POLICY PAPER
Working Group 5

BEING FIT FOR AN UNCERTAIN FUTURE:
NEW OPERATING MODELS FOR THINK TANKS –
RESEARCH, COMMUNICATIONS, AND FUNDING

WORKING GROUP 5 MEMBERS

CO-CHAIRS

Paolo Magri, Executive Vice President and Director, ISPI (Italy)
Milena (Mihajlovic) Lazarevic, Co-founder and Program Director, CEP (Serbia)

MEMBERS

Dan Abelow, Everybody Rise (USA)

Abdulkerim Alhubaishi, Strategic Fiker Center for Studies (Turkey)

Mustafa Y. Ali, HORN International Institute for Strategic Studies (Kenya)

Norah Alsubaie, Rasanah Interventional Institute for Iranian Studies (Saudi Arabia)

Vardan Atoyan, AMBERD Research Center, Armenian State University of Economics (Armenia)

Daniel Aum, The National Bureau of Asian Research (USA)

Soe Myint Aung, YCIR - Yangon Centre for Independent Research (Myanmar)

Ahmed Azirar, IMIS - Moroccan Institute for Strategic Intelligence (Morocco)

Dipankar Banerjee, Chanakya Chakra (India)

Camilla Bausch, Ecologic Institute (Germany)

Beatriz Bechara de Borge, The Millennium Project (Colombia)

Rob Bluey, The Heritage Foundation (USA)

Howard Blumenthal, University of Pennsylvania (USA)

Keith Burnet, Chatham House (UK)

José Luis Chicoma, Ethos Public Policy Lab (Mexico)

Duangthip Chomprang, ITD - International Institute for Trade and Development (Thailand)

George Christopoulos, EMEA - Euro-Mediterranean Economists Association (Spain)

Walter Corzo, Diálogos (Guatemala)

Kevin Cowl, MEI - Middle East Institute (USA)

Michael Cox, LSE IDEAS (UK)

Carlo Dade, Canada West Foundation (Canada)

Matt Dann, 3in (Belgium)

Francesca Delicata, ISPI - Italian Institute for International Political Studies (Italy)

Maria Clara Escobar, ICP - Instituto de Ciencia Politica Hernán Echavarría Olózaga (Colombia)

Martina Faria Bouvier, CIPPEC - Center for the Implementation of Public Policies for Equity and Growth (Argentina)

Brian D. Finlay, Stimson Center (USA)

Florence Gaub, EUISS - EU Institute for Security Studies (France)

Arjun Gidwani, Chennai Centre for China Studies (India)

Jerome Glenn, The Millennium Project (USA)

Nimrod Goren, MITVIM - The Israeli Institute for Regional Foreign Policies (Israel)

Rocio Guijarro, Cedice Libertad (Venezuela)

Sirkka Heinonen, The Millennium Project (Finland)

Taishi Ito, RIJAG - Research Institute for Japan's Globalization (Japan)

Boris Kalisky, PSSI – Prague Security Studies Institute (Czech Republic)

Michael Kleeman, UCSD - University of California San Diego (USA)

R. Andreas Kraemer, Ecologic Institute (Germany)

Manjeet Kripalani, Gateway House - Indian Council on Global Relations (India)

Yasushi Kudo, The Genron NPO (Japan)

Alena Kudzko, GLOBSEC Policy Institute (Slovakia)

Oksana Kuziakiv, Institute for Economic Research and Policy Consulting (Ukraine)

François Landers, RUSI - Royal United Services Institute (UK)

Milena (Mihajlovic) Lazarevic, CEP - European Policy Centre (Serbia)

Paolo Magri, ISPI - Italian Institute for International Political Studies (Italy)

Andrew Marshall, Atlantic Council (USA)

Josué Martínez-Castillo, Academia de Centroamérica (Costa Rica)

James McGann, Think Tanks and Civil Societies Program (TTCSP), University of Pennsylvania (USA)

Mercedes Méndez Ribas, CIPPEC - Center for the Implementation of Public Policies for Equity and Growth (Argentina)

Lea Metke, IFRI - Institut français des relations internationales (France)

Shahid Minhas, SDPI - Sustainable Development Policy Institute (Pakistan)

Mohammad Mohsen Momeni Rad, GPTT - Governance and Policy Think Tank (Iran)

Martha Montemayor, UNIDOS POR EL HUAJUCO

Pol Morillas, CIDOB - Barcelona Centre for International Affairs (Spain)

Tanoubi Ngangom, ORF - Observer Research Foundation (India)

Theva Nithy, The Millennium Project (Malaysia)

Verónica Ortiz, COMEXI - Mexican Council on Foreign Relations (Mexico)

Sat Pillai, CircledUp (UK)

Francesco Rocchetti, ISPI - Italian Institute for International Political Studies (Italy)

Lydia Ruddy, ERIA - Economic Research Institute for ASEAN and East Asia (Indonesia)

V.S. Sambandan, The Hindu Centre for Politics and Public Policy (India)

Bruna Santos, ENAP - National School of Public Administration (Brazil)

BK Sharma, United Service Institution of India (India)

Arafat Shoukri, Aljazeera Centre for Studies (Qatar)

María Mercedes Spinosa, CIPPEC - Center for the Implementation of Public Policies for Equity and Growth (Argentina)

John Sweeney, Narxoz Business School in Almaty/Qazaq Research Institute for Futures Studies (Kazakhstan)

Siré Sy, Think Tank Africa WorldWide Group (Senegal)

Andrea Tanco, MPI - Migration Policy Institute (USA)

Niels Veldhuis, Fraser Institute (Canada)

Antonio Villafranca, ISPI - Italian Institute for International Political Studies (Italy)

David Wisner, Michael and Kitty Dukakis Center for Public and Humanitarian Service (Greece)

Gina E. Wood, Atlantic Council (USA)

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I. AKNOWLEDGEMENTS

70 senior experts and executives from 61 think tanks and research centers joined Working Group 5 (WG5) and the workshops of its four subgroups. They provided valuable insights, proposals, best practices, and action-oriented recommendations to respond to the strategic and operational challenges posed to think tanks by the COVID-19 pandemic. This report, therefore, is the result of a joint effort of all the members of WG5 (see above for the complete list), and includes written contributions provided by:

Mustafa Y. Ali, HORN International Institute for Strategic Studies (Kenya); Vardan Atoyan, AMBERD Research Center (Armenia); Camilla Bausch, Ecologic Institute (Germany); Rob Bluey, The Heritage Foundation (US); Michael Cox, LSE IDEAS (UK); Francesca Delicata, ISPI (Italy); Florence Gaub, EUISS (France); Jerome Glenn, The Millennium Project (USA); R. Andreas Kraemer, Ecologic Institute (Germany); Manjeet Kripalani, Gateway House (India); Alena Kudzko, GLOBSEC Policy Institute (Slovakia); Milena (Mihajlovic) Lazarevic, CEP (Serbia); Mercedes Méndez Ribas, CIPPEC (Argentina); Lea Metke, IFRI (France); Pol Morillas, CIDOB (Spain); Tanoubi Ngangom, ORF (India); and Gina E. Wood, Atlantic Council (USA).

All the members of WG5 wish to thank Professor James McGann for his vision, action, and constant support, which ultimately made the Global Think Tank Town Hall possible.

II. BACKGROUND ON TOWN HALL MEETINGS

Introduction

Countries across the globe are struggling with the destructive health and economic consequences of COVID-19. However, unlike the devastating pandemic of 1918, there are opportunities in the current context to rapidly share information and collaborate across borders. Think tanks are positioned to serve policymakers and the public as they grapple earnestly with the current and future health and economic consequences of a pandemic on this scale. When stakeholders look to think tanks for research and innovative policy solutions, organizations must be ready with information and easily digestible strategies for government, civil society and private sector decision makers.

The Global Think Tank Town Halls were designed to serve as catalysts for evidence-based, policy-relevant, action-oriented policies and proposals to create solutions for saving lives and livelihoods in the wake of this COVID-19 crisis. The Think Tank Town Halls demonstrated a special moment of unity, as 1226 think tank executives, scholars and policymakers from over 540 institutions in over 87 countries met over the course of the three Town Halls. The objectives were to create rapid and proactive responses to the growing economic, public health and welfare crises that have engulfed countries around the world. The Global Think Tank Town Halls largely focused on the public health crisis, economic recovery, vulnerable populations, international cooperation, and new think tank models. The Town Halls showcased leadership, resilience, and innovation across the world, and evinced the importance of global cooperation, especially in times of crises.

Global Think Tank Town Hall I

The First Global Think Tank Town Hall on April 7, 2020 brought together close to 400 participants from 278 institutions and 85 countries to discuss the procedural and substantive effects of COVID-19, as well as potential responses to pandemics in a post-COVID-19 world. During the opening panel of the First Town Hall, the participants discussed strategies for how think tanks can continue their work by reorienting towards the current crisis.

Think tank leaders emphasized the importance of creating and maintaining new relationships, especially those between think tanks and local actors and policymakers. Five themes for think tanks to consider going forward were presented: leadership, communication, technology, security and resiliency. By focusing on these themes, think tanks would be able to produce research and recommendations that will have a lasting policy impact.

Global Think Tank Town Hall II

The Second Global Think Tank Town Hall took place on May 13, 2020 and brought together 303 think tank executives, scholars and policy makers from 87 countries. The goal was to produce five action-oriented reports within 45 days that will be conveyed to the T20 Secretariat for inclusion in briefing materials for the G20. The outcomes of these reports would then be discussed at a third and final Global Think Tank Town Hall. These five action-oriented reports were produced by five respective working groups and were centered around:

1. Addressing the Public Health Crisis
2. Preparing National and International Strategies for Economic Recovery and Revitalization
3. Identifying Innovative and Inclusive, Public and Private Interventions Strategies to Help Vulnerable Groups
4. Fostering International Cooperation—Creating Rapid, Responsive, and Resilient Systems to Respond to Future Crisis
5. Being Fit for an Uncertain Future: New Operating Models for Think Tanks—Research, Communications and Funding

Global Think Tank Town Hall III

On June 30, 2020 think tank executives, scholars and policymakers came together for the largest of the three Town Hall meetings with 560 participants from over 80 countries. During this event, the five working groups established at the previous Town Hall presented their research findings from the past month. Their findings included strategic, action-oriented recommendations, as well as positive interventions occurring in various countries. These action-oriented recommendations were at the center of The Third Town Hall, as key proposals were presented during the Town Hall, and a more detailed list of recommendations was made available after the Town Hall through reports by each respective working group. As the final and main event of the Virtual Town Hall series, the Third Town Hall was essential in establishing what the role and next steps of think tanks should be during this COVID-19 pandemic. Following this Town Hall, from July 6-10th 2020, each working group held a breakout session with 30-80 attendees each to further discuss their findings and recommendations.

The following report was created in preparation for this final Town Hall, as it presents key rapid and action-oriented steps to mitigate the COVID-19 crisis for all. The video recordings of the Town Halls, along with the PowerPoints and reports of all the Working Groups, can be accessed using the links provided below:

https://www.gotothinktank.com/town-hall-reports
https://www.youtube.com/channel/UC1CJ9zQSNKAnTkx00iPYdgQ

III. EXECUTIVE SUMMARY

Amidst the growing uncertainties imposed on think tanks by the COVID-19 pandemic, this rapid-response working group focused on survival strategies for think tanks for both the short and long terms. The participating think tanks joined four subgroups where they discussed and shared short-term best practices for managing the crisis in terms of communication and organizing events in an online environment, fundraising and relations with partners, donors, and allies in the new circumstances, as well as re-focusing research activities. Participants also applied out-of-the-box thinking to envision post-crisis realities and propose adaptations which think tanks should try to make in order to keep their relevance and resilience in the years to come.

In particular, through an interactive and highly dynamic workshop for each subgroup, challenges and approaches to reinventing four key dimensions of think tanks' activities were discussed, including: 1- Digitalization and Beyond: Reinventing Communication; 2 - Digitalization and Beyond: Reinventing Events; 3 - Reinventing Funding, and; 4 - Reinventing Research. A final wrap-up workshop enabled participants to highlight key findings, suggestions, and comments from all the sub-groups and related workshops.

Numerous action-oriented recommendations and best practices were provided by participants. They can be found in Section VI of this report.

Building partnerships emerged as a recurring idea in all of the discussions held in the four sub-groups of Working Group 5. They were proposed as a tool to communicate more effectively, to host more memorable events, to fundraise more effectively, and to engage in more comprehensive and multidisciplinary research initiatives and programs. Numerous action-oriented proposals provide examples and ideas for building partnerships which can help think tanks achieve their short- and long-term goals of institutional adaptation and survival.

In terms of communication, challenges as well as recommendations and examples focused on the need to "cut through the noise" created in the media space, particularly with the immense increase in the production of online media. Moreover, participants discussed the issue of ensuring the confidentiality and safety of sensitive online discussions and the need to recast and adapt communication budgets and formats. The main solutions think tank executives proposed revolved around:

- Identifying and working in niche intersections of COVID-19 and specific issues in which think tanks hold expertise.
- Focusing on highly visible communication and stakeholder outreach initiatives that can make a real difference.
- Building alliances with investigative journalists able to help think tanks by both providing content for their research and by identifying the best ways to communicate research outputs to the public.
- Developing tight security protocols for online discussion fora and clear communication of such protocols to stakeholders participating in sensitive debates.
- Investing in new and diversified online (combined with face-to-face when possible) formats of communication and engaging stakeholders.

When discussing how to re-invent events in the digital sphere, think tank executives addressed the challenges of designing and hosting memorable events, able to keep the attentions of online audiences and compensate for the loss of the added value of networking and person-to-person interaction. Whereas participants agreed that everyone was still learning and searching, several practical examples were shared:

- The new opportunities and benefits that come with digital events need to be grasped, particularly in terms of their significantly widened potential audiences, as well as the easier access to speakers from across the globe they provide.
- Moreover, reduced environmental impact of online events should be emphasized and retained even after the crisis, by carefully determining when and to what extent physical events will be necessary.
- In this new context, speakers and moderators should step up their presentation skills and adapt to more dynamic and much shorter formats, while finding new ways to engage and interact with their new audiences.
- Hybrid events are already being prepared by some think tanks, and both software and hardware solutions are currently emerging to meet different needs in terms of large, medium, and small events.

Fundraising-related challenges were met with a number of innovative proposals and examples to help tackle both the immediate shortage of funds and the long-term adaptation needs of think tanks. In the short term, the need to make donors feel like they are part of solutions was emphasized. While think tank executives overwhelmingly agreed on the need to diversify sources of funding, they also agreed that new funds should not come at the expense of independence and integrity standards. Moreover, in the digital-by-default communication environment, engagement with donors needs to be highly personalized and tailored, with the development of distinct strategies for each type of donor. Fundraising should become a function cutting across organizations, and researchers should be empowered to engage with donors as well. To diversify funding sources, several ideas were put forward:

- Engaging the private sector as partners in research projects, rather than simply as donors. Such partnerships would ensure cooperation on an equal footing with companies.
- With scarce resources, funders are prioritizing high-impact projects which are more attainable through partnerships between several think tanks or various civil society actors; so one way to access new donors is by building partnerships with other think tanks (for example, regional, international, and thematic ones) and with different civil society organizations.
- Working to ensure that think tanks are included in corporate social responsibility (CSR) programs and legislation, as CSR can be another source of funding.
- Think tanks in the "Global North" could outsource research activities to smaller think tanks operating in the "Global South" in order to cut their own costs while at the same time providing new sources of funding for struggling peers in less privileged regions.

To adapt their research agendas to new realities and become more relevant in the future, think tanks need to redirect and widen their research priorities. Tackling immediate needs should nevertheless not happen at the expense of focuses on more traditional research topics, which will regain (or even increase in) relevance after the pandemic. Multidisciplinarity in the work of think tanks should take new forms and dimensions, by:

- Breaking the "thematic silos" culture in many organizations (shadowing governments' policy areas) and finding new policy intersections, including those related to public health and the COVID-19 pandemic.
- Developing thematic partnerships with other think tanks (domestically as well as internationally) focused on long-term research programs, in which participating organizations could match and combine complementary expertise and skills.

IV. INTRODUCTION

The unprecedented, multifaceted crisis created by the COVID-19 pandemic is taking its toll on the operations of think tanks across the world. Faced with decreased budgets and more difficult working environments, think tanks are expected to be even more timely and relevant in their responses than before, convening discussions and proposing solutions for the numerous policy challenges arising from the pandemic. Against this complex background, Working Group 5 of the Global Town Hall to Save Lives and Livelihoods has focused on survival strategies for think tanks, those needed both to adapt to the short-term consequences of the crisis and those that will arise in the longer term. Concerning short-term survival, participating think tank executives sought to identify the best international practices with respect to how think tanks continue to operate efficiently during this health and economic crisis, how to manage relations with partners, donors, and stakeholders/allies, and how to move towards new organizational models and communication strategies. Concerning the mid to long term, participants employed out-of-the-box thinking to envision post-crisis realities and propose deeper organizational adaptions required to function efficiently and effectively in the new environment.

The discussions of the working group focused on the following pillars, in which rapid responses and organizational adaptions are needed in order for think tanks to survive and remain relevant:

1. **Digitalization and Beyond: Reinventing Communication.** Communication, including policymaker and public engagement, is a persisting challenge for think tanks. As an overload of news and information about the pandemic has saturated the media landscape, distilling meaning from the chaos has become and will continue to be essential for the survival of the industry. What are some lessons learned from this experience? How should communication priorities be changed, with digital communication becoming increasingly important, and be more timely, innovative, and attractive? How can think tanks emerge from this crisis as better “conveyers” of the needs and concerns of citizens and stakeholders to policymakers?

2. **Digitalization and Beyond: Reinventing Events.** Going digital by default is both an opportunity and a challenge which needs to be properly tackled. Zoom conferencing has made it easier to reach out to international speakers and to target international and new audiences, decreasing the relevance of the size or even the budget of think tanks. Digital events have, however, led to the multiplication and duplication of events and to higher competition for audiences, as well as to branding and identification problems for organizers. How are think tanks adapting at present and what new formats and solutions are they developing for the post-crisis environment?

3. **Reinventing Funding.** Funding streams are being affected in the near, medium, and long terms, making them even scarcer than before. In a context of higher competition for funding, think tanks need to innovate and rethink partnership strategies. How are think tanks maintaining donor relations in a predominantly online working environment? How are they collaborating within their sector (with other think tanks) and across sectors (with the private sector, civil society, and others) to fundraise more effectively? How are they ensuring the fuller involvement of their donors and diversifying their fundraising strategies, while preserving independence and integrity?

4. **Reinventing Research**. Think tanks are faced with a sudden need for the redirection and widening of their research priorities, for focusing on new topics (including health-related issues), and for the application of new tools (including statistics). Internal capacities, however, cannot be refitted overnight, and many

organizations' budgets do not allow sufficient agility in a short span of time. To what extent should organizations change the focuses of their research and to what extent should they also keep working on more traditional issues (which will regain salience after the crisis)? What solutions are think-tank executives envisaging to respond to these challenges?

5. **Management and Organizational Adaptations.** In a disrupted world and new operating environment, think tank managers need to mobilize their staff by providing meaning and direction. The new context urges them to reconsider staffing (new competences/skills/knowledge are required), decision-making procedures, and internal procedures. But this crisis also offers the opportunity to overcome old internal rigidities and improve management and leadership.

These five priority topics were discussed through four subgroups, thematically oriented around the first four pillars, while the fifth topic was addressed as a horizontal issue by all of the subgroups. The work proceeded through five interactive workshops, in which think tank executives from across the world contributed their experiences and ideas in an open and frank atmosphere. As a preparation for the workshops, an online survey was sent out to Working Group 5's participants. The survey served to understand the demographics of the participants (presented in the Appendices) and to organize the contributions of the numerous participants in the thematic subgroups. Consequently, the first four workshops had thematic focuses on the thematic pillars (and also included discussion of cross-cutting managerial and organizational implications and adaptations), with the participation of the members according to topics of their choice. The last workshop then served to present main findings and action-oriented recommendations to the entire working group. In addition to contributions made through discussion in the workshops, seventeen think-tank executives also contributed with written best practices, which are presented in Section V of this report. Section VI then summarizes the action-oriented recommendations generated by the Working Group, and Section VII provides a conclusion.

V. APPROACH AND RESULTS

Members of Working Group 5 shared views, proposals, action-oriented recommendations and best practices on survival strategies for think tanks. They highlighted both short-term and long-term implications for think tanks in terms of communication and events in the new digital context, fundraising, relations with donors and partners, and research activities. In particular, all the members of WG5 were invited to join the following four subgroups (SGs): 1 - Digitalization and Beyond: Reinventing Communication, 2 - Digitalization and Beyond: Reinventing Events, 3 - Reinventing Funding, and 4 - Reinventing Research. In interactive and highly dynamic workshops for each subgroup, members discussed common challenges and approaches to adapt and relaunch their activities in the post COVID-19 world. Some members provided written contributions (see the boxes of this section), sharing best practices, insights, and proposals. **The main results of the activities of each subgroup are shown below**.

SG1
Digitalization and Beyond: Reinventing Communication

Communication, including policymaker and public engagement, is a persisting challenge for think tanks. In keeping with the Latin proverb “Primum vivere deinde philosophari,” *(First live, then philosophize)* think tanks must adapt their communications to the difficulties of the ongoing crisis, while simultaneously learning from this situation in order to become more effective communicators in the long run. They need to apply out-of-the box thinking techniques in order to become timelier in responding to problems, more innovative, and more attractive to donors. At the same time, any changes that are being implemented in the short-term, for the sake of managing in this period of crisis, need to be proportionate to their purposes: radical transformations that will not be applicable after the crisis should be avoided. Three major challenges that emerged, and around which action-oriented proposals and good practices were proposed, concern: 1 - the overproduction of content and information and the challenge of adding value; 2 - creating a safe environment for strategic and sensitive discussions in the online environment, and; 3 - recasting communication budgets and formats to respond to digital demand.

- This subgroup discussed the **challenges of increased output and online media production**, as an immediate impact of COVID-19 on the communication strategies employed by think tanks. As website visits and social media engagement surged in the wake of the pandemic, many think tanks have rushed to increase their production volumes, creating a two-fold challenge: communicating effectively on so many products in a short span of time is difficult, yet if volume increases at the expense of quality, think tanks can end up contributing to the general “noise” rather than cutting through it. To address this issue, an action-oriented proposal was the identification of niche intersections of COVID-19 pandemic and specific issues where not much work has been done (yet within think tanks’ expertise areas, to retain consistency), and focusing communications on these areas. The Heritage Foundation provided an example of how it successfully “cut through the noise” by setting up a National Coronavirus Recovery Commission, which allowed it to both engage a multitude of stakeholders in its COVID-19-related work and to widely communicate the results of its work (see Box 1). Another proposal for ensuring relevance and adding value in the current noise is an increased focus on building new partnerships and alliances, for example with investigative journalists, who can work with think tanks both on adding depth to jointly-explored problems and on increasing the reach of such collaborative work, as they know what the public will pay more attention to. Finally, in order to ensure that think tanks’ audiences are not overwhelmed with information, the better targeting of communications was proposed, for example by tracking the interests of specific audiences to model the production of new content or by creating targeted newsletters for specific audiences based on their expressed interests.

- Another major challenge for think tanks has been **ensuring confidentiality in the management of key communication and stakeholder engagement functions**, such as convening, hosting, and moderating strategic debates and discussions on sensitive topics. This will be more important in some policy areas than others, but it holds true for parallel negotiations in international affairs or track-two diplomacy as well as candid exchanges of experience in almost all areas. Ecologic Institute made a specific actionable proposal to address this challenge, focusing on the development of tight security protocols for online discussion fora which would be clearly communicated to invited stakeholders, thus reassuring them of the safety of such communication (see Box 2).
- **The recasting of communication budgets and formats** was discussed as an immediate challenge, requiring a shift from traditional communication initiatives to new, online platforms and products. The Heritage Foundation provided a good example, with the fast adaptation of its Annual Leadership Conference into a virtual event which effectively expanded its outreach to supporters of the organization far beyond what would have been possible in the traditional face-to-face format (see Box 3). Another innovative example was provided by Chatham House, which organized its Common Futures Conversations as a "closed online environment which enables exchange through a number of activities, including direct messaging, blogging, user surveys and livestreams of events" (see Box 4).

BOX 1

BEST PRACTICE ON

"CUTTING THROUGH THE NOISE" BY COMMUNICATING ON FLAGSHIP INITIATIVES

by **Rob Bluey**
Vice President of Communications, *The Heritage Foundation* (USA)

The National Coronavirus Recovery Commission, a project of the Heritage Foundation, brings together some of the nation's top experts and thinkers to offer their specialized experience and expertise to navigate America through this crisis and toward recovery. The commission is made up of 17 members, led by Heritage Foundation President Kay C. James. Commissioners have experience in medicine, economics, government, business, and human behavior. Over the course of two months, the commission has met virtually and developed 264 recommendations and policy proposals for federal, state, and local governments, as well as private businesses.

The commission prioritizes getting its message in front of as many eyes as possible and has been enormously successful in this endeavor. The commission's work has been quoted in major media outlets and recognized by the White House, state governors, local leaders. In addition, Kay C. James was invited to serve with the White House Great American Economic Revival Industry Groups to share the commission's ideas.

Although the commission's meetings are closed to the media, Heritage staff have organized three successful press briefings using Microsoft Teams as a means of interacting with journalists whenever new recommendations are released. The briefings start with short opening statements from commissioners and executive directors, followed by open-ended Q&A for the press. This format allows journalists to get detailed information on recommendations and ask commissioners about current events. The commission's website, coronaviruscommission.com, serves as a hub for all 264 recommendations as well as coronavirus-related research from the Heritage Foundation, news releases, and media appearances. Nearly 800 private citizens have used the website's submission form to share their own ideas for reopening America. The commission posts regular updates on its Facebook and Twitter accounts. The final report will be issued on June 15, 2020, at a virtual event open to the public.

BOX 2

BEST PRACTICE ON

COMMUNICATING SAFELY IN AN ONLINE ENVIRONMENT

BOX 3

BEST PRACTICE ON

HOW TO COMMUNICATE A VIRTUAL ANNUAL CONFERENCE

BOX 4

BEST PRACTICE ON

HOW TO INNOVATE FORMATS AND ENGAGE YOUNG PEOPLE

Read more about communication

Fernando Castelló-Sirvent, Vanessa Roger-Monzó, Juan Manuel García-García, “Deep impact: a longitudinal analysis of the presence of think tanks in the press during the crisis and the recovery period,” Economic Research-Ekonomska Istraživanja, December 2019.

HTTPS://DOI.ORG/10.1080/1331677X.2019.1694561

SG2
Digitalization and Beyond: Reinventing Events

The unprecedented speed, scope, and uncertainty of the COVID-19 crisis have deeply affected the activities of all think tanks, but their impact is particularly profound on events. Due to necessary limitations on physical gatherings and international travelling, in a short span of time think tanks were forced to look for completely new formats and platforms for one of their key activities. They had to quickly learn how to "reinvent" their events while leaving some questions unanswered at the moment, such as those related to the added value of networking and person-to-person interaction. Along with the unprecedented challenges they pose, virtual events also provide new opportunities and have further accelerated processes and changes which were already underway.

- One question raised by many think tanks is how to recreate some key features of physical events, such as the high degree of interaction, confidentiality, and networking, in a digital environment. Public platforms also raise concerns about speakers' privacies and their abilities to effectively conduct negotiations and tackle delicate issues (see Box 1). Going digital also takes its toll on relations with sponsors and donors, as they expect a return in terms of visibility and exclusivity when providing funds for events (see Box 2). Furthermore, online audiences tend to have lower attention spans, changing established event schedules and forcing think tanks to find new ways to engage their audiences with new formats (see Boxes 2 and 3). Both speakers and moderators need to carefully manage their time at events. To this end, new skills and training may be required. With speakers and audiences potentially scattered across the globe, organizers are also challenged by working across different time zones (see Box 4). Finally, the ubiquitous spread of digital events is raising the bar for organizing high-quality, memorable events. Think tanks must find new ways to make their events stand out, and must also effectively tap into the full potential of digital platforms (see Box 5) and ensure that digital experiences run smoothly and comfortably for everyone involved (see Box 4).
- As think tanks brainstorm, and experiment with, new formats, many of the challenges that arise go hand in hand with new opportunities. First, in the global quest for a green revolution, think tanks can lead by example, lowering the carbon footprint of many of their activities (see Box 1). Meeting virtually requires energy but avoids significant direct (from travelling, for example) and indirect (such as from catering or heating and cooling venues) impacts of physical events. Furthermore, despite the increased difficulty of fundraising, costs are significantly decreasing, as venues (and with them lighting, microphones, boards, travel, and so on) are replaced with virtual environments. At the same time, even though think tanks spend less on logistics, they are able to reach out to wider audiences in terms of both speakers and participants.

Social media plays an important role in this, as it allows think tanks to build connections with new audiences and tailor products accordingly (see Box 5). In this sense, virtual events may be an opportunity, especially for small and less famous think tanks to make themselves heard by organizing high-quality events with fewer resources.

- Different types of events pose varied challenges and opportunities. The traditional need to differentiate between small, closed-door meetings, medium- to large-size events, and flagship conferences now entails other variables, such as whether an event is hybrid or entirely digital (see Box 3). In this new environment, speakers and moderators will have to step up their presentation skills, adapt to faster, shorter formats, and find new ways to engage and interact with audiences (see Boxes 4 and 5). Organizers are also challenged by the need to recreate – at least to some extent – the atmosphere of side (and yet crucial) activities for networking, such as face-to-face conversation during coffee breaks (see Boxes 3 and 4). Digital events nevertheless allow for a longer run-up to a flagship event, with a number of smaller preparatory events scattered over several weeks.

BOX 1

BEST PRACTICE ON

GOING DIGITAL: WHY WE SHOULD RETHINK EVENT FORMATS

by **Camilla Bausch**
Director, *Ecologic Institute* (Germany)

The coronavirus emergency forced think tanks to readapt their events to new online formats. Moving online poses challenges, but also offers the chance to significantly reduce our carbon footprint, for example by avoiding direct emissions caused by travelling. As opinion leaders, think tanks share part of the responsibility to set an example by promoting more sustainable practices. The virtual events we have come to master during the lockdown (by learning, and investing in, such activities) can thus become a permanent, greener business habit.

However, one must bear in mind that not all events are the same. Some events, such as those involving delicate negotiations and topics, still require face-to-face meetings. On many other occasions, however, virtual solutions can be adequate or even advantageous with respect to outcomes regarding time and money spent (by both organizers and participants). Virtual events actually make it easier to reach broad and geographically diverse audiences (even with limited budgets) and could enable the participation of people not able to travel or leave home.

When choosing between physical, online, and hybrid events in the future, we should take into consideration the following factors: could the purpose of the meeting be achieved in a virtual format? Would an online version be accepted by participants and is it feasible technologically? What needs to be planned and designed differently as compared to planning for a physical meeting? Could hybrid elements be implemented?

In addition, if the event requires the physical presence of participants, the environmental footprint of the face-to-face meeting should be considered. The host should take into account: a) environmentally friendly travel options (such as trains instead of flights); b) offsetting emission, and; c) environmentally friendly accommodation and sustainable catering (such as vegetarian options and reusable tableware).

BOX 2

BEST PRACTICE ON

ENGAGING DONORS AND OTHERS IN VIRTUAL EVENTS

by **Gina E. Wood**
Vice President of Foundation and Institutional Giving, *Atlantic Council* (USA)

The value of face-to-face interaction will never go away, but there are times when going virtual is a necessary part of your event program. This requires the same **care and attention as hosting an in-person event.** In both formats, you need to effectively promote the event and engage your attendees, including donors. By thinking of virtual events not as small, one-off presentations but as value-added, engagement-driven experiences, you can create impactful events that extend well-beyond computer screens. The following are the four main types of virtual events.

Webinars. Webinars typically last somewhere from 45 to 80 minutes. Holding webinars allows attendees from around the world to join in. Organizations can charge attendees to join webinars using online payment services or they can be offered for free. Webinars typically use video conferencing tools that allow Q&A, trainings, the ability to present live or pre-recorded videos, and can be offered on-demand after the fact.

Virtual Conferences. Much like in-person conferences, virtual conferences are built around live, complex agendas that include keynotes, sessions, breakouts, and more. Virtual conferences include multi-session content and can involve community engagement tools. While not as effective in terms of lead capture and networking as in-person events, virtual conferences allow attendees to view keynotes in real-time, build their own agendas from relevant, on-demand content, and interact with other attendees.

Internal Hybrid Events. These include town halls, organization-wide events, trainings, and more. For organizations that span countries, even continents, internal hybrid events are used to share messages to entire organizations when employees are not all gathered in the same place. While it would be great to fly every employee to your organization's headquarters, it would be incredibly costly, and the scheduling required would be time-consuming. The next best option is to host events that are part in-person, part virtual.

External Hybrid Events. These events are held for those outside of your organization. These events require higher levels of video production so that virtual attendees are provided a similar quality to in-person attendees. These events allow attendees who are unable to travel to the event to participate and learn. It is challenging to provide the same value at external hybrid events, as in-person attendees can network more freely and engage more easily with content than those attending virtually.

BOX 3

BEST PRACTICE ON

HOW TO ORGANIZE SMALL AND MEDIUM-SCALE ONLINE EVENTS IN THE (POST) COVID-19 ERA

by **Lea Metke**
Project Officer to the Director, *IFRI* (France)

Small to medium-scale digital events should offer secure/confidential video conference platforms, especially when discussing sensitive issues. Considering the wider audiences you are now able to reach, it is best to organize your events in English and at convenient times for different time zones. Furthermore, these types of events should not last more than 90 minutes and should be interactive to keep audiences engaged. At the same time, you should try to develop new formats that could replace traditional conferences in the long term, "30-minute virtual breakfast debates," for example, are now possible, while before it was not feasible to invite people to your institution for only 30 minutes. Moving online poses new risks, and therefore you have to prepare events carefully: train your staff, organize tests before events, brief your speakers properly, and task two colleagues to step in in case there are any problems. Finally, even if they are virtual events, you still have to remember to take pictures and register them in order to have material that can be spread on social media, for instance.

The most important thing though, is to decide which types of events you want to organize depending mainly on what audiences you wish to reach. You can distinguish between two types of small/medium-scale events.

Meetings. These are designed to be interactive events with all participants being able to share screens, turn their cameras and audio on, and see who else is attending. For this reason, they have a short input speech to introduce the topic, leaving enough space for Q&A. This format is perfect to replace former "closed door roundtables" and other events designed for small groups of people. The target groups for these events include donors, private corporate members, important public figures, and public officials aiming to have active discussions. Reproduce these meetings regularly (making them monthly or bi-monthly events) to create connections with audiences. Also, as coffee breaks and cocktails are now part of the past, develop "virtual rooms" where people can meet informally after events.

Webinars. These are designed to give panelists and hosts the possibility to share their cameras, audio, and screens. Webinars allow watch-only attendees who have the possibility to interact via Q&A and chat. This format is perfect for audiences of at least 50 people and could replace former traditional conferences. Part of the target group for this format are donors, private corporate members, important public figures, public officials, academics, journalists, and the general public. As there is a lot of virtual competition, make sure that no other major events are taking place at the same time of yours. In order to keep the audience's attention, make sure that presentations are shorter and more active than those of usual conferences. Make your Q&As interactive: instead of using the Q&A function, you could give the participants the possibility to take the virtual stage and ask questions out loud. Also, in this case, develop "virtual rooms" where people can meet informally after events.

BOX 4

BEST PRACTICE ON

TRANSFORMING FLAGSHIP EVENTS INTO HYBRIDS

by **Alena Kudzko**
Director, *GLOBSEC Policy Institute* (Slovakia)

Hybrid events are likely to carry on also after the health emergency has ended, as they offer possibilities for participation also to people who are not onsite. GLOBSEC is currently transforming its forum into a hybrid event, concentrating on several aspects.

First of all, it is working closely with start-ups and small companies from the region to identify the most appropriate **tech platforms**. They happen to have even more user-friendly and customizable solutions for comparable prices than the big tech companies.

The **quality of chosen tech platforms** is also important: they must be secure and work smoothly. In an increasingly saturated space, production, tech, and presentation aspects are very important to draw attention and participation. These solutions are not cheap.

Bearing in mind a potential second wave of the coronavirus, we are working with **epidemiologists** to devise solutions to ensure safe conferences, including possible health checks, testing, and restricting participation from certain countries.

Sessions will need to be scheduled taking into consideration different **time zones** (the prime time is early European afternoon, as it allows time for the Americas to wake up and Asia to not yet fall asleep).

We are still looking for ways to recreate coffee breaks and private **informal** chats online.

Pre-event sessions will take place online, and we are hosting them over several months before the hybrid event in the fall. To ensure continuity and encourage participants to take part in more sessions, we are connecting these different sessions. Ideas from a brainstorming session, for example, will be elaborated upon later in another session. Furthermore, we are also differentiating between the various sessions by using different formats, experimenting with different brainstorming methods (such as live texts, discussions, pre-submitted questionnaires), surveys, simulations, and mock exercises that keep audiences engaged.

BOX 5

BEST PRACTICE ON

REIMAGINING ENGAGEMENT IN BIG EVENTS

by **Tanoubi Ngangom**
Chief of Staff and Programs, *Observer Research Foundation* (India)

As big conferences are not replicable in the digital format, think tanks across the globe are exploring new ways to host big events. Most of these innovations fall under three overarching themes.

The first is how to **bring real-world aspects into the digital arena**. Customized conferencing platforms that align with conference branding and design elements can enhance the look and feel of large, digital convenings. These customizations would also include designated tabs/options for displaying conferences, sponsor logos, profiles of speakers and delegates, and relevant research/video products that organizers may want to plug. Conferences also provided a space where delegates could meet up for bilateral conversations and smaller meetings. How do we introduce a digital networking lounge and create opportunities for people to engage with each other? Could we find a way to transform person-to-person chat windows to video side rooms?

The second theme regards how to **optimize digital conferences, adapting them to different media and audiences**. Digital conferences can be adapted to different social media platforms that benefit from a wide spectrum of resonance. For instance, there could be products tailored for Twitter (such as Twitter live casts) and Facebook with panelists/speakers engaging live with audiences/participants. Conference agendas could be linked to digital session planners and participants' calendars.

Finally, **adapting to the virtual**. Going online often means dealing with shorter attention spans on the side of audiences. How can we keep participants engaged throughout conferences? Live Q&A sessions, polls, surveys, and simulation exercises can be a way to keep audiences involved and enhance discussions.

SG3
Reinventing Funding

Due to the COVID-19 pandemic, most think tanks are faced with reduced funding in the near, medium, and long terms. In this context they are experiencing a contradiction: on the one hand, donors and stakeholders are providing less funding, because of both lacking funds and shifting priorities (such as their redirecting money to immediate responses to the pandemic). On the other hand, think tanks are expected to do more and to be even more relevant than before with fewer resources. To square this circle and maintain financial sustainability, think tanks need to rethink their funding strategies and innovate in how they engage with donors and other stakeholders while preserving their independence and integrity. The major challenges identified by this subgroup were: 1 – the diversification of funding sources; 2 - donor engagement in the virtual environment, and; 3 – remaining independent when funding is scarce.

- **The diversification of funding sources** was acknowledged as a necessity, in order to adapt to scarcer funding in the mid-to-long run and increase the sustainability of think tanks by not relying excessively on any single donor. Think tanks need to develop individual strategies for drawing funding from various sources, such as international corporations, individual donors, international organizations, civil society grants, and private foundations. Several think tanks made concrete, action-oriented proposals on diversifying their funding sources. **The creation of joint initiatives through partnerships** with other think tanks, other civil society organizations, and private companies was proposed by ISPI (see Box 1) and CEP (see Box 2). While ISPI has successfully partnered with private companies, working on par with them as partners (rather than donors), CEP has built a network of think tanks across the Western Balkans as a permanent partnership structure, and has engaged in comprehensive projects with various types of NGOs in Serbia. Both approaches have helped these organizations acquire new sources of funding and extend the impact of their initiatives. Furthermore, Gateway India (see Box 3) suggested investing effort to ensure that local corporate social responsibility legislation includes think tanks, so that companies can extend their CSR support to them. As proposed by the HORN International Institute for Strategic Studies (see Box 4), new funding can be found for think tanks in the developing world through the establishment of research partnerships with peers in developed countries. Such partnerships can also be beneficial for bigger and better-funded think tanks, potentially helping them to cut some of their research costs by "outsourcing" activities to partners in the developing world.
- **Donor engagement** has become much more difficult in the virtual environment, as the personal contact often essential to this process has been lost. This particularly holds true for engagement with new donors,

which is of great importance as think tanks need to fundraise aggressively in the coming months and years. To address this challenge, workshop participants signaled a few options:

- **"Keep your donors near, dear, and clear."** (Gina Wood, Vice President, Foundation and Institutional Giving, Atlantic Council, USA)
  - Near: Keep in touch with your donors through email, social media, special briefings, and other forms of communication. While they do not necessarily need to receive a lot of communications, they should definitely receive the most important ones. They need to understand how relevant, and helpful, you are in general and for the specific circumstances of your stakeholders. Ask for their input and make them feel involved (in some cases you could build advisory boards on specific issues) - that they are part of solutions to major problems. If they feel involved, they may be more willing to provide funds. Remember that your donors do not fund you to achieve your goals, but theirs.
  - Dear: Thank your donors for their support and let them understand how precious they are in this period, not only because of their money but also because they can share their perspectives, experience, networks, and other resources.
  - Clear: Be honest with your donors and stakeholders about your problems and the way you (as well as other think tanks) are facing them. They must be aware both of what you are doing to keep your staff safe and the negative financial impact you are facing. Inform them about how your activities and staff might be reduced.
- **Make sure that virtual communication with donors is personalized** rather than generic, as recommended by the Atlantic Council. It is much better to use video conferences than phone calls or e-mails to stay in contact. The creation of personalized video messages for specific donors may be of help.
- **Engage staff in fundraising**. Whereas scholars and experts are not necessarily hired for fundraising, they can be trained and empowered to perform this function, too. Presidents or CEOs have the main responsibility in this regard, but everyone else can also find ways to contribute to fundraising. It is important to build relationships with donors at the top of organizations, and then to make sure staff keep in touch with donors on a regular basis in order to better explain the impact of your research on the one hand and to better understand donors' priorities on the other. You need to develop a fundraising culture encompassing all your staff and allow everyone to fundraise in the areas in which they work.

- Whereas reliance on partnerships is needed more than ever, it carries with it another challenge: **remaining independent**. This challenge can emerge in any type of partnership but is especially relevant when discussing partnerships with private companies. CIPPEC from Argentina provided a number of practical measures and tips for monitoring and controlling independence and avoiding conflicts of interest when planning and initiating cooperation with various donors (see Box 5).

BOX 1

BEST PRACTICE ON

HOW TO ENGAGE PRIVATE COMPANIES: FEWER DONORS, MORE PARTNERS

by **Francesca Delicata**
Head of Corporate Programs, *ISPI* (Italy)

In the face of the current crisis, one option that ISPI – as a medium-sized think tank – has implemented over the past three years, and that we are now trying to further strengthen, is the **engagement of private companies as partners instead of donors or sponsors**. In some cases, we call them "knowledge partners" to underline the difference between them and donors/sponsors. In fact, our partners build projects with us from the very beginning, provide content, and are part of our work streams.

So far, for instance, we have built knowledge partnerships with McKinsey on global cities and infrastructure, Boston Consulting on young leaders, KPMG and Deloitte on G20, Google on artificial intelligence, ENI and ENEL on energy transition, and PMI on illicit trafficking. **This does not, however, affect our independence, as we strive to cooperate on an equal footing with these companies**. We are complementary to each other and **we pool our assets**, in a **win-win game**; ISPI generally contributes to joint projects with its expertise on international relations ("the geopolitical side" of infrastructure, cybersecurity, global cities, among other concepts), while partners contribute with their expertise on business and economics ("the economics" of smart cities, sustainable infrastructure, energy transition, to name a few). ISPI also contributes with a very "light" but "quick" event and communication team, while partners provide graphic designers and other services, and ISPI provides access to policymakers and qualified institutional and business audiences at the national level, while partners provide senior experts/managers at the international level. What ISPI does neatly complements what partners need, and vice versa.

Advocacy may emerge as the result of our joint work, because we share the same approach and the same objectives, but it is neither the starting point nor the main reason we choose to cooperate. The main reason is to **achieve more than ISPI could do on its own, while preserving integrity and impartiality**.

Against this background, there are also **downsides** which need to be taken into consideration. First, **funds made available by partners can be reduced** at the very moment when an extra effort in terms of management is required to keep more people on board, produce more reports, organize more meetings, and other activities. Another downside may emerge when partners have different sizes and move at different speeds. This holds true especially when cooperating with a big company, as **processes become more complicated and time-consuming**. As a result, you may compromise on the outcome and/or miss other opportunities as you are moving too slowly to overcome certain constraints. This is a big challenge especially in times of crisis, when think tanks need to move faster.

BOX 2

BEST PRACTICE ON

PARTNERING WITH OTHERS TO FUNDRAISE MORE EFFECTIVELY

by **Milena (Mihajlovic) Lazarevic**
Co-founder and Program Director, *CEP* (Serbia)

The European Policy Centre (CEP) is a non-governmental, nonprofit, independent think tank based in Belgrade. We are 100% project-funded, and thus have no operating funds, and, for instance, no membership funding by companies, philanthropists, or the Serbian government. Our funding comes from action grants or commissioned contracts, mainly from international development assistance or foreign private foundations (such as the Open Society Foundations).

In our strategy to ensure liquidity, we are actively focused on partnering up for more creative fundraising, likely to become increasingly relevant in light of the COVID-19 crisis. In our work we have developed **three types of partnerships**:

1. **Horizontal** partnerships with other think tanks - mainly cross-border in the Western Balkans region (through the regional Think for Europe Network, which we lead and coordinate);
2. **Vertical** partnerships with other types of civil society organizations - such as watchdog, activist, and local grassroots organizations, professional associations (such as judges' or prosecutors associations), and others. Through horizontal and vertical partnerships with these various organizations, we develop more holistic approaches to project design and implementation. These partnerships have helped us fundraise more effectively, creating projects and initiatives that are far more comprehensive than what a single think tank from Serbia can do alone. Such projects allow us to punch above our weight in terms of geographical reach and access to international organizations and EU level policymakers, and extend our impacts to both citizens and policymakers, thus reaching multiple levels. Most of the projects we have implemented to date have been either vertical or horizontal partnerships, with very few exceptions. There are a lot of challenges in maintaining and managing such partnerships, but in the end the results are well worth the effort.
3. **Junior partnerships in consortia** - we have built significant internal capacities, experience, and expertise in asserting ourselves as a valuable local partner to major international consultancy companies and development organizations in the delivery of technical assistance to the Serbian government. In Serbia, as in the rest of the Western Balkan region, major international consultancies and international development organizations have, to a large extent, assumed the role of think tanks in society. Through the work they perform, funded by international development assistance, they have effectively become the main policy advisors to the government. This has played a part in limiting the development of local think tanks, in terms of their objective numbers, human resources, and the roles they play in domestic policy processes. Instead of being the actors the government goes to for policy research and advice, we are in a continuous struggle to have our voices heard.

Part of our fundraising diversification strategy focuses on increasing the share of service contracts in our budget, with a focus on technical assistance projects to the Serbian and Western Balkan region's administrations. Such projects are mainly funded by the EU, UK, USA, Germany, as well as several other governments of EU member states, but are implemented either by international consultancy companies or by international development organizations (such as the World Bank, the UN, and others). By partnering up as a junior member of consortia with major international consultancies or by being hired as an implementing partner by international development organizations, we play an important part in their processes, while staying at arm's length from the Serbian government, which only appears in the role of beneficiary. Thanks to our already-existing share of funding from the mentioned sources, our funding and human resources have remained stable throughout the COVID-19 crisis.

BOX 3

BEST PRACTICE ON

USING CORPORATE SOCIAL RESPONSIBILITY AS A SUITABLE ROUTE FOR THINK-TANK FUNDING

by **Manjeet Kripalani**
Co-founder and Executive Director, *Gateway House* (India)

CSR in India and think tanks: In India, independent think tanks like Gateway House receive funding, inter alia, through the corporate social responsibility (CSR) route, under the category of "education."

Each company that meets certain profit criteria has to contribute 2% of their net profit to CSR activities. The CSR rules are mandatory as well as wide-ranging. Corporations can choose between promoting education, gender equality, or sustainable environmental goals.

The most popular area is education. Nearly 90% of companies prefer to fund educational initiatives. These closely align with corporate goals of being able to hire from a pool of high-caliber potential employees, who can be productive for both companies and the country at large.

Public policy institutions and think tanks have not specifically been included in the definition of education. They are, nevertheless, usually incorporated as nonprofits, trusts, or societies, and are recognized as "research institutions engaged in spreading education." Therefore, they are eligible for CSR funding.

The case for think tanks and CSR: Think tanks and public policy institutions, in their purest and original forms, are neither pressure groups, nor lobbying organizations, nor for-profit consultants, and strictly confine their activities as voluntary organizations to achieve purposes within the powers conferred by their charters, boards, and the laws applicable to nonprofit organizations.

Think tanks are often described as "universities without students." They hire highly qualified individuals with specialized knowledge, often with PhDs. They are directly and indirectly involved in solving global and domestic problems facing economies, trade, and commerce. Business treats grants to think tanks as long-term investments, confident of financial and societal returns. Many progressive, pragmatic entrepreneurs in India, the USA, Europe, and Asia support think tanks and participate in their debates and research, with outcomes that often become policy.

Their status as nonprofits with high standards of corporate governance reassures corporations that think tanks stay non-partisan, independent, and financially sustainable.

This makes for a strong case to have think tanks recognized, supported financially, and treated as socially responsible investments within CSR initiatives.

International CSR rules: Internationally, most CSR is voluntary. In Europe and in India, it is mandatory. While the rules in India are broad, and include education, in Europe and the United States, it is mostly focused on sustainability, society, and the environment. However, in both these continents, CSR funding for think tanks can be considered under the category of "governance."

BOX 4

BEST PRACTICE ON

"OUTSOURCING" RESEARCH TO CUT COSTS IN A COVID-19 ENVIRONMENT

by **Mustafa Y. Ali**
Chairman, *HORN International Institute for Strategic Studies* (Kenya)

Stepping up efforts to address challenges related to COVID-19 is the top priority for think tanks around the world. Partnerships are key in this regard. They are even more urgent because of disruptions to global travel due to COVID-19 which will last for some time. Researchers normally travel long distances, across continents, to collect and validate data, and undertake primary research. With the current disruptions, and with COVID-19 not likely to abate soon, it makes sense to engage in constructive partnerships between think tanks located in the Global North and those in the Global South, and within those in the Global South and Global North.

Such partnerships, in which "outsourcing" research will be a key component, will help in cutting research costs, while at the same time helping and empowering struggling think tanks around the world. It will also help in the generation and transfer of knowledge. Partnerships and outsourcing research will also contribute to transferring the "think tank culture," rooted and established in places such as the United States, to many other places, especially those located in the Global South.

While think tanks that are generally better funded, rooted, and sustainable will benefit by increasing the ease of doing research and generating knowledge from far-flung places for their audiences, such partnerships will also empower "struggling" think tanks. This will contribute to sharpening policy based on evidence in areas that need these services but cannot afford them.

Disruptions by COVID-19 should not reduce the efficacy of think tanks around the world. Instead, think tanks should use these "disruptions" for the better, by informing policymakers and decision-makers in a timely manner, with the best available data and information available across the world.

BOX 5

BEST PRACTICE ON

MANTAINING INDEPENDENCE AND INTEGRITY IN UNCERTAIN TIMES

by **Mercedes Méndez Ribas**
Institutional Development Director, *CIPPEC* (Argentina)

Due to the current pandemic, the majority of, if not all, thinks tanks are faced with uncertainty in relation to their sources of funding: international cooperation's focus is now on coping with the urgencies of the pandemic, with lockdowns in major cities putting further strain on corporations already involved in a global economic recession, limiting their capacities to contribute to civil society.

In times like these, it is of utmost importance that think tanks guarantee their long-term sustainability by protecting their reputations and integrities. Under financial constraints, it is too easy to receive funds if you overlook conflicts of interest or the importance of research independence.

There are several tools that think tanks can quickly implement without the need for additional funds or specialized teams, namely:

- Focusing on having diverse sources of funding and having specific strategies for each of them so that if one fails, others still remain, including international cooperation, private companies, individual donors, and foundations;
- Diversifying sources of funding within projects by creating special committees with the internal rule that for projects receiving funds from the private sector, at least three companies should contribute funds, and a project advisory committee should guarantee independence;
- Monitoring ongoing donations on a monthly basis to make sure that not one of them surpasses a 10% threshold of total donations, so as to minimize potential risks;
- Screening donors to avoid potential conflicts of interest that could affect your institution in the future;
- Nominating internal committees responsible for monitoring and implementing these measures, prior to the approval of projects, with written rules on the screening of donors and the steps to be taken in cases of potential conflicts of interests or losses of independence;
- Communicating the rules in place for guaranteeing transparency, as well as the enforcement of such rules, to team members, boards of directors, and trustees, since they are your best ambassadors.

Read more about funding

Enrique Mendizabal, “How Covid 19 is affecting funding, and what think tanks and funders can do about it,” *OnThinkTanks*, May 6, 2020,

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SG4
Reinventing Research

COVID-19 touches on raw nerves regarding the research activities of think tanks, and puts their abilities to provide timely, independent, and accurate analysis in the context of scarcer resources and higher competitiveness, to the test. Three major research-related aspects Of the work of think tanks were discussed in the subgroup on research, including the redirection and widening of research priorities, multidisciplinarity and partnerships in the think tank community, and the need for revised internal procedures and organizational models.

- Think tanks are faced with a sudden need for the **redirection and widening of their research priorities** and for refocusing on new topics (including health-related issues) and tools (such as statistics and big data analysis). This is not an easy task, as think tanks have shown to be blind to two things: they usually do not work on health policy, and even those with broader agendas seldom work on health-related issues. In addition, think tanks are not great at anticipating the future: the SARS epidemic in 2002-2003 should have be a lesson learned for everybody. Still, think tanks were caught by surprise and turned out to be unprepared for the current situation, as they usually underestimate the importance of modeling scenarios.

  However, while initially unprepared, today think tanks need to react and show responsiveness when choosing research priorities and by adapting their research programs/centers to cover new issues raised by COVID-19. Such a refocusing is key to addressing the concerns of those asking for accurate information and analysis (see Box 1). In so doing, however, think tanks should be careful to avoid losing sight of their traditional research topics, many of which will regain salience after the crisis. To this aim, think tanks need to be systematic in their research, and their attentions should not totally be devoted to COVID-19. The underlying structural issues of international relations should still be an area of concern for international affairs think tanks, which have to recognize that previous trends may be further accelerated/aggravated by the spread of the coronavirus (see Box 2). Issues related to the effects of multipolarity, the crisis of multilateralism and liberal order, the rise of inequality, the future of globalization, the unknowns of climate change, and technology and disinformation - just to name a few - are still relevant topics which need to be studied in a systematic manner. In other words, think tanks should not become centers for "international journalism" but should rather characterize themselves by their abilities to produce in-depth and systematic analysis on global issues, even in the age of COVID-19. "In crisis, there is the risk of 'jumping on the bandwagon,' but research cannot replace journalism. It is important to practice patience even though it is hard" (Florence Gaub, Deputy Director, EUISS).

Therefore, adaptation to the changes in research agendas brought by COVID-19 may need to proceed on a twin-track, adding to the complexity of the challenge.

- **"Multidisciplinarity" and "partnership"** are buzzwords in think tanks' research departments in adapting to the new context. Think tanks are aware of the need for interdisciplinary research and, at the same time, design their research programs in such a way as to be useful for practice and policymaking. As a result, think tanks tend to organize programs in parallel to government structures, and therefore risk working in "silos" (such as foreign affairs, security, economic policy, and others) as they "shadow" government policy structures. However, COVID-19 has a horizontal impact across policy domains, and the ability to properly analyze its effects goes beyond the traditional commitment to multidisciplinarity (see Boxes 3 and 4). To engage in multidisciplinary research on newly emerging topics - particularly the myriad of spin-off issues related to the COVID-19 pandemic - think tanks need proper strategies, new resources, more funds, and a lot of patience to learn how to work in truly interdisciplinary teams and across policy domains. To this end, rethinking partnerships can be key also in making the inclusion of novel research on COVID-19 sustainable. Despite an initial push to shift research priorities towards COVID-19, think tanks should ensure that they can raise funding for continued research efforts. In this light, they should seek funding for programs, not just projects. Research projects have limited life spans, so sustainable research programs should become a priority, particularly at a time when resources, both public and private, will be scarce and redirected towards other priorities (such as health and economic recovery). Think tanks should therefore envisage cooperation beyond projects and consider more sustainable and enduring partnerships based on joint, merged programs that enable longer cooperation. This holds true also because local think tanks cannot fully cover topics that are better suited for other think tanks; if, for example, EU-based funders need an analysis on Brazil, they could reach out to a Brazilian think tank rather than to an EU-based think tank with a program on Latin America. EU institutions provide another example, as regarding needs unfulfilled by existing EU think tanks, they have started to establish their own think tank as they cannot find the requested expertise/analysis on the market. Think tanks should create such a market for knowledge by working together and having strategic discussions on research agendas aimed at meeting the needs of EU institutions and pooling funding (instead of simply redirecting funding to their own, internal research programs/centers).

  In the context of higher competition for funding, think tanks may have a much harder time "going global" if they are not able to build long-standing and sustainable partnerships to "import" competences from peers and other academic and non-academic actors.

- To better cope with a post-COVID-19 reality, think tanks need to re-consider their internal procedures and explore the possibilities of new organizational models (see Box 5). Think tanks should revise internal procedures and divisions into research programs/centers to take full advantage of new partnerships. Besides, they should take a step forward to establish decentralized working environments where the divisions between resident researchers and associate researchers may become less and less important. In the context of scarcer financial resources, savings on office space and utility services can contribute to financial sustainability. A paramount shift is also needed in terms of staff selection, as new competences and higher research flexibility are needed. To some extent, a high degree of flexibility may even be preferred to hyper-specialization. Last but not least, researchers should be made aware of the relevance of linking research priorities to funding, thus actively contributing to the future sustainability of research activities.

  It is worth noting, however, that one-size-fits-all models and solutions do not exist. "Regions, countries, local legislations, conditions, resources, and think tank models are different. Therefore, each case needs different and unique approaches. Besides, authoritarian governments may use public health measures, laws, regulations, and temporary restrictions to increase pressure on civil society organizations" (Vardan Atoyan, Deputy Director and Senior Expert, AMBERD Research Center).

BOX 1

BEST PRACTICE ON

ENHANCING PARTNERSHIPS AND REDIRECTING RESEARCH PRIORITIES

by **Pol Morillas**
Director, *CIDOB* (Spain)

Think tanks need to take into account three principles when adapting their research agendas to the circumstances of COVID-19. First, they must show responsiveness when choosing their research priorities. In the short run, their programs must be adjusted to the challenges that COVID-19 represents. CIDOB, for instance, has included a strand of research on the impact of COVID-19 in all of its thematic lines of research: our "global geopolitics and security" program is now looking at the effects of COVID-19 on the global order, the Mediterranean, Latin America, and EU foreign policy; our "global cities" program is now analyzing the response of cities to the pandemic and recovery strategies of world cities, and looking at best practices; our "migrations" program is now analyzing the effects of COVID-19 on all phases of migration, from push factors to integration, and; our "sustainable development" program is now looking at the impact of COVID-19 on the 2030 Agenda and the SDGs. As much as possible, CIDOB has used existing lines of funding to produce relevant analysis on these issues, convincing donors of the need to undertake such research.

Second, think tanks must continue to be systematic in their research. All of our attention should not be devoted to COVID-19. The underlying structural issues in international relations should still be an area of concern for international affairs think tanks. For instance, issues related to the effects of multipolarity on the global order, technology, and disinformation, to name a few, are still relevant topics regardless of the effects of COVID-19, so these should continue to be studied by think tanks in a systematic manner. In other words, think tanks should not become centers for international journalism but should rather characterize themselves by their capacities to produce in-depth and systematic analysis on global issues.

Third, think tanks must ensure that the inclusion of research on COVID-19 becomes sustainable. Despite an initial push to shift research priorities towards COVID-19, think tanks must ensure that they can raise funding for a continued research effort. In this light, they must seek funding for programs, not just projects. Research projects have limited life spans, so sustainable research programs should become the priority, particularly at a time when resources, both public and private, will be scarce and redirected towards other priorities (such as health, economic recovery, and others). To this end, think tanks must envisage cooperation beyond projects and consider more sustainable and enduring partnerships based on joint programs that enable longer cooperation.

BOX 2

BEST PRACTICE ON

KEEPING TRACK OF PRE-EXISTING PATTERNS

by **Michael Cox**
Director, *LSE IDEAS* (UK)

My response in terms of where the world may or may not be heading – and indeed in terms of future research trajectories for think tanks – is to urge some degree of caution, not because I think COVID-19 will not have major consequences, but rather to suggest that its consequences have, of necessity, to be viewed in relation to pre-existing patterns already present in the international order. In this sense COVID-19 might more accurately be seen as an accelerator and stimulant to previous trends rather than a tipping point moment in its own right.

Thus the pandemic, it could be suggested, should not in of itself be regarded as the cause of a crisis in globalization, but rather as a factor pushing globalization in directions in which it was already moving anyway. By the same measure, COVID-19 has not been the primary reason for a deterioration in US-China relations. Instead, it has only exacerbated a downward spiral in a relationship that was already teetering before the pandemic. Moreover, though the health crisis has exposed deep fissures in our various systems of governance, one can hardly argue that they were not there in full view well before the pandemic struck. Nor has COVID-19 led to deep inequalities: it has merely exposed them for all to see in ways that even Thomas Piketty could never have imagined! Finally, though the pandemic has driven the issue of climate change off the top of the policy agenda for the moment, it has in its own way begun to reveal the outlines of a new world where one can for the first time in years hear birds sing, see blue skies, and gaze across cities without all the haze and smog obscuring the view. Of course, I am not suggesting we should not be looking at the causes and consequences of a pandemic which has already killed hundreds of thousands, forced a shutdown of large parts of the world economy, and increased tensions within societies and between states as a whole. It is only to remember that many of the big issues we were writing about before will remain just as important once the pandemic is over as they were before it began.

BOX 3

BEST PRACTICE ON

INTEGRATING KNOWLEDGE ACROSS POLICY DOMAINS

by **R. Andreas Kraemer**
Founder and Director Emeritus, *Ecologic Institute* (Germany)

Think tanks need to work across policy domains more. That is one of the lessons of the coronavirus pandemic and the policy coordination needs exposed in coping with COVID-19. Many think tanks and most think-tank programs are organized to mirror established divisions between policy domains, such as foreign affairs, security, economic policy, environmental policy, and so on. Government is organized – or "stove-piped" vertically – in this way, and so are parliaments and their committees that shadow the work of governments. Even sections in print newspapers and tabs on news websites reflect this organization of public and policy discourse.

However, the habit to mirror stove-piping tends to get think tanks wrong-footed when it comes to anticipating, analyzing, advising, and advocating good policy to address emerging issues and emergencies, because most of these do not respect the conventional boundaries of policy domains. This can be seen, for instance, in the Earth's overheating and its impacts across the board and in all geographies, the effects of the digital revolution on all walks of life, and, now in the 2019 coronavirus pandemic, with its multifarious impacts and complex adaptive policy responses.

In principle, think tanks are interface organizations. They work between science, policy makers, and the public, and many also branch out and connect to business and the media. They bridge academic work, organized in scientific disciplines, with management practices, policy and politics. Most think tanks organize their science in teams that cover several disciplines; as institutions, think tanks excel at multidisciplinary, interdisciplinary, and transdisciplinary research. Furthermore, think tanks also integrate staff and fellows from different cultural or language backgrounds. Diversity in staff and fellows contributes valuable perspectives, and think tanks are good at integrating them.

In addition, think tanks should also do more to integrate knowledge - horizontally - from across different policy domains, and help to overcome the dysfunctional effects of stove-piping in government. This may be easy to say in principle but difficult to do in practice, as dominant funding patterns are still locked into the rigid divisions of government departments. This is true for think tanks that are emanations of the state, as most in fact are, funded by one department or ministry and required to help think through a specific policy area. It is also reinforced by expectations from non-governmental funders, be they corporations or foundations, as well as users of think-tank outputs and even peers in the think tank community; the headings in the annual Global Think Tank Ranking of the University of Pennsylvania are evidence of this pervasive habit or pattern. Given the entrenched nature of "stove-piping," many think tanks find it difficult to change internal structures and to become more horizontal. There are two essential steps that can be taken:

- One is to establish programs with an "and" in the middle, such as "climate and security," "digitalization and governance," or "food and health." The advantage of such programs is that they establish a framing and an ambition that helps with internal organizational development as well as with external communication. At the same time, donors – with their own internal restrictions in mind – can still decide to fund only one part of the program, knowing that expertise will spill over to the other, and that it will eventually be integrated and more useful.
- The other, important next step is to communicate clearly, internally, to all boards, and to external supporters and funders, the aim of cutting across artificial boundaries between policy domains as a strategy designed to produce better policies. Non-academic and non-governmental think tanks will find that easier than those that do not have the freedom and independence to do so.

BOX 4

BEST PRACTICE ON

PARTNERING WITH LOCAL INSTITUTIONS ON THE GROUND TO WORK ON RELIEF

by **Manjeet Kripalani**
Co-founder and Executive Director, *Gateway House* (India)

Thanks to earlier discussion in the working group about being involved locally with COVID-19 in some way or form, our think tank teamed up with two urban organizations. One is Praja, which works on issues of urban governance and, at this time, has used its network to conduct considerable food relief distribution in Mumbai's affected areas. The second is the Urban Design Research Institute (UDRI), which has been working with the local municipal corporation on redesigning urban spaces for accommodating the peculiarities of COVID-19.

We brought together Praja and UDRI with experts from the Shanghai Institute of International Studies to understand what COVID-19 lessons and protocols we, as two cities, could learn from each other. We are hoping that there will be a pilot project in Mumbai in which some of these protocols learned from Shanghai can be put in place. The Chinese consulate general in Mumbai has agreed to initiate this process.

BOX 5

BEST PRACTICE ON

EXPLORING NEW ORGANIZATION AND OPERATING MODELS

by **Jerome Glenn**
Co-founder and CEO, *The Millennium Project* (USA)

"TransInstitutions," as a new organization and operating model, whose:

- governing bodies have self-selected people from government, business, academia, NGOs, and international organizations (like the WHO), but not with a majority from any one institutional category;
- workers/researchers who are usually employed outside of these institutional categories but not in a majority from any one category;
- income comes from government, business, academia, NGOs, and international organizations, but not with a majority from any one institutional category, and;
- added value can be shown to all these institutional categories through some form of annual report and or research products.

As a result of the above definition, organizational research has to make sense to the bottom line (since business is involved) and politically (since government is involved). It also has to be based on knowledge and intellectual rigor (since universities are involved), its own values (since NGOs are involved), and has to be internationally sensitive (since the UN or other international organizations are involved). A TransInstitution has the advantage that it can act coherently but differently through these different institutional categories. TransInstitutions have no "legal personhood," but national legislators could add them to national corporate law, so that there would be non-profit law, for-profit law, and eventually TransInstitutional law.

This is an extremely cost-effective operating model for a think tank and is how the Millennium Project operates, with the use of nodes around the world. This project is not a perfect TransInstitution, but is close to this operating model. The Millennium Project has 65 nodes around the world. Each node is group of institutions and individuals from these institutional categories but not with a majority from any one category. Within a single country; it connects global and local perspectives and research; the members of a node invite research participants; if a study is on the future of X, for example, then the business members would invite the best business people on X, the academic members would invite the best academics on X, etc.; research is collected and assessed through Online Real-Time Delphi software to create scenarios, priorities, forecasts, and other requirements for reports, and; each node can draw on all the other nodes.

Read more about research

J Hernando, Marcos Gonzalez, "Two British think tanks after the global financial crisis: intellectual and institutional transformations," *Policy and Society*, vol. 37, no. 2, March 2018

https://doi.org/10.1080/14494035.2018.1450087

VI. IMPLICATIONS AND RECOMMENDATIONS

Based on the workshop discussions and the best practices collected from working group participants (presented in the previous section), what follows is a comprehensive list of all the action-oriented recommendations of Working Group 5.

Action-Oriented Key Recommendations

Digitalization and Beyond: Reinventing Communication

1. **Focus communication on niche intersections** of COVID-19 and specific issues where not much work has been done and where your think tank has expertise as a strategy to achieve recognition and "cut through the noise" in the media space, particularly with the immense increase in online media production.
2. **Prioritize highly visible communication and stakeholder outreach initiatives,** which can make a real difference in the current crisis environment and provide greater visibility.
3. **Build alliances with new media actors such as investigative journalists.** They are able to help think tanks by both providing content for their research and by identifying the best ways to communicate research outputs to the public.
4. **Develop tight security protocols for online discussion fora** and clearly communicate them to stakeholders participating in sensitive debates. This will help ensure confidentiality and the safety of sensitive online discussions.
5. **Invest in new and diversified online communication and stakeholder engagement formats.** Where possible, these should be combined with face-to-face communication formats. To this end, communication budgets also need to be reshaped, shifting their focuses more towards online channels.

Digitalization and Beyond: Reinventing Events

1. **In the online environment, events need to be memorable.** Formats need to be reformed, better managed, and kept short and engaging to draw the attentions of online audiences while compensating for the loss of the added value of networking and person-to-person interaction.
2. **Grasp the new opportunities and benefits that come with digital events**, particularly significantly widened potential audiences as well as easier access to speakers from across the globe. Whereas this increases international competition for audiences, for small think tanks it creates a chance to organize impactful events even in the absence of large budgets.
3. **Think tanks need to work with speakers and moderators to ensure they step up their presentation skills** and adapt to more dynamic and shorter formats. At the same time, they need to find new ways to engage and interact with their audiences, for example by bringing in participants to ask live questions in online webinars, rather than just via the Q&A features.
4. **Develop hybrid events as a potential post-COVID-19 default format for events.** These events, which combine physical and online participation as well as a multitude of different formats of

interaction with the audience, are already being promoted by some think tanks, and both software and hardware solutions are currently emerging to meet the different needs of both large, medium, and small events.

5. **Benefits to the environment need to be emphasized and retained** to the largest extent possible, even after the crisis, by carefully determining when, and to what extent, physical events are strictly necessary.

Reinventing Funding

1. **Make donors feel like they are part of the solution to specific, pandemic-related problems.** This approach can help tackle fundraising challenges, especially in the short-term.
2. **Engagement with donors needs to be highly personalized and tailored** in the digital-by-default communication environment. Think tanks, therefore, need to develop distinct strategies for each type of donor.
3. While working to diversify funding sources, **consider engaging the private sector as partners in research projects, rather than simply as donors.** Such partnerships should ensure cooperation on an equal footing with companies and protect think tanks from the loss of independence.
4. **Engage in partnerships with new and various types of civil society actors, to increase your impact.** With scarce resources, funders are prioritizing high-impact projects, so one way to access new donors is by getting involved in more comprehensive initiatives that promise to achieve wider and deeper societal impacts. This can be done through partnerships with other think tanks (regional, international, and thematic ones) and with different civil society organizations (such as watchdogs, activists, service providers, and others).
5. **Explore new sources of funding such as corporate social responsibility (CSR).** To achieve this, think tanks in many countries need to work proactively to ensure that their industry is covered by CSR programs and push for legislation to incentivize the private sector to fund them through these schemes.
6. **Consider outsourcing research activities to peers operating in less developed parts of the world.** Think tanks in the “Global North” could outsource research activities to smaller think tanks operating in the “Global South” as a way to cut their own costs while simultaneously providing new sources of funding for struggling peers in less privileged regions. Moreover, the latter will benefit from the transfer of expertise and skills in such collaboration.
7. **Keep independence and integrity in mind when fighting to acquire new funding.** The diversification of sources of funding is the right way forward, but it needs to be accompanied by institutional checks and procedures that will ensure the maintenance of research independence and integrity standards. Some examples include setting percentage thresholds for donations, donor screening for conflict of interest, the creation of internal monitoring committees, and more.
8. **Spread the function of fundraising across your organization.** While it will likely largely remain the responsibility of executive directors and presidents, fundraising should become more institutionally embedded as a function cutting across organizations. Though this is not their primary skill, researchers should - and can be - empowered to engage with donors.

Reinventing Research

1. **Redirect and widen research priorities**. Research programs and centers need to focus on new issues raised by COVID-19 and use new and advanced tools, such as statistics and big data analysis. To this aim, they should show “responsiveness” (when choosing research priorities), be “systematic” (by assessing the impacts of redirection on all research areas), and “sustainable” (in terms of present and future human and financial resources required).

2. **Do not lose sight of traditional research topics,** as many of them will regain salience after the crisis. Hence, attention should not solely be devoted to COVID-19. The underlying structural issues in international relations should still be an area of concern for international affairs think tanks, which also have to recognize that previous trends may be further accelerated and aggravated by the spread of COVID-19.
3. **Resist the temptation of becoming centers for "international journalism"** and continue to characterize think tanks by their abilities to produce in-depth and systematic analysis on global issues in the age of COVID-19 as well. Avoid the risk of "jumping on the bandwagon," as research cannot simply replace journalism (while links and collaboration with journalists are welcome).
4. **Enhance multidisciplinarity across policy domains.** Adjust the traditional, internal organization of research in which centers and departments tend to work in silos (such as foreign affairs, security, economic policy, for instance), replicating governments' policy structures. Rather, consider the "horizontal impact" of COVID-19 across policy domains, which can be identified from the myriad of other issues related to the pandemic. This will require new strategies and resources, increased funds, and patience to learn how to work in truly interdisciplinary teams across policy domains.
5. **Move cooperation beyond single projects**. With the aim of making research more sustainable in the context of increased competition for funding, collaboration should go beyond projects to build enduring partnerships based on joint, "merged" programs that enable more sustainable cooperation. Such joint, long-term programs would enable think tanks to gain global relevance by pooling their resources and expertise rather than duplicating them.
6. **Create new markets by working together**. International organizations (IOs) have needs that remain unfulfilled by existing think tanks and strive to establish their own think tanks as they cannot find the requested expertise and analysis on the market. Think tanks need to create that market by working closely with their peers and having strategic discussions on research agendas aimed at meeting the needs of IOs and pooling funding.
7. **Reconsider internal procedures and explore new organizational models** to take full advantage of this new context. This may also imply doing away with the distinction between "resident researchers" and "associate researchers," which is losing relevance as a result of the COVID-19 disruption. Research priorities should also be linked to funding, so researchers may actively contribute to the sustainability of their work. Think tanks also have to gauge if, and to what extent, flexibility should be preferred to hyper-specialization when selecting new researchers.

In all of the discussions held in the four subgroups of Working Group 5, partnerships emerged as a recurring concept and an important tool which think tanks can use in the development and delivery of their short-term and long-term institutional survival and adaptation strategies. They were proposed as a tool to communicate more effectively, to build more memorable events, to fundraise more effectively, and to engage in more comprehensive and multidisciplinary research initiatives and programs. Many of the action-oriented proposals listed above are in fact examples of, and ideas for, partnerships which can help think tanks achieve their short-term and long-term goals and emerge from the ongoing crisis stronger.

VII. CONCLUSION

Most think tanks – just as most individuals, businesses, and governments – will not exit this storm the same as when they first entered. That is a fair assumption to make. Yet, whether they will come out of it stronger and more resilient or weakened and without clear survival perspectives will largely depend on their abilities and preparedness to learn from their peers' best practices, not necessarily by copying them, but by analyzing them and adapting elements to the local circumstances in which they operate.

The working group's members jointly identified and collected a set of twenty-five action-oriented proposals for meeting and surviving challenges in five priority areas: 1 - Digitalization and Beyond: Reinventing Communication; 2 - Digitalization and Beyond: Reinventing Events; 3 - Reinventing Funding, and; 4 - Reinventing Research. The fifth topic – Management and Organizational Adaptations – was discussed as a cross-cutting issue of these four thematic pillars. The action-oriented proposals presented in detail in this report are based on the hands-on experiences of the participating think tanks and their internal discussions on how to adapt to the new circumstances of the ongoing crisis.

Throughout the discussions of this working group, the development and rethinking of various types of partnerships emerged as a regular topic. They were proposed as tools to achieve more effective and efficient communication of the work of think tanks, to create more memorable and engaging events, to fundraise more successfully, as well as to render research activities more comprehensive and truly multidisciplinary. Several action-oriented proposals listed in this report provide examples and ideas for partnerships which can help think tanks achieve their short and long-term goals for institutional adaptation and survival.

The proceedings of Working Group 5 showed a remarkable readiness of think tank executives to share experiences with counterparts from other countries and continents, as well as revealed a real need for peer learning. Hence, this report aims to become a tool which will inform brainstorming sessions and inspire joint research, advocacy, and fundraising initiatives for think tanks across the globe. Moreover, by unanimously recognizing and showcasing partnerships as a cross-cutting tool for supporting think tanks' efforts to respond to shared challenges and strengthening their mission of providing sound and evidence-based policy advice, this report aspires to stimulate closer collaboration and the creation of new networks and long-term initiatives among think tanks.

APPENDICES – PROFILE OF WG5 MEMBERS

CHART 1 - GEOGRAPHICAL COVERAGE OF WG5 MEMBERS

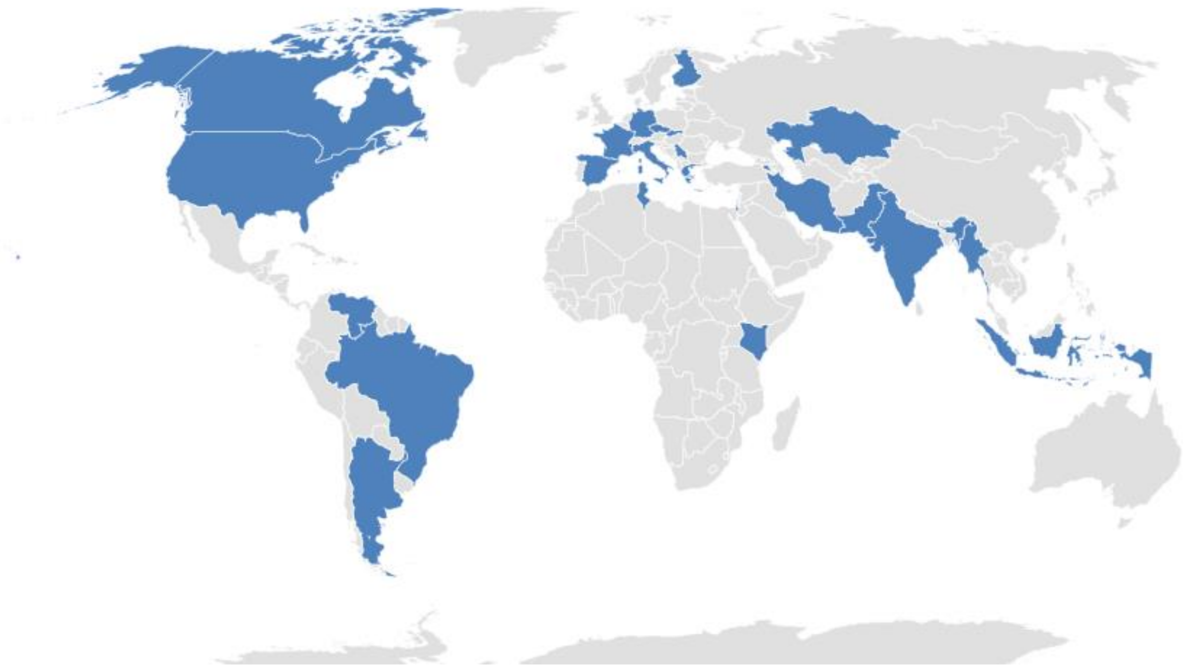

CHART 2 - WG5 MEMBERS BY YEAR OF ESTABLISHMENT

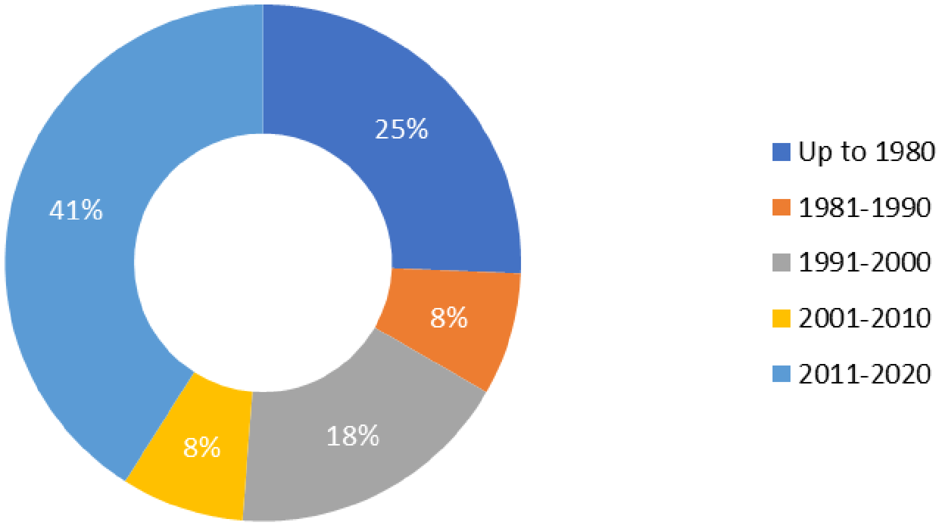

CHART 3 – WG5 MEMBERS BY ANNUAL BUDGET (IN MILLION US DOLLARS)

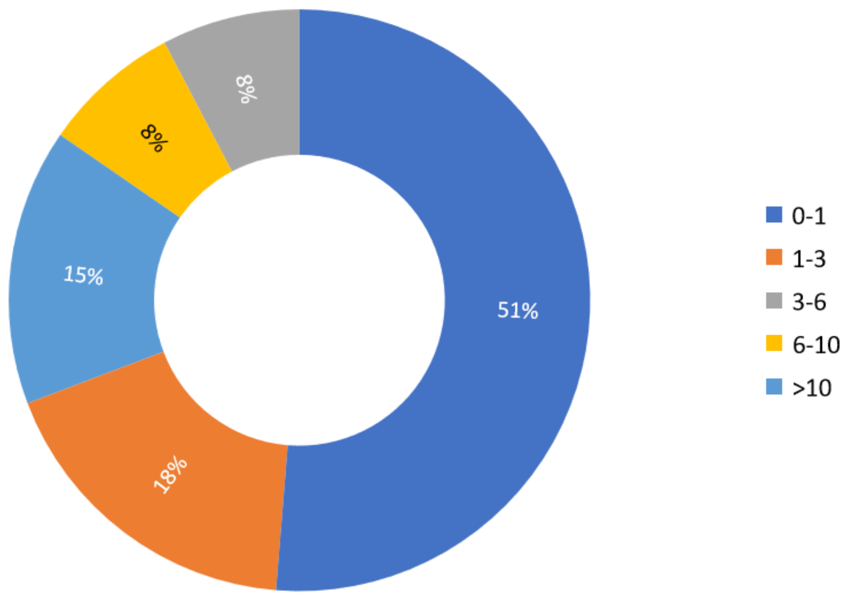

CHART 4 – WG5 MEMBERS BY NUMBER OF EVENTS ORGANIZED ANNUALLY

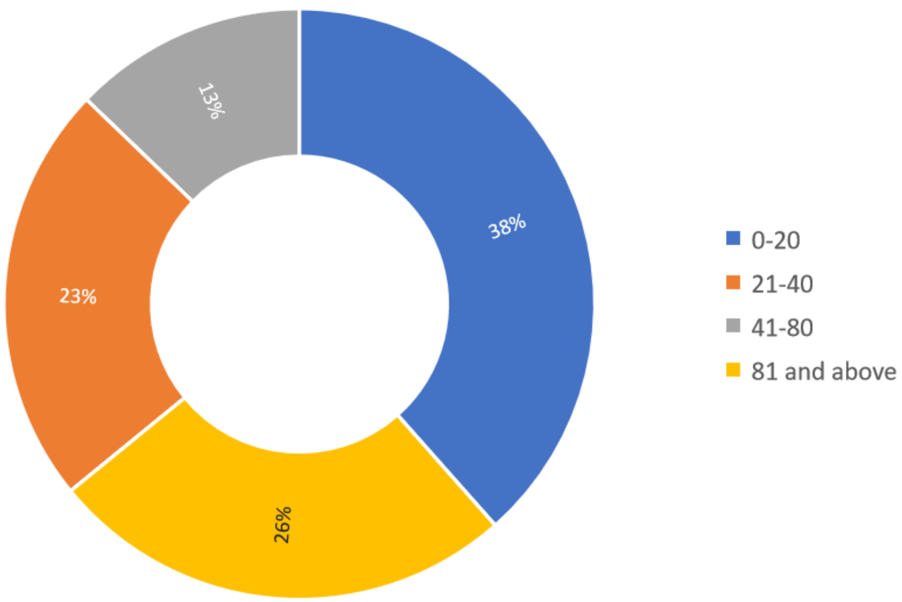

CHART 5 – WG5 MEMBERS BY NUMBER OF PERMANENT STAFF

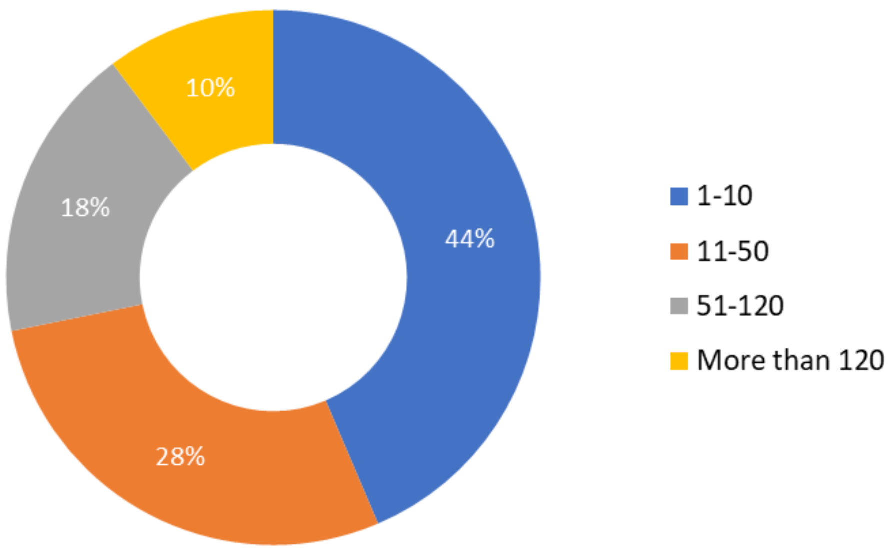

CHART 6 – WG5 MEMBERS BY NUMBER OF RESEARCH STAFF

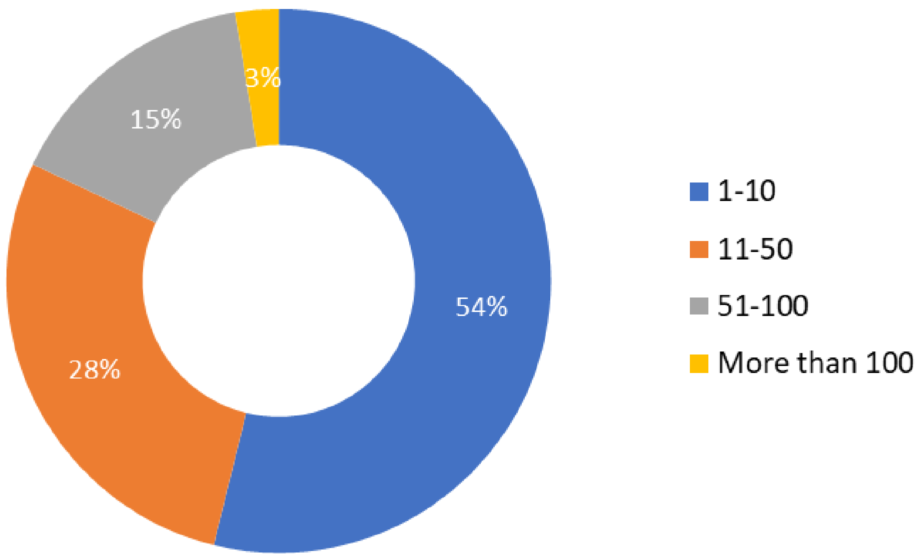

CHART 7- WG5 MEMBERS BY PERCENTAGE OF PUBLIC FUNDING (GOVERNMENT, INTERNATIONAL ORGANIZATIONS, DEVELOPMENT ASSISTANCE)

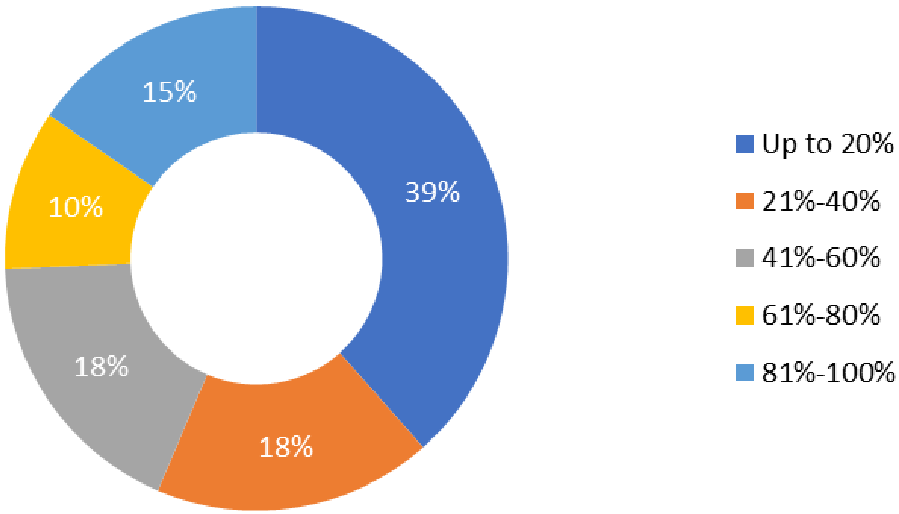

CHART 8 – WG5 MEMBERS BY PERCENTAGE OF PRIVATE FUNDING (CORPORATE/INDIVIDUAL MEMBERSHIP, ETC.)

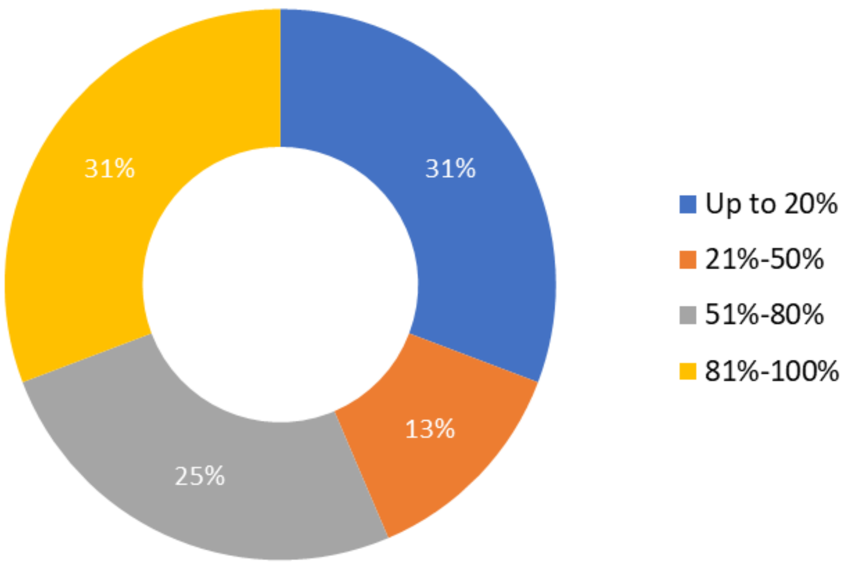

CHART 9 – WG5 MEMBERS BY TOP TWO CONCERNS AMONG THE WORKING GROUP PILLARS