

## 2007 SURVEY OF THINK TANKS A SUMMARY REPORT

The Think Tanks and Civil Societies Program is pleased to announce the publication of **Global Trends and Transitions: 2007 Survey of Think Tanks**, an in-depth survey of all known public policy research organizations, or “think tanks,” worldwide. James McGann, Director of the Think Tank and Civil Societies Program “the ‘think tanks’ think tank” specializes in the study of research organizations; the survey was carried out in order to develop an empirical base for further research on trends that are currently affecting think tanks. The findings contained in the report are a follow up to the 1999 comprehensive assessment of this class of institutions. We expect that this study will make a major contribution to the understanding of public policy research organizations, and is likely to become an important reference point for donors, policy makers, and civil society groups that are interested in working with these important institutions. **A summary of the findings is provided below.**

### THINK TANKS AND CIVIL SOCIETIES PROGRAM

“Helping Bridge the Gap  
Between Knowledge  
And Policy”

**Table 1.0**

REGION	# Institutes Responding	# Institutes Database
S. & E. Asia	77	548
E. Europe	173	480
W. Europe	282	1187
Africa	69	265
Latin America	67	462
Middle East	51	188
Aus. & NZ	16	32
U.S. & Canada	293	1873
<b>Total Worldwide</b>	<b>1028</b>	<b>5035</b>

Surveys were emailed and mailed to 5,035 think tanks in 169 countries, and of these, 1028 institutions responded from 134 countries. Each respondent was asked to provide the following information: year established, annual budget, number of staff, type of activities, and types of research. Optional questions included the following: products and services, income, sources of funding, expenditure levels, deficits/surpluses, and value of endowment. The results of this study have been compiled into a report that analyzes this data by region: Asia, Eastern Europe, Western Europe, Africa, Latin America, the Middle East, Australia and New Zealand, and the United States and Canada.

The picture emerging from this survey is a radically different one from the one we reported on in 1999. At that time, the community of think tanks was quite dynamic and growing. Today we find that the number of think tanks being created has decreased dramatically and major shifts in their priorities and operations are taking place in every region of the world. In the changing marketplace of ideas, new and old think tanks have been compelled to rethink their strategies for engaging and influencing policy makers, the press, and the public. The trends illustrated in this report help to show some of the current and future challenges and opportunities that think tanks are encountering. It is important to note that the data for the decade beginning in 2000 does not cover a full decade but strong trends are clearly evident. We believe these trends will only be reinforced

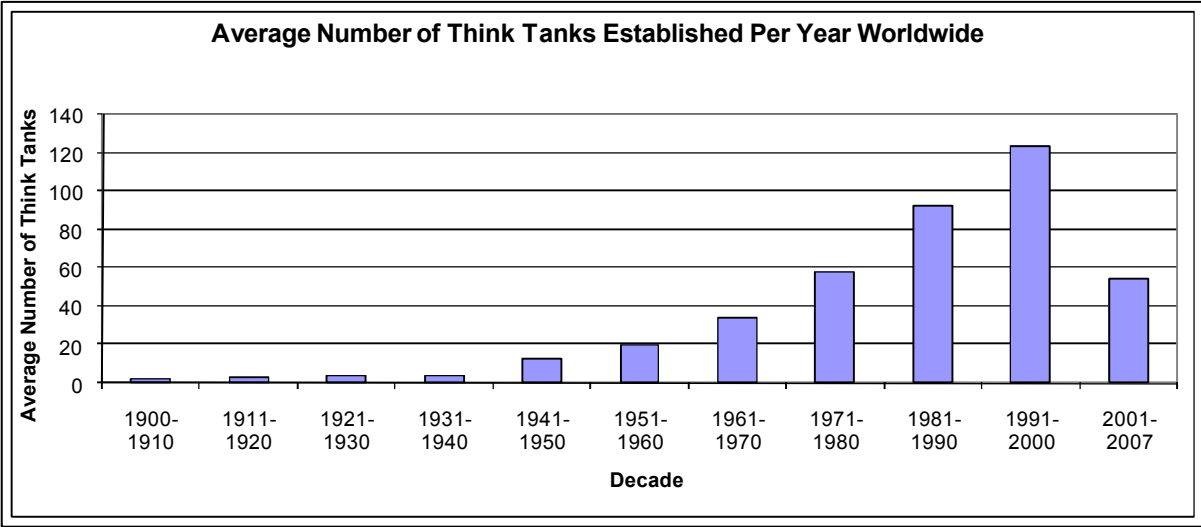
with additional data and research. The findings of the study are summarized in the following charts and graphs.

Table 1.0 shows the number of think tanks in our database and the number that responded to the survey per region. Not surprisingly, the survey revealed that many closed societies and societies in turmoil, such as Brunei, Libya, Myanmar, North Korea, Suriname, Swaziland, Djibouti, Turkmenistan, and Equatorial Guinea do not have think tanks. Most countries in the world now have at least one think tank (see list of countries with think tanks on page.

The charts and graphs provided below represent the number of think tanks established per year worldwide. The data is based on the information gathered from the 3,794 think tanks that provided background information. This information included address and date established but may not have furnished answers to other questions on the survey. Of the responding think tanks, 1,242, or 31.9%, were established between 1991 and 2000. The drastic increase in think tanks that began in the 1980's can be largely attributed to greater democratization in formerly closed societies, trade liberalization, and the expansion of both market based economies and globalization. The general trend that can be drawn from this information is that the rate of establishment was most pronounced in the 1990s (with the exception of the US & Canada).

Please note that information regarding the number of think tanks established per year worldwide was gathered not only through surveys, but also through the Think Tanks and Civil Societies directory of think tanks. This directory includes the date established for each institution listed in the directory. As a result, this information is more comprehensive than other sections of the report and includes dates established for 3794 (77.3 %) of the 5035 known think tanks in the world.

**Graph 1.0 Number of Think Tanks Established**



**Table 2.0 a. Number of Think Tanks Established by Period**

Period	1900-1910	1911-1920	1921-1930	1931-1940	1941-1950	1951-1960
# Think Tanks Established	17	25	38	37	120	193
# Think Tanks Est. per Year (Avg.)	1.55	2.5	3.8	3.7	12	19.3

**Table 2.0 b. Number of Think Tanks Established by Period**

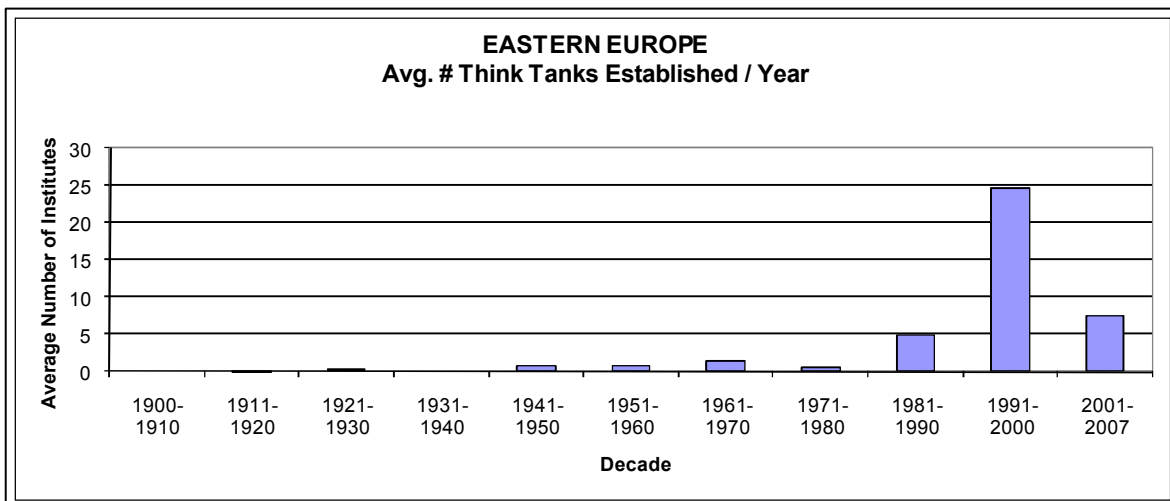
Period	1961-1970	1971-1980	1981-1990	1991-2000	2001-2007	TOTAL Responses
# Think Tanks Established	340	577	925	1242	380	3794
# Think Tanks Est. per Year (Avg.)	34	57.7	92.5	123.2	54.3	NA

Our analysis of the survey data found that the United States, Western Europe and Canada are home to the largest percentage (61.37%) of the world's think tanks. As previously stated, most regions of the world experienced a proliferation in their number of think tanks during the period between 1991 and 2000. This growth was quite pronounced in Eastern Europe, Africa and the Middle East. The United States and Canada, however, experienced a gradual overall decrease in the number of think tanks established per year from the 1980's to present. One of the most significant findings is that while Asia and Latin America have experienced sustained growth in the number of think tanks being established Eastern Europe and Africa have experienced a dramatic decline in recent years.

**Dramatic Decline in the Number of Think Tanks in Eastern Europe**

Of all of the regions of the world, Eastern Europe experienced the most drastic increase in think tanks in the 1990's at the conclusion of the Cold War. Specifically 24.5 think tanks were established per year from 1991 to 2000 but only 7.43 institutions have been founded per year in the seven year period between 2001 and 2007. This finding may be a result of the success or the transformation process in this region or it may be an indication of the lack of funding and/or institutional capacity of think tanks in this part of the world.

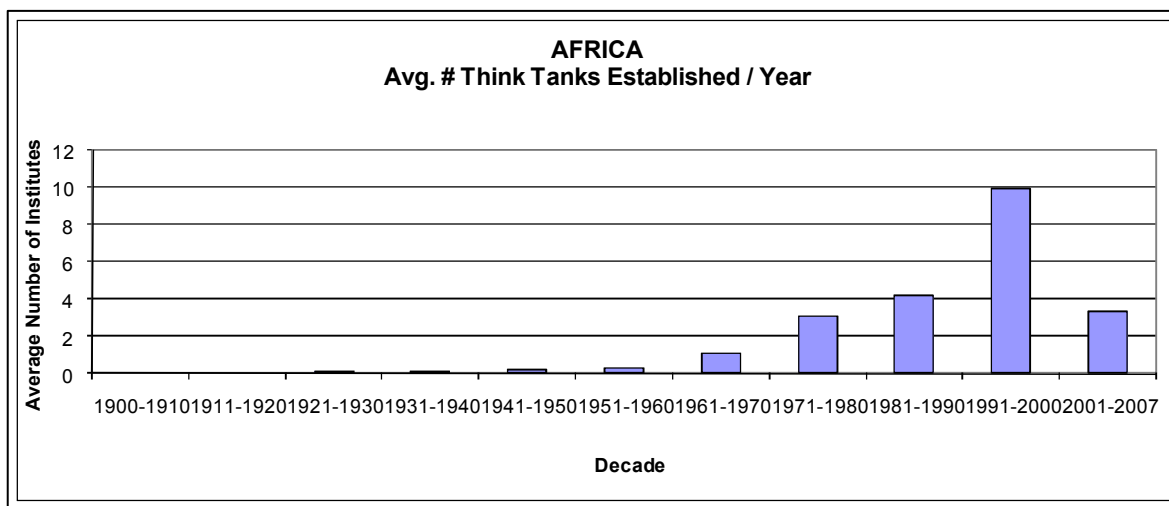
**Graph 3.0 Number of Think Tanks Established in Eastern Europe**



### **Africa is also experiencing a Slow Down in the Number of Think Tanks Being Established.**

According to those institutions responding to the 2007 survey, the first African think tanks were founded in the 1920's. Sub-Saharan Africa was not home to a significant number of think tanks until the 1960's. This increase can be attributed to the decolonization of African nations, the majority of which received their independence during this ten year period. As was the case in Eastern Europe, the African region experienced a proliferation in their number of think tanks during the 1990's. Currently, however, a mere 3.3 think tanks are being established in Sub-Saharan Africa per year. This is a remarkable decrease from the 9.9 institutions founded per year in the 1990's.

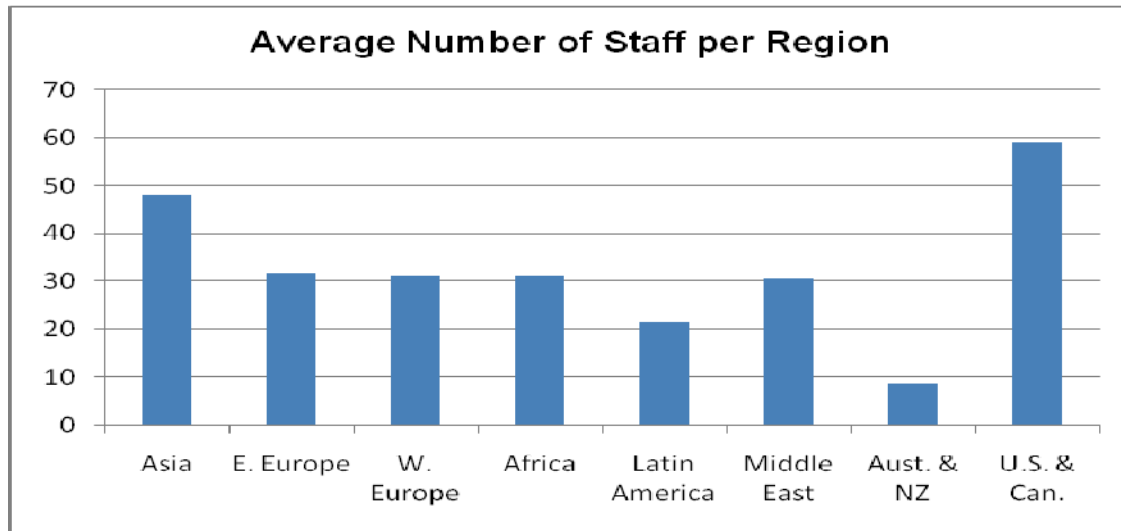
**Graph 4.0 Number of Think Tanks Established in Africa**



### **Vast Majority of Think Tanks are Relatively Small Organizations But There Are Exceptions**

According to our findings most think tanks employ under ten research and administrative staff members. As illustrated in the chart below, as the range in the number of staff members increases, the number of think tanks falling into the category declines. Think tanks in the United States and Canada clearly have the highest number of staff members on average. Interestingly, Asia follows close behind. Think tanks in the U.S. and Canada tend to be larger and our study reveals that the average number of staff per think tank in these countries was 44.6.

**Graph 5.0 Average Numbers of Staff Employed by Region**



**Think Tank Activities and Research Become More Specialized and Advocacy Declines**

In the 1999 Report, although fewer institutes responded to the survey, a greater number of think tanks engaged in a wider range of activities. 787 think tanks responded to this question in 1999, 82.34% of which engaged in Policy Analysis. In 2006/2007, 1,017 think tanks answered, of which only 55.06% engaged in Policy Analysis. The most notable declines in activities from 1999 to 2006/2007 were in Contract Work (from 304 to 119), Training & Technical Assistance (from 262 to 120) and Policy Advocacy (from 254 to 149).

**Table 2.0 a. 1999-2007 Comparison of Activities**

**1999 Survey Findings**

Region (Total # of Institutes responding)	World (787 )
Policy Research	648 (82.34%)
Scholarly Work	393 (49.94%)
Public Education	313 (39.77%)
Contract Work	304 (38.63%)
Training & Technical Assistance	262 (33.29%)
Policy Advocacy	254 (32.27%)

Please note: Findings highlighted in blue indicates a significant change in findings between 1999 and 2007 survey data.

### 2006/2007 Survey Findings

Region (Total # of Institutes responding)	World (1017 )
Policy Research	560 (55.06%)
Scholarly Work	280 (27.53%)
Public Education	135 (13.27%)
Contract Work	119 (11.70 %)
Training & Technical Assistance	120 (11.79%)
Policy Advocacy	149 (14.65%)

### Types of Research Worldwide

Of the 1028 institutes that participated in the survey in 2006-7, 997 responded to this question. The data is divided into **9 categories: domestic economy, international economy, national security, regional studies, social research, educational issues, international cooperation and development research (this was not included in the 1999 report), and “other” research.** Many of the institutes had more than one type of research and some specified the exact type of research in the category labeled “other”. The types of research in the “other” category include: science and technology, health care, peace and conflict resolution studies, fiscal policy issues and governance and democracy research. 1999 data, and 2006/2007 data and analysis follow. In addition there tends to be regional and national variations on the types of research conducted that appear to be associated with the history and political culture of a particular region or country. **One of the most surprising findings is the dramatic decline in environmental research and the emergence of international cooperation and development oriented research.** Additional research will need to be conducted to determine what caused these shifts in research priorities.

**Table 2.0 b. 1999-2007 Comparison of Types of Research**

### 1999 Survey Findings

Region (Total # of Institutes responding)	Worldwide (766)
Social	351 (45.82%)
Domestic Economy	341 (44.52%)
Regional Studies	250 (32.64%)
International Economy	250 (32.64%)
Environment	250 (32.64%)
Education	200 (26.11%)
National Security	180 (23.50%)
Other	35 (4.57%)

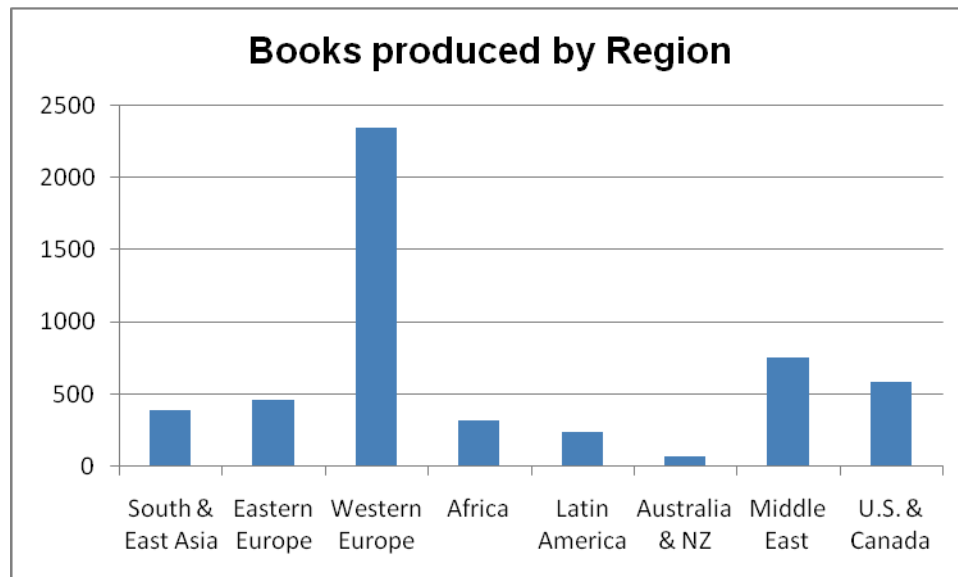
### 2006/2007 Survey Findings

Region (Total # of Institutes responding)	Worldwide (997)
Social	337 (33.80%)
Domestic Economy	287 (28.79%)
Regional Studies	336 (33.70%)
International Economy	179 (17.96%)
Environment	163 (16.35%)
Education	219 (21.97%)
National Security	238 (23.38%)
International Cooperation and Development	236 (23.67%)
Other	364 (36.51%)

### Products and Services Provided by Think Tanks Today

The findings presented here do not vary significantly from the data collected, analyzed and reported in the **1999 International Survey of Think Tanks**. This being said, there are some findings that are worth noting. The data presented below is quite telling and accentuates the difference in the mix of products produced by think tanks in various regions of the world. For instance, the focus on producing books in Europe and the extensive use of the World Wide Web as a means of conveying information in Canada, Western Europe and the US. Finally, there are stark differences between the OECD countries and developing and transitional countries in number and type of products they produce.

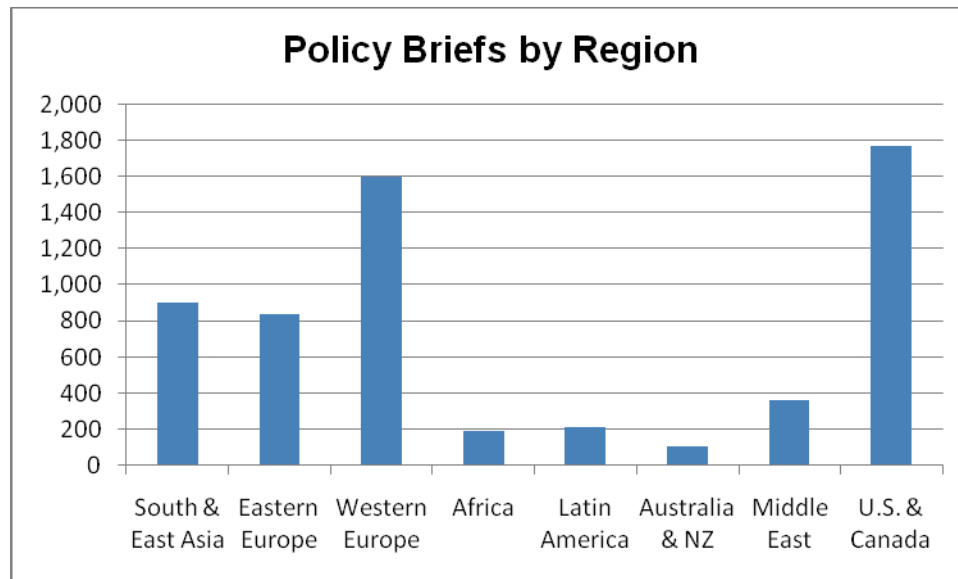
**Graph 6.0 Books Produced by Region**



With one exception, this section, like the others preceding it, shows an increase in the output of the institutes of each region, but with one exception. Each region demonstrates a slight increase in the

production of books, except the U.S. & Canada. In the case of the U.S. & Canada, there is, in fact, a substantial decrease in the number of books produced. This in itself is a significant departure from the trend towards increased output and publication of books, newspaper articles, newsletters and journal articles.

**Graph 6.1 Policy Briefs Produced by Region**



Recurrence of common themes: general increase in policy briefs produced by institutes in all regions. The U.S. & Canada and Western Europe produce substantially more policy briefs than the rest of the regions. (Eastern Europe has, in particular, increased substantially).

### **Media Appearances**

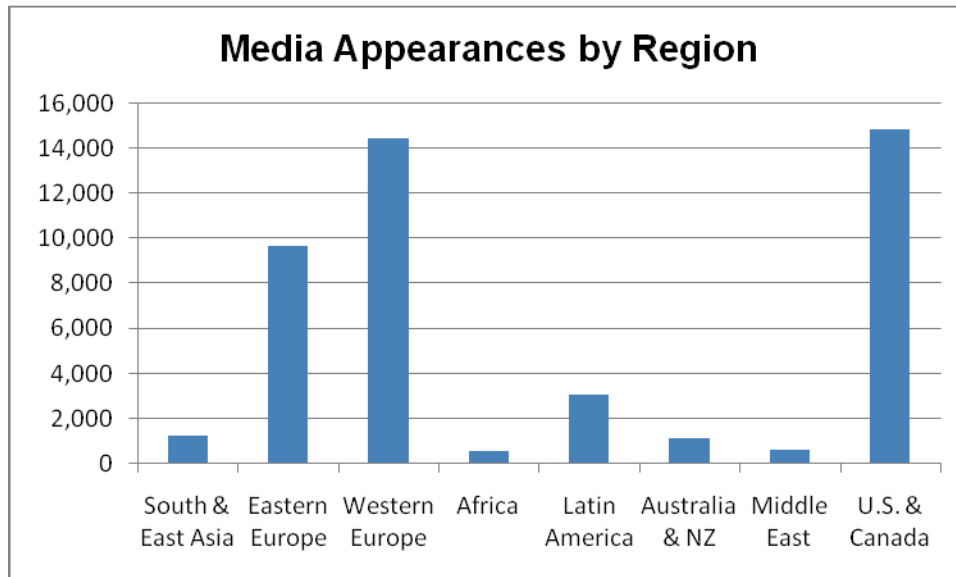
These two sections did not appear in the 1999 Report. They are, however, interesting to analyze because in terms of products and services (if the terms encompass books, newsletters, newspaper articles, policy briefs and journal articles, media appearances, major conferences, workshops/seminars, trainings and public education) media appearances are an important part of an institute's output and form a significant percentage of the products and services.

### **Internet and web hits**

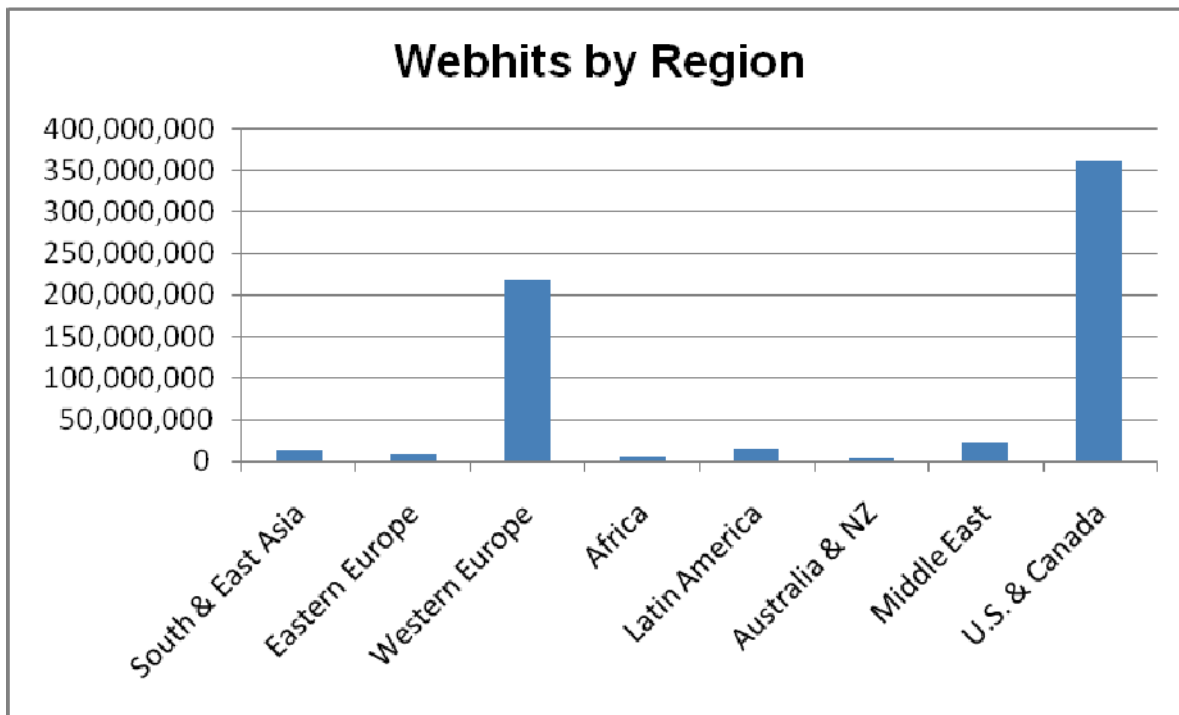
Web hits are also an indication of the importance of the Internet as a resource for think tanks with limited means to publish their work and reach large audiences at a low cost. Although we have no other data with which we can compare this report's web hit results, the very existence of web hits as a section on the Profile Update Survey is an indication of the trend towards increased communication and a heightened ability of think tanks to spread information around the globe.



**Graph 6.3 Media Appearances by Region**



**Graph 6. Web Hits by Region**



## Summary of Key Findings

- Decline in growth of think tanks worldwide but especially in Africa and Eastern Europe.
- Increased specialization of research topics and agendas
- Dramatic decline in research on environmental issues and rise in research focused on international development and cooperation.
- Major shift away from advocacy oriented activities
- Move away from producing books in US and Canada and a global increase in the production of policy briefs.
- The vast majority of think tanks in the world operate with relatively small staffs and budgets.
- An elite class of mega think tanks that operate on the national, regional and global level tend to have large staffs and budgets.
- Media and internet have become a major market for think tank products.
- Think tanks are facing increased competition from For-Profit Consulting Firms, 24/7 Cable News Networks, Government Organized NonGovernmental Organizations (GONGOS) and Lobbying and Advocacy Groups.

## Conclusions

The on-going challenge for think tanks is to produce timely and accessible policy oriented research that effectively engages policymakers, the press and the public on the critical issues facing a country. Gone are the days when a think tank could operate with the motto “research it, write it and they will find it.” Today, think tanks must be lean, mean, policy machines that produce research and analysis that is understandable and accessible for policy makers and the public. **The Economist** described “good think tanks” as those organizations that are able to combine “intellectual depth, political influence, and flair for publicity, comfortable surroundings, and a streak of eccentricity.” Those who fail to organize and integrate these qualities into their think tank will become known for their “pedantry, irrelevance, obscurity, poverty and conventionality.” Many think tanks have already successfully met this challenge and are now playing a critical role in bridging the divide between the academic and policy communities and between policy makers and the public.

For all the reasons outlined in this summary report, independent think tanks will continue to play a critical role in the policy making process. Clearly, there is no shortage of policy challenges at the national, regional and global level. The world we live in can be characterized by what someone described as “The Four Mores.” More issues, more actors, more competition and more conflict. Over the last 10-15 years, governments and civil society groups have come to rely on think tanks for ideas, evidence and advice and I am confident that this trend will continue well into the future.

# 2007 GLOBAL SURVEY OF THINK TANKS FACT SHEET

## Think Tank Definition

Think tanks or public policy research, analysis and engagement institutions are organizations that generate policy-oriented research, analysis and advice on domestic and international issues that helps policymakers and the public make informed decisions about public policy.

## Global Overview

There are 5080 Think tanks in the World

- Africa 274 (5.39%)
- Latin America 408 (8.03%)
- Western Europe 1198 (23.58%)
- Eastern Europe 483 (9.51%)
- Asia 601 (11.83%)
- Middle East 192 (3.77%)
- North America 1924 (37.79%)

## United States

There are 1776 think tanks in the US

- 91% created since 1951
- More think tanks since 1970 than the previous 50 years
- 58% established in the last 25 years
- Number has more than doubled since 1980
- 31% 1981-1990---End of Post WWII consensus & Challenge to the Welfare State
- Most of the think tanks that have come into existence in the US since the 1970s are specialized
- About 1/5 or approximately 350 of the think tanks are located in DC
- More than ½ are university affiliated
- Number of think tanks appears to be declining over the last five years

## Reasons for the growth of think tanks

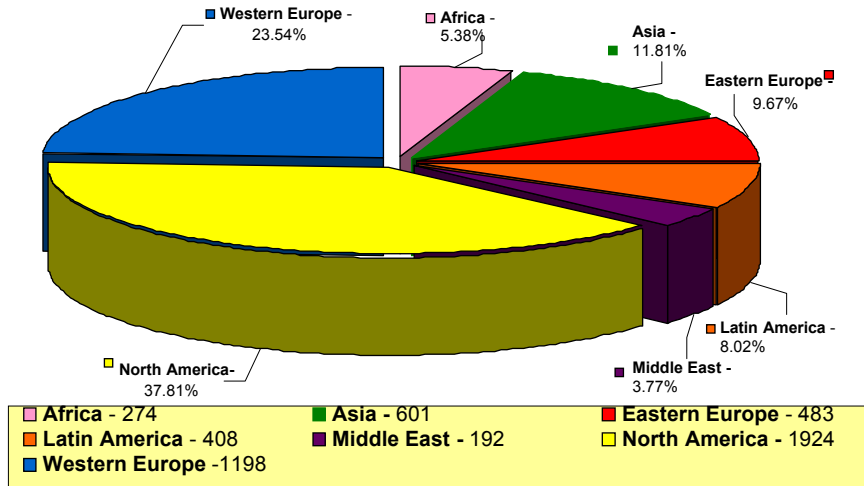
- Information revolution
- End of government monopoly on information
- Complexity and technical nature of policy problems
- Size of government and crisis in confidence in government officials
- Globalization and the growth of state and non state actors
- Need for timely and concise information and analysis “in the right form at the right time”

## Reasons for the Decline in Number of Think Tanks Being Established Worldwide

- Political and regulatory environment hostile to think tanks and NGOs
- Changes in funding priorities by major public and private donors
- Underdeveloped institutional capacity

- Advocacy Organizations, For Profit Consulting Firms and Electronic Media are replacing some think tanks
- Donors did not build institutions they funded projects and programs
- Institutions have served their purpose

## GLOBAL DISTRIBUTION OF THINK TANKS BY REGION



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**Please note that the data reported in this section varies slightly from the survey data in the other sections of the report in that Australia and New Zealand are included in the Asia and Mexico is included in North American.**

## GLOBAL DISTRIBUTION OF THINK TANKS BY COUNTRY

Africa		Asia		Eastern Europe		Latin America		Middle East		North America	
Angola	3	Afghanistan	5	Albania	9	Antigua & Barbuda	0	Algeria	4	Canada	94
Benin	4	Australia	26	Armenia	7	Argentina	100	Bahrain	2	Mexico	54
Botswana	3	Bangladesh	34	Azerbaijan	7	Bahamas	1	Cyprus	6	United States	1402
Burkina Faso	10	Bhutan	1	Belarus	6	Barbados	2	Egypt	21	Washington D.C.	374
Burundi	6	Brunei	0	Bosnia & Herzegovina	3	Belize	0	Iran	11		
Cameroon	10	Cambodia	8	Bulgaria	28	Bermuda	1	Iraq	14	Region Total:	1924
Cape Verde	1	China	73	Croatia	10	Bolivia	27	Israel	35		
Central African Rep	1	Fiji	1	Czech Republic	23	Brazil	38	Jordan	9		
Chad	3	Hong Kong	29	Estonia	9	Chile	30	Kuwait	8		
Comoros	0	India	122	Georgia	7	Colombia	24	Lebanon	11		
Congo	1	Indonesia	19	Hungary	30	Costa Rica	32	Libya	0		
Congo, D.R.	4	Japan	103	Kazakhstan	7	Cuba	11	Morocco	9		
Côte d'Ivoire	4	Kiribati	0	Kyrgyzstan	5	Dominica	2	Oman	0		
Djibouti	0	Laos	2	Latvia	8	Dominican Rep	13	Palestine	17		
Equatorial Guinea	0	Malaysia	16	Lithuania	10	Ecuador	12	Qatar	0		
Eritrea	3	Maldives	6	Macedonia (FYR)	10	El Salvador	12	Saudi Arabia	3		
Ethiopia	16	Marshall Islands	0	Moldova	2	Grenada	1	Syria	4		
Gabon	1	Micronesia	0	Montenegro	3	Guadeloupe	4	Tunisia	8		
Gambia	5	Mongolia	3	Poland	35	Guatemala	10	Turkey	19		
Ghana	17	Myanmar	0	Romania	50	Guyana	1	U.A.E	4		
Guinea	1	Nauru	0	Russia	104	Haiti	2	Yemen	7		
Guinea-Bissau	0	Nepal	12	Serbia	20	Honduras	5				
Kenya	26	New Zealand	6	Slovakia	11	Jamaica	4				
Lesotho	1	North Korea	2	Slovenia	32	Nicaragua	8				
Liberia	2	Pakistan	15	Tajikistan	1	Panama	9				
Madagascar	1	Palau	0	Turkmenistan	0	Paraguay	6				
Malawi	4	Papua New Guinea	2	Ukraine	43	Peru	21				
Mali	6	Philippines	13	Uzbekistan	3	Puerto Rico	5				
Mauritania	0	Samoa	1			St.Kitts-Nevis	1				
Mauritius	2	Singapore	6			St.Lucia	1				
Mozambique	2	Solomon Islands	0			St.Vincent	1				
Namibia	6	South Korea	29			Suriname	0				
Niger	1	Sri Lanka	14			Trinidad & Tobago	7				
Nigeria	27	Taiwan	36			Uruguay	8				
Rwanda	1	Thailand	8			Venezuela	9				
Sao Tome & Principe	0	Tonga	0								
Senegal	11	Tuvalu	0								
Seychelles	1	Vanuatu	0								
Sierra Leone	1	Vietnam	9								
Somalia	2										
South Africa	47										
Sudan	1										
Swaziland	0										
Tanzania	6										
Togo	4										
Uganda	9										
Zambia	6										
Zimbabwe	14										
Region Total:	274	Region Total:	601	Region Total:	483	Region Total:	408	Region Total:	192	Region Total:	1198
<b>World Total</b>		<b>5080</b>									

Western Europe	
Andorra	1
Austria	36
Belgium	49
Denmark	30
Finland	26
France	162
Germany	187
Greece	28
Iceland	7
Ireland	14
Italy	87
Liechtenstein	2
Luxembourg	3
Malta	4
Monaco	0
Netherlands	54
Norway	15
Portugal	19
San Marino	0
Spain	49
Sweden	69
Switzerland	72
United Kingdom	283
Vatican City	1

## Think Tank and Civil Societies Program

The Think Tanks and Civil Societies Program (TTCSP) at the Foreign Policy Research Institute examines the role policy institutes play in governments and in civil societies around the world. Often referred to as the '**think tank's think tank**,' TTCSP examines the evolving role and character of public policy research organizations. The Program is directed by James G. McGann, Ph.D. a Senior Fellow at FPRI and President of McGann Associates, a program and management consulting firm specializing in the challenges facing think tanks, international organizations and philanthropic institutions. Over the last 20 years the Think Tanks and Civil Societies Program has laid the foundation for a global initiative that will help bridge the gap between knowledge and policy in critical policy areas such as international peace and security, globalization and governance, international economics, environment, information and society, poverty alleviation and health. This international collaborative effort is designed to establish regional and international networks of policy institutes and communities that will improve policy making and strengthen democratic institutions and civil societies around the world. The Think Tanks and Civil Societies Program works with some of the leading scholars and practitioners from think tanks and universities in a variety of collaborative efforts and programs. If you would like additional information about our publications and programs contact [JM@fpri.org](mailto:JM@fpri.org).

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### About the Author

**James McGann** is an FPRI senior fellow and director of its Think Tanks and Civil Societies Program. He is also an assistant professor of Political Science at Villanova University and president and founding partner of McGann Associates, a program and management consulting firm specializing in the challenges facing think tanks, policymakers, international organizations and philanthropic institutions.

Dr. McGann has served as a consultant and advisor to the World Bank, United Nations, United States Agency for International Development, Soros, Hewlett and Gates Foundations and foreign governments on the role of nongovernmental, public policy and public engagement organizations in civil society. He has served as the senior vice-president for the Executive Council on Foreign Diplomats, the public policy program officer for The Pew Charitable Trusts, the assistant director of the Institute of Politics, John F. Kennedy School of Government, at Harvard University, and a senior advisor to the Citizens Network for Foreign Affairs and the Society for International Development.

Among Dr. McGann's publications are *Competition for Dollars, Scholars and Influence In The Public Policy Research Industry* (University Press of America 1995), *The International Survey of Think Tanks* (FPRI, 1999), *Think Tanks and Civil Societies: Catalyst for Ideas and Action*, co-edited with Kent B. Weaver (Transaction Publishers 2000), *Comparative Think Tanks, Politics and Public Policy* (Edward Elgar 2005), *Think Tanks and Policy Advice in the U.S: Academics, Advisors and Advocates* (Routledge, 2007), *Think Tanks Catalysts for Democratization and Market Reform* (Forthcoming) and *Global Trends and Transitions: 2007 Survey of Think Tanks* (Forthcoming).

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