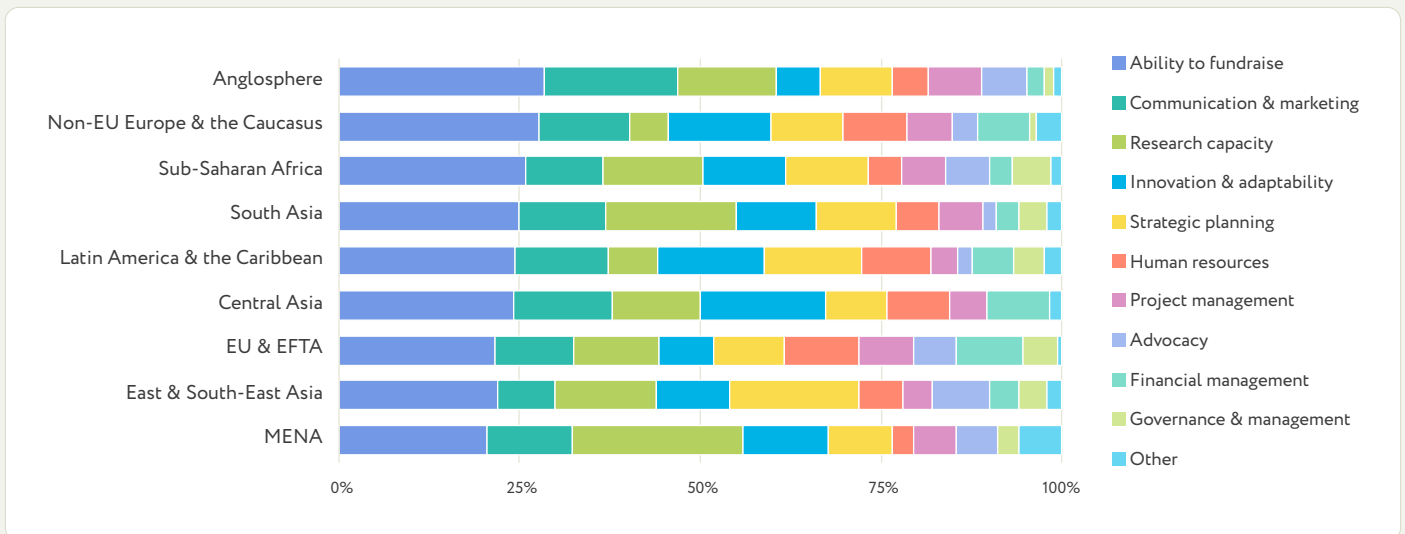
In sum, think tanks’ capacity shortfalls are not a matter of scale, but are deeply tied to institutional design. In particular, the lack of core administrative structures – rather than the size of an organisation – appears to be the most reliable predictor of operational vulnerability in terms of self-identified capacity gaps.

QUESTIONS FOR DISCUSSION

1. Are internal administrative structures – such as the presence or absence of specialist HR and finance units – better predictors of institutional resilience than external factors like donor recognition or publication output? Do external evaluations of think tanks overlook internal organisational and capacity weaknesses that are obscured by size, brand, or visibility?
2. Would focusing support on specific structural gaps (e.g., finance, HR, research management) be more effective than providing general support based on size or location?

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FIGURE 20. SELF-REPORTED CAPACITY-BUILDING NEEDS, BY SUBREGION



Survey sample: 333

AI USE

THINK TANKS ARE USING AI FOR

- Communications** (49%)
- Research** (46%)
- Administration** (30%)
- Fundraising** (19%)
- Other** (5%)

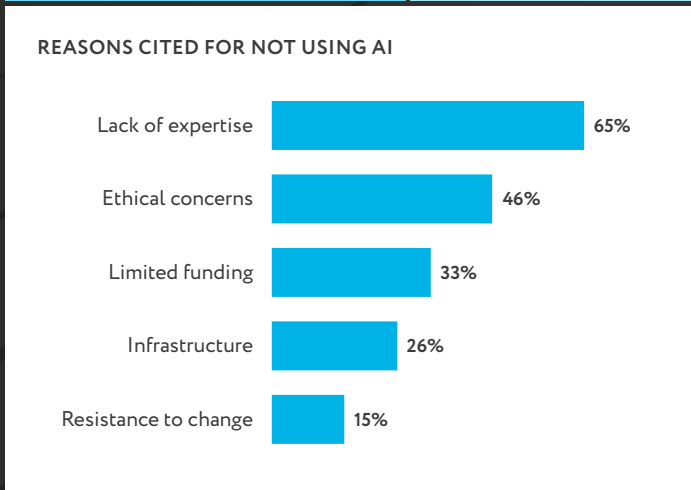
The percentage of think tanks that report **using AI increased from 57% in 2024 to 71% in 2025**

HIGHEST AI USE, BY SUBREGION

- **83%** EU & EFTA
- **77%** East & South-East Asia

LEAST AI USE

- **54%** MENA
- **50%** South Asia



Reasons cited by think tanks that are not using AI include **lack of expertise** (65%) and **ethical concerns** (46%)

DIVERSITY, EQUALITY & INCLUSION (DEI)

34% of think tanks do not have any documented DEI policies

Think tanks that receive international funding are **twice as likely to have DEI policies** compared to domestically funded organisations (79% vs 56%)

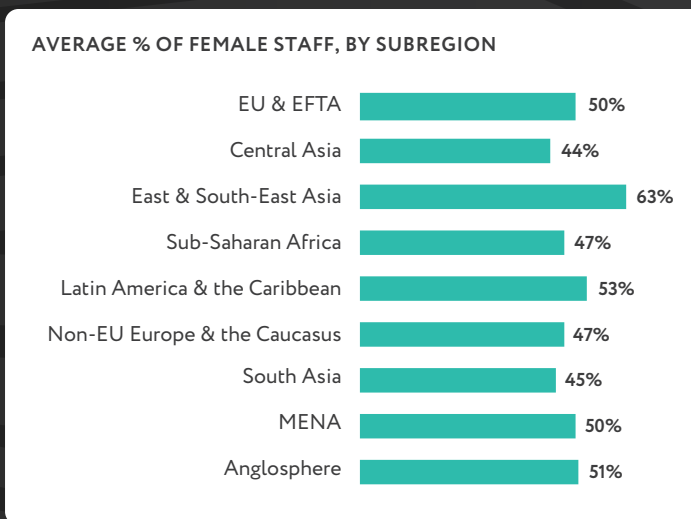
AMONG THINK TANKS WITH DEI POLICIES (66%), THESE ARE FOCUSED ON

- Gender** (64%)
- Race/ethnicity** (41%)
- Disability** (34%)
- Age** (33%)
- Social class** (29%)
- Language** (20%)

THINK TANKS IMPLEMENT THEIR DEI POLICIES THROUGH

- Organisational practices** (87%)
- Hiring processes** (74%)
- Project design/implementation** (65%)
- Communications/outreach** (56%)
- Research design** (46%)

GENDER*



Globally, think tank staffing is essentially gender balanced

Median average: 50% women

However, **fewer than 1 in 3 of the world's think tanks are led by a woman**

SUBREGION WITH THE MOST FEMALE-LED THINK TANKS

Latin America & the Caribbean (41%)

SUBREGION WITH THE FEWEST FEMALE-LED THINK TANKS

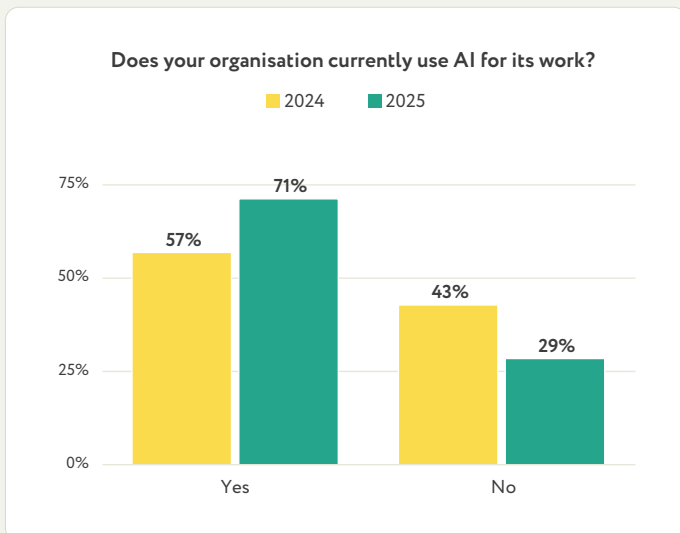
East & South-East Asia (9%)

9

The emerging AI divide: Uptake is driven by geography and context – not by organisational factors

Compared to last year, the 2025 data show a notable increase in the number of think tanks adopting artificial intelligence (AI) tools in their work. In 2024, 57% of surveyed organisations reported using AI in their work, while by 2025, this had risen to 71% (Figure 21). This 14-point increase within a single year is a strong indicator of growing interest in, experimentation with, and capacity for AI technologies across the sector.

FIGURE 21. USE OF AI TOOLS (2024–2025)



Survey sample: 333

APPLICATIONS OF AI USE

The shift towards wider uptake of AI technologies may reflect broader global trends in digital adoption, the increasing accessibility of new tools, or a growing recognition of AI’s potential in areas such as research automation, communications, and policy analysis.

When we asked think tanks *how* they have been using AI in their work, the following emerged as the most common applications:

- Communications (49%) – for drafting, editing, translation, and audience profiling
- Research (46%) – for data analysis, literature review, and writing support
- Administration (30%) – including scheduling, HR tasks, and internal reporting
- Fundraising (19%) – such as donor research or writing proposals
- Other areas (5%) – such as training

Among the organisations that do not currently use AI (29%), the main reasons cited for this were:

- **65% lack of in-house expertise**
- **46% ethical concerns**
- **33% limited financial resources.**

Less common responses, but still present were:

- **26% infrastructure gaps**
- **15% resistance to change.**

Most respondents reported more than one barrier to the adoption of AI within their organisation. Notably, lack of expertise was almost always cited alongside other reasons, highlighting that skills are the cornerstone of readiness.

These findings suggest that when it comes to AI, the sector needs more than just tools or funding. Instead, practical training, ethical guidance, and targeted capacity-building efforts are required to break down the most common barriers and support the responsible adoption of AI.

AI USE BY ORGANISATIONAL CHARACTERISTICS

To identify potential predictors of AI use among think tanks, we analysed a number of variables, namely: average staff age, funding type, average team size, annual turnover, and the proportion of researchers with PhD qualifications. None of these variables revealed a statistically significant relationship. For example:

- Organisations with younger staff (higher % under the age of 35) are not more likely to adopt AI.
- Annual turnover and team size have no predictable relationship to an organisation’s use of AI or otherwise.
- The proportion of staff with PhDs is nearly identical between organisations that do use AI and those that do not (27% vs 29%).

DID YOU KNOW?

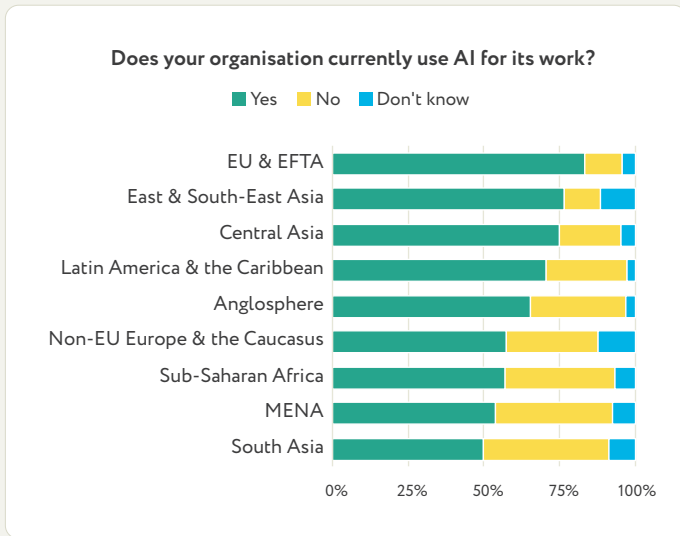
It is not who you are but where you are: a think tank’s use of AI depends far more on its external context than internal organisational factors.

9

AI USE BY SUBREGION

Conversely, when we analysed AI usage by *subregion*, the differences became significant. Think tanks in the EU & EFTA lead the field, with 83% reporting that they use AI, followed by those in East & South-East Asia (77%). In contrast, only 50% of organisations in South Asia and 54% in the MENA subregion use AI tools according to our survey – highlighting an emerging geographic digital divide (Figure 22).

FIGURE 22. USE OF AI, BY SUBREGION



Survey sample: 333

- QUESTIONS FOR DISCUSSION**
1. Can disparities in the uptake of AI technology be reduced through donor strategies that include AI-related capacity building and address infrastructure gaps in lower-income regions?
 2. Do data protection regulations and digital rights frameworks create operational or ethical challenges for think tanks adopting AI?
 3. Is the geographic divide in AI adoption more reflective of disparities in national innovation systems than in organisational readiness?
 4. Are external factors, such as infrastructure and ecosystem support, more influential in AI uptake among think tanks than internal features like budget and staff size?
 5. Does the divide in AI use along geographic and national-economy lines represent a new form of inequity in the global knowledge system?

AI USE BY NATIONAL INCOME LEVEL

When we looked at the pattern of AI uptake across different national income contexts, a similar divide emerged. **Three-quarters of think tanks in high-income countries report using AI tools in their work, compared to about two-thirds in middle-income contexts and fewer than half in low-income settings.** This statistically significant pattern underscores the role of broader national infrastructure and resources in enabling organisational-level AI use.

Our findings suggest that efforts to foster AI use in policy research should focus less on internal levers and more on broader contextual enablers – particularly digital infrastructure, regional learning networks, and accessible training opportunities. European centres, which are leading the way in AI adoption, can serve as practical reference points for peer exchange and capacity-building in lagging regions.

Join the conversation!
 Explore these and other questions and hypotheses from our partners and OTT by visiting onthinktanks.org/sos2025

10

An uneven landscape: Subregional context and international funding drive commitments to DEI policies, but implementation and results are internally focused

Our survey data reveal that the principles of diversity, equity, and inclusion (DEI) are not yet fully embedded across the think tank sector. While some progress is evident, particularly around gender issues, many organisations still lack a comprehensive and explicitly implemented DEI policy.

The concept of DEI applies across multiple dimensions of identity, personhood, and other categories of belonging, but organisational policies are usually based on a set of core characteristics that are typically protected by law, such as gender, race, age, disability, and so on. We asked think tanks which of these areas were covered by an explicit written DEI policy within their organisation. Gender emerged as the most common dimension to be addressed within these policies, with 64% of organisations reporting at least one active measure aimed at promoting gender equity.

Other dimensions, such as race/ethnicity (41%), disability (34%), and age (33%), were seen to receive moderate attention within organisational DEI policies, pointing to some efforts towards broader inclusion. However, social class (29%) and language (20%) are much less commonly incorporated into DEI practices, suggesting that these aspects may remain underexplored, or have been deprioritised, by many organisations.

However, 34% of the surveyed organisations answered “None of the above” in relation to this question, indicating that they do not have any explicit written DEI policies at all.

DEI POLICIES BY SUBREGION

With 34% of our sample indicating the absence of any written DEI policies, we analysed three additional variables (staff size, annual turnover, and subregion), to better understand the factors associated with this gap.

The results show that a think tank’s geographical location is a much stronger predictor of institutional engagement with DEI than either its staff size or turnover. Although larger organisations and those with higher turnover are more likely to have DEI policies according to simpler analyses of our data, these factors are no longer statistically significant once we control for subregional variation.

In contrast, when it comes to geographical location, a robust and significant association emerged - with interesting and unexpected results. Among the think tanks that *do not* have any formal DEI policies according to our survey, the lowest proportion are located in sub-Saharan Africa, and the highest fall within our Anglosphere category. The fact that the latter subregion also has the highest average turnover and largest staff sizes challenges the assumption that inclusive practices are more common in larger and better-resourced organisations.

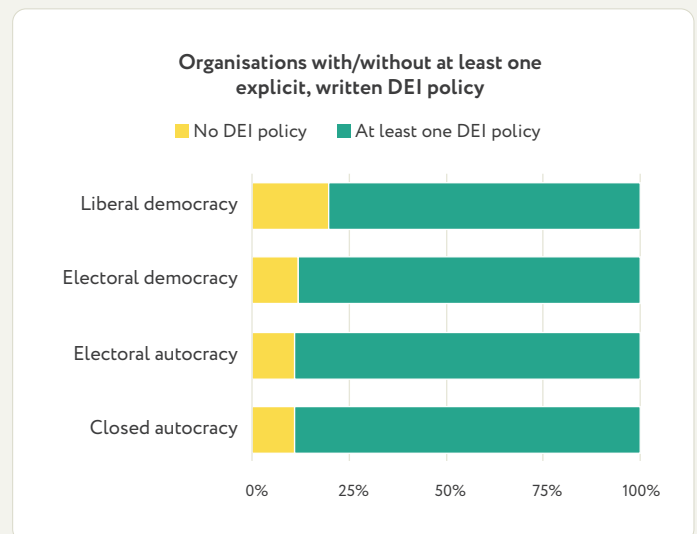
DEI POLICIES BY NATIONAL INCOME LEVEL

When we expanded the model to include national income level, we found that organisations based in low- and middle-income countries (both upper- and lower-tiers) are significantly more likely to have formal DEI policies compared to those in high-income countries. This aligns with the above subregional findings, and underscores the insight that well-resourced contexts - whether at national or organisational level - do not necessarily imply widespread engagement with formal DEI policies.

DEI POLICIES BY POLITICAL REGIME TYPE

When we analysed the existence or otherwise of formal DEI policies in think tanks operating under different political regimes, we found that DEI policies were *least* prevalent among organisations based in liberal democracies (Figure 23). Although the difference with other regime types was relatively small, this finding nonetheless supports the somewhat counterintuitive pattern already seen in the data on subregional and national-income contexts: think tanks in high-income, Anglocentric, liberal democracies are less, rather than more, likely to have formal organisational DEI policies.

FIGURE 23. ORGANISATIONS WITH DEI POLICIES, BY POLITICAL REGIME TYPE



Survey sample: 333

10

DEI POLICIES BY SOURCE OF FUNDING (INTERNATIONAL VS DOMESTIC)

Think tanks that rely primarily on international funding are significantly more likely to have formal DEI policies compared to their domestically funded counterparts (79% vs 56%).

International funding is often tied to donor requirements that explicitly include expectations around diversity, equity, and inclusion, and these principles are frequently embedded within reporting frameworks, grant conditions, and institutional policies with which grantees must comply. In contrast, domestic funding tends to come with fewer external demands, which may result in lower incentives for organisations to formalise their DEI commitments.

IMPLEMENTATION OF DEI POLICIES

When it comes to implementation, think tanks with formal DEI policies tend to focus on internal systems and human resources, and report only limited application to their research and other activities. According to our survey, 87% of organisations with at least one formal DEI policy apply it to their internal organisational practices, and 74% to their hiring processes. Meanwhile, 62% integrate DEI into their project cycles and 56% into communications; while only 46% apply DEI principles to their research design. This suggests that DEI is most embedded within organisations' internal systems and staff management, and that its influence on knowledge production remains underdeveloped.

Of the organisations with DEI policies, half reported implementing them across three or more areas, while a quarter said they are applied over five or all six domains, showing that DEI is typically embedded relatively widely at the intra-organisational level.

Respondents were asked to select from the following areas to indicate how their DEI policies are being implemented:

- Organisational practices
- Projects
- Hiring processes
- Research design
- Communications
- Other

We also asked think tanks about the results they have observed since implementing DEI policies. These responses indicate that the most visible outcomes are internal: 57% report seeing positive changes in organisational culture, including improved values, workplace environment, and interpersonal dynamics. Similarly, 53% note an increase in overall staff diversity.

Elsewhere, however, progress in achieving DEI outcomes appears to be slower, with only 43% of organisations reporting greater diversity in leadership roles, and just 36% seeing stronger engagement from underrepresented groups among their external stakeholders. Meanwhile, 10% of organisations with formal DEI policies report seeing no clear outcomes since their implementation.

QUESTIONS FOR DISCUSSION

1. Will the withdrawal of USAID funding have an impact on the wider donor ecosystem, in terms of its emphasis on diversity, equity, and inclusion (DEI)? Could a reduction in donor focus on DEI lead to a decline in its formal policy adoption among think tanks – especially in contexts where domestic funding is unlikely to include equity conditionalities?
2. Do regional political histories and donor legacies – such as post-colonial dynamics – play a more significant role in shaping DEI practice among think tanks than other factors, like budget size or staff characteristics?
3. Is there a link between leadership diversity and more comprehensive DEI engagement in research and communication?
4. Do donor-driven DEI expectations lead to genuine institutional change, or mainly formal compliance?
5. Do different types of think tanks – such as advocacy-based, academic, or government-embedded units – have different capacity levels when it comes to pursuing ambitious DEI strategies?

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The On Think Tanks State of the Sector Report 2025 presents a nuanced view of today's think tank sector – a landscape shaped by uneven optimism and mounting political pressures. A key finding is the central role that the perceived value of evidence plays across the sector. Think tanks working in environments where research evidence is respected are markedly more optimistic – both about their own institutional future and about the sector as a whole. They also display greater resilience in the face of political polarisation and operational challenges.

This pattern holds across political regimes: from liberal democracies to closed autocracies, think tanks thrive when evidence is viewed as credible and useful. A think tank in an authoritarian context can succeed if its evidence is valued, while one in a democracy may falter if evidence is dismissed.

This insight is increasingly relevant as global polarisation deepens. The share of think tanks reporting severe impacts from political polarisation in their national context rose by 12 percentage points in a single year – from 24% in 2024 to 36% in 2025. Political polarisation affects dissemination, partnerships, and media access. Yet organisations in evidence-valuing contexts report significantly fewer disruptions, suggesting that trust in research can buffer them against fragmentation.

FUNDING DYNAMICS: BEYOND CORE SUPPORT

Funding, once seen as the primary driver of organisational strength, presents a more complex part of the picture. Both core funding and funding that is domestic in origin remain beneficial – but they are no longer sufficient to guarantee resilience or strategic clarity. Even among core-funded think tanks, covering indirect costs remains challenging.

A broader shift is needed towards funding models that prioritise mission and long-term impact. For think tanks, this requires a clear understanding of real indirect costs and candid engagement with funders on sustainability. For donors, it calls for reduced reporting burdens, more flexible arrangements, and more sustained partnerships. Funding alone is not enough; trust and strategic alignment are essential. Flexible funding should empower institutions to lead with strategy rather than merely survive through deliverables.

INTERNAL STRUCTURES AND RESILIENCE

This year's report highlights that internal structures are crucial to resilience. Capacity gaps are connected to an organisation's structure rather than its size: think tanks with dedicated HR and finance teams report far fewer skills gaps in those areas, and may be less likely to require external support.

Fundraising remains the most pressing capacity challenge worldwide, with nearly three-quarters of think tanks (regardless of size or funding) reporting a need for stronger skills in this area. This suggests that capacity-building support should be allocated based on a more nuanced organisational profile that takes account of internal structure and systems, rather than simply geographical location or size.

AI AND THE NEW DIGITAL DIVIDE

AI adoption is rising sharply: 71% of organisations now use AI tools, up from 57% in 2024. However, uptake is uneven. Internal factors such as budget, team size, or average staff age have little influence, but context is a robust and significant indicator. In high-income countries, almost three-quarters of think tanks use AI, compared to fewer than half in low-income settings, underlining concerns about a growing digital divide. Our survey shows the gap is not about motivation, but about access to training and infrastructure, and supportive ecosystems.

To ensure responsible adoption, investment must go beyond toolkits or pilot projects. The sector needs robust digital infrastructure, ethics training, and regional learning networks, to prevent AI use from contributing to – and deepening – existing inequalities in research and policy influence.





LOOKING AHEAD

The sector must move beyond simplistic debates (such as domestic vs international funding or core vs project-based support) and focus on building robust, mission-driven models that can withstand political, financial, and technological shifts.

Ultimately, this report reaffirms that strategic clarity, strong internal systems, and societal trust in evidence remain the most powerful levers of think tank effectiveness. In an era of rising uncertainty and inequality, these are the foundations on which a stronger, more resilient sector must be built.

For this edition, we partnered with 25 organisations from different regions of the world. These partners were instrumental in shaping the 2025 report: they helped with the pilot survey; expanded the survey's reach through their networks, increasing both sample size and breadth of representation; and analysed survey data from their respective national and regional perspectives. Additionally, 19 of our partner organisations produced insightful blogs and short reports based on our findings, contributing critical and fascinating local context to this global data.

■ ANGLOSPHERE

-  **Quincy Institute** (USA)
 -  **Do US think tanks have a financial disclosure problem?**, Nick Cleveland-Stout – Research Associate
-  **Results for Development/ Governance Action Hub** (USA)
 -  **Between polarization and purpose: How think tanks navigate shrinking neutral ground**, Natida Nivasnanda – Senior Program Associate; & Tracy Jooste – Associate Director
-  **The Wilberforce Society** (UK)
 -  **Why are think tanks so wrong about think tanks?**, Alex Prvulovich



■ EU & EFTA

-  **STEAR** (Belgium)
 -  **Europe–Asia: Reimagining Asia–Europe think tank dialogue amidst changing global order**, Muhammad Anugrah Utama – Editor-in-Chief
-  **Think Tank Lab** (Germany)
 -  **Signals from the German sector: What think tanks are learning about AI, communication, and staff development**, Think tank Lab team

■ EAST & SOUTH-EAST ASIA

-  **IDEAS Malaysia** (Malaysia)
 -  **Malaysia's think tanks are adapting fast – but can they stay credible in a polarised age?**, Ryan Panicker – Assistant Manager, Advocacy and Events
-  **Taejae Future Consensus Institute** (South Korea)
 -  **Towards goal-oriented cooperation: Rethinking South Korea's think tank ecosystem**, Yoochan Cho – Research Assistant


■ CENTRAL ASIA

-  **CAPS Unlock** (Kazakhstan)
 -  **Think tanks in Central Asia: Inside the sector**, Tlegen Kuandykov – Program Coordinator

■ SOUTH ASIA



-  **Nepal Policy Institute** (Nepal)
 -  **Nepal's evolving think tank ecosystem and policy landscape**, Dinesh Thapa – Fellow



■ MENA

-  **Madinah Institute** (Saudi Arabia)
 -  **Thriving or surviving? KSA, GCC & MENA Think Tanks in 2025**, Hytham ElSaiid – Consulting Director
 -  **Think Tanks in Saudi Arabia, GCC, and MENA—2025 State of the Sector Report**, Hytham ElSaiid – Consulting Director

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