CEE Regional Think Tank Mapping

Fabio Ashtar Telarico

TTCSP

THINK TANKS AND CIVIL SOCIETIES PROGRAM

UNIVERSITY OF PENNSYLVANIA

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THINK TANK LANDSCAPE 2021

Max Shpilband

CEE Project Lead, University of Michigan

Jan Magielski

Intern Coordinator, CEE Project Lead, University of Pennsylvania

Dr. James Mcgann

TTCSP Director, University of Pennsylvania

Issues, Characteristics, and Opportunities

CEE THINK TANK LANDSCAPE

Penn

TTCSP

The Lauder Institute
Wharton · Arts & Sciences
University of Pennsylvania

Abstract

Geopolitically speaking, Central Eastern Europe (CEE) appears to be almost unique. This distinctiveness is due to the peculiar mixture of immutable geographic facts, pluri-secular trends, and the effects of human agency evolution that shaped its evolution. Clearly, one cannot study the regional think tank landscape without paying attention to this idiosyncrasy — yet, any orientalism should be avoided. In fact, CEE think tanks are part of the wider, European and global think-tank communities. Hence, they do face some challenges that have no analogue elsewhere. But besides these exceptional circumstances there are issues and opportunities which are not incompatible with those of other regional think-tank landscapes.

In this report, through a comprehensive literature review and data collection process, we combine normative assessments of the CEE think tank landscape with historical narratives and empirically supported trends to create a more precise and refined distinction of the CEE regional think tank landscape. Every key issue central to the region and every country within it is presented in individual chapters, with aggregate data and generalizations about the region at large given an isolated focus as well. Thus, this report provides an overview of the relationship between issues of artificial technology and technology, COVID-19, democratic backsliding and corruption, divergent civil societies, European integration, lack of acceptance, underfunding, younger government, and those issues previously neglected in literature relevant to the CEE think tank landscape with statistics about the policy areas, budgets, staff sizes, democratization, GDP, and number of think tanks over time. This assessment leads to 28 distinct opportunities for strategic development that CEE think tanks and actors may employ in response so they may address these issues successfully.

ACKNOWLEDGEMENTS

A special thank you to the University of Pennsylvania Lauder Institute, whose encouragement helped this team thrive and grow. The path to completing this report was made possible by the diligent work of our diverse and talented intern team. This diverse team used their linguistic, cultural, and academic skill set cooperatively, maintaining a commitment to high quality research while assessing a high quantity of literature, think tanks, and data. Especially while navigating the complexities of social distancing and university life, the voluntary dedication this team had in the production of this report, as well as the Central and Eastern European Think Tank Summit and cleaning our master database, exemplifies the willingness and ability of new generations of think tank executives, academics, and policymakers in addressing ever-evolving challenges in global affairs. Furthermore, the TTCSP executive report contributors ensured that all 2020 reports, including this one, maintained an institution-wide foundation of research methods, inter-team communication to ensure holistic global and regional landscape analysis, and consistency in definitions and typology.

Summer 2021 Intern Team

Max Shpilband
Fabio Ashtar Telarico
Yelyzaveta Kindyeyeva
Mayya Belova
Ballina Prishtina
Anmol Kejriwal
Yoshna Singh

Spring 2021 Intern Team

Jan Magielski
Alan Burd
Danilo Gleichmann
Margaret Peng
Emilė Petravičiūtė
Jana Součková

Fall 2020 Intern Team

Alexander Basescu
Alisa Reiner
Anastasiia Malenko
Ellen Kamalyan
Jan Magielski
Klara Schmidt
Milan Filo
Olgierd Fudali
Vadim Kuznetsov

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Fabio Ashtar Telarico

In the following section, we examine aggregate statistics about trends within the CEE landscape as a whole region, as well as present further distinctive analysis such as an overview of past TTCSP Global Go-To Index information about the CEE think tank landscape, the relationship between the variables examined in our data collection process, and side by side comparisons of the statistical trends identified between CEE countries, among others.

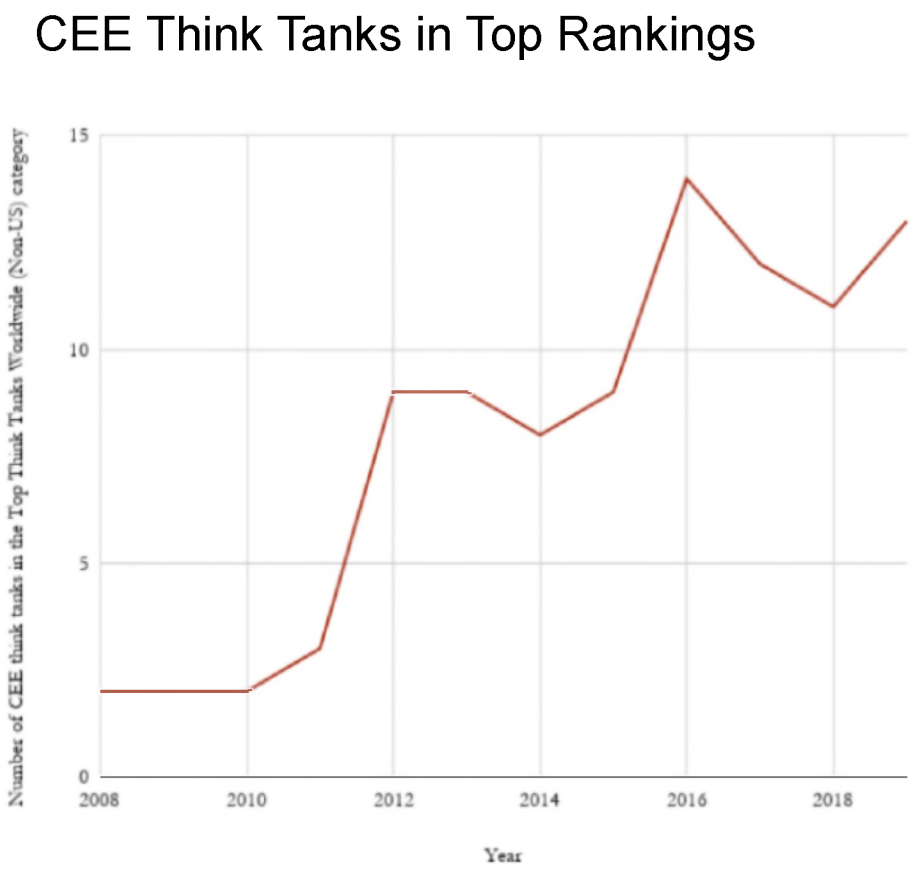
Global Go-To Index Tracking

The growth of think tanks across the globe has exponentially increased the potential for international communication, information-gathering, and both new and creative policy analysis. Continuing technological advances inevitably further the increasingly complex and overwhelming amount of available information. Developing efficient methods of organizing and filtering policy ideas in order to effectively react and respond to the dynamic policy making environment is critical. As the Global Go-To Index analysis indicates, think tanks will need to adopt entrepreneurial and tech-savvy communication strategies while continuing to produce rigorous, policy relevant analysis to preserve their future. This way, such entities will survive and thrive for years to come. They still, however, face an operating environment that is full of tensions and disruptions. To successfully navigate it, think tanks have to gain a better understanding of the threats and opportunities facing all knowledge-based organizations and adapt to meet the demands of the new market. Consequently, research must be high-quality, timely, and accessible in order to effectively engage policy makers, the media and the public. Therefore, it was suggested that think tanks must accordingly adapt to the growing demand for rapid data analysis and prompt accurate expertise.

Investigating the reasons for the decline of think tanks, the Global Go-To Index focuses on various external and internal factors forcing these entities to disband themselves. The determinants falling under the first category include, but are not limited to, political and regulatory environment growing hostile to think tanks and NGOs in many countries, decreasing funding for policy research by public and private donors, and public and private donors' tendency toward short-term project- specific funding in lieu of long-lasting stable financial support. Declining rates of growth in the think tank landscape, indicated by closures and less openings, may also be attributed to organization relocation as CEE think tanks face the challenge of brain drain, similar to other developing regions, particularly India. Academics and experts who often partake in think tank research are incentivized to leave the CEE region by higher pay and

greater job opportunities elsewhere. According to the conducted analysis, these aspects, as well as the ones related to underdeveloped institutional capacity resulting in the inability to adapt, hinder a plethora of think tanks from carrying on their activity. Other causes noted are pertaining to the competition from other types of organizations - such as advocacy organizations, for-profit consulting firms, law firms, and 24/7 electronic media - that think tanks face. They also tend to discontinue their activity once the established objectives are reached.

On the other hand, the Global Go-To Index identifies factors that have contributed to the growth of think tanks. In that case, dissimilarly to the agents increasing the decline of think tanks, external forces turn out to be more important than the internal ones when it comes to the think tanks' increase in number. The analysis suggests that information and technological revolution, the end of national governments' monopoly on information, increasing complexity and technical nature of policy problems, globalization and the growth of state and non-state actors, and need for timely and concise expertise are among factors defining the growth of think tanks.



Along with other areas of the world, the Global Go-To Index has extensively investigated the CEE states since 2008. In spite of their constant presence in this analysis, think tanks from the region remain underrepresented compared to the counterpart organizations all over the world. Hence, one may arrive at the conclusion that the international recognition of CEE think tanks is still in its infancy. As the graph indicates, they maintain a continued presence in the category ranking non-US think tanks worldwide, growing in number again after 2018 which was preceded by the period of the decreasing trend visible on the curve. Thus, there is still a major potential for multidimensionality.

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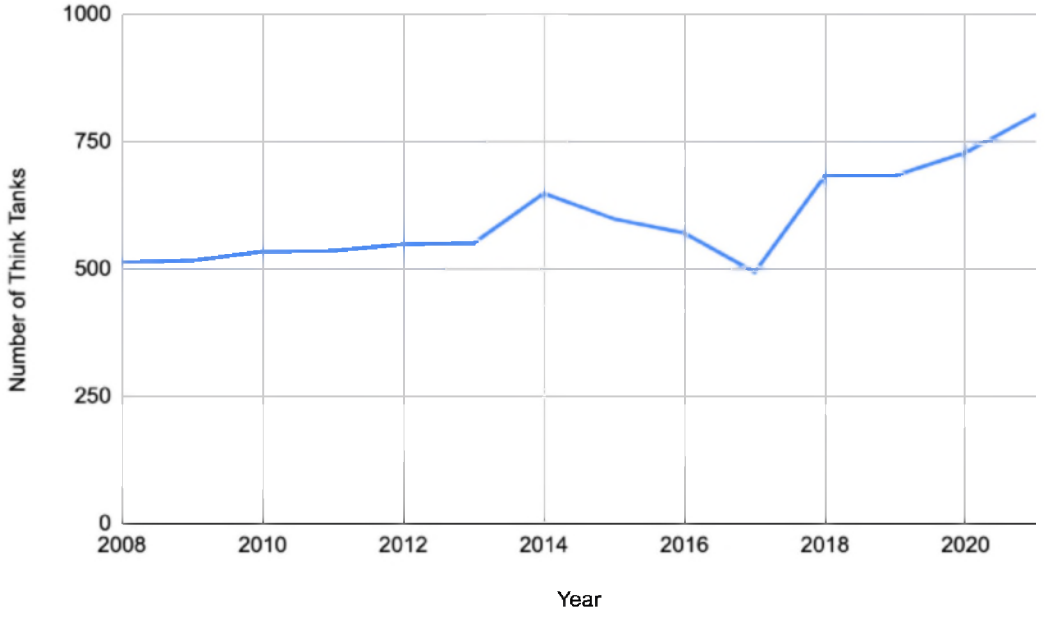
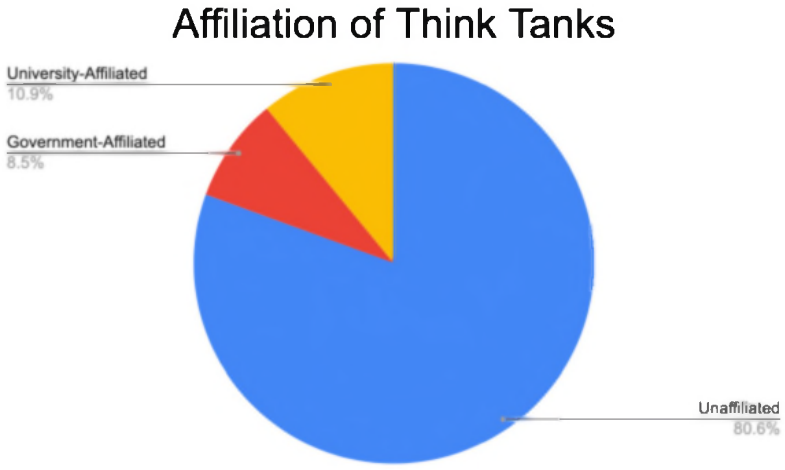
TOTAL NUMBER OF THINK TANKS, 2008-2021



Year	Number of Think Tanks
2008	514
2009	517
2010	535
2011	536
2012	549
2013	551
2014	649
2015	599
2016	571
2017	494
2018	684
2019	684
2020	729
2021	815

As the graph suggests, the number of think tanks fluctuated slightly over the last 12 years. Interestingly, the number of think tanks peaked for the first time, in 2014, during the Crimean Crisis and then experienced a downslide until 2017. This might be explained by an influx of think tanks founded only to accomplish short-term goals, which, having done their research and analysis of the 2014 crisis, then ceased to exist. The spike in 2018 is attributable to a dramatic increase in the number of Russian think tanks on the eve of the FIFA Championship, which took place in the summer of 2018 over several Russian cities. As Russian think tanks serve as a tool of soft power helping to promote a positive image abroad, the trend indicates the country's attempts to prepare for receiving an influx of people from all over the world and supporting its prestige.

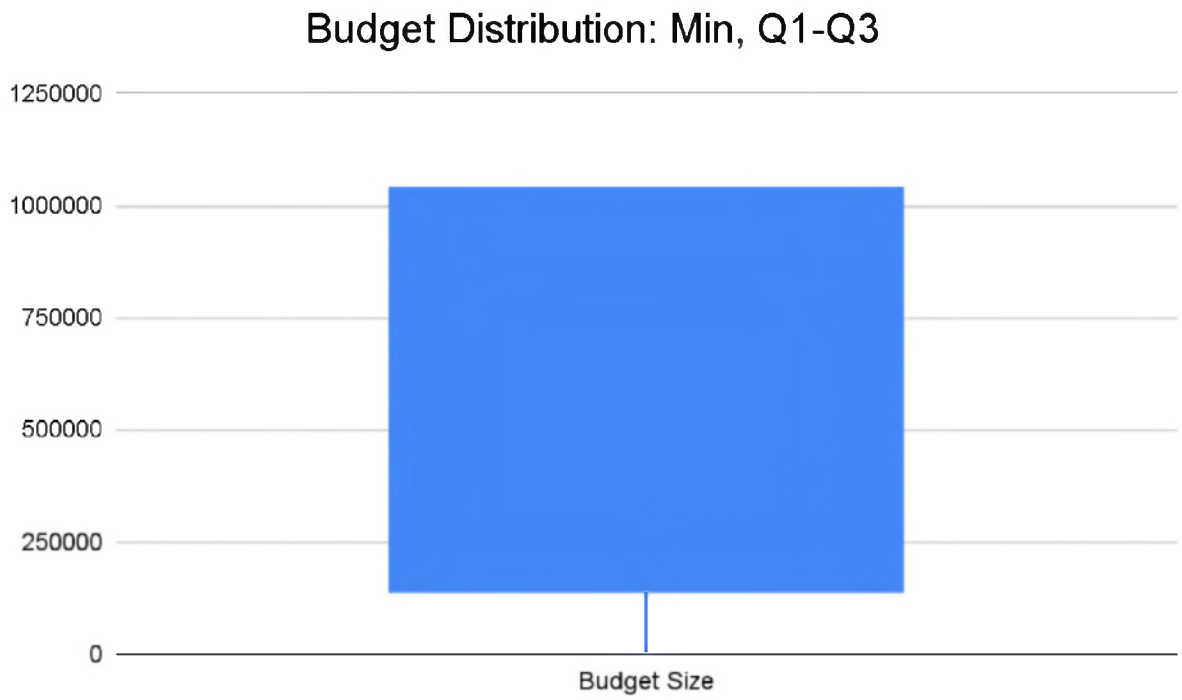
Affiliation



Affiliation	Number of Think Tanks
University affiliated	10.9%
Government Affiliated	8.5%
Unaffiliated	80.6%

Most think tanks in the CEE region are unaffiliated. However, such a high percentage might be attributed to legal manipulation: NGOs or private organizations might register as think tanks to avoid increased governmental oversight or financial responsibilities such as taxation. Thus, while empirical evidence suggests the CEE think tank landscape is predominantly independent of biased institutional partnerships, our literature review and in-depth analysis of think tank's funding sources suggests that self-identified independent think tanks must be scrutinized as potentially biased. As they are included in the independent category of affiliation due to their branding, hybridized understandings of categories of affiliation must be applied in understandings of the CEE think tank landscape, as the blurred line between the public and the state renders such a face value interpretation unsatisfactory.

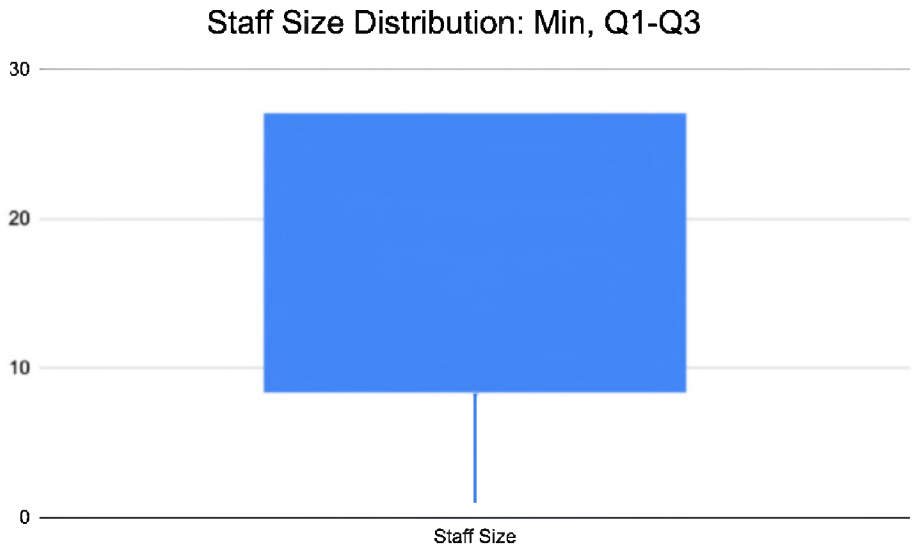
Budget

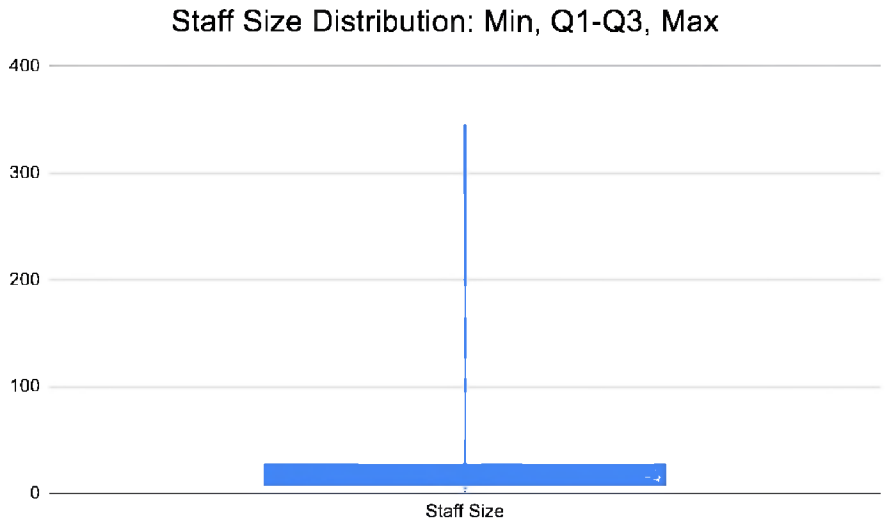


N-Size = 195	Min	Q1.	Median	Q3	Max
Budget	2,784	141,448	442,112	1,037,016.2	184,900,000

All financial values presented in this report are in USD (American Dollars). The distribution of the budgets of CEE think tanks shows multiple unique trends. As demonstrated by the necessity to include separate box and whisker plots, the first excluding the top quartile values and the bottom displaying the full budget distribution, a handful of think tanks contain the majority of the overall CEE think tank landscape's financial resources. While the bottom quartile of the budget distribution is the smallest range of any quartile, as quartiles go up, so does the range, indicating a decline in the number of think tanks with higher and higher budgets. Not only does this suggest many think tanks struggle with financing, but it suggests they face competition with other think tanks for the largest donor pools. Furthermore, budget trends are likely related to staffing trends as human capital requires payment. Thus, for a myriad of operational and organizational issues and needs, think tanks in the CEE region must be cognizant of the importance of addressing financial issues such as underfunding or a lack of diversity in funding sources. Also, out of 814 think tanks of our representative sample, only 195 think tanks reported their budget. It is clear that transparency remains an issue.

Staff Size

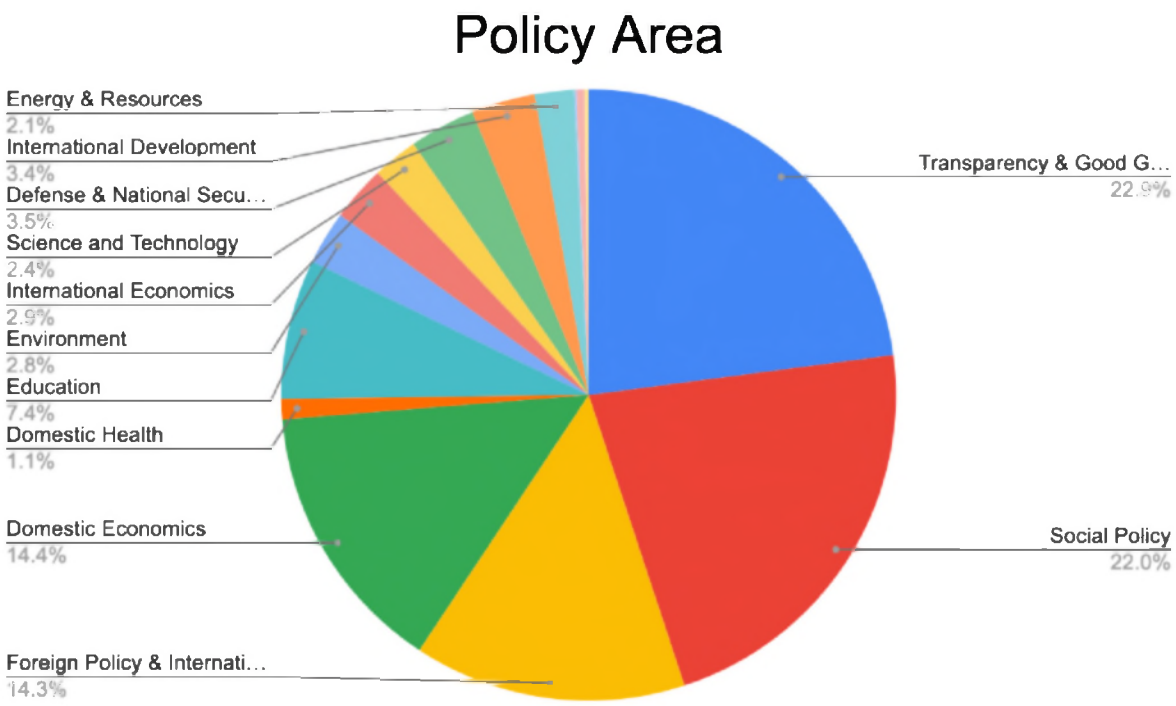




N-Size=499	Min	Q1	Median	Q3	Max
Staff Size	1	8.5	14	27	346

As may be noticed, budget and staff size reveal a crucial characteristic about the landscape of CEE think tanks: top tail clustering with all forms of capital, human and financial. Such a trend might be attributed to the low level of civil trust to independent organizations, low level of governmental funding, and multiple obstacles to receiving foreign financial support, such as laws requiring think tanks and NGO cooperating with foreign donors to register as foreign agents. A remarkably low median of 14 staff members suggests that there are many under-sourced and small think tanks compared to an elite handful who are the largest and most visible. The largest think tanks by staff include the Analytical Center for the Government of the Russian Federation (Russia), Primakov National Research Institute of World Economy and International Relations (IMEMO) (Russia), Jagellonian Club's Centre of Analysis (Poland), and Labor Market Research Institute of Lithuanian Social Research Centre (Lithuania).

Policy Area



Data on policy areas was available for all 814 think tanks identified in the CEE region. The team was able to readily identify and categorize policy areas upon checking each think tank website throughout the first two phases of data collection when making sure an institution was still active. The team sorted think tanks into both primary and secondary policy areas if a second was applicable, then extended the primary area into the secondary area if the think tank focused on a single discipline. These values were summed and then divided by two, meaning the number of think tanks active in a particular policy area is better conveyed as a percentage, since a think tank may be represented across either one or two policy areas based on the diversity of its programming.

As can be observed, the two highest percentage policy areas are transparency and good governance (22.9%) and social policy (22.2%). Not surprisingly, having been liberated from the communist rule about 30 years ago, the CEE countries are still in a transition period toward democracy. Moreover, the authoritarian legacy of these states often manifests itself with right-wing and nationalist governments seizing power, such as

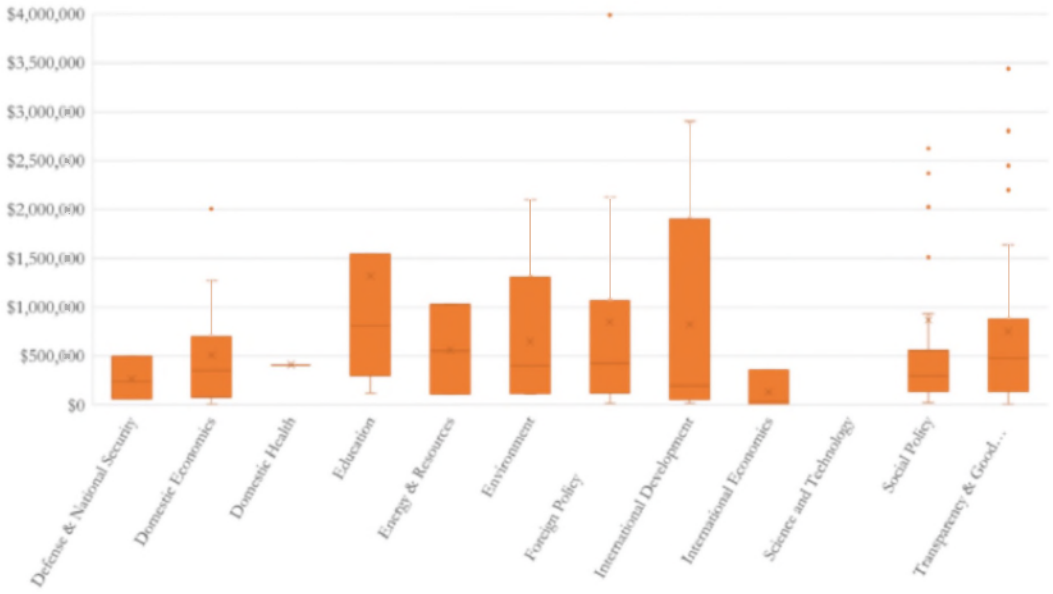
in Poland or Hungary. Additionally, CEE countries have a strong tradition of the so-called social contract between the state and its citizens, which stems from Soviet socialist rule. However, considering the collapse of the centralized economy in the 1990s and consequent crises that hit the CEE, the region has lower levels of wealth and living standards. Therefore, the emphasis on social policies is natural. Science and technology as well as food and water policies are very scarce in the region.

Domestic economics and foreign policy and international affairs are the second cluster of policy areas widely represented among think tanks. Though most CEE countries are focused on improving their economic situation and are constantly struggling on whether to side with the West or Russia, these areas are confined to the government-level policymaking and are generally closed for public discussion. Education is important as part of social policies and demographic stimuli. Yet as for other policy areas, they tend to be deprioritized in face of "primary" issues that require immediate response and attract most funding from the state budget.

Bivariate Analyses

The preceding sections dealt with a host of key variables one by one. The present paragraph looks for the mutual interrelations between couplets of variables across Central- and South-Eastern Europe. In this way, it highlights trends that could otherwise go unnoticed due to the sheer amount of data supporting this report. Box and whisker plots are the favoured sort of visualisation for many of these bi-variate analyses, as it has traditionally been the case for TTCSP's reports. On a more technical note, one should flag up that, as in the previous issue, the plots' boxes display the interquartile range. However, unlike previous approaches, the two whiskers reach out to the maximum and the minimum, respectively. In addition, where appropriate and possible, tables accompany the charts to better specify a few descriptive statistics of the employed datasets. Understanding the relationship between variables allows one to develop a clearer view on how the challenges think tanks face (e.g., underfunding or under-staffing) affect particular think tanks (i.e., in a given policy area) differently. Therefore, policymakers, think tank executives, scholars, and donors will appreciate the need to promote think tanks' development via a strategic use of scarce resources.

Policy Area/Budget Size



Policy area	*Minimum*	*Median*	*Maximum*	*N*
Defence and National Security	*$61,300*	*$236,830*	*$500,000*	*2%*
Domestic Economics	*$2,784*	*$352,617*	*$2,004,633*	*15%*
Education	*$119,658*	*$807,433*	*$4,467,188*	*5%*
Energy and Resources	*$106,347*	*$549,326*	*$1,027,292*	*2%*
Environment	*$109,543*	*$404,363*	*$2,092,986*	*3%*
Foreign Policy	*$900,000*	*$1,166,479*	*$5,174,226*	*7%*
International development	*$5,000*	*$148,802*	*$2,900,000*	*5%*
International economics	*$5,400,000*	*$7,175,428*	*$8,950,855*	*1%*
Social Policy	*$20,000*	*$300,000*	*$10,615,460*	*26%*
Transparency_and_Good governance	*$3,044*	*$494,668*	*$5,487,392*	*33%*
Totals[409]	*$672,768*	*$1,163,595*	*$4,322,003*	*150*

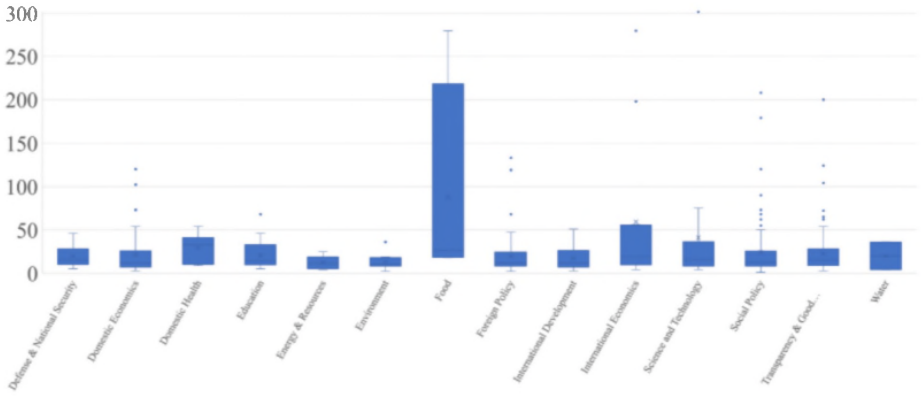
Pairing policy area and budget size, a few facts become evident. First of all, think tanks focusing on international economics have a comparatively higher budget than the other remaining 99% of the sample. A similar talking point can be made in relation to think tanks focusing on foreign policy. In general, education-focused think tanks would appear to have a high median budget. Yet, since they represent only 5% of the sample,

[409] The ten largest data points were omitted in order to ensure the best possible representations of the bigger picture.

this conclusion may be untrustworthy. Meanwhile, think tanks focusing on domestic economic, social policy, or transparency and good governance, are the most differentiated, as the wide interquartile range suggests. Furthermore, social policy think tanks are the least well-funded, indicated by their low minimum and median values.

Therefore, social-policy think tanks are disproportionately underfunded and in need of concentrating on financial planning and attracting potential donors. Nonetheless, as all policy areas are of relevance to a vast number of stakeholders for a vast number of reasons, investment should not be necessarily seen as a zero-sum game. Rather, it should be understood that there exist equity gaps within the CEE think tank landscape that warrant future research and amelioration. Other notable trends include similar minimum values for education-, energy-, and environment-dedicated think tanks, and a lack of budget transparency more broadly across most policy areas. Additionally, the fact that including the ten largest budgets skews the dataset sensibly, implies a further takeaway point. Namely, that a handful of pre-eminent think tanks dominate the CEE landscape by being recipients of most domestic and international funds — especially those earmarked by the EU, and foreign private donors.

Policy Area/Staff Size



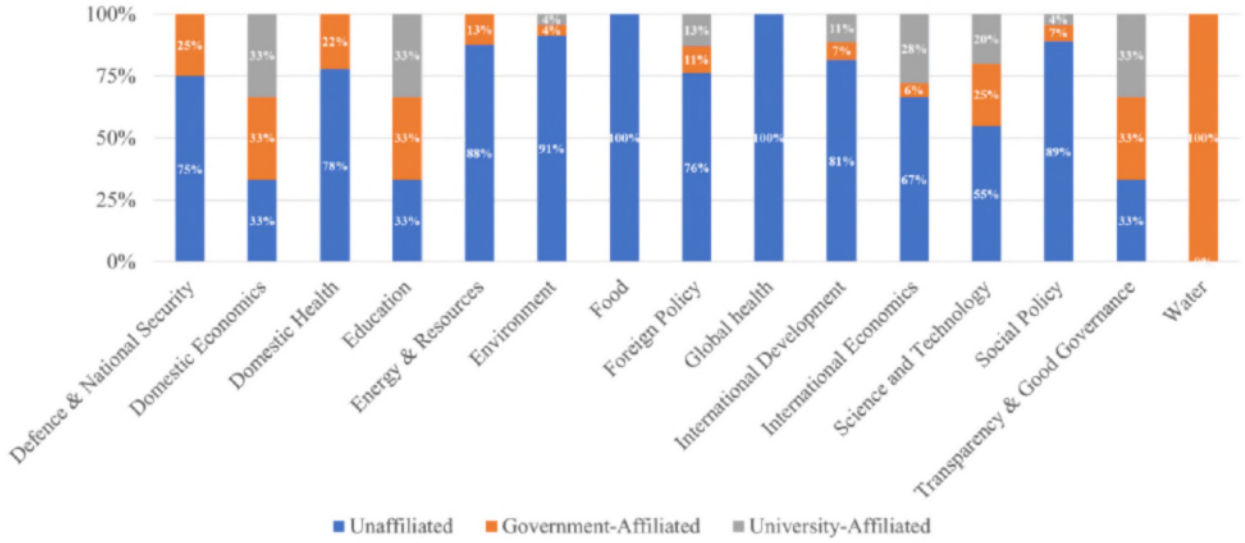
Policy area	Minimum	Median	Maximum	N
Defence and National Security	5	15	46	3.9%
Domestic Economics	3	12	120	11.3%
Domestic Health	9	33	54	1.4%
Education	5	14	68	4.5%
Energy and Resources	4	11	25	1.8%
Environment	2	10	36	3.1%
Food	18	26.5	280	0.8%
Foreign Policy	2	12	133	15.0%
International Development	3	12	51	3.7%
International Economics	4	19	280	3.3%

Science and Technology	4	15.5	302	2.9%
Social Policy	1	14	302	22.6%
Transparency and Good Governance	2	15	200	25.3%
Water	4	20	36	0.4%
Totals	5	16	138	487

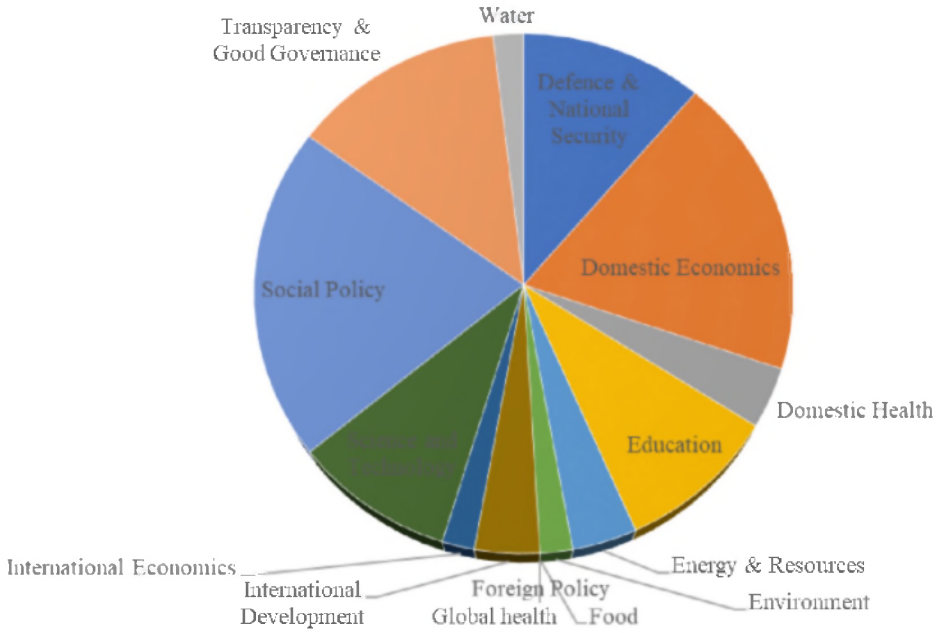
CEE think tanks' staff size data is not only more transparent than budget size, but indicates a greater variance within most policy areas and between policy areas as well. It should be noted that think tanks in the defence and national security, environment, international economics, international development, and science and technology were the least likely to disclose information about their staff size. Perhaps because of a few big institutions' reticence, it was possible to include all the values present in the dataset and still get a perfectly readable chart and regular statistics. One should also note that the prevalence of a few relatively outlying maximum values indicates that dominant think tanks within the CEE landscape centralise most human capital within their organisations, even if many of those top institutions do not disclose their data. Thus, expertise is not diffused across the entire think tank landscape, but densely concentrated. For example, the largest Central- and South-Eastern European think tanks in three categories (domestic economics, foreign affairs and international relations, and transparency and good governance) all have staffs of more than 200 people. Yet, a further breakdown of the data reveals that staff size's 75th percentile in these policy landscapes is systematically below 30. Moreover, think tanks focusing on domestic health and food tend to have the highest median. Yet, they are scarcely represented in the sample (1.4% and 0.8%). Investments in human capital are equally as potentially useful as financial investments, as expertise is needed to capitalize on resources and adapt to pressing issues and changing circumstances. Think tanks working in the areas of social policy, environment, education, or transparency and good governance generally have lower median staff sizes. Thus, the impression is that smaller institutions are more traditionally deep rooted

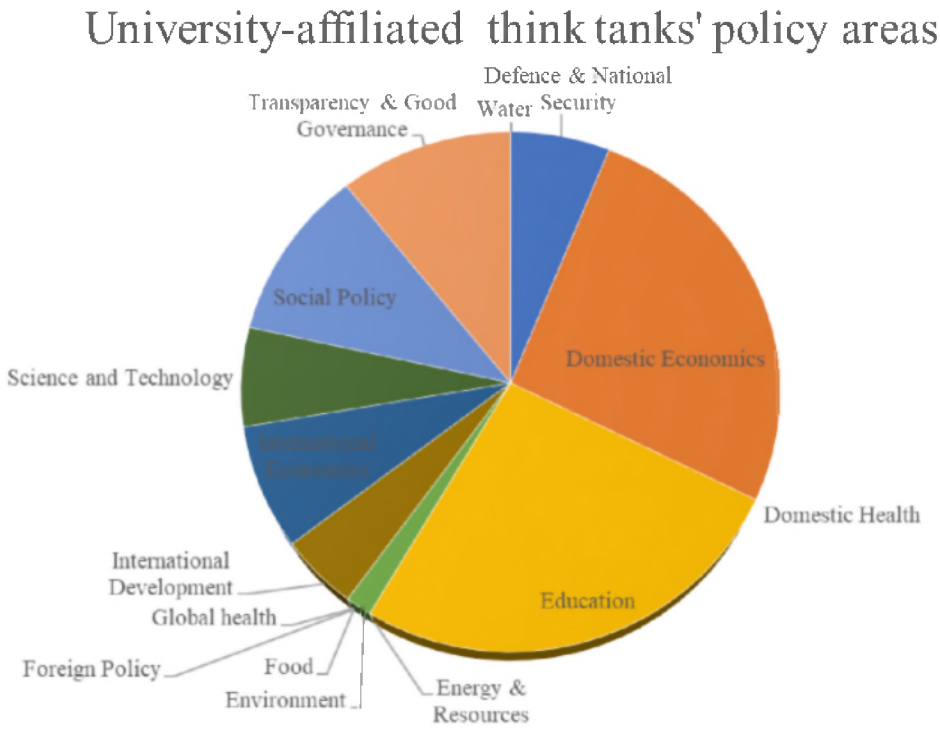
Partnerships with universities could further generate human capital by creating low-cost internship programs and graduate schemes. Furthermore, institutional partnerships further legitimise the sector and advertise its potential utility in career building, which could help newer generations overcome acceptance issues that have hindered the think tank sector in the past.

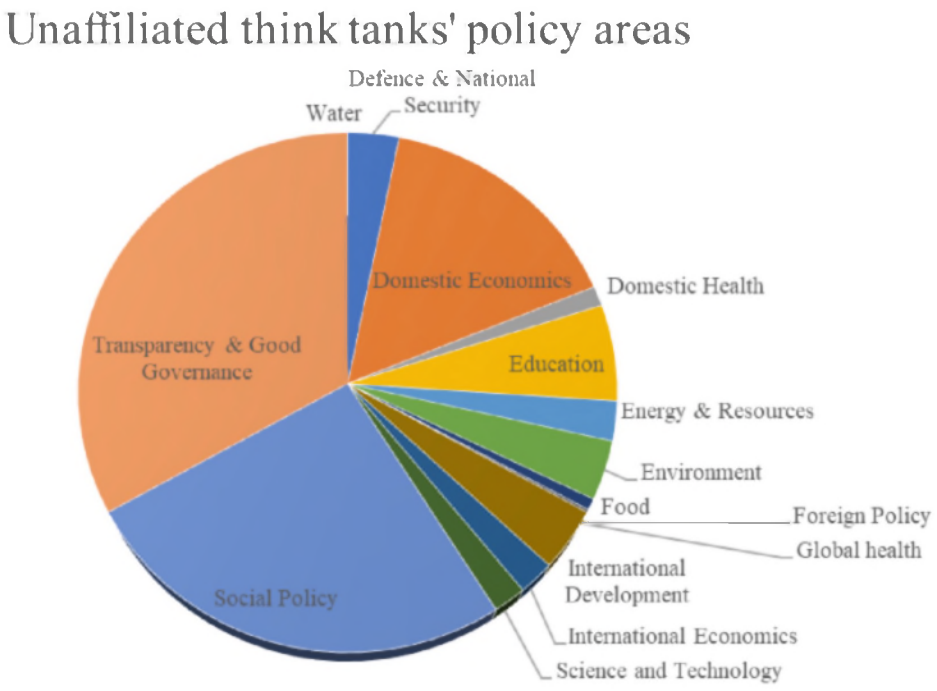
Policy Area/Affiliation Relationship



Government-affiliated think tanks' policy areas



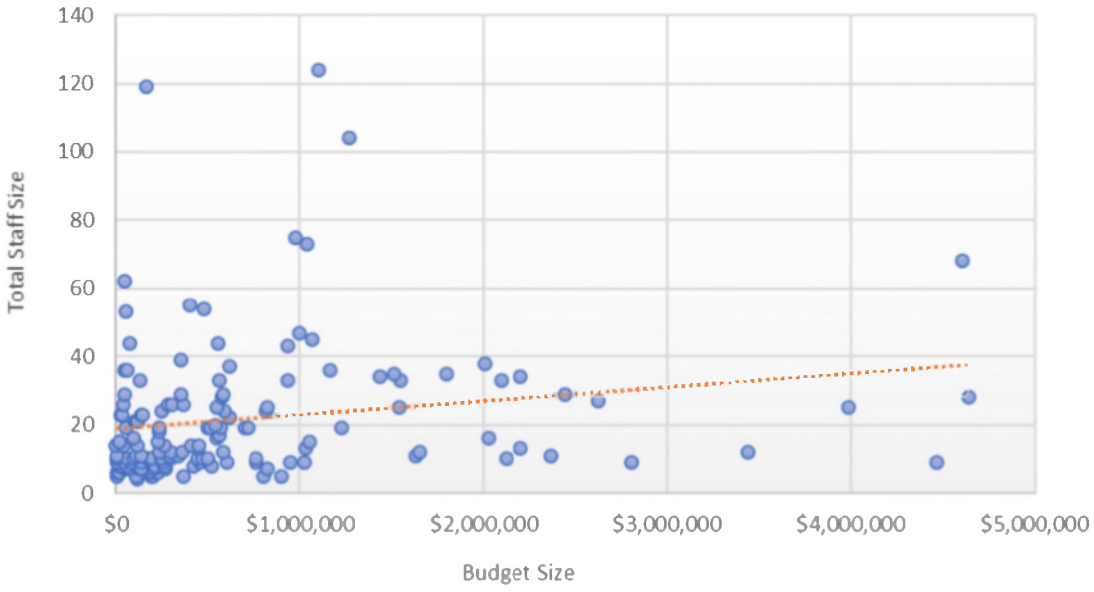




Transparency and good governance, social policy, domestic economics, and foreign policy and international affairs are the predominant focus policy areas regardless of the affiliation categories. A larger percentage of independent think tanks

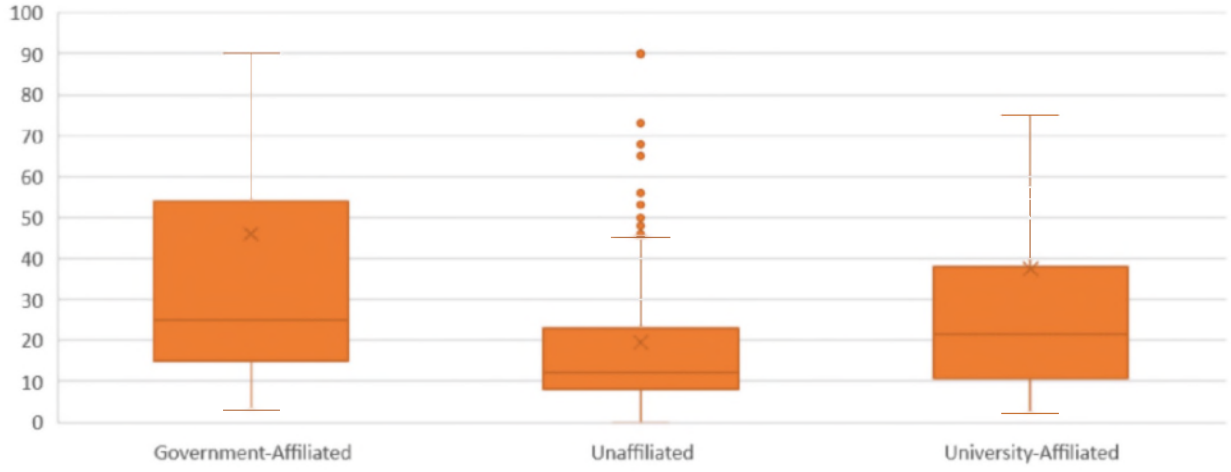
focus on transparency and good governance and social policy compared to think tanks that lie underneath formal institutions such as universities and government administrations. This suggests that these formal institutions are not as keen to produce research that may yield conclusions that challenge their pre-extant operating procedures. Furthermore, social policy can be understood as a broader issue that requires policy implementation assistance and further surveillance research, long-term activities involving civil society partnerships that may not be conducive to the financial or political power-based agendas of these institutions under which a think tank may be housed. Domestic economic policy is studied more by government and university affiliated think tanks. Possibly because public institutions would be the main beneficiaries – and often are the proposer – of these reforms. A similar conclusion can be inferred from institutional think tanks' more marked emphasis on foreign policy and international affairs as well as defence and national security compared to independent think tanks. After all, foreign policy and security research is often based on classified data or otherwise better suited for public servants with access to insider information about those sectors' operations. This analysis and the underlying empirical evidence show that affiliation actually influences what policy areas a given think tank engages in. While further investigation is needed to make conclusions about the causal relationship between the two variables, it is evident that affiliation lends to bias that influences research agendas, an important consideration in the formation of institutional partnerships.

Budget/Staff Size



The relationship between budget and staff size is both predictably and evidently positive. However, in order to make it clearly visible on a chart (i.e., trend line not flat), it is necessary to remove the single largest and the 10 wealthiest organisations from the dataset. Albeit weak, a correlation exists between the two indicators which logic can explain by highlighting that most of the staffers require a salary. Meanwhile, the weakness of the correlation is related to many researchers' positions being part-time, or even completely voluntary (e.g., unpaid internships). Moreover, a significant portion of the budget is often allocated to expenses other than human capital (e.g., rent, bills, transportation, etc.). Thus, this correlation could not but be flexible and highly dependent on the context. Participation in the think tank sector may not be transactional and comes in a variety of forms, some of which do not increase the overall staff count. While limitations exist in assessing how the relationship between budget and staff size may generate policy recommendations, the positive relationship between the two and the rate of change of their correlation should be understood as contextual. Over time, wider participation may further diminish the clarity and steepness of this relationship. Moreover, it should be understood that compensation for hard work is justified and may be necessary to attract the expertise necessary to further legitimate the think tank sector.

Affiliation/Staff Size

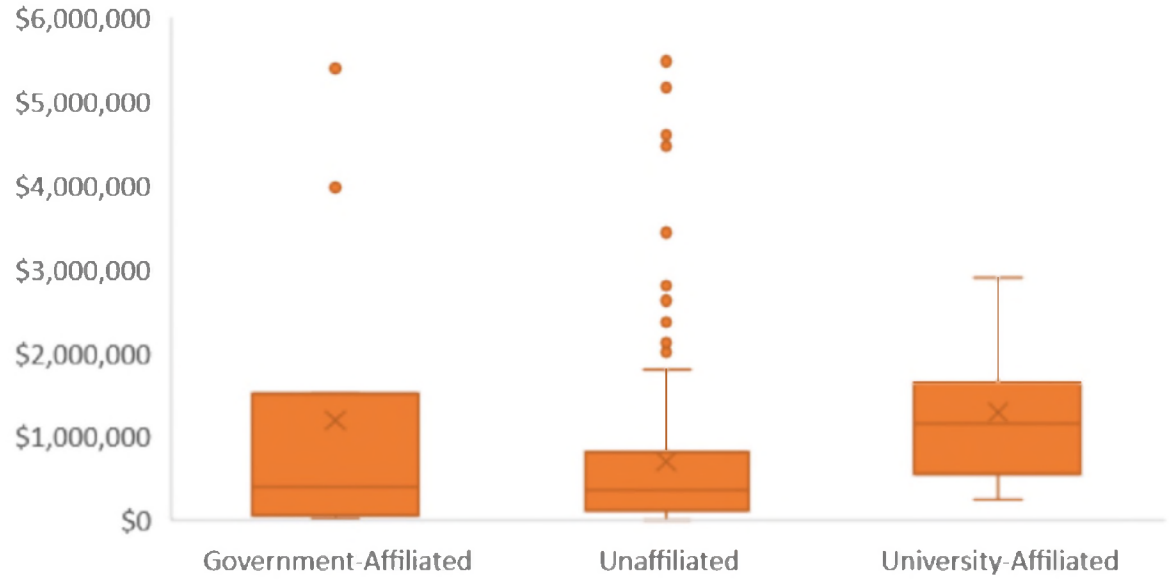


	Minimum	Median	Maximum	Count
Government-Affiliated	3	25	280	9%
Unaffiliated	1	12	302	81%
University-Affiliated	2	21.5	280	11%
Totals	**2**	**19.5**	**287**	**468**

In assessing the relationship between affiliation and staff size for Central- and South-Eastern European think tanks, a few facts emerge clearly. First, government-affiliated think tanks are larger in terms of personnel than both other categories of think tanks. This is likely due to the increased funding governments have at their disposal through treasuries, central banks, and tax revenues. Furthermore, the benefits of any government-related career may push worthy researchers to avoid independent and university-affiliated organisations which grant less benefits (e.g., healthcare provision. Thus, government-affiliated think tanks may also be more likely to attract greater quantities of higher-quality staffers.

However, some of the highest maximum values had to be excluded as they would have distorted the chart and annexed descriptive statistics excessively. Unaffiliated and government-affiliated think tanks have maximum values of over 300 staff members, which suggests that universities have greater caps on hiring that the other two categories. On the contrary, government-affiliated think tanks have higher floors on the number of permanent positions in their analytical centres. Regardless, the median think tank across all categories has between 12-25 employees, which is lower compared to the upper tails of the distribution than the lower tails. Ergo, human capital as well as financial capital may be assumed to have been centralised by a few dominant research organisations.

Affiliation/Budget



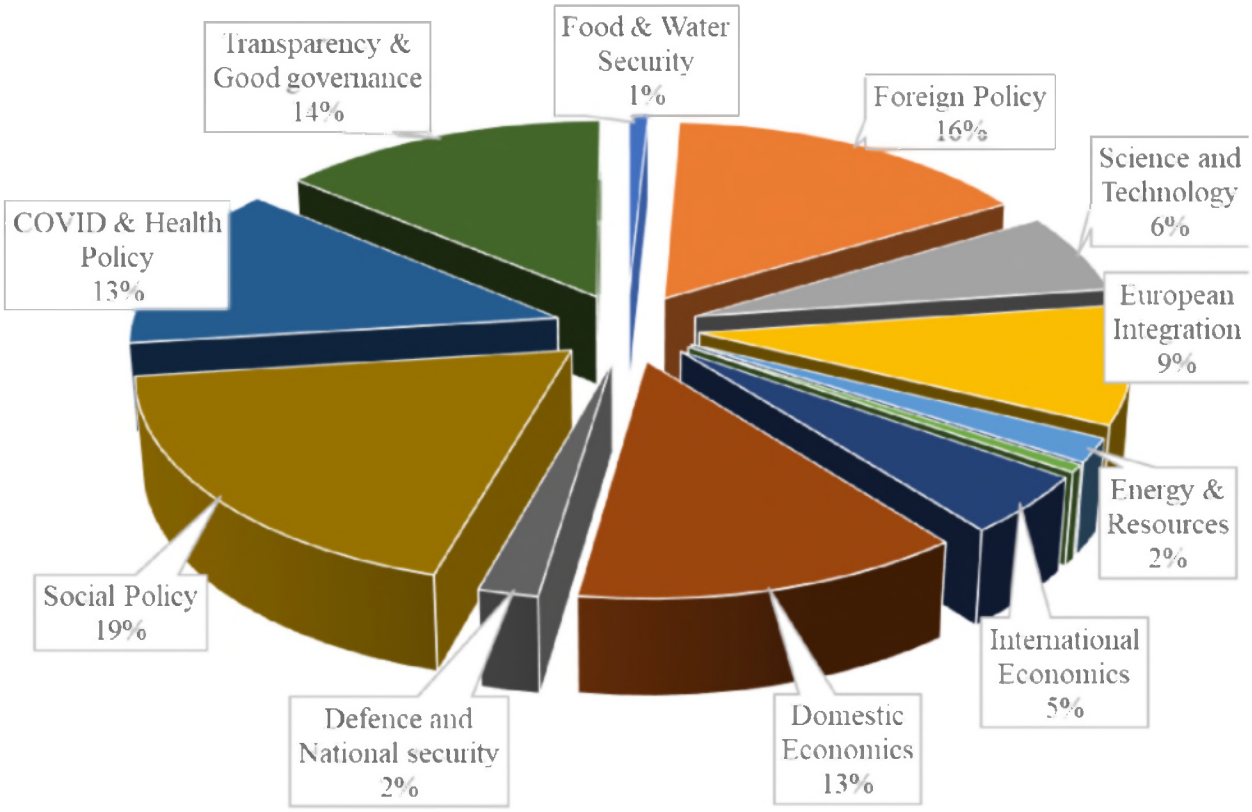
	Minimum	Median	Maximum	Count
Government-Affiliated	$30,000	$271,785	$5,400,000	7%
Unaffiliated	$2,784	$360,051	$5,487,392	89%
University-Affiliated	$248,594	$1,166,479	$2,900,000	4%
Totals[410]	**$93,793**	**$599,438**	**$4,595,797**	**167**

Evaluating the relationship between think tanks' budget and affiliation in CEE is a difficult task due to these organisations' limited transparency — especially for non-independent ones. Furthermore, many maximum values had to be excluded from the dataset as their extreme position in comparison to the mass of most non-affiliated think tanks and the rest of the distribution would distort the graph and the annexed descriptive statistics.

Nonetheless, one can still draw two conclusions from these very limitations. First, university-affiliated think tanks in CEE do not see a cluster of dominant institutions receiving the greatest share of funding. Second, non-independent affiliated think tanks are comparatively more reticent to disclose their budget size. Hence, government- and university-affiliated think tanks should enhance their transparency in order to gain legitimacy and credibility as institutions deserving potential partnerships. Meanwhile, independent and government-affiliated think tanks need to develop strategies to further grow their funding sources as their broader distribution indicates less financial stability — especially at the lower end of the spectrum.

[410] The 11 think tanks with the largest budgets had to be removed from the dataset.

Publication Output per Policy Area

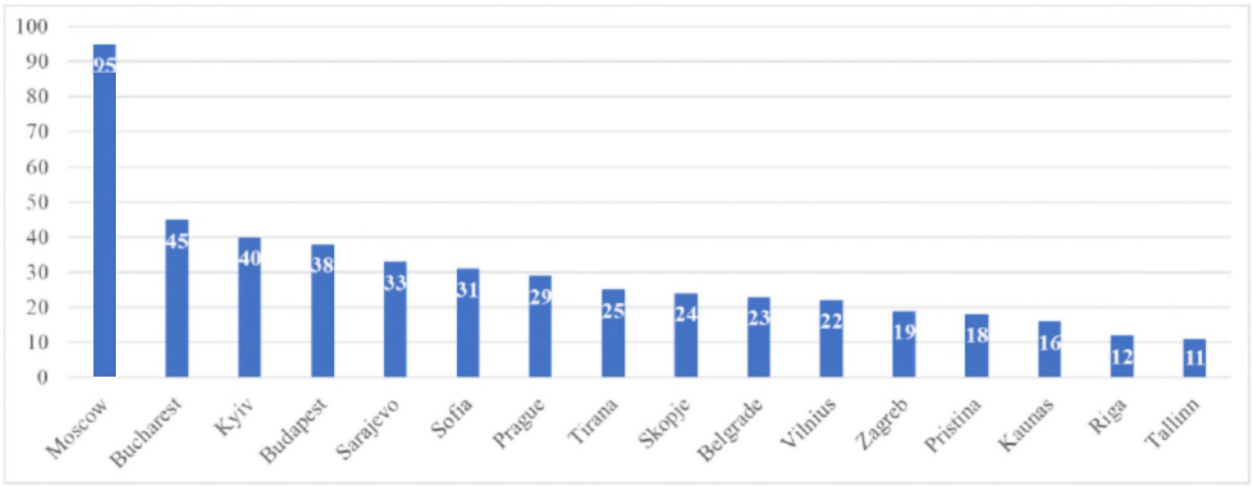


Clearly, think tanks' role in and influence on the various stages of policymaking are dissimilar across Central- and South-Eastern Europe as a whole. Yet, publishing original research is one of the few undertakings that virtually all think tanks carry out. As a matter of fact, the provision of knowledge and its dissemination through various means (written text of variable accessible, multimedia, interviews, conferences, etc.) is almost vital to think tanks. This is the function that traditionally the TTCSP has acknowledged as essential to capture the essence of these institutions' work and research agendas. It is highly likely that not all research projects will necessarily relate mainly to the policy areas think tanks generally to prioritise — even more so in such a volatile and diverse region. Thus, the TTCSP CEE team analysed about 300 publications produced by a representative sample of the over 800 think tanks active in the region. As part of its activity, the team read into these institutions' publications to determine the addressed policy area/s. This section briefly summarizes the results of this inquiry to determine if CEE think tank's publications manifest the adaptability other regional landscapes have reliably proven to possess.

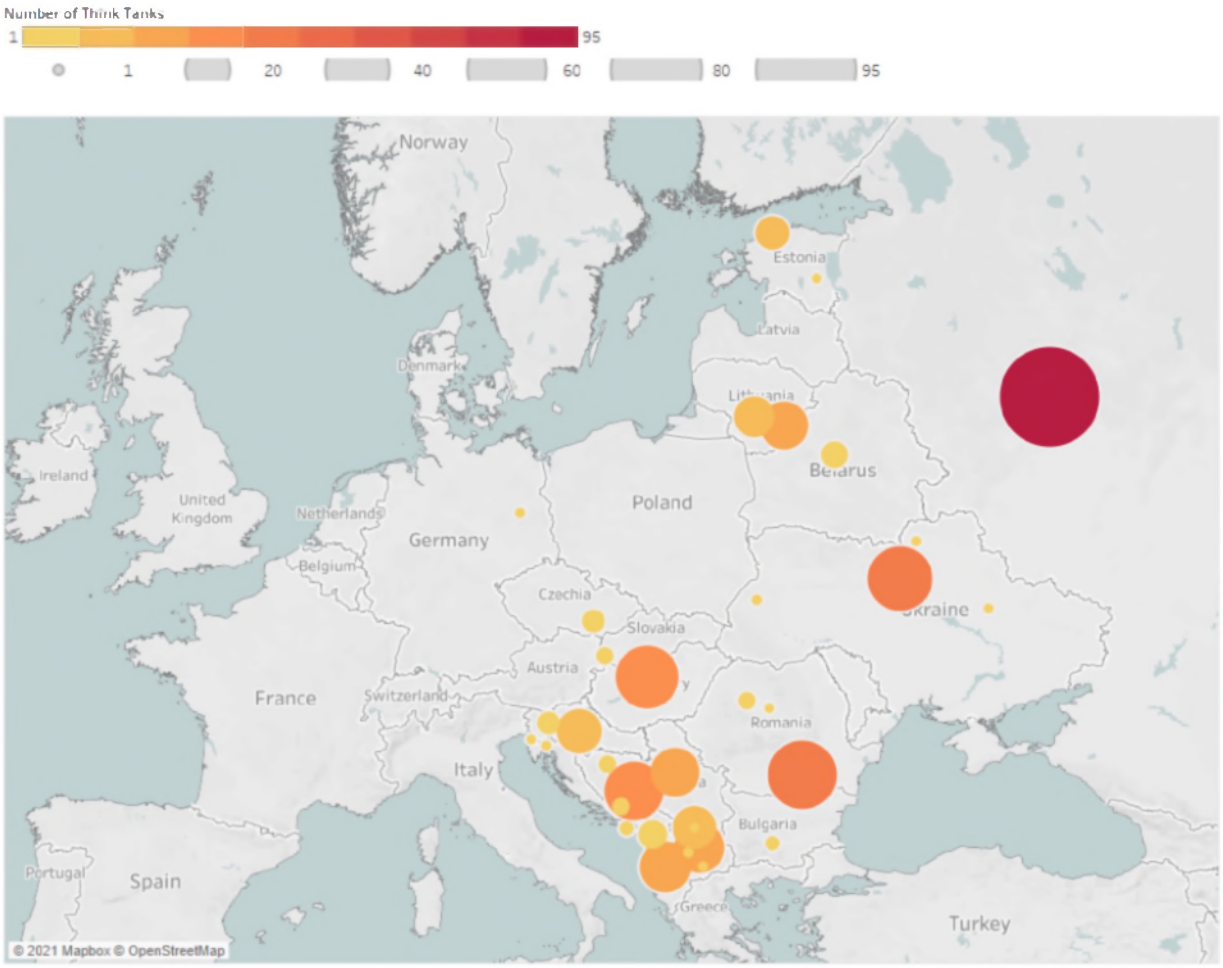
It is especially important to underline that about 13% of the representative sample of publications address the recent pandemic. In fact, healthcare and related

issues are one of the less commonly stated areas of focus for CEE think tanks (1.4%). Thus, at least in the course of 2019 and 2020, regional think tanks' level of adaptability and responsiveness to emerging issues has been substantial. Social policy and human rights, transparency and good governance, domestic economics, and foreign policy make up about 50% of the sampled publications. However, it should be noted that approximately 9% of all research focused on Europeanisation and EU integration. Thus, the willingness to engage with the EU – especially for accession countries and the 'Western Balkan Six' as a whole – is a stable regional peculiarity. Moreover, it is evident that technical fields such as science and technology or energy and resources constitute a small percentage of the selected sample. Yet, these figures are way larger than the percentages of think tanks specialising expressly in these areas.

Geographic Distribution

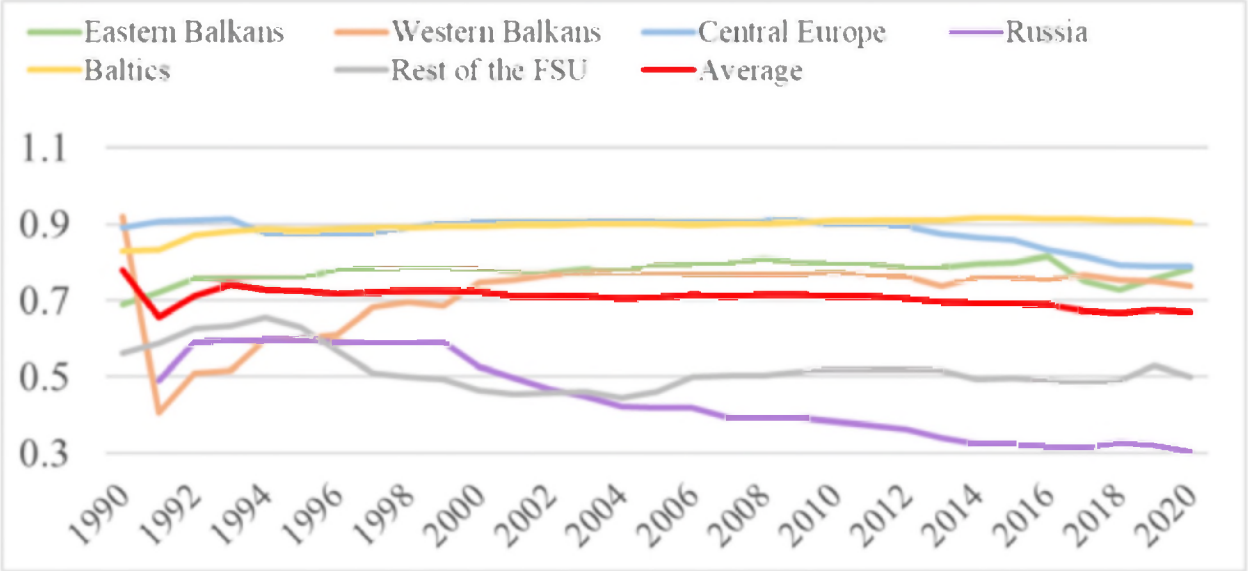


Mapping the Central- and South-Eastern European think-tank landscape, a number of hub cities make their appearance. They host over 10 think tanks and are usually the capital of a country of the region. Hence, the revolving door theory of human capital in the think tank sector applies to the CEE region as well as North America. Moscow, Bucharest and Kyiv, are the most important hubs of the region. Meanwhile, Budapest, Sarajevo, Sofia, Prague, Tirana, and Skopje are increasing their relevance, with well over 25 operational think tanks each.



Besides the fact that many think tank's concentrate in capital cities, no major trend seems apparent except the tendency for their distribution to correlate weakly with regional population. For instance, in Russia almost all think tanks are located in the westernmost regions, following population distribution trends. Sometimes, smaller cities host up to three think tanks despite a minimal residing population. Thus, subregional policymaking needs may be an important factor in CEE. As the following map shows, this trend is especially evident in former Yugoslav countries. To notice, large circles of darker shades indicate a greater number of think tanks and vice versa.

Democratisation processes



The chart above is based on Project Democracy Matrix data on CEE countries between 1990 and 2020. The countries are aggregated according to TTCSP's standards with a few exceptions. First, the Balkans are separated into a Western and Eastern part, with the latter having joined the EU on January 1, 2007 (i.e., Bulgaria and Romania). Meanwhile, Hungary and Poland joined Czechia and Slovakia in the "Central Europe" category to keep the graph legible. Third, the category "Rest of the Former Soviet Union (FSU)" includes only Belarus, Moldova and Ukraine to allow for Russia's and the Baltics republics' unique development path to stand out.[411]

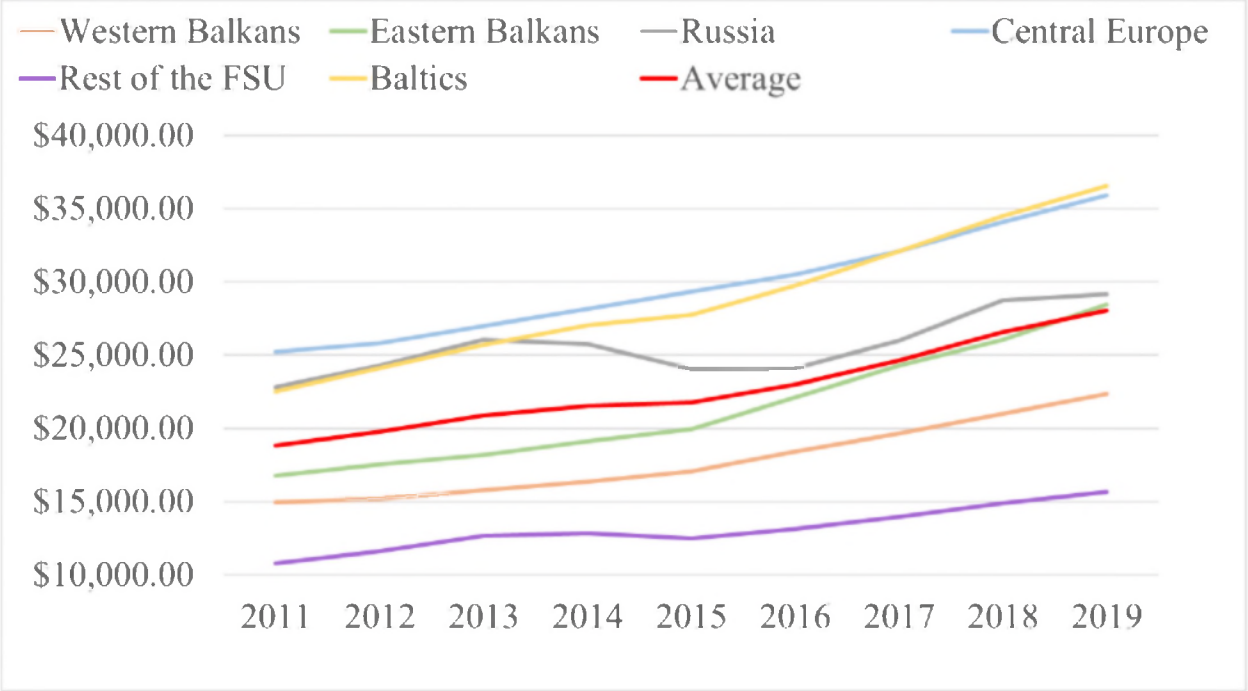
The trendlines display the progressive democratisation of CEE in 1990–2010 and gives a hint of the backsliding and deconsolidation trends of the last two decades There are three key junctures in this latter time frame worthy of further explanations: 2013, 2016 and 2019. In 2013, the Sovereign Debt Crisis struck the region aggravating a slight recession which had begun at the end of the first decade of the 21st century due to the Global Financial Crisis.[412] Economic strain translated into political turmoil already in 2013, with diffused democratic backsliding due to the emergence of right-wing

[411] Fabio Ashtar Telarico, 'Digital Civic Cultures in Post-Socialist South Eastern Europe: Lessons, Prospects and Obstacles After Thirty Years of Media (Il)Literacy in the Region', in *Дигитална Гражданска Компетентност и Медийни Стереотипи [Digital Civic Competence and Media Stereotypes]*, 1st ed. (Montana, Bulgaria: Polymona, 2021), 95–108, https://fatelarico5.wixsite.com/website/chapter-2021-2.

[412] Ritsa Panagiotou, 'The Greek Crisis as a Crisis of EU Enlargement: How Will the Western Balkans Be Affected?', *Southeast European and Black Sea Studies* 13, no. 1 (March 2013): 89–104, https://doi.org/10.1080/14683857.2013.773178.

strongmen in Poland and Hungary and demagogue politicians virtually everywhere. Then, 2016 bears the scars of the massive inflow of economic migrants and asylum seekers that shook the EU and Europe as a whole in 2014–2015. Many demagogic political forces played the anti-immigration card, gaining increasing traction.[413] Lastly, the 2018–2020 period saw a series of striking elections in which far-right nationalist parties have confirmed their popularity and, often, entered government or retained power. Meanwhile, civil unrest and political instability mushroomed, with Belarus, Bulgaria,[414] and Serbia[415] being especially volatile countries in the summer of 2020.

GDP per Capita Growth

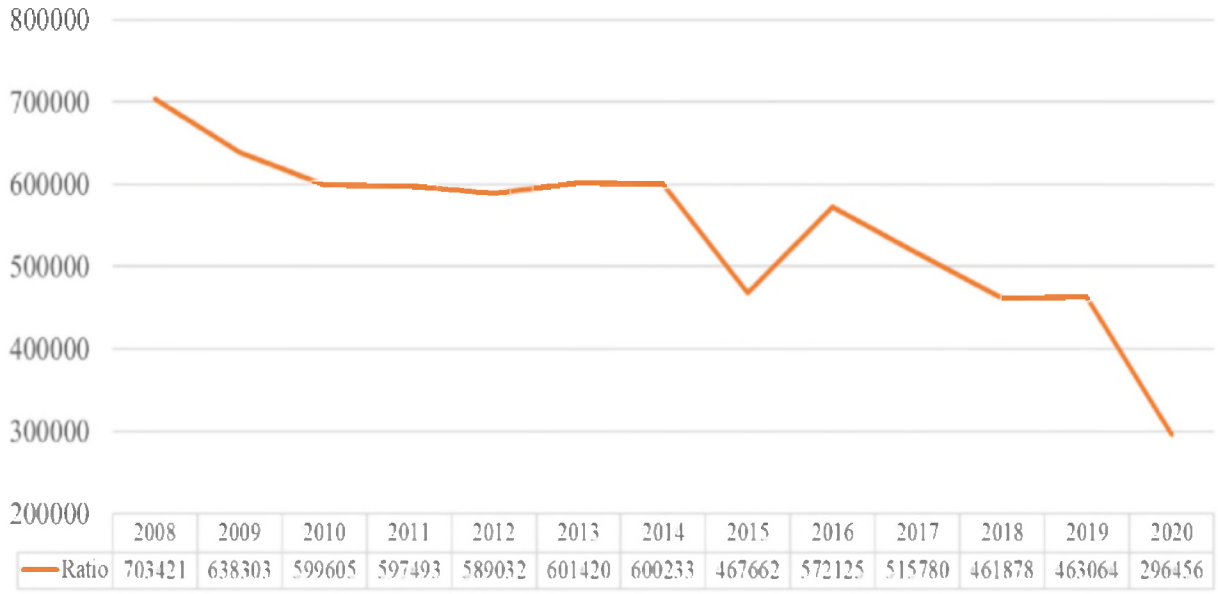


Central and Eastern European countries' GDP per capita expressed in Purchasing Power Parity has grown sensibly over the three decades since the end of the Cold War. Yet, during this long period the general trend has masked massive

[413] David Ost, 'Regime Change in Poland, Carried Out From Within', *The Nation*, January 2016, https://www.thenation.com/article/regime-change-in-poland-carried-out-from-within/.
[414] Fabio Ashtar Telarico, 'From Protests to Constitutional Crisis: Boyko's Latest Gamble', Global Risk Insights, 14 October 2020, https://globalriskinsights.com/2020/10/from-protests-to-constitutional-crisis-boykos-latest-gamble/.
[415] Fabio Ashtar Telarico, 'When Pandemics Fuel Aborted Revolutions: Serbia's Hot Summer and What Comes next', Global Risk Insights, 1 December 2020, https://globalriskinsights.com/2020/12/when-pandemics-fuel-aborted-revolutions-serbias-hot-summer-and-what-comes-next/.

fluctuation every now and then. The most recent breaking points in the positive-trend series are 2015 and 2019. reflective of the two monumental economic crises Europe experienced in those years. In 2015, the World Bank estimated the growth in GDP per capita for CEE countries as defined by TTCSP at around 1%, down from 3% in the previous year and from over 5% in 2012. This was the tail strike of the Sovereign Debt Crisis's hit on CEE countries' economies. Variability is much stronger for those groups of countries that fluctuate around the average (the Eastern Balkans and Russia). A similar impact also affects Belarus, Moldova and Ukraine. Meanwhile, the wealthier countries (Central Europe and the Baltics) have suffered much less despite being more dependent on the EU — which suffered greatly after the Global Financial Crisis. Obviously, data for 2020 are not yet finalised and, therefore, published at the moment of writing. However, it is legitimate to expect that the generally upward trajectory has bent in the opposite direction quite significantly.

Population/ Number of Think Tanks

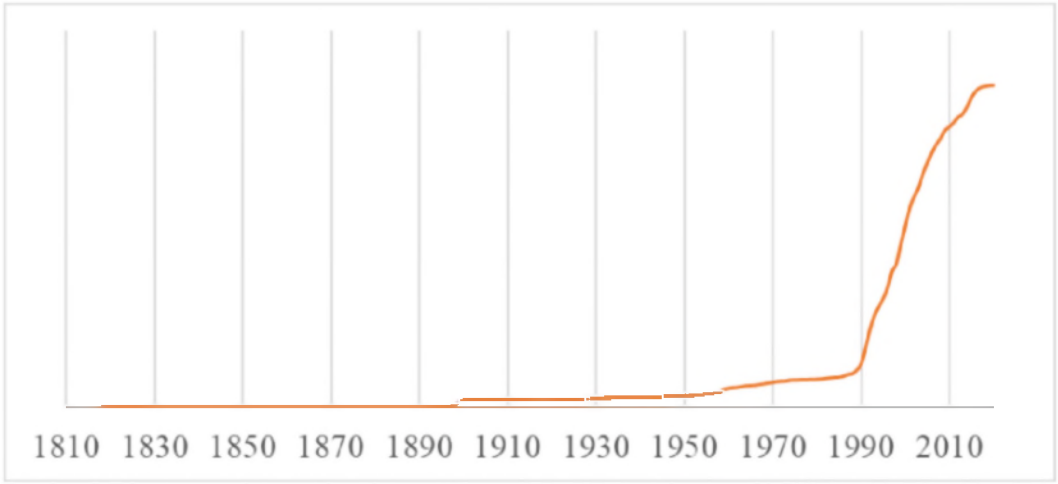


	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Ratio	703421	638303	599605	597493	589032	601420	600233	467662	572125	515780	461878	463064	296456

Graphing the ratio of population to the number of think tanks in the CEE region since 2008 has mapped out a negative trend, moving sharply downwards within the last two years. The time period of 2008 to 2014 displays a steadily decreasing trend line at a -14.67% percent change, directly correlated to the increase in think tanks and a mild stagnation in population within the region. A focal point of the graph is the immense drop in the trend line during 2015, which is the result of a decrease in CEE population by -1.8%, a 627,545 deficit from the 2014 population (347,020,111). This decline in

population could be a consequence of the 1990 economic depression in CEE which led to fewer births during that era, including a demographic crisis in Russia in 1998. Therefore, the sudden reduction is speculated to be an echo of the post-Soviet generation struggling to get back upon its feet. Between 2015 and 2016, the CEE population to the number of think tanks grew positively, only to be set towards a downward trend past 2016. Since 2016, CEE has seen the ratio of CEE population to the number of CEE think tanks to have developed in a manner that is favourable for think tanks because as the ratio lowers, it is conclusive of more research facilities entering the arena to advocate for the values and changes that civil society needs.

Years Founded



It can be inferred from the graph that the first uptick is 1919 – after this year, the number of think tanks begins to increase gradually over time. After the end of the First World War and the consequent collapse of Austro-Hungary, Central and Eastern European countries that were previously part of the Empire began their struggle to form as sovereign states. For instance, Estonia was plunged into the War for Independence, the Hungarian Soviet Republic was established, and Slovakia named Bratislava as its new capital. However, the main kink point is 1989. After the collapse of the Berlin Wall, the wave of overthrowing Soviet rule sweeps throughout Central and Eastern Europe. This year, Gorbachev recognised the national identification of former USSR republics, and they began to form as nationstates. Combined with other factors such as the growth of the Internet and the creation of the European Union in 1993, the mentioned changes warranted new research opportunities.

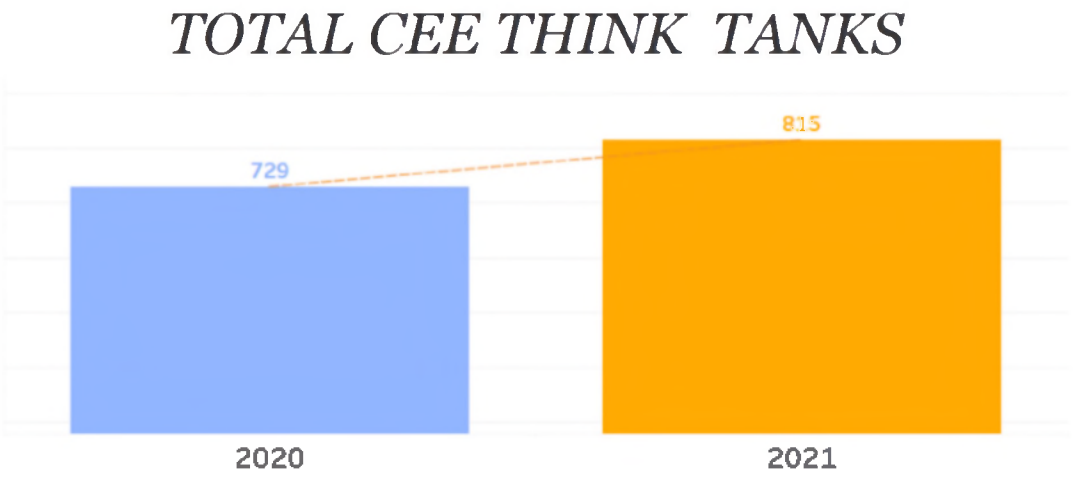
2021 in numbers – Closed, new and total think tanks

117 New CEE Think Tanks added to database during the Summer of 2021

109 Think Tanks reported Closed in Summer of 2021

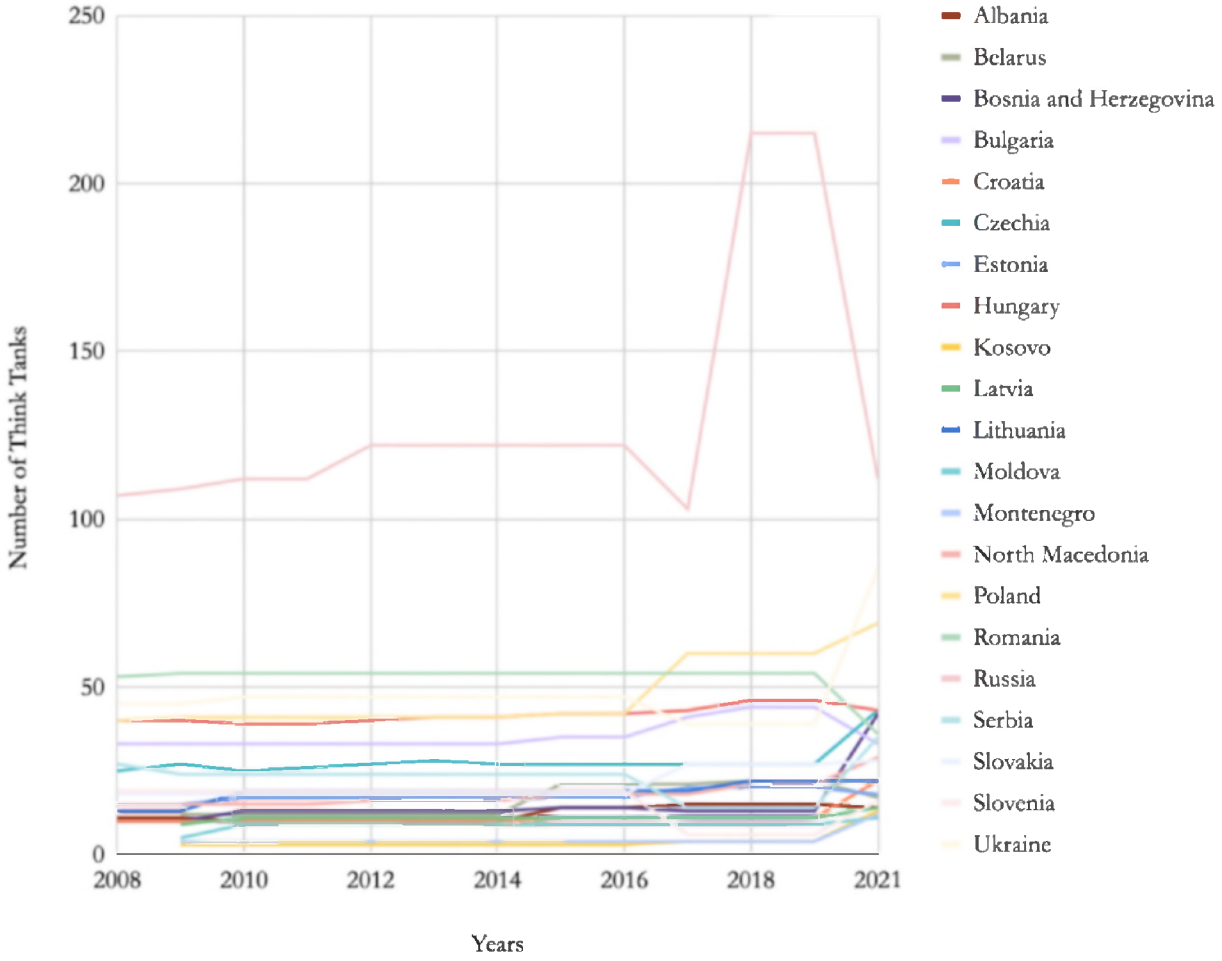
815 Is the total number of active Think Tanks in CEE

7.2% Of the world's **11,175** Think Tanks is in the CEE Region



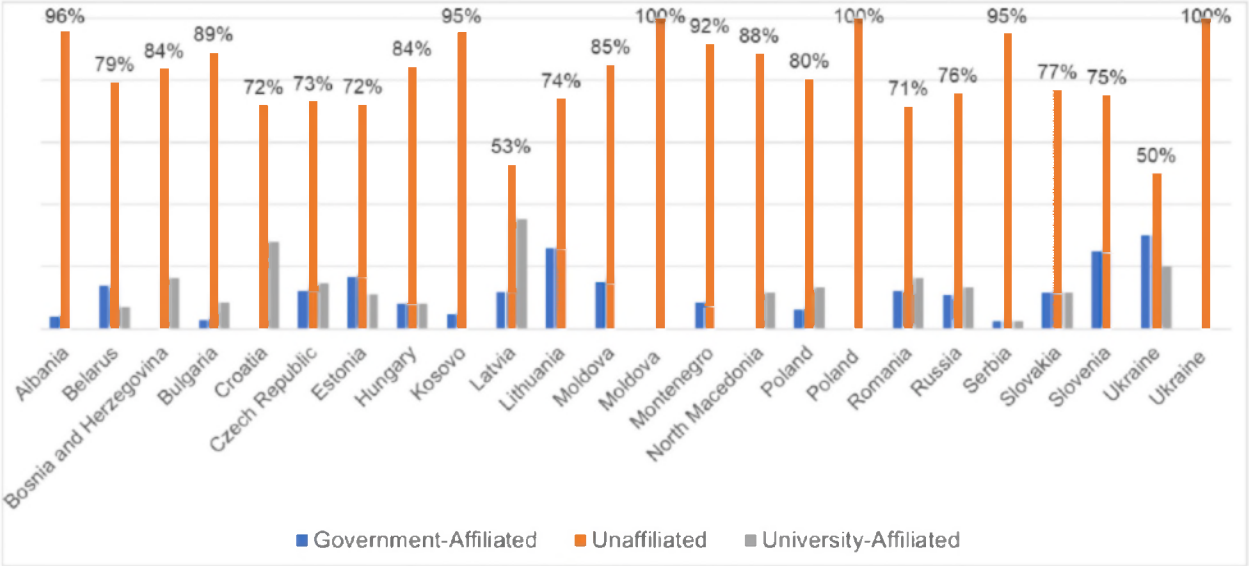
By Country Statistics Comparison

Total Number of Think Tanks



The graph reveals that, unsurprisingly, Russia has the greatest number of think tanks. Yet this might be attributed to the size of the country and its population rather than the density of the think tanks landscape. As for the trend lines in the bottom of the graph, EU CEE countries, such as Romania or Poland, generally have more think tanks than non-EU states like North Macedonia or Montenegro. Additionally, naturally, smaller states, for example Kosovo, have the lowest number of think tanks. Furthermore, as the graph not only shows where countries stand in comparison to one another in 2020, their development throughout the 21st century indicates that no countries stand as outliers in the CEE think tank landscape in their comparative stance to one another, as only slight position changes in terms of rank by quantity are indicated, which can be attributed to previous sampling error by past GGTI teams in their estimates of landscape size.

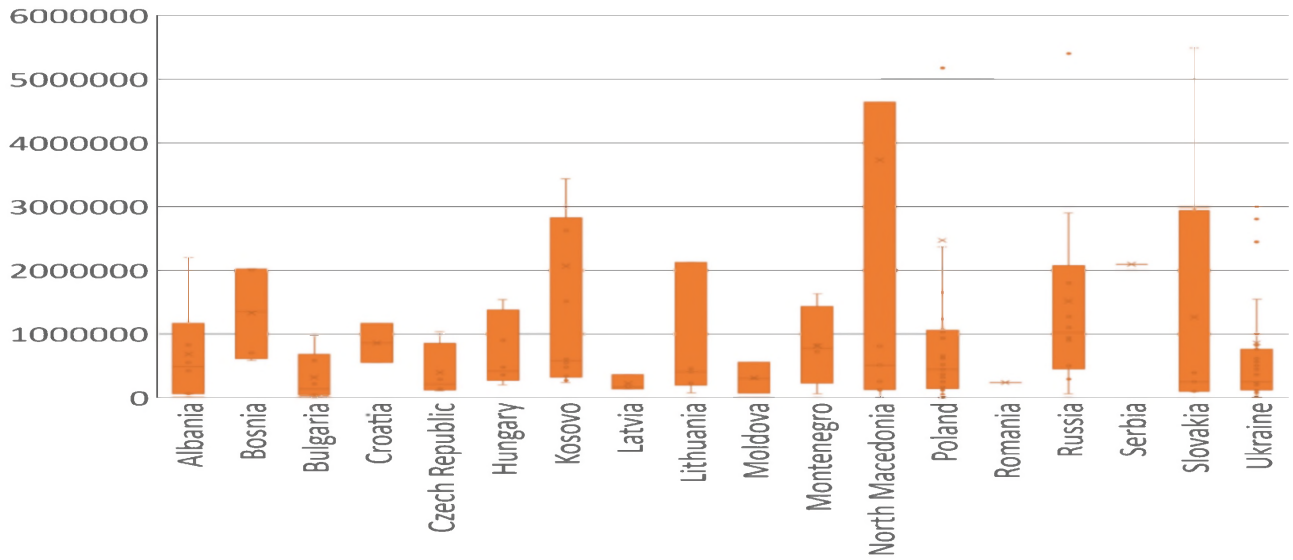
Affiliation



It is evident from the graph that the CEE region has an overwhelming majority of unaffiliated think tanks. Every CEE country think tank landscape is composed of at least 50% unaffiliated think tanks, with some countries such as Montenegro and Moldova having 100% of their think tanks unaffiliated. University-affiliated think tanks are the second most prevalent type of think tanks in the CEE region, with 18 CEE countries having a university-affiliated think tank presence. While not included in our finalized, three-fold typology, it should be noted that the most uncommon affiliation of the aggregate CEE landscape of the original 7 part TTCSP affiliation typology is political party- affiliated think tanks, of which only Poland and Ukraine have any, justifying their grouping as government-affiliated given their direct influence over policy making processes. Furthermore, while university affiliated think tanks are second most common, Slovenia, Bulgaria, Serbia, Belarus and Estonia all have a greater quantity of government affiliated tanks. Additionally, percentages are indicated on the top of each bar in the graph above.

Country specific clarifications on the exact number of think tanks falling into any categorical variable can be found in the appropriate country specific chapter. Affiliation is important for two reasons when assessing the CEE think tank landscape. First, affiliation with an institution such as government or a university can lead to bias in research agendas and spin of output when disseminated or communicated to the wider public. Secondly, funding is inherently tied to these partnerships, and countries with a think tank landscape exhibiting diversified affiliation are more likely to have developed established institutional partnerships that contribute to greater availability and stability of funding, a key goal for any think tank.

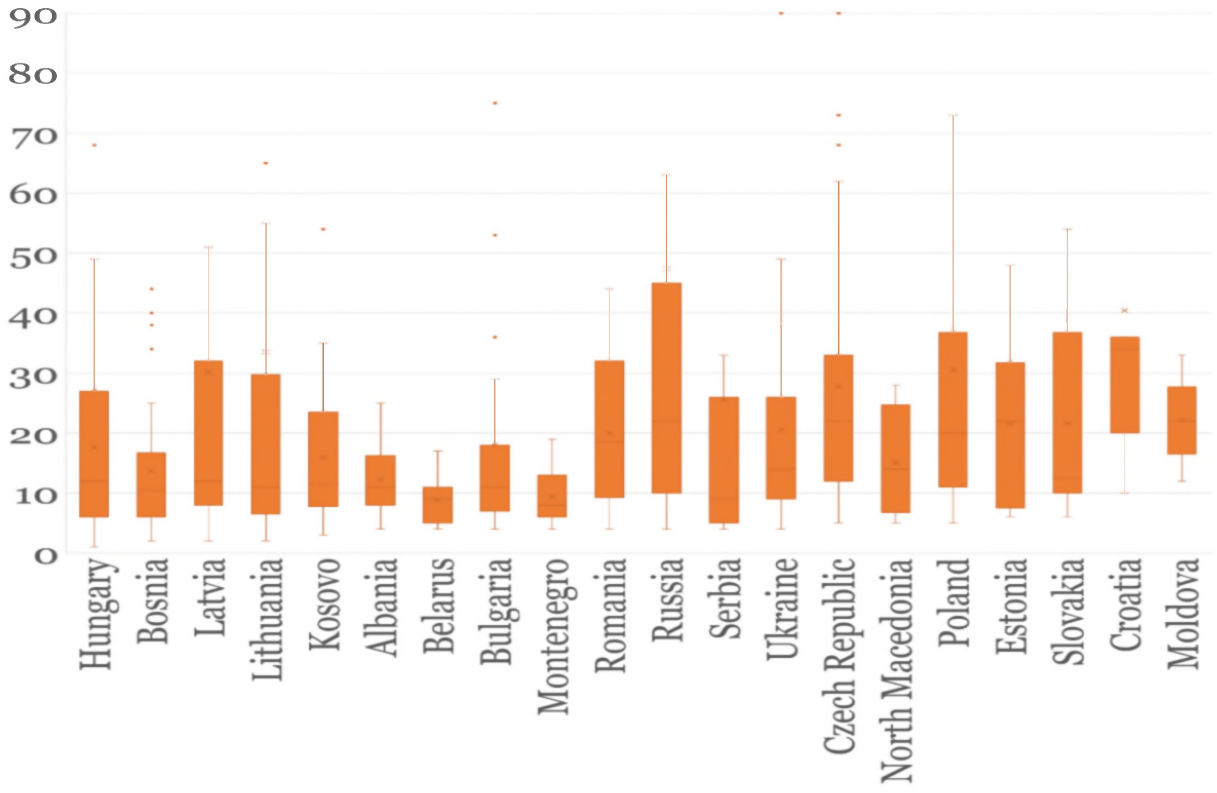
Budget



Country	Minimum	Median	Maximum
Albania	30000	2200000	523674.6125
Belarus	N/A	N/A	N/A
Bosnia and Herzegovina	582311	2024288	1328393
Bulgaria	37400	978816	318436.3333
Croatia	309320	1166479	675041.7067
Czech Republic	49083	4603102	998881.7143
Estonia	18147	1434248	522770.75
Hungary	200000	2928811574	293359160.9
Kosovo	237982	10615460	2066817.2
Latvia	136630	8950855	2720701.07
Lithuania	78289	64026381	9644501.379
Moldova	71781.64	558966	311803.5467
Moldova	N/A	N/A	N/A
Montenegro	60964	1632794.36	810179.84
North Macedonia	2784	19775277	3730404.714
Poland	3044	54708414	2467894.135
Romania	60650	28863829	4643604
Russia	50000	5400000	1383314.727
Serbia	590710	1200000000	278410176.8
Slovakia	94110.62	5487392	1263235.924
Slovenia	5000	62000	30228.57143
Ukraine	573482	1545200	1059341

The common trend amongst CEE think tanks' budget sizes is a median budget of $387,785, yet there are essential outliers to take note of. For example, Croatia's think tanks have a seemingly larger budget in comparison, yet this is an anomaly caused by low budget transparency that inhibits overly generalizable findings from Croatia, Estonia and Latvia because of two or less disclosed budgets from our representative samples. On the other side of the spectrum, Bosnian think tanks have the smallest median budget of the CEE region at $42,656. Notable trends exist in this data. First, across all countries, top tail clustering suggests a concentration of resources in the hands of a smaller minority of more powerful think tanks, which indicates a gap in legitimacy and capital within the landscape. Secondly, as shown in our table, transparency of budget is a huge issue across the landscape, as it inhibits confidence in donors who do not how their contributions relate to the operations of a think tank and it inhibits the ability of researchers, such as the TTCSP, to provide as precise recommendations as possible in our mission to help the think tank sector flourish so it may extend public policy efficiency across all sectors.

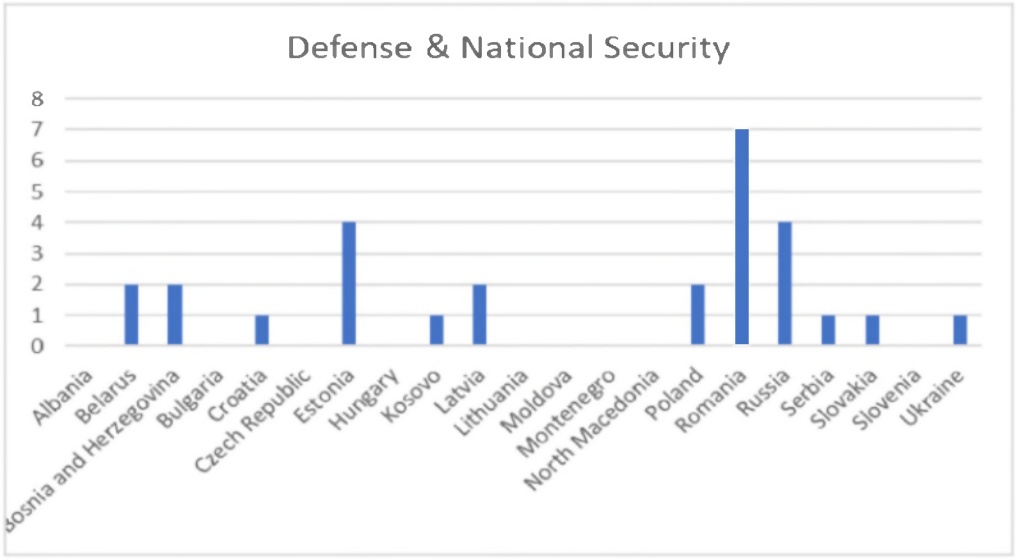
Staff Size

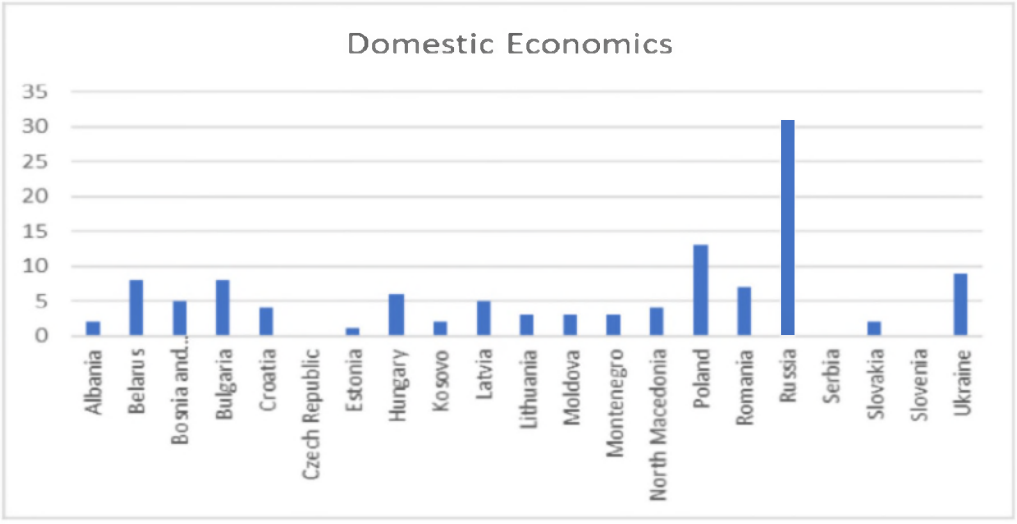


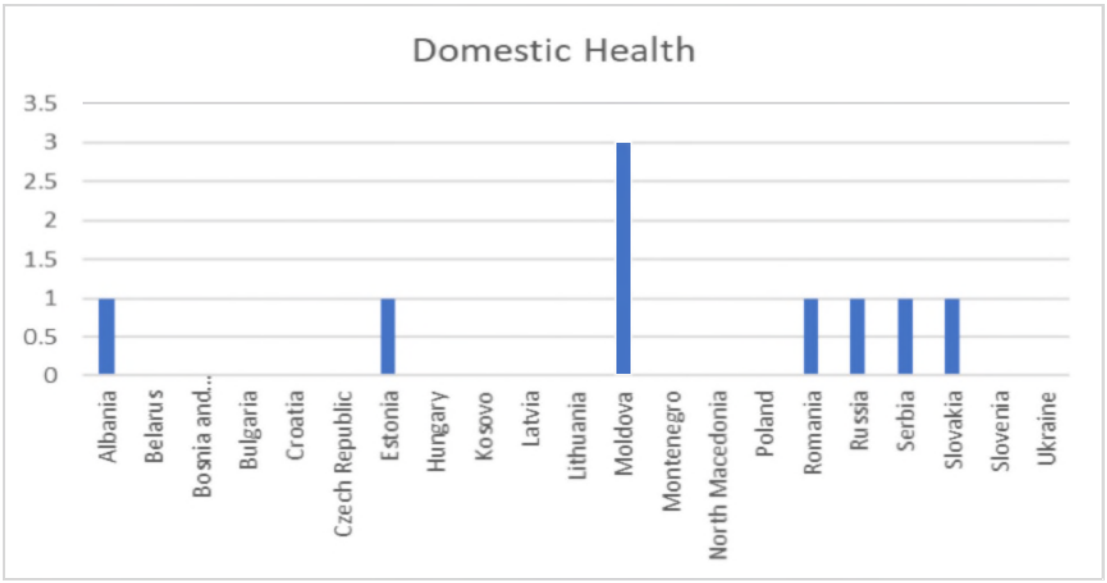
Country	Minimum	Median	Maximum
Albania	4	12.00	25
Belarus	4	8.82	17
Bosnia and Herzegovina	0	13.33	44
Bulgaria	4	18.13	75
Croatia	10	40.43	120
Czech Republic	5	1670.89	44397
Estonia	6	17.18	34
Hungary	1	17.64	68
Kosovo	3	15.94	54
Latvia	2	18.00	51
Lithuania	2	33.55	200
Moldova	12	22.17	33
Moldova			
Montenegro	4	9.44	19
North Macedonia	5	15.07	28
Poland	5	30.53	302
Poland			
Romania	3	16.30	46
Russia	4	47.37	280
Serbia	4	27.56	133
Slovakia	6	22.47	54
Slovenia	10	20.00	36
Ukraine	4	19.44	90

The CEE median staff size is 15 employees with most countries having concentrated median staff sizes within the range of 10-30 people. Russia and Poland are the two countries with think tanks that have median staff sizes over 40 people. For Poland, this can be connected to their budget size, as Polish think tanks have a larger median budget of $5,708,414, allowing them to hire more researchers. Human capital is closely related to but not dependent on financial capital, as internship programs and part-time consultancies offer alternatives. Furthermore, the cost of research itself means budgets should not be considered purely as an enabler of human capital. However, like budget, there exists top tail clustering, especially amongst university and government affiliated think tanks which have the institutional support to acquire experts and analysts consistently and sustainably when compared to independent think tanks. These think tanks exist in every country, yet for the entire CEE region, the trend holds true as well since some maximum values are more extreme than others, unrelated to the population size of a given country. When comparing budget and think tank size across country, the size of the country or sample should not have a huge correlational effect on the size of

an institution's capital because smaller country size relates to a smaller number of think tanks, meaning resources are distributed amongst institutions, resulting in similarly sized think tanks across the CEE region. As transparency remains an issue with the disclosing of staffing, it is not as severe as with budget size.



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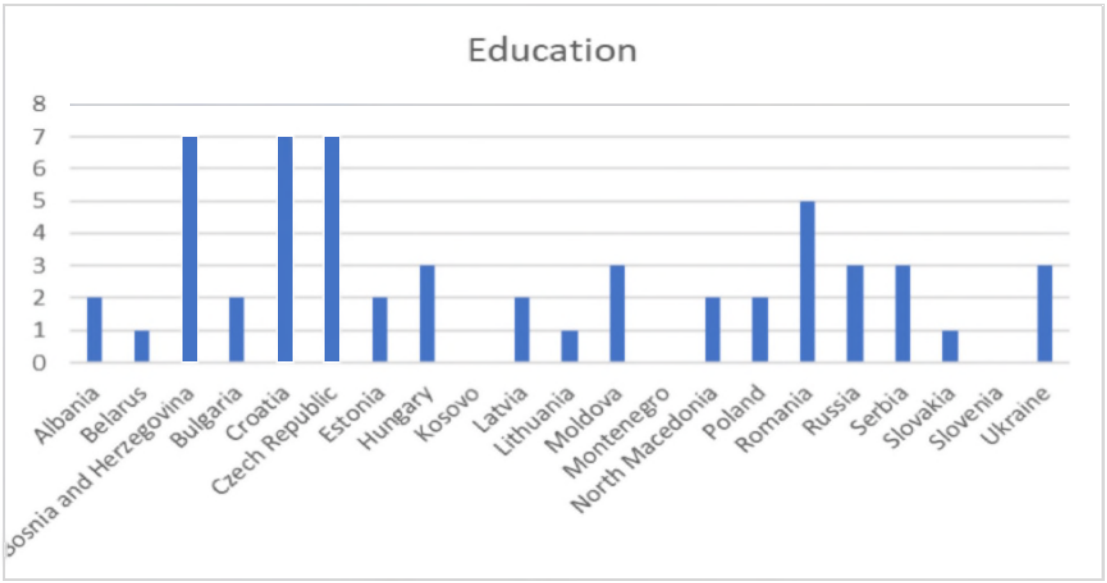
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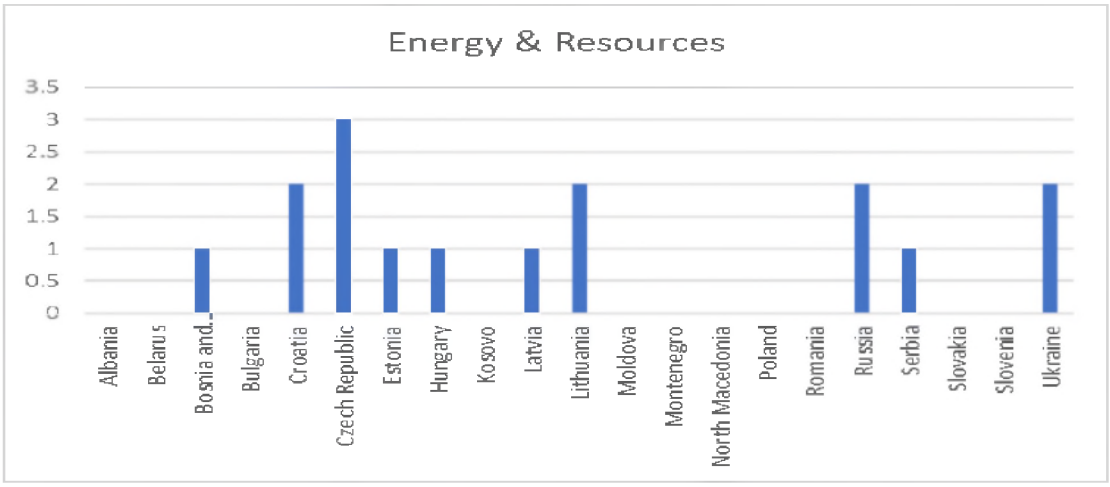
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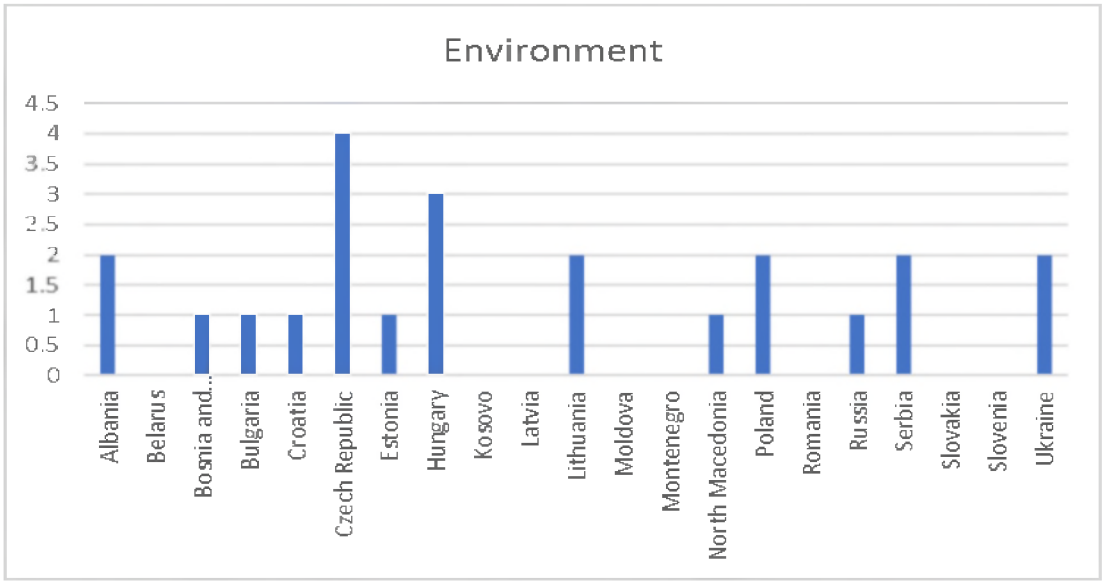
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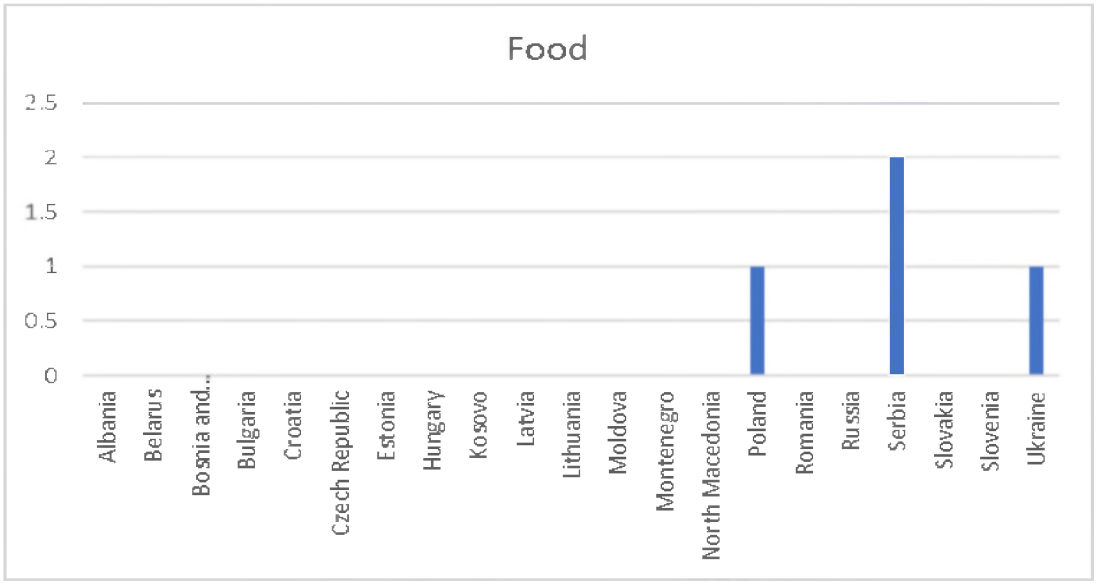
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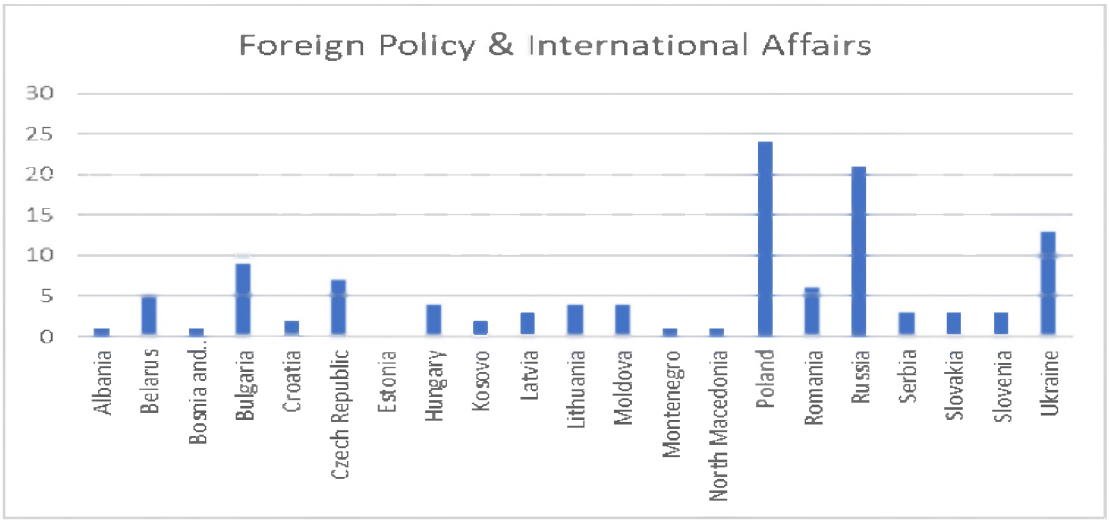
Foreign Policy & International Affairs
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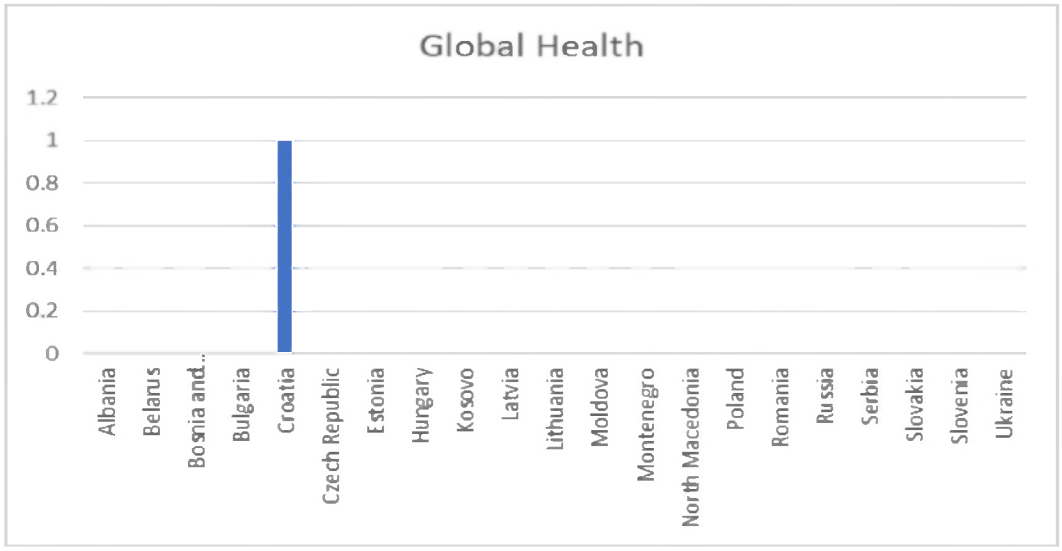
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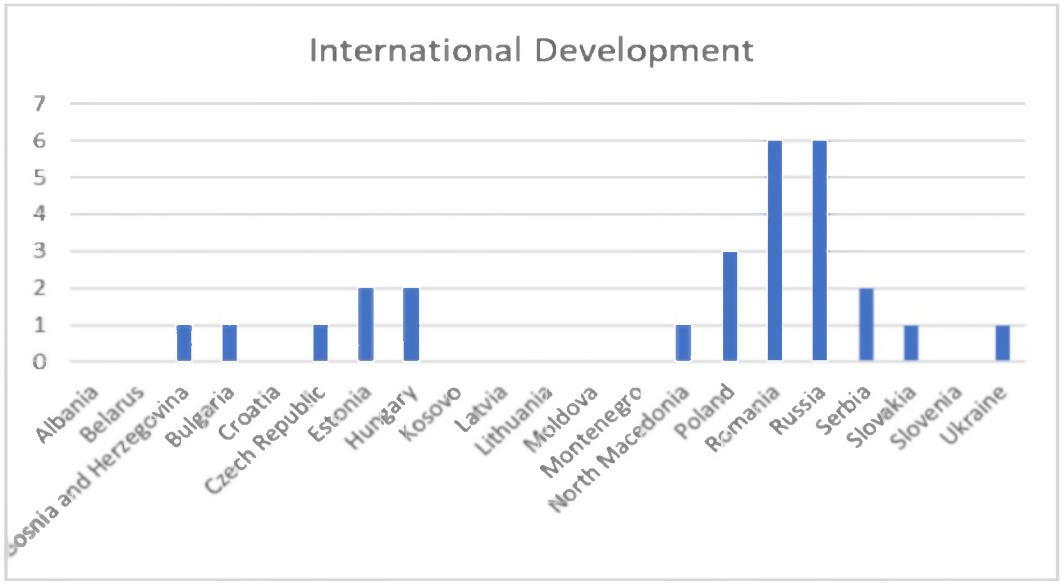
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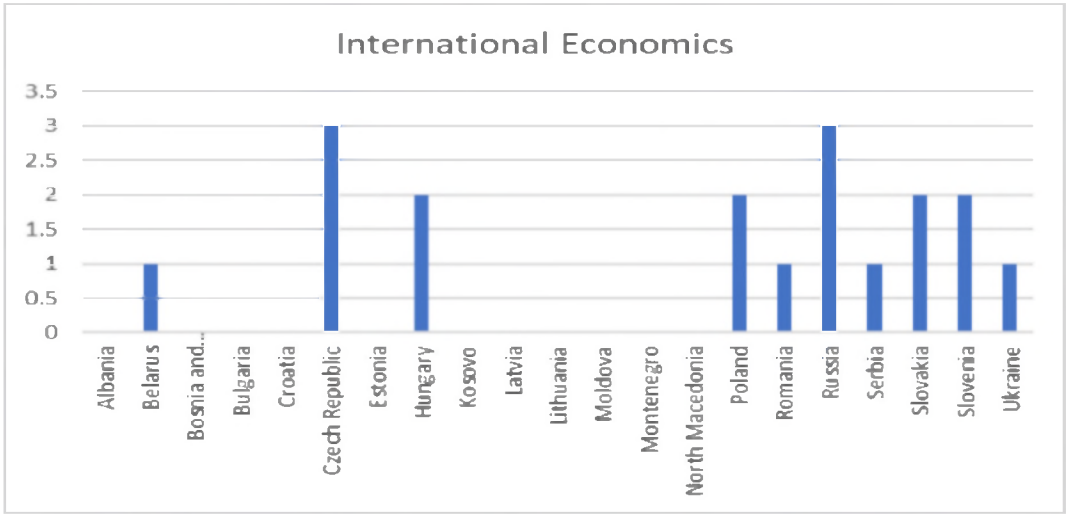
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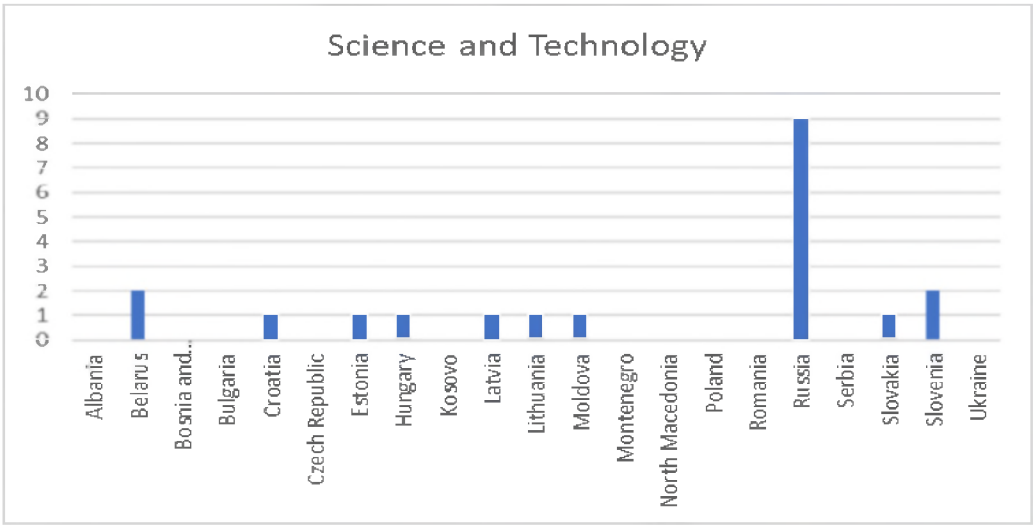
Science and Technology
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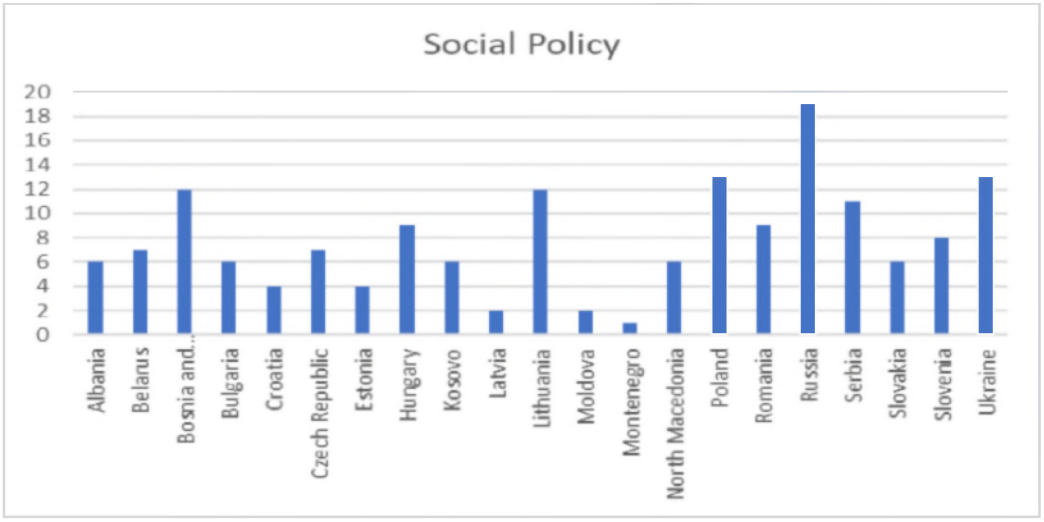
Social Policy
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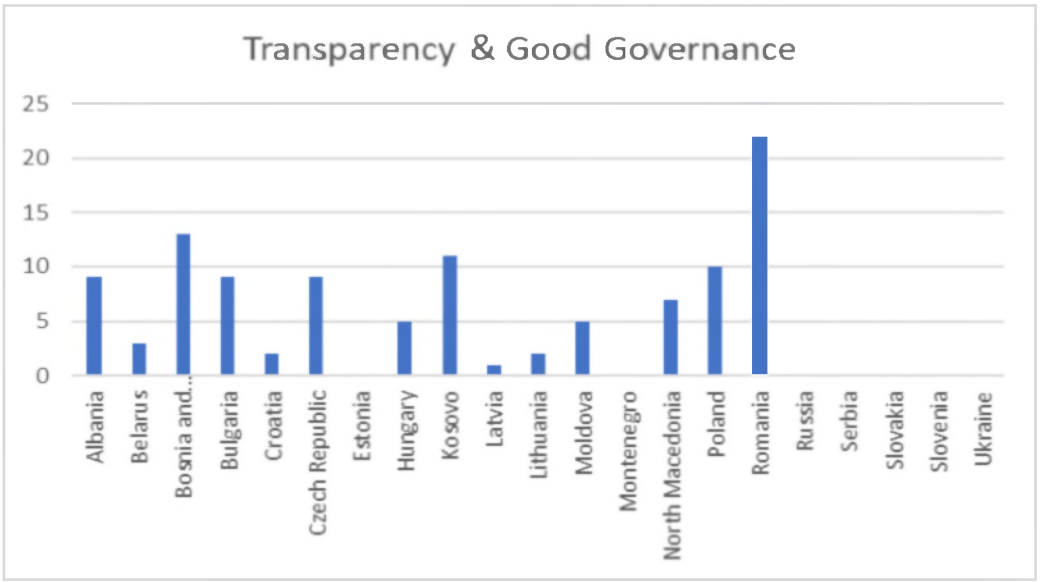
Transparency & Good Governance
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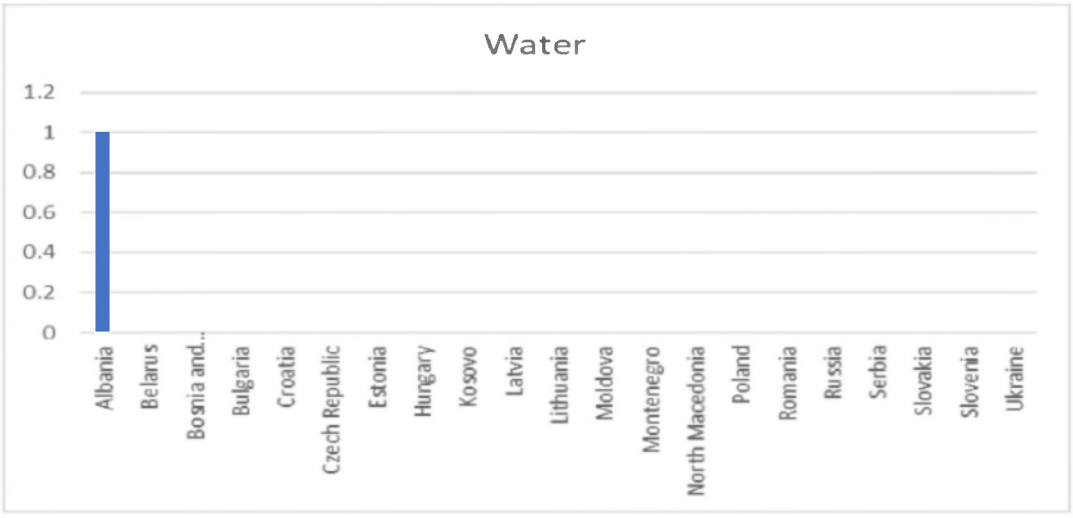


The number of each country's think tanks engaged in a specific area of focus is displayed on top of each bar the preceding bar graphs. This enables a by country comparison of how each country relates to the next in terms of what their research attention is oriented towards. While across the whole CEE region, trends are evident as certain policy areas have greater representation across every country's individual think tank landscape, many smaller trends can be noticed from these differences, which are analyzed more in depth in each country specific chapter.

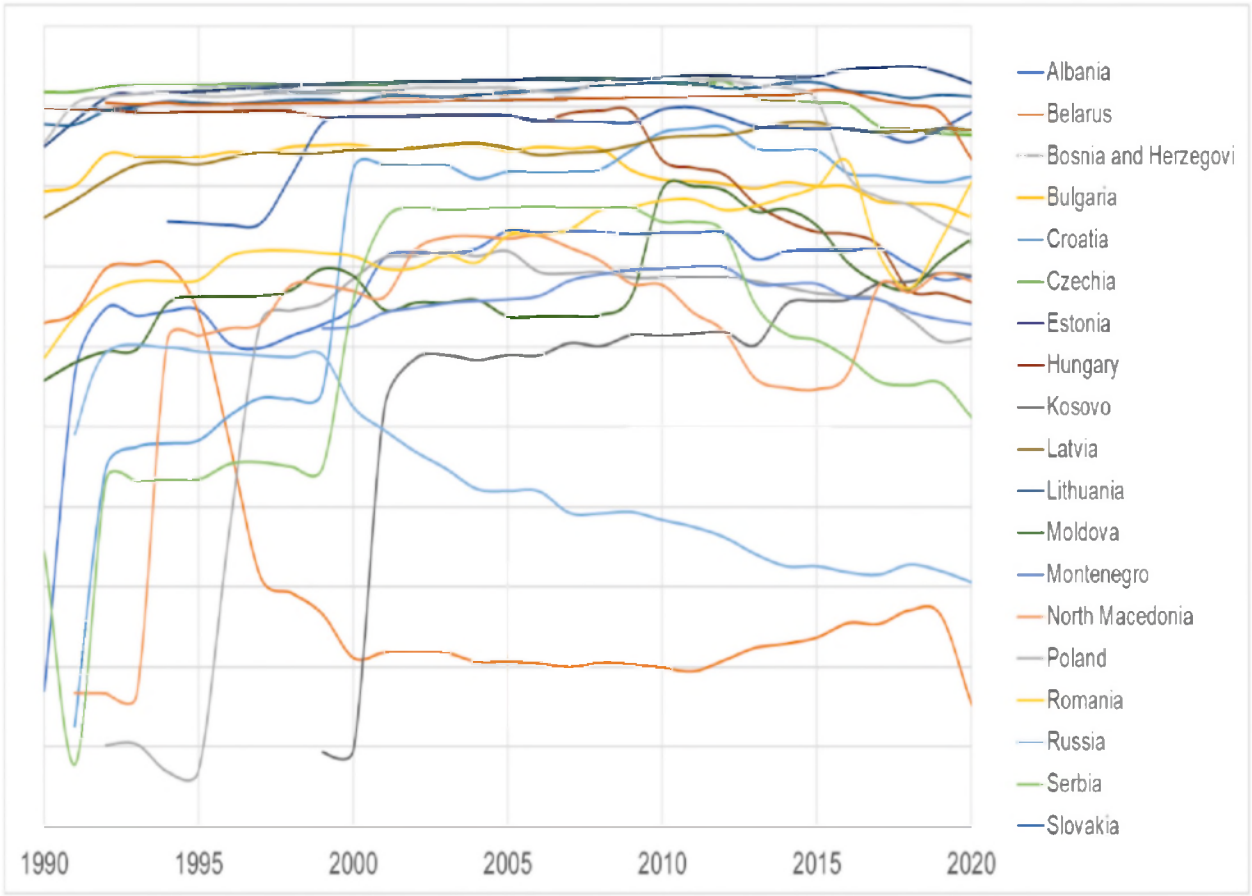
Inside of CEE think tanks, social policy (22.2%), transparency and good governance (21.6%), foreign policy and international affairs (13.6%), and domestic economics (13.3%) are the four categories that are primarily researched. This can be explained by CEE countries needing to stabilize their economies and civil societies after the dissolution of former communist states. Of the aforementioned, social policy is the policy area with the most engagement from CEE think tanks. 14 out of the 22 CEE countries' think tanks have at least 20% of their respective think tanks prioritize social policy, with many of these think tanks working alongside educational CSOs, indicating a regional characteristic whereby education is considered a policy implementation alternative to legislative change. Additionally, there are discernable efforts by CEE think tanks, specifically in Kosovo (42.3%), North Macedonia (33.3%) and Ukraine (36.8%), to focus on transparency and good governance. It can be deduced that this is the result of previous instability on behalf of many governments throughout the last two decades contributing to think tanks' desires to better strengthen their democracy through policy legislation. The spotlight on foreign policy and international affairs is emphasized the most by Polish think tanks with 20.3% of their think tanks pivoting towards the subfield, a notable external policy orientation that may be attributed to its membership in multilateral IGOs such as the V4, EU, and NATO. Additionally, domestic economics is a

sizable component of CEE think tanks' focal points because of post-Soviet reforms in creating globalized, market-based economies in the last three decades. A predominant concentration of Belarusian think tanks, a little over 30%, have incorporated domestic economics into their core research agendas. Compared to Slovenian think tanks, of whom only 4.3% concentrate on the role that domestic economics plays, because Slovenia has a significantly higher GDP per capita than Belarus, it may be inferred that economic research may emerge in response to instability as opposed to safeguards against recession.

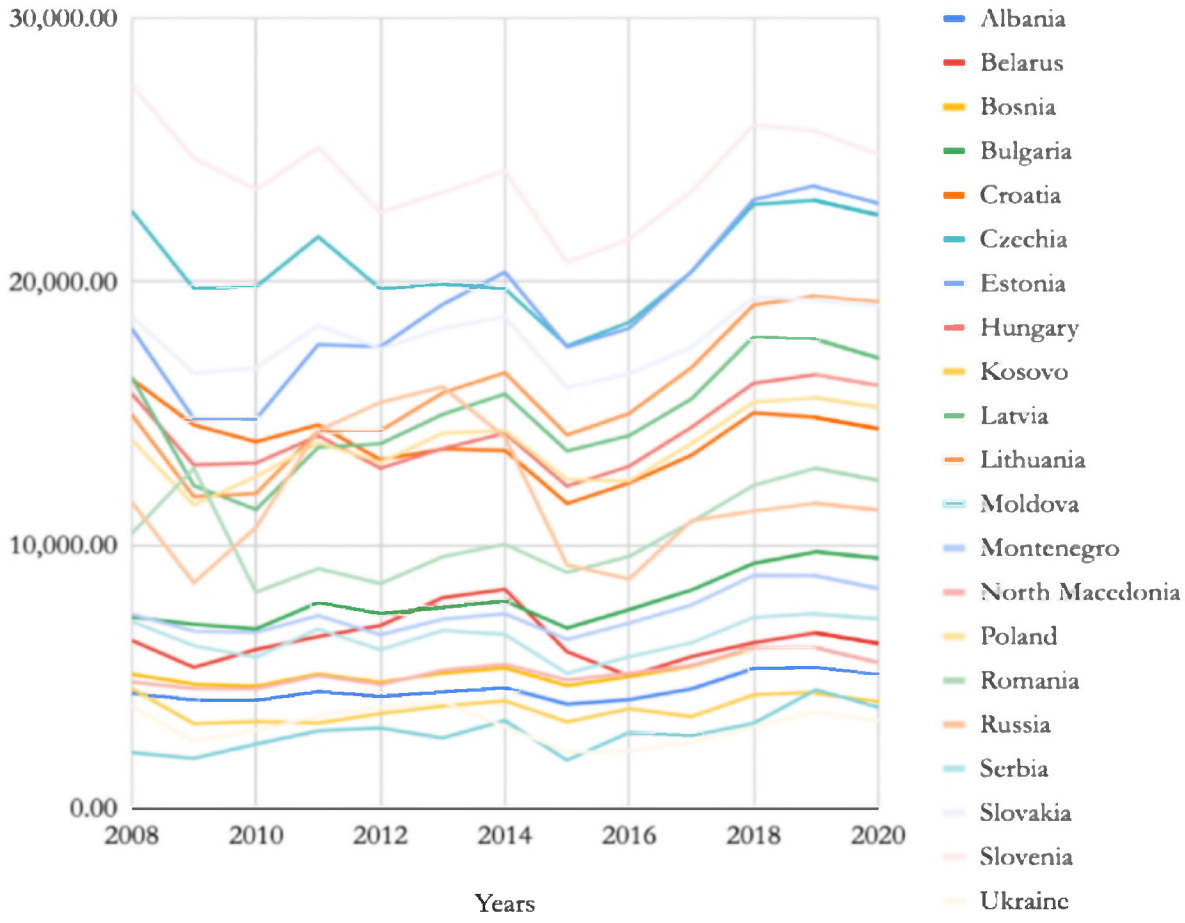
Contrastingly, the policy areas that receive substantially lower attention in CEE think tanks are international development (5.4%), international economics (6.1%), defense & national security (3.1%), science and technology (2.4%) and a handful of others. Both the graphs for international development and international economics show less engagement from CEE think tanks; the highest percentage of involvement in the former is by 17.3% of Romanian think tanks and the latter displays 14.5% of Polish think tanks. Both graphs cite countries with 0% think tank involvement in the policy area, furthering the point that neither are a pressing issue for CEE think tanks. Similarly, science and technology is not a policy area of great importance. 10 CEE countries' think tanks do not venture into science and technology despite the vast economic opportunities in the development of this sector. Likewise, defense & national security do not play a major role in CEE think tanks' research. Within the CEE region, at most, 7.7% of think tanks pay mind to defense and national security, being Belarus and Latvia. Education and the environment are somewhat prevalent research topics within CEE think tanks, yet there is no emphasis placed on domestic health, global health, water and food. Conclusively, CEE think tanks are focused more on state stabilization, growth and development of civil society than universal issues such as global health or water, despite their relevance domestically.

Democratization Trends

Analysis of the graph displays the gradual decrease of democratization in the CEE region as measured by the EIU Democracy Index. The trajectories of the trend lines have been steadily moving downwards indicating democratic backsliding in most CEE countries. This might be attributed to some sort of disillusionment with Western-style democracy in the aftermath of the 1990s and the 2008 economic crisis that hit the CEE region and instinctive leaning towards a stronger, more authoritarian states able to sacrifice some extent of democracy in return providing people with security and stability, just like in the Soviet times.

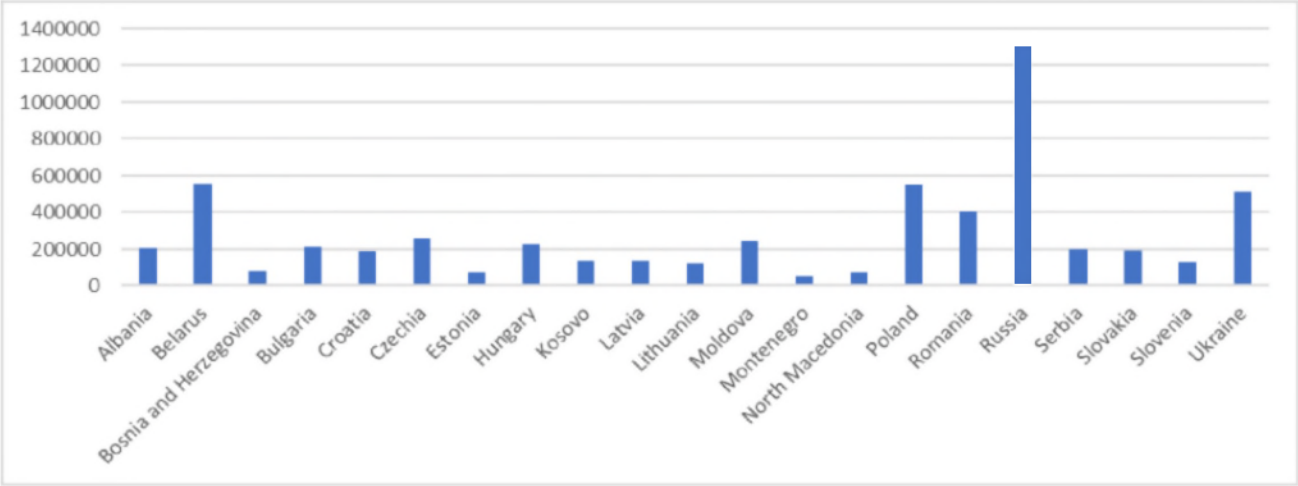


GDP PPP Per Capita



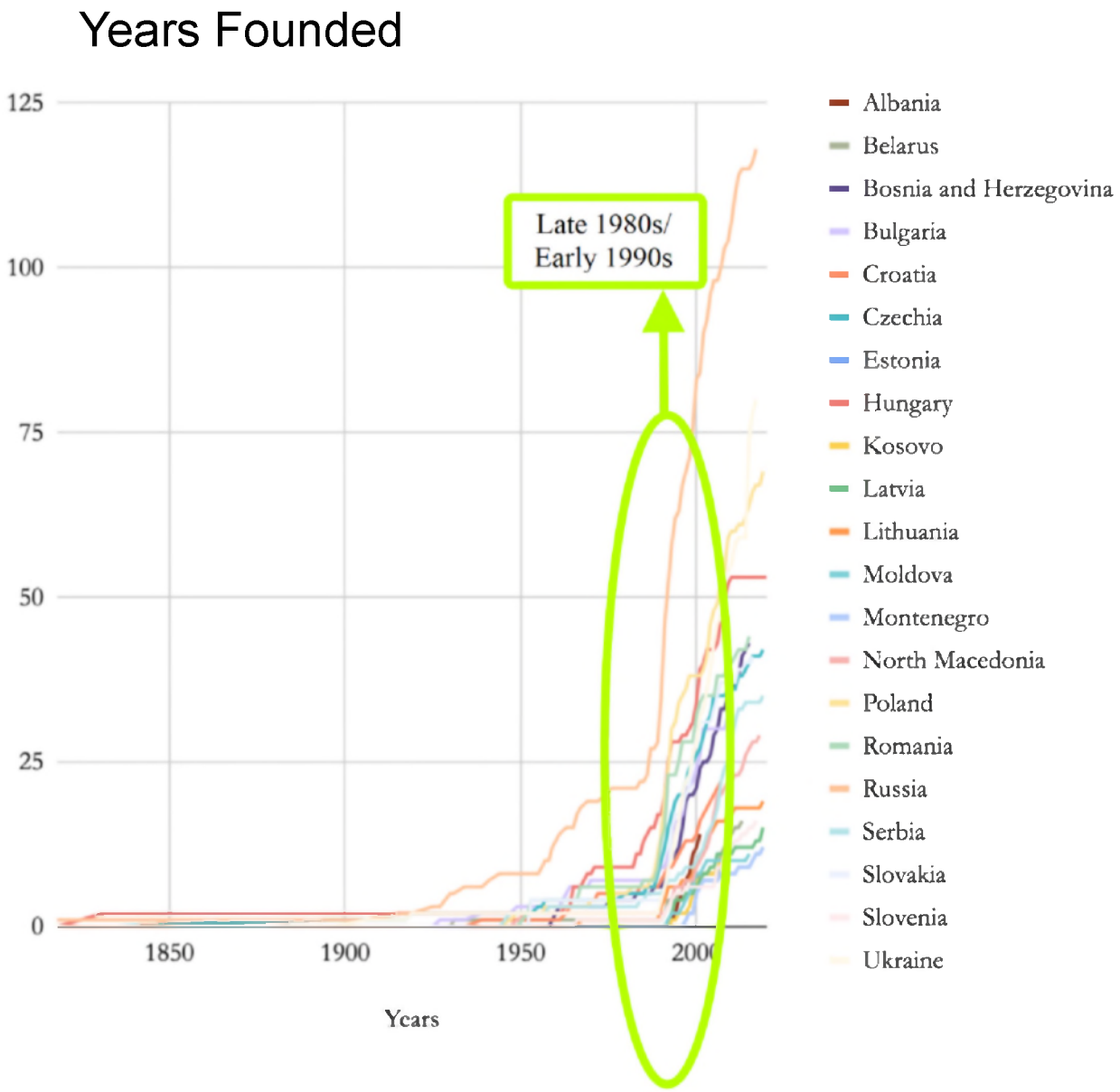
GDP per capita in the CEE region was shirking as of 2020, with almost all countries in an downward trajectory mostly due to the global recession induced by the COVID crisis. The graph displays that the CEE region had distinct kink points that affected every country in some capacity. Particularly, the Great Recession of 2008 as well as the spillover from the Eurozone Debt Crisis of 2013 are reflected clearly in the sharp dips in GDP per capita in the entire region. While the region suffered as a collective during these two major events, Russia's drastic drop in GDP per capita in 2015 is the largest of the region at a $4,852 per capita decrease. This analysis reveals that GDP fluctuations are relatively grouped across CEE countries, as increases and decreases in GDP per capita are notable across all trendlines. This suggests that the findings of this report may be generalized across the entire CEE region. However, as many more factors other than economic context shape the applicability of policy recommendations and characteristics derivation, country specific chapters should be understood as well when a think tank of a particular country is assessing their comparative stance within the CEE landscape and how they may improve it.

Population/ Number of Think Tanks, 2020



There is a consistent trend in the population per number of think tanks in the CEE region; however, Russia, Belarus, Poland, Romania, and Ukraine act as outliers. Outside of the five countries mentioned, the remaining countries' population/think tanks do not cross above 300,000 people per think tank. Russia is the largest deviation, as its population/think tank result is higher than 1,300,000. This can be explained by Russia's outstanding population in comparison to its CEE partners, of whom are not as densely populated. However, it indicates that the think tank landscape may be disproportionately smaller, warranting further development in large cities other than Moscow where people would benefit from locally or regionally oriented research. Notably, as climate change contributed to recent Siberian wildfires, environmental management research could be a useful niche to fulfil the landscape. Since none of the CEE countries are as highly populated as Russia, it results in an aberration in the graph.

While Belarus is an outlier, the number of think tanks per capita indicates that larger countries have more developed think tank landscapes, as Poland, Russia, Ukraine, and Romania are all the most densely saturated think tank landscapes. Furthermore, as smaller states have less developed think tank landscapes, it may be suggested that international donors and willing partner institutions look to these underserved landscapes for more urgent opportunities to help grow and foster think tanks.

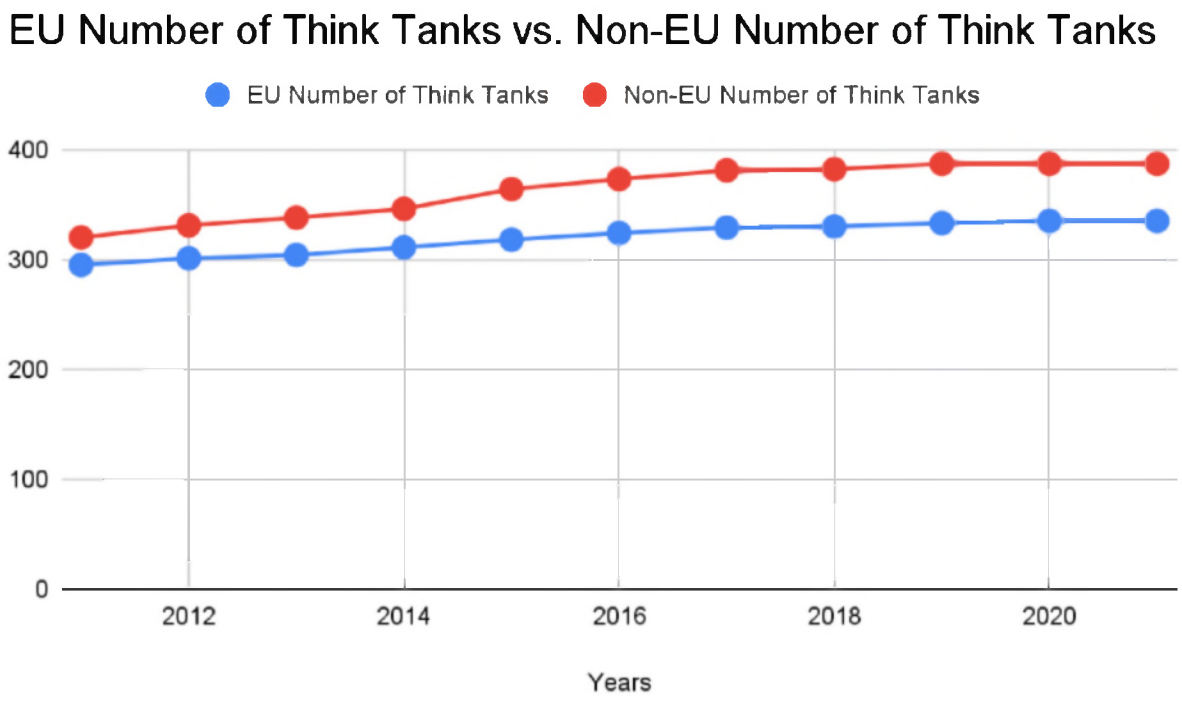


As displayed in the graph, the CEE region shares a general pattern of when think tanks were founded throughout the years. This graph was created by aggregating available data on the years in which think tanks reportedly opened, which suggests not all think tanks in the landscape may be represented if they did not disclose this information. The common kink point in all the trend lines is approximately in the year 1991, after which a huge spike in the rate of new think tanks opening is observed. This is a result of the dissolution of the communist regimes of the former Soviet Union, former Yugoslavia, and former Czechoslovakia, in conjunction with waves of liberal policies sweeping the region and the rise of the Internet. Thus, the need for third-party policy advice dramatically spiked and think tanks filled in the vacuum. Furthermore, minor spikes may be observed in the post WWII era as power and regimes were reoriented broadly, and throughout the 2000s in key years corresponding to waves of EU accession efforts by CEE countries, such as 2004, 2007, and 2013. Moving forward, it is expected that many

think tanks will be forced to close in the region due to lacking domestic and international funding due to the COVID crisis and the need to deviate from traditionally accentuated policy areas towards the fields of domestic and global health. Therefore, the dissolution of former communist regimes, the rise of the internet era, and the advent of the European Union may be understood as the three pivotal factors that sparked substantial acceleration in the historical development of the CEE think tank landscape.

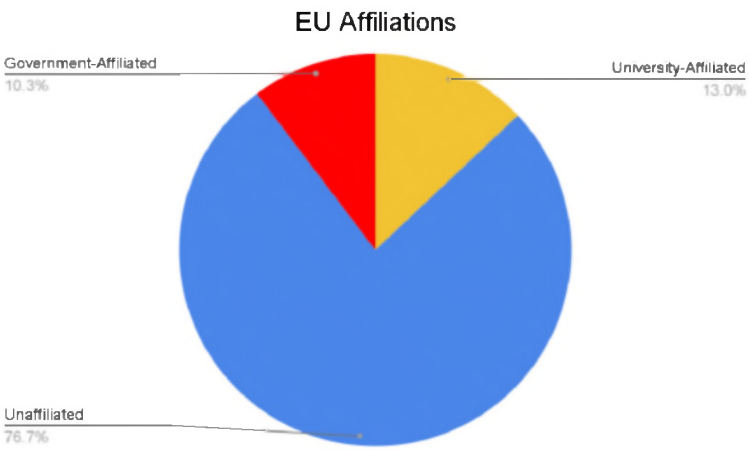
View of the Warsaw Skyline

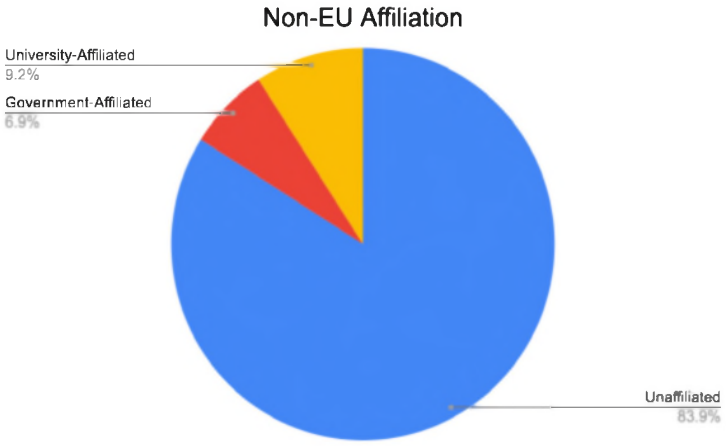
EU vs. Non-EU CEE Comparison



The trend shows that while the number of think tanks in EU CEE countries and non-EU CEE countries does not differ significantly, EU CEE states have historically had more think tanks. This is attributable to the fact that EU CEE countries are generally wealthier and have moved further ahead in their transitions to democracy than non-EU CEE countries. Additionally, in order to be admitted to the European Union, the countries must comply with certain rules and standards, which might have warranted additional research and the growth of civil participation in governance. Thus, the proliferation of EU membership may reduce the gap between Western Europe and the CEE region in terms of landscape size and funding. Interestingly, in 2017 the trend reverses – after a slight decline in 2016, the number of think tanks in non-EU CEE increases sharply throughout 2017 into 2018. This is attributable to the spike in the number of think tanks in Russia due to the FIFA Championship, which caused an influx of foreign tourists and the need of the country to present itself in the best light. Furthermore, as the spike in the Russian think tank landscape is also attributable to the centralization of research power under Putin's Izborsky Club, the reversal of this trend should not inhibit the historical utility of EU membership across all CEE countries for the development of their think tank landscapes.

Affiliation





Affiliation	EU CEE	Non-EU CEE
Government Affiliated	10.3%	6.9%
University Affiliated	13.0%	9.2%
Unaffiliated	76.7%	83.9%

Both EU CEE countries and non-EU CEE countries' think tanks' are predominantly unaffiliated. The non-EU CEE countries have 7.2% more think tanks that identify as unaffiliated Think Tanks than EU CEE countries. In addition, EU CEE countries have more university-affiliated and government-affiliated than non-EU CEE countries respectively, indicating that international organizations provide opportunities for landscape growth across all sector affiliations. This also means that EU Think tanks may be more transparent in their affiliation. This increased percentages of institutionally partnered affiliations may likely be caused by the need on behalf of government and more globalized university systems to research less domestically centered agenda items.

Budget

Region	Min	Quartile 1	Median	Quartile 3	Max
EU	$3,044.00	$169,944.00	$404,363.00	$983,900.00	$64,026,381.00
Non-EU	$2,784.00	$199,931.00	$364,052.00	$1,261,012.00	$19,775,277.00

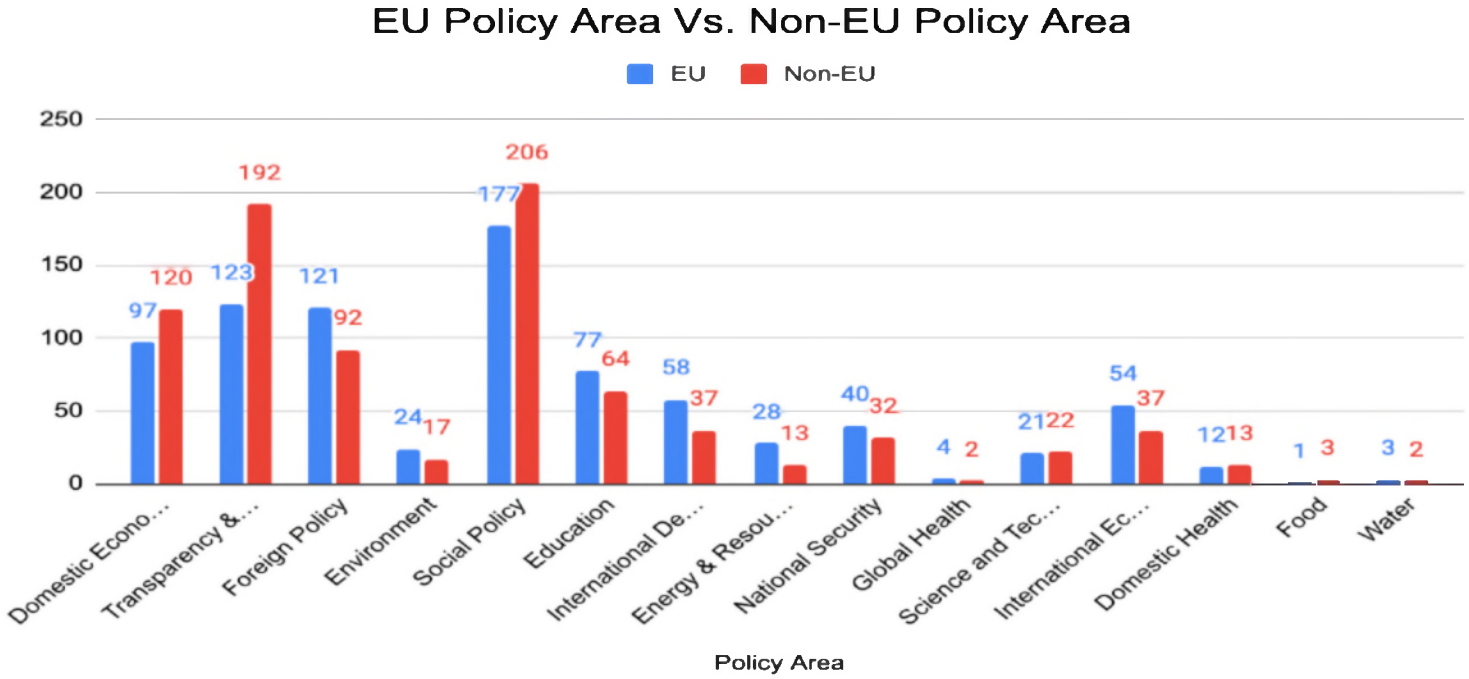
The graph demonstrates that EU member states have more think tank funding than their non- EU CEE counterparts. EU CEE countries' think tanks have a median budget of $404,363 while the non-EU CEE countries' think tanks have a median budget of $364,052. This disparity may be explained by the financial benefits that EU CEE countries experience by being members of the EU, giving organizations a larger platform to apply to for grants, find sponsorships, deepen networks, gain international recognition and legitimacy, and ultimately have a fiscal safety blanket.

Staff Size

Region	Min	Quartile 1	Median	Quartile 3	Max
EU	1	9	15	29	302
Non-EU	1	8	12	24	346

Likewise, the staff sizes for think tanks within EU and non-EU CEE countries coincides with the budget size graph. The median staff size for non-EU think tanks is 12 people while the median EU think tank staff size is 15. As a result of their larger budget, EU think tanks can afford to employ more people in comparison to non-EU think tanks. Furthermore, greater integration into the wider European community may provide more human capital development opportunities. However, the think tank that has the largest staff is found in the Non-EU region

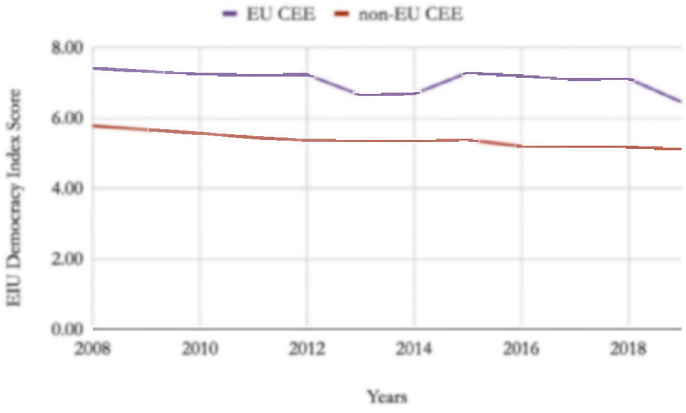
Policy Area



Policy Area	EU	Non-EU
Domestic Economics	97	120
Transparency & Good Governance	123	192
Foreign Policy	121	92
Environment	24	17
Social Policy	177	206
Education	77	64
International Development	58	37
Energy & Resources	28	13
National Security	40	32
Global Health	4	2
Science and Technology	21	22
International Economics	54	37
Domestic Health	12	13
Food	1	3
Water	3	2

Non-EU CEE think tanks and EU CEE think tanks, in tandem, prioritize social policy (non- EU CEE: 24.2%, EU CEE: 21.1%) and transparency and good governance (non-EU CEE: 22.5%, EU CEE: 14.6%). Non-EU think tanks are significantly more focused on Transparency and Good governance with 192 think tanks in non-EU countries compared to 123 in EU think tanks. In both good governance and social policy categories, non-EU CEE think tanks have visibly dedicated more of their research efforts to these topics. Additionally, non-EU CEE think tanks (3.8%,) are less invested in defense & national security than EU CEE countries (4.8%). This can be explained by their prioritization of transparency and good governance in the presence of lack of governments with nationalistic tendencies and populist regimes. The remaining research categories are dominated by EU CEE think tanks, though the imbalance is not large. None of the CEE countries' think tanks, regardless of EU membership status, have dedicated their research efforts towards food, water, or health, which may be subject to change as a result of shifts in funding availability towards these key areas from the pandemic.

Democratization Trends

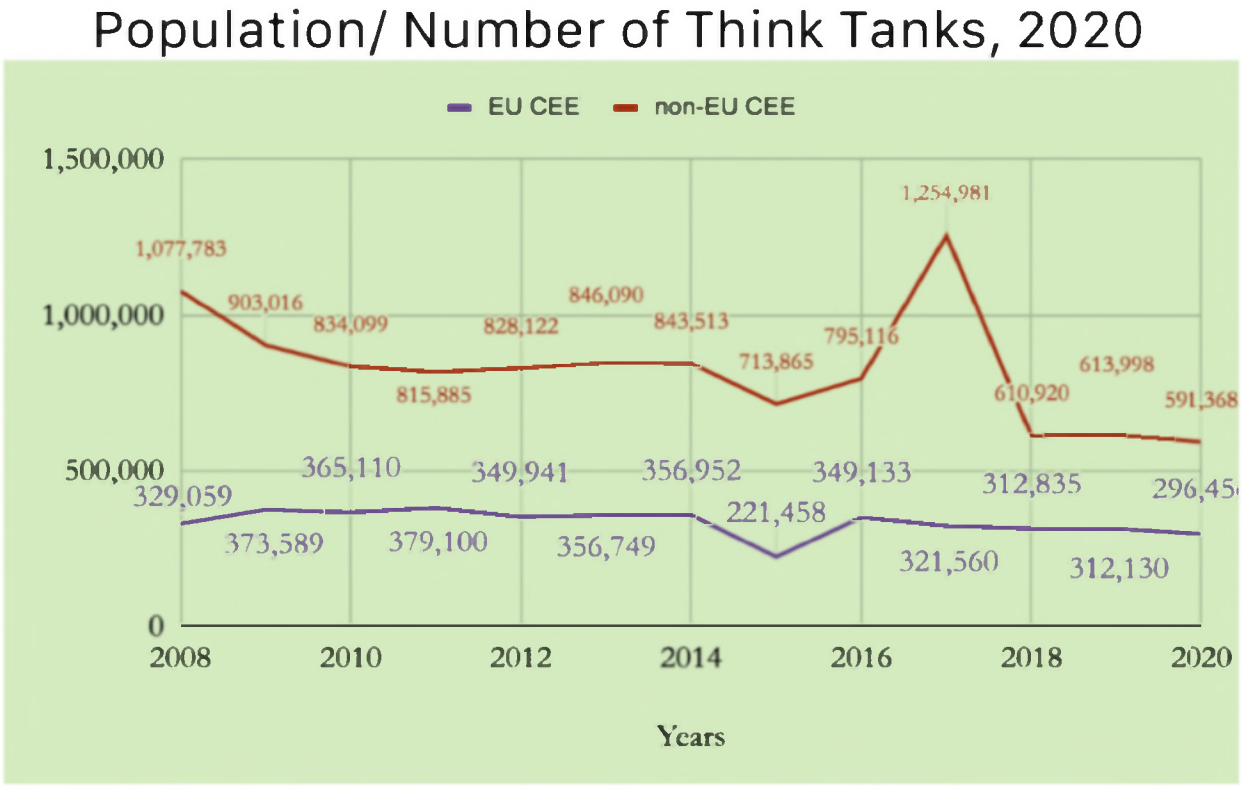


Year	EU CEE	non-EU CEE
2008	7.42	5.78
2010	7.25	5.57
2011	7.22	5.45
2012	7.24	5.37
2013	6.66	5.36
2014	6.69	5.35
2015	7.29	5.38
2016	7.20	5.20
2017	7.10	5.18
2018	7.13	5.18
2019	6.46	5.11

Non-EU CEE countries and EU CEE countries are both subject to democratic backsliding, however it is important to analyze divergence between these two groups. Primarily, non-EU CEE countries have been gradually travelling downwards from an average of 5.78 to 5.11 out of 10 in the last decade according to the Economist Higher Intelligence Unit Democracy Index. In contrast, EU CEE countries have had identifiable moments of democratic backsliding which can be seen in the graph as sharp decreases in the trend line as opposed to consistent backsliding, exhibiting a change from 7.42 in 2008 to 6.46 in 2019 with an average percent change of -14.9%. These dips occurred in 2012 and 2018, as there are resurgences of right-wing nationalistic sentiments, civil unrest and political instability in CEE EU states, which are not immune from CEE regional issues despite their closer geopolitical proximity to Western European think tank landscapes.

GDP per Capita Growth

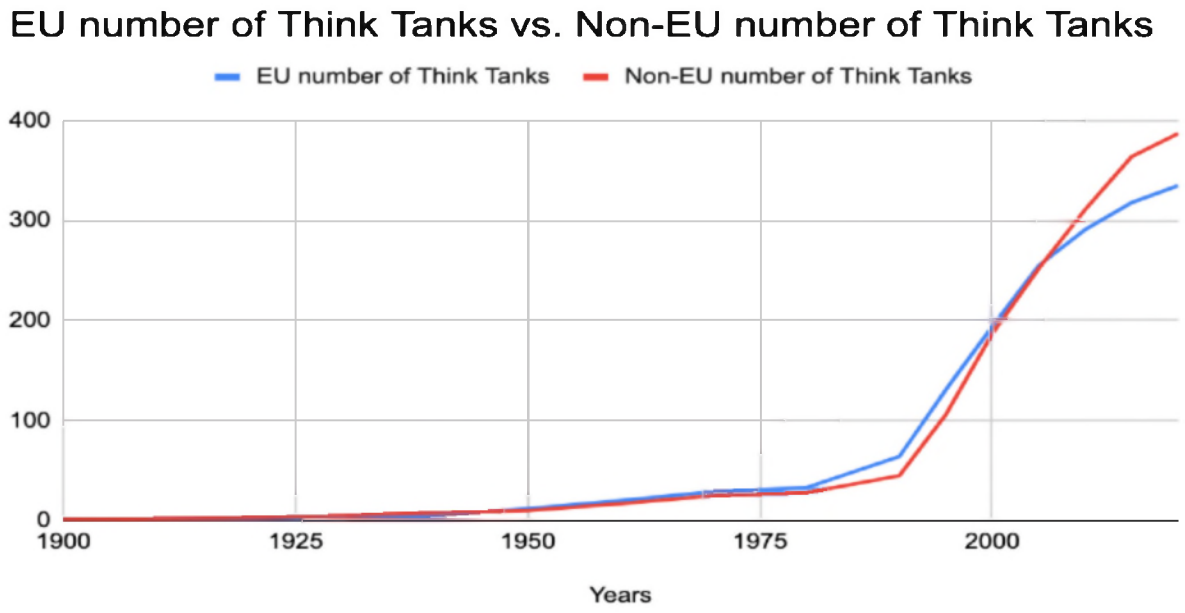
Upon examination of the graph, there are two major takeaways. First, non-EU CEE countries have a lower GDP per capita than CEE countries in the European Union. EU CEE countries' GDP per capita is approximately 1.74 times more than non-EU CEE countries. More importantly, though they are not similar in GDP per capita, both groups show inverse fluctuations at the same time until becoming parallel in 2019. For example, in 2013, the EU CEE countries experienced a dip in their GDP per capita while non-EU CEE countries had a peak in their collective GDP per capita simultaneously. It can be inferred that EU CEE countries GDP per capita were affected by an outside factor that did not apply to the non-EU countries and therefore did not have a negative effect on their GDP per capita; on the contrary it gave non-EU countries an opportunity to thrive. As globalization means economies are subject to external shocks, both positive and negative, economic partnerships by EU CEE states may mean these countries will be more vulnerable to losses from COVID as their economies are less insulated from such a shock, equalizing the two groups. Equally, their speedier recovery is likely due to their privilege in cross national learning and fiscal assistance. International organizations like the IMF, WTO, and World Bank involve CEE countries inside and outside of the EU, which may override the divergent economic effect caused by EU membership.



This graph shows non-EU CEE countries with a population/number of think tanks measurement almost double that of the EU CEE states. Thus, EU membership

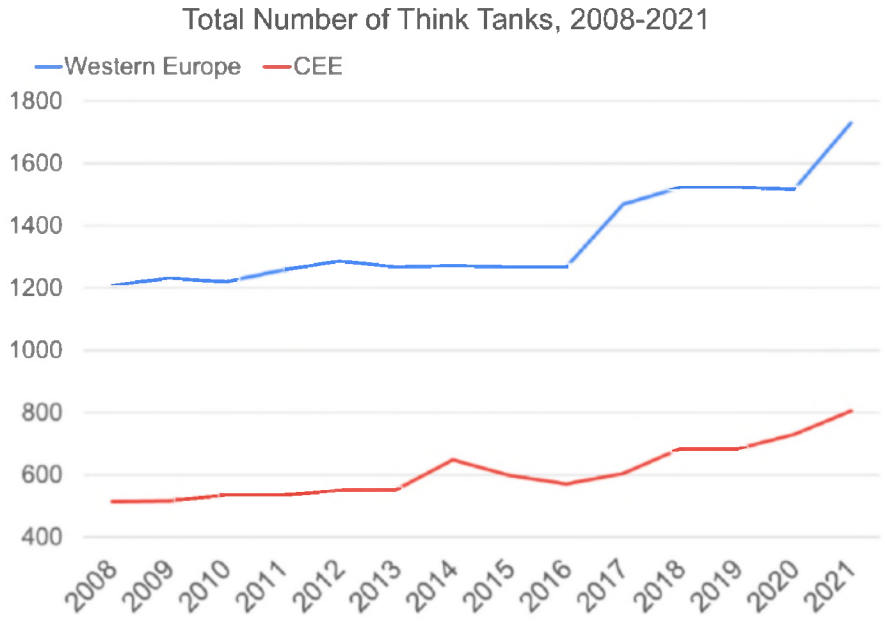
correlates to significantly larger think tank landscapes. Non-EU CEE countries have a population/number of think tanks measurement of 591,368 people per think tank while EU CEE countries have 296,456 people per think tank, which suggests that EU accession efforts and membership may create new research demands. Furthermore, it should be noted that Ukraine and Russia have large populations that distort the non-EU CEE group even further away from EU CEE members. These key outliers dramatically skew this graph and present an interesting idea about CEE integration into the EU, which is notably more likely and more easily facilitated in smaller countries.

Years Founded



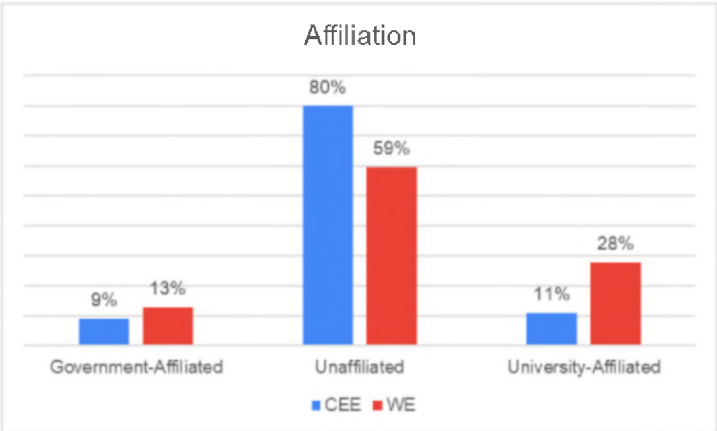
As shown above, non-EU CEE think tanks and EU CEE think tanks follow nearly the exact same trend line. EU CEE think tanks emerge at a more gradual rate, yet the two groups parallel each other's trajectory in think tank development from 1967 to 2014. By 2015, the two groups intersected, and non-EU CEE think tanks surpassed the amount of think tanks in EU CEE countries. As of today, non-EU CEE countries have more think tanks than EU CEE countries at 387 to 335, which is somewhat distorted by the high number of think tanks in Russia and Ukraine. Nonetheless, this trend offers hope for EU membership not being a prerequisite for landscape development, despite its positive benefits in funding and partnership formation. Thus, while EU accession likely has boosted the rate of think tank development in the region, it should be understood that the magnitude of the effect from the rise of the Internet era and the dissolution of former communist regimes had a larger blanket effect across the region.

Western Europe vs. Central and Eastern Europe

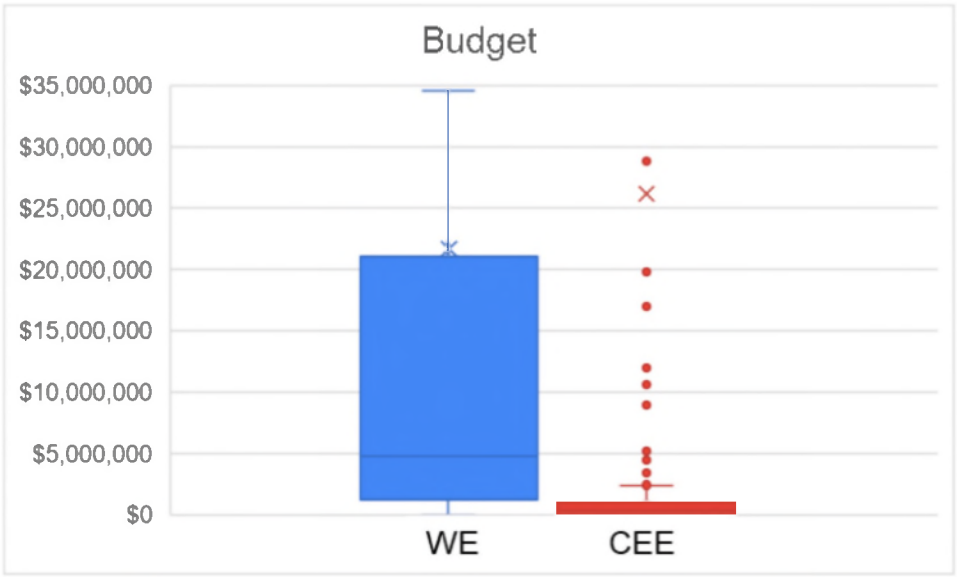


Year	Western Europe	CEE
2008	1208	514
2009	1233	517
2010	1220	535
2011	1258	536
2012	1287	549
2013	1267	551
2014	1272	649
2015	1267	599
2016	1267	571
2017	1468	605
2018	1523	684
2019	1523	684
2020	1517	729
2021	1731	805

The latest TTCSP data show that there are way more active think tanks in Western European (1731) than in CEE (805). It appears that the two regions have different growth trends. These trends might be related to different levels of democratisation in the two regions, with Western Europe hosting some of the most consolidated and ancient democracies in the world. Generally, more stable liberal democratic regimes favour civil society's development through the creation of a public more likely to mobilise peacefully.

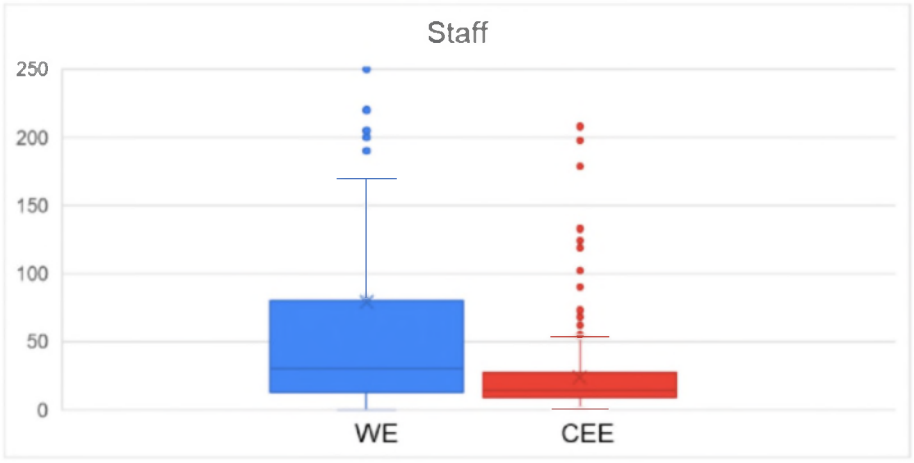


Notably, the percentage of government-affiliated think tanks is quite similar in Western Europe and CEE. Yet, Western Europe has more than double the number of university-affiliated think tanks than CEE has. Meanwhile, unaffiliated think tanks remain dominant.



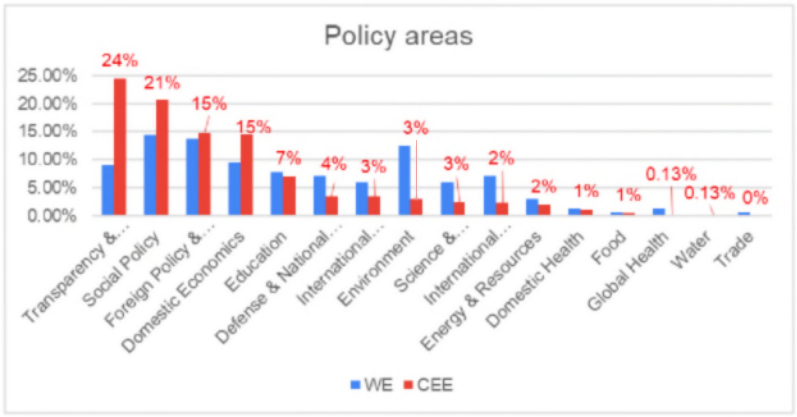
	WE	CEE
Avg. bottom 25%	$563,315	$62,389
Median	$5,052,600	$431,056
Avg. top 25%	$68,586,627	$104,812,072

Western European think tanks have a median budget size of over $5 million. In comparison, CEE think tanks' median budget is around $400,000. This is not at all surprising given that Western Europe is on average much wealthier than the CEE region due to the presence of world-leading economies, such as Germany, the UK (which was still a member of the European Union in 2020), and France. Additionally, Western European think tanks are generally unconstrained foreign funding. Whereas in some CEE countries, governments have limited external funding.



	WE	CEE
Avg. bottor	8	6
Median	31	14
Avg. top 25	282	59

The median staff size for a Western European think tank is 31 people, more than double CEE's median think tank size of 14 people. This significant difference echoes Western European think tanks' larger median budget — which allows them to hire more staffers. The presence of a number of outliers in both regions suggests that human capital tends to concentrate in a handful of big wealthy organisations.



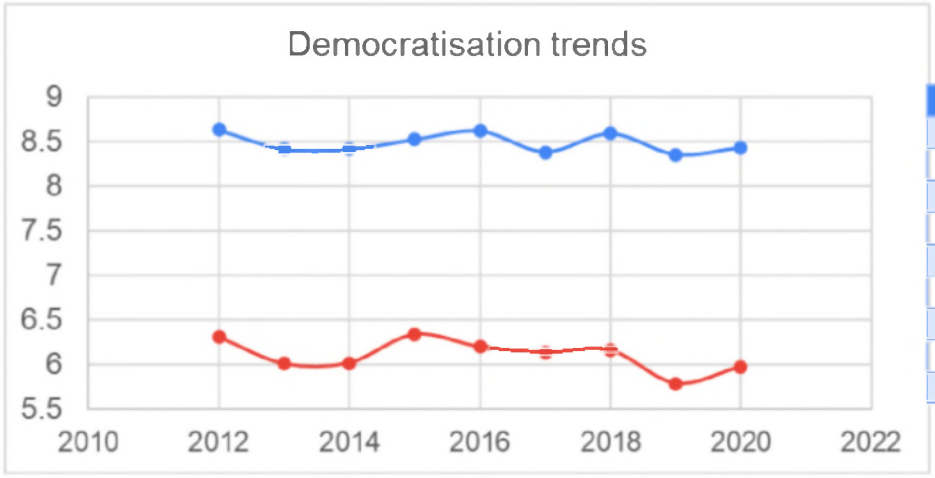
Area	WE	CEE	
Transparency & Good Governance	8.98%	24.40%	Top 3
Social Policy	14.37%	20.75%	
Foreign Policy & International Affairs	13.77%	14.72%	
⋮	⋮	⋮	
Global Health	1.20%	0.13%	Bottom 3
Water	0.00%	0.13%	
Trade	0.60%	0.00%	

Policy areas such as water, food, domestic health, global health, energy and resources, or science and technology tend to be disregarded by think tanks in both Western and Central-Eastern Europe. Transparency, foreign policy, and social policy are the three policy areas to which most CEE think tanks devote their attention. The picture is quite similar in WE, where the environment takes transparency's place amongst the top three. The fact that CEE think tanks prioritise transparency and good governance may be reconnected to these countries' mostly failed transformation in free-market democracies over the past three decades. As a result, the current political regime has not been able to prevail and change the dominant political culture.[416]

[416] Fabio Ashtar Telarico, 'Digital Civic Cultures in Post-Socialist South Eastern Europe: Lessons,

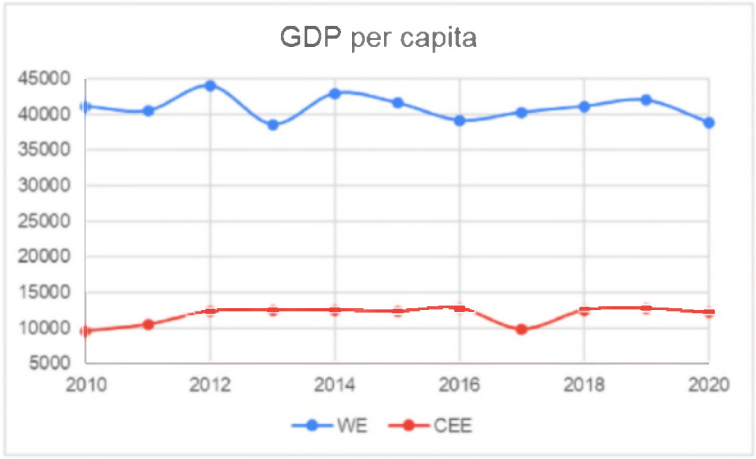
International development and international economics policy areas remain equally underrepresented in both regions.

It is noteworthy that policy areas, like the environment, defence and national security, remain more popular amongst Western European think tanks than in CEE. Policy areas like environmental issues remain underrepresented in CEE. Transparency and good governance stands out as the key policy area where divergence between the two regions occurs in terms of the percentage of think tanks that value researching it. A greater percentage of CEE think tanks focus on this area, likely due to the need for independent think tanks to combat democratic backsliding and corruption.



Year	WE	CEE
2012	8.63	6.31
2013	8.41	6.01
2014	8.41	6.02
2015	8.52	6.34
2016	8.62	6.2
2017	8.38	6.14
2018	8.59	6.16
2019	8.35	5.79
2020	8.43	5.98

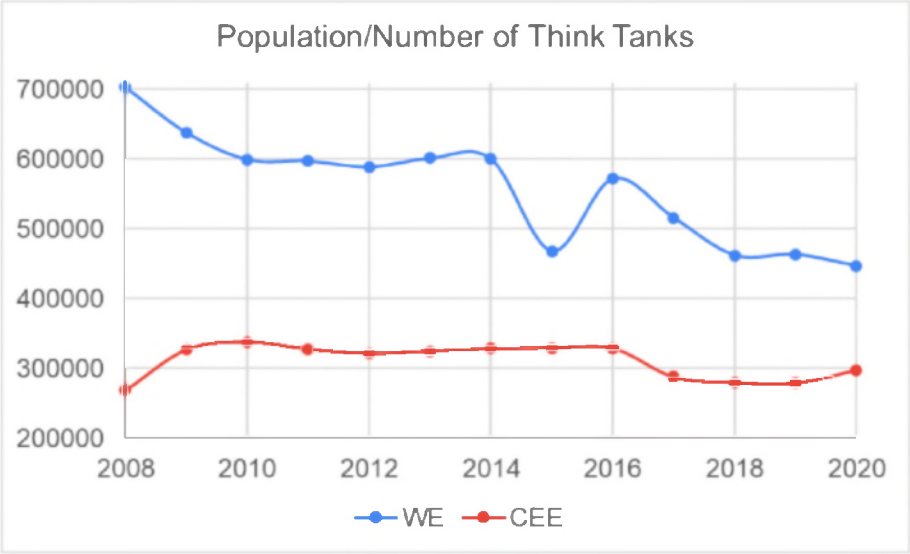
Western European countries tend to have higher EIU Democracy Index Scores than the CEE countries. Historically, this can be attributed to the fact that while Western Europe has a long tradition of democratic regimes. Meanwhile, most of the CEE region adopted communist one-party rule until the last decade of the 20th century.



GDP per capita	WE	CEE
2010	41154	9565
2011	40581	10516
2012	44,062	12371
2013	38647	12470
2014	43000	12526
2015	41648	12379
2016	39193	12784
2017	40331	9853
2018	41170	12489
2019	42028	12752
2020	38921	12154

Prospects and Obstacles After Thirty Years of Media (Il)Literacy in the Region', in *Дигитална Гражданска Компетентност и Медийни Стереотипи [Digital Civic Competence and Media*

Stable democracies usually go hand-in-hand with stable market economies. Western Europe did not suffer from the economic depression that hit the CEE region in the 1990s after the collapse of the USSR.



Year	WE	CEE
2008	703421	268656
2009	638303	326706
2010	599605	337692
2011	597493	327567
2012	589032	321328
2013	601420	325000
2014	600233	328121
2015	467662	329309
2016	572125	328579
2017	515780	287828
2018	461878	279974
2019	463064	279213
2020	446804	297542

As the graph above suggests, Western Europe is more highly populated than Central and Eastern Europe. This can be explained by historical and cultural factors. There are significantly more think tanks in WE due to more favorable political and social climates for think tanks to thrive.