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Think Tanks and Civil Societies Program
Foreign Policy Research Institute

THINK TANKS
 AND
 CIVIL SOCIETIES
 PROGRAM
 "Helping Bridge the Gap
 Between Knowledge
 And Policy"

2007 SURVEY OF THINK TANKS
WESTERN EUROPE - SUMMARY REPORT

The Think Tanks and Civil Societies Program is pleased to announce the release of the **Regional Report on Western European Think Tanks**. This report is one in a series that are drawn from the **Global Trends and Transitions: 2007 Survey of Think Tanks**, an in-depth survey of all known public policy research organizations, or "think tanks," worldwide. 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 for Western Europe is provided below.**

Surveys were emailed and mailed to 5,035 think tanks in 169 countries, and of these, 1,028 institutions responded from 134 countries (20.42% global response rate). Of the 1,187 think tanks in Western Europe, 282 institutions responded (23.76% response rate). 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 or surpluses, and value of endowment. Please note that each responding institution did not necessarily answer questions in each category, which accounts for the variations in the total number of responses for certain questions

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
Region Total:	1198

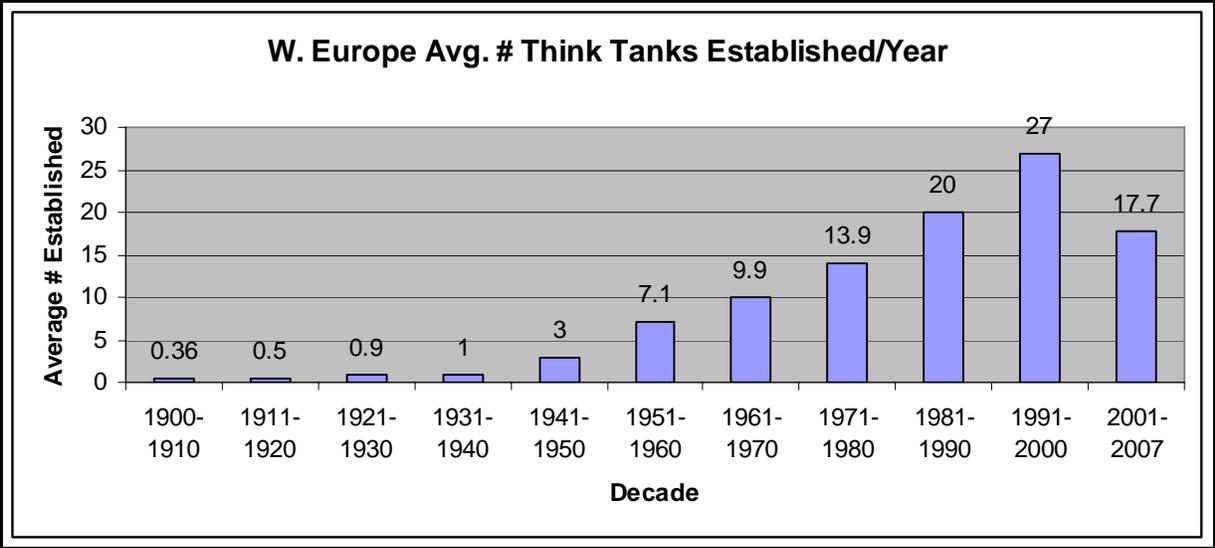
Table 1.0 - Number of Think Tanks

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
Total Worldwide	1028	5035

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 in Western Europe has decreased dramatically and major shifts in their priorities and operations are taking place.** 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, the expansion of both market based economies and globalization, and integration and expansion of the European Union. The general trend that can be drawn from this information is that the rate of establishment was most pronounced in the 1990s.

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.

The charts and graphs provided represent the number of think tanks established per year in Western Europe. The data is based on the information gathered from the 282 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. Please note that information regarding the number of think tanks established per year in Western Europe 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.

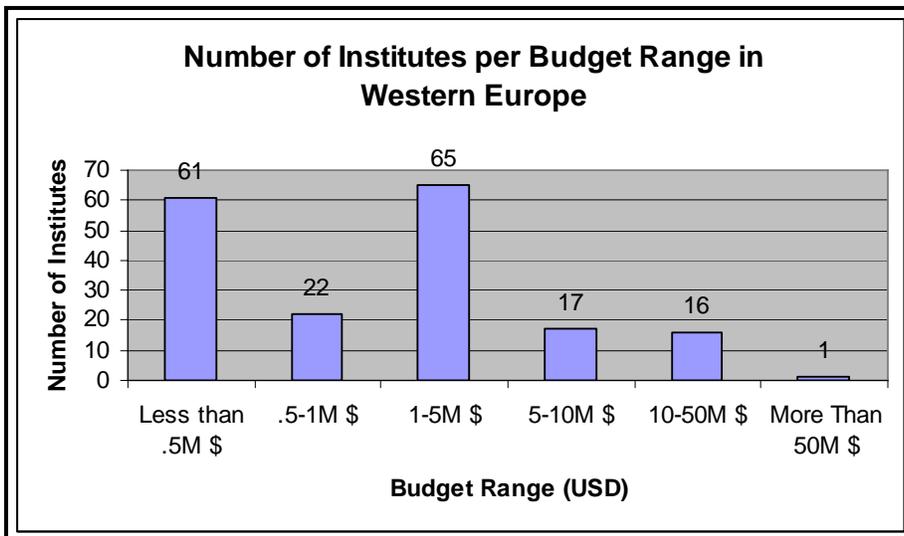


Western Europe may be experiencing a Slow-Down in establishing new think tanks.

Western Europe saw the creation of a relatively high number of think tanks per year in the first half of the twentieth century. This trend continued through the 1990's with more and more think tanks being established per year with each passing decade. 27 think tanks were established per year in the 1990's. In this decade alone, approximately 28% of all 961 responding Western European think tanks were founded. Since then, only 17.7 institutions have been founded per year. It is important to note that the 2006-7 survey does not cover a full decade but strong trends are clearly evident. It does seem feasible, however, that the Western European region could make up for this downward trend in think tank establishment in the next three years as the decrease has not been as severe as in other regions like Eastern Europe.

Vast Majority of Institutions Have Budgets Less Than \$5 Million

Of the 182 Western European think tanks responding to the budget question, 61 have an annual budget of less than \$500,000; 22 have a budget range of \$500,000 to \$1 million; 65 have a range of \$1 million to \$5 million; 17 have a range of \$5 million to \$10 million; 16 have a budget range of \$10 to \$50 million; and one has a budget of more than \$50 million. As noted in the 1999 report, the apparent lack of institutes with budgets of more than \$50 million does not necessarily indicate that such institutions are rare. Again, the sensitivity of the budget question comes into play and it is unfortunate because it prevents an accurate analysis from being conducted.



Most Western European Think Tanks Employ Very Small Staffs

Western European think tanks tend to employ a very low number of people. According to our findings most Western European 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.

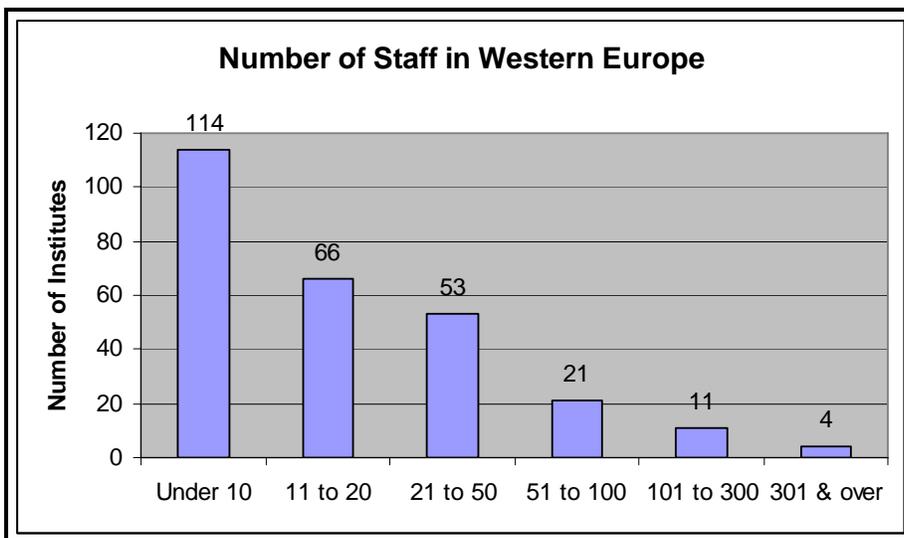


Table 2.0 – Average Staff Size

Average Staff Size in Western Europe (for institutes responding)		
*Total	31.29	262
Research Staff	21.63	250
Admin & Support	11.03	254

Table 2.1 – Median Staff Size

	Low	Median	High
Total	1	14	2500
Research Staff	0	8	1500
Admin & Support	0	4	1000

* Excluding information from Berlin Information Center for Transatlantic Security. They reported 38,780 Research Staff.

Think Tank Activities Have Become More Specialized

Table 3.0 – Activities (1999)

Region (Total # of Institutes responding)	W. Europe (138)
Policy Research	107 (77.54%)
Scholarly Work	80 (57.97%)
Public Education	52 (37.68%)
Contract Work	70 (50.72%)
Training & Technical Assistance	45 (32.61%)
Policy Advocacy	40 (28.99%)

Table 3.1 – Activities (2006-7)

Region (Total # of Institutes responding)	W. Europe (276)
Policy Research	152 (55.07%)
Scholarly Work	67 (24.28%)
Public Education	30 (10.87%)
Contract Work	18 (6.52%)
Training & Technical Assistance	16 (5.80%)
Policy Advocacy	30 (10.87%)

In the 1999 Report, although fewer institutes responded to the survey, a greater number engaged in a wider range of activities. In contrast, the 2006-7 survey saw declines in all types of activities. Most notably, contract work has dropped from 70 to 18 (50.72% to 6.52%) and training and technology work crashed in this period from 45 to 16 (32.61% to 5.80%).

Think Tank Research is Increasing and Becoming More and More Specialized

Table 4.0 – Types of Research (1999)

Region (Total # of Institutes responding)	W. Europe (330)
Social	54 (16.36%)
Domestic Economy	49 (14.85%)
Regional Studies	48 (14.55%)
International Economy	50 (15.15%)
Environment	46 (13.94%)
Education	27 (8.18%)
National Security	56 (16.97%)
Other	7 (2.12%)

Table 4.1 – Types of Research (2006-7)

Region (Total # of Institutes responding)	W. Europe (276)
Social	78 (28.26%)
Domestic Economy	59 (21.38%)
Regional Studies	76 (27.54%)
International Economy	53 (19.20%)
Environment	36 (13.04%)
Education	44 (15.94%)
National Security	70 (25.36%)
International Cooperation and Development	82 (29.71%)
Other	109 (39.49%)

Notable changes from 1999 include an increase in Regional Studies from 48 to 76 (14.55% to 27.54%) and an increase in Education from 27 to 44 (8.18% to 15.94%). **One of the most surprising findings is the dramatic decline in Environmental research and the emergence of Health Policy and International Cooperation and Development oriented research.** The table above shows that, unlike in 1999, the most common research for think tanks in Western Europe in 2006-7 is research listed in the “other” category. Compared with only 2.12% in 1999, 39.49% of Western European think tanks responding to the survey now engage in “other” activities.

Responses for the “Other” column include:

- Foreign policy and International Relations (With a focus on European affairs and integration.)
- Peace and conflict studies
- Science and Technology
- Labor policy
- Human rights
- Health Policy (35 or 12.68% listed this.)

Western Europe is the World’s Second Largest Producer of Products and Services.

Western Europe continues to provide policymakers and the public a large number of products and services and is second only to the U.S. & Canada in absolute terms, with one exception. Western Europe produces more books than any other region of the world (45.39% of the total amount published worldwide). It is also important to mention that along with the U.S. & Canada, Western Europe makes extensive use of the Internet in disseminating information and materials to policymakers and the public.

Table 5.0 – Percentage of Products and Services

# Responded to This Question	Percentages (Products/Services)*	Percentages % **
250	Product (52%) / Services (48%)	(4)(4)(27)(33)(10)(7)(3)(2)(2)(8)

* This includes Seminars, Publications, conferences, newsletters, monographs, policy briefs and books.

** This includes all the products (books¹, newsletters², newspaper articles³, policy briefs⁴ and journal articles⁵) and services (media appearances⁶, major conferences⁷, workshops/seminars⁸, trainings⁹ and public education¹⁰) of the organization.

Tables 5.1 – Types of Products and Services

# Seminars & Conferences	# Trainings & Public Education	# Journal Articles, Newsletters & Newspaper Articles	
9,888	2,340	24,403	
Books	Media Appearances	Policy Briefs	Policy Maker Briefings & Advisings
2,339	14,401	1,597	7,354
Newsletters	Newspaper Articles	Journal Articles	Web hits
2,299	17,473	4,631	216,344,792



Summary of Western Europe

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Establishment Rate

- In the 1990's alone, approximately 28% of all 961 responding Western European think tanks were founded. Since then, the rate of establishment has dropped to 17.7 institutions have been founded per year.

Budget

- Of the 182 Western European Institutes responding to the budget question, 61 have an annual budget of less than \$500,000; 22 have a budget range of \$500,000 to \$1 million; 65 have a range of \$1 million to \$5 million; 17 have a range of \$5 million to \$10 million; 16 have a budget range of \$10 to \$50 million; and one has a budget of more than \$50 million.

Staff Numbers

- The majority of Western European think tanks employ less than ten people.

Types of Activities

- Between 1999 and 2006-7, Western Europe saw a drastic decline in the number of think tanks conducting contract work (decline from 70 to 18) and training and technology activities (decline from 45 to 16).

Types of Research

- The major types of "other" activities conducted by Western European think tanks are the following:
 - Foreign policy and International Relations
 - Peace and conflict studies
 - Science and Technology
 - Labor policy
 - Human rights
 - Health Policy
- There was also a notable increase from 1999 to 2006-7 of think tanks conducting national security research (increase from 57 to 70) and education research (increase from 27 to 44).

Products and Services

- Western European think tanks most commonly use newspaper articles to disseminate their findings. However, they also publish a greater number of books than any other region in the world.



Conclusion

As the European Union continues integration and expansion, 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 critical issues facing Western Europe and the rest of the world. It should be noted that while the growth of think tanks in Western Europe has decreased since the 1990s, this does not correlate to a decrease in the demand for the products and services they provide. Increased competition from For-Profit Consulting Firms, Cable News, government organized non-governmental organizations (GONGOS), and lobbying and advocacy groups requires think tanks to adapt to an increasingly competitive market. In order to remain relevant, think tanks must continue to adapt to the ongoing challenges of an ever changing world. Those who succeed in adapting will continue to play a critical role bridging the gap 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 levels. 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 past 10-15 years, governments and civil society groups have come to rely on think tanks for ideas, evidence and advice. I am confident this trend will continue will into the future.



Other Reports

In addition to this report, we have prepared overviews of Think Tank activity in North America, Eastern Europe and the former USSR, the Middle East, Asia/Pacific, Africa and Latin America in addition to our *Global Trends and Transitions: 2007 Survey of Think Tanks*. If you are interested in viewing these, please contact Dr. James G. McGann, E-Mail: JM@fpri.org Fax: (215) 732-4401 Phone: (215) 732-3774 ext. 209.

Appendix I

This list of the leading think tanks provided below was prepared for the Global Think Net Study (McGann, August 2006.) The organizations that were identified for inclusion in the universe provided below have been recommended by a panel of think tank administrators, scholars, donors and policy makers. This group included over 70 scholars of think tanks, 24 directors of regional and global think tank networks, 400 executives of think tanks around the world, 20 foundation and NGO executives who fund think tanks, and 4 intergovernmental organizations with think tank programs. The panel was asked to identify think tanks with a reputation for producing high quality research and analysis on both domestic and international policy issues, a regional and/or global reach with their programs and publications, frequent citations or mentions in scholarly and popular publications (generated via Lexis-Nexis). This effort resulted in the identification of the over 200 think tanks from every region of the world. We then circulated the list of 200 non-U.S think tanks to think tanks around the world and asked them to select the top 50 think tanks from the list. We excluded U.S. think tanks because we felt it might lead to overrepresentation of think tanks based in the United States. Vote responses, coupled with our own research and assessment, have yielded the top 50 think tanks globally:

Western European Think Tanks Considered for the Top 50

Western European Think Tanks Considered for the Top 50 **	Country
Adam Smith	UK
Association for Liberal Thinking	Turkey
Austrian Institute for International Affairs	Austria
Bertelsmann Foundation	Germany
Bruegel	Belgium
Center for Applied Policy Research (CAP)	Germany
Center for European Reform (CER)	UK
Center for European Security Studies (CESS)	Netherlands
Center for a New Europe	Belgium
Center for Social and Economic Research	Poland
Centre for European Economic Research (ZEW)	Germany
Centre for European Policy Studies	Belgium
Centro de Investigaciones de Relaciones Internacionales y Desarrollo (CIDOB)	Spain
Committee of International Studies at the Hungarian Academy of Sciences	Hungary
Danish Institute of International Affairs (DUPI)	Denmark
Danish Institute of International Studies	Denmark
Demos	UK
European Union Institute for Security Studies	France
European Policy Center	Belgium
Finnish Institute of International Affairs	Finland
FOA	Sweden
Fondazione Eni Enrico Mattei (FEEM)	Italy

Foreign Policy Center	UK
Foreign Policy Institute	Turkey
Foundation for Social Analysis and Study (FAES)	Spain
French Institute of International Relations (IFRI)	France
FRIDE	Spain
Geneva Center for Security Policy (GCSP)	Switzerland
German Council on Foreign Relations (DGAP)	Germany
German Institute for Economics Research (DIW)	Germany
German Institute for International Politics and Security (SWP)	Germany
Hellenic Foundation for European and Foreign Policy (ELIAMEP)	Greece
Hungarian Institute of International Affairs (HIIA)	Hungary
Institut Choiseul	France
Institut European de la Meditterania (IEMed)	Spain
Institut Montaigne	France
Institute of Economic Affairs (IEA)	UK
Institute for Fiscal Studies	UK
Institute of International Affairs (IAI)	Italy
Institute for International and Strategic Relations (IRIS)	France
Institute for Public Policy Research (IPPR)	UK
Institute for Strategic Studies	Portugal
Instituto Bruno Leoni	Italy
International Crisis Group	Belgium
International Institute for Strategic Studies (IISS)	UK
International Peace Research Institute	UK
International Policy Network	UK
Kiel Institute for World Economy	Germany
Liberte Cherie	France
Netherlands Institute of Foreign Relations	Netherlands
Netherlands Institute of International Relations Clingendael	Netherlands
New Defense Agenda	Belgium
Norwegian Institute of International Affairs (NUPI)	Norway
Overseas Development Institute (ODI)	UK
Peace Research Institute (PRIF)	Germany
Policy Exchange	UK
Polish Institute of International Affairs	Poland
Real Istito Elcano	Spain
Reform	UK
Royal Institute of International Affairs (RIIA) (Chatham House)	UK
Royal International Service Institute (RUSI)	UK
Stockholm International Peace Research Institute	Sweden
Strategic Research Foundation (FRS)	France
Südosteuropa Gesellschaft (South East European Association)	Germany
Swedish Institute of International Affairs	Sweden
Tampere Peace Research Institute (TAPRI)	Finland
Timbro	Sweden

University of Iceland	Iceland
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** List taken from possible 200 worldwide. Those listed in **RED** were included in the Top 10 and those listed in **BLACK** were included in the Top 50 (not including the U.S.)

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.

Research Team

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).

Research Interns

Umber R. Bawa

BSE- Economics, Concentration in Operations and Information Management, University of Pennsylvania, The Wharton School (2008)

Fiona Burns

BA- Political Science and French, Minor in Middle East Studies, Drew University (2007)

Christian Colin

BA- International Relations and Economic History, University of Pennsylvania (2007)

Hilary Craig

BA- International Relations, Public Health Minor, Concentration in Sustainable Development of Africa and the Middle East, Boston University (2008)

Jason L. Luchkiw

BA- Economics and Political Science, Specialization in Political Economy, Temple University (2006)

Alexandra Martins

BA- International Relations and Theatre Arts, University of Pennsylvania (2008)

Richard J. Slavin

BA- International Relations and Anthropology, University of Pennsylvania (2009)

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All requests, questions and comments should be sent to:

James G. McGann, Ph.D.

Director, Think Tank Civil Societies Program

Telephone: (610) 519-8040 / (215)732-3774 ext. 209

Email: James.McGann@villanova.edu or Jm@fpri.org

Think Tanks and Civil Societies Program
2007 INSTITUTIONAL CONTACT UPDATE FORM
(Please mail or email the completed form to us at your earliest convenience)

To: Foreign Policy Research Institute (Think Tanks and Civil Societies Program)
Att: Dr. James G. McGann **E-Mail:** JM@fpri.org **Fax:** (215) 732-4401 **Phone:** (215) 732-3774 ext. 209
Address: 1528 Walnut St., Suite 610, Philadelphia, PA 19102

Please check the appropriate box(es) below:

Yes, I would like to receive a copies research conducted on the issues facing think tanks & policy makers.

Yes, I would like to know more about Think Tanks and Civil Societies Program.

Yes, I would like to be on your mailing list.

Please complete the 2007 Update by answering all the questions listed below. Thanks for your help.

1. Name of Institution: _____

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City _____ State/Province _____ Postal Code _____ Country: _____

3. Phone: _____ 4. Fax: _____

5. E-Mail: _____ 6. Website: _____

7. Executive Director/Chief Executive Name: _____

8. Contact Person's Name _____ Email address: _____

8. Date Established: _____ 9. Total Annual Budget--Year _____:US\$ _____

Thank you for you for taking the time to help me keep your contact information up-to-date.

Please let me know about any new thinks tanks in your area and please email me copies of directories and lists of think tanks in your country and region of the world so I can make sure they are all in our database?

I need your help so I can keep the Global Directory of Think Tanks up to date, so please keep me informed about think tank developments in your area.

Finally, if you know of any think tanks that have opened or closed in the last 12 months I would appreciate if you would share their names and addresses with me.

Thanks for your continued interest and support of my research. Jim McGann