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Point of view

Think tanks in Brussels

The EU market of ideas under strain

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This paper by the High Commission for Strategy and Planning (HCSP) provides an up-to-date overview of the ecosystem of Brussels-based think tanks dealing with European public policy. As both an important resource for decision-makers and vehicles of influence, these organisations play a key role in the circulation of ideas at the EU level. Based on a non-exhaustive sample, this contribution identifies the main players in this landscape, providing an overview of the most influential institutes as well as their activities and funding.

Analyzing funders allows us moreover to bring to the fore certain players seeking to influence the European agenda (Member States, third countries, philanthropic foundations, private companies, political parties). This analysis highlights a clear dominance of American players, especially tech companies, the consolidation of a Eurosceptic ecosystem, the insufficient presence of French actors, and the emergence of Chinese funding.

Against a backdrop of increasing fragility, heightened by the recent withdrawal of funding from the European Commission, this report sets out recommendations to strengthen the resilience of policy research.

Introduction

Think tanks are relatively little-known players in the public debate in France, but their influence on European institutions is no less significant. These institutions, at the crossroads of academia, business and public administration, have seen their role grow considerably since the 1980s and the strengthening of the European project. They are, in fact, **particularly well-suited to the workings of the European legislative process**. Given the wide variety of subjects dealt with by the European institutions and their complexity, **the production of ideas, studies, opinions and foresight has been partly delegated to third parties**. This brings the way Brussels operates closer to the Anglo-Saxon, Nordic and German models, which are characterised by greater interaction with civil society than the French model¹.

As highlighted in various studies on these institutions, think tanks are **fundamentally ambivalent organisations, situated at the intersection of research and political advocacy**. Originating in the Anglo-Saxon world at the beginning of the 20th century with the aim of mobilising philanthropy to improve public policy, the model of the private think tank has spread, becoming a central player in political debate in many systems². Think tanks must therefore **be understood both as a valuable resource for decision-makers and as vehicles of influence, at times promoting a specific agenda**³.

Drawing on quantitative data and interviews with key players, this study offers **an up-to-date overview of this landscape**, which remains relatively unknown outside so-called the Brussels “bubble”. Whilst the EU’s transparency register lists seven hundred think tanks in contact with the Commission, around a hundred of which are based in Brussels, we have narrowed the sample down to around twenty institutes with an annual budget exceeding 500,000 euros and working on European public policies⁴. This non-comprehensive study therefore does not account for a number of important players which are mainly based in member states or third countries, even if they are represented in Brussels.

Regarding political positioning, the ecosystem appears **broadly consensual**, with more significant differences on regulatory issues. Nevertheless, there has **recently** been **the**

¹ Abelson, D. and Rastrick, C. (eds.), *Handbook on Think Tanks in Public Policy*, Cheltenham, Edward Elgar, 2021.

² *Ibid.*

³ Patard M. (2014), *Democracy between Expertise and Influence: The Case of French Think Tanks*, Paris, Dalloz.

⁴ https://transparency-register.europa.eu/find-out-more/statistics_en

emergence of a Eurosceptic ecosystem that is increasingly well-resourced, **funded mainly by the Hungarian government.**

A detailed analysis of the funding of these organisations reflects **the balance of power between actors seeking to influence European decision-making.** Whilst information on funding remains patchy due to inconsistent reporting of income by think tanks, we offer here conservative estimates to identify the most active funders.

In addition to the European institutions themselves, our study shows that **US players remain the main funders of the ideas market in Brussels,** demonstrating the continuing importance of the single market to actors from across the Atlantic. As for Chinese funding, while it remains modest in absolute terms, its presence indicates **that Beijing is implementing a strategy to exert influence in this area.**

Among the Member States of the European Union, **France can count on the presence of a number of think tanks in Brussels, but lacks the extensive network of political and private foundations enjoyed by Germany,** as well as other countries more accustomed to interaction between public authorities and civil society. Its influence in the European policy debate suffers as a result.

In the private sector, the data reveal that certain sectors of the economy are particularly active in funding think tanks, foremost among which **tech firms, energy companies and financial services,** the sectors most affected by European policies.

The public policy research ecosystem is currently undergoing **a period of structural turbulence,** driven by a number of factors: the reallocation of Commission grants, the politicisation of civil society funding, and the withdrawal of certain private donors, including American foundations that have historically had a strong presence. However, the risk is that this uncertainty will encourage **the weaponization of research as a means of interference,** including by actors with an agenda contrary to European interests

1. An updated overview of Brussels-based think tanks

Think tanks working on European issues in Brussels are part of a wider landscape of expertise on European legislation. In addition to the significant research capabilities within institutions such as the Joint Research Centre (JRC), which employs around 2,800 people, or the European Parliament's Research Service (see Table 1), European decision-makers can draw on a range of external actors whose role is to inform debate and reflection at the European

level⁵. This practice of delegating expertise can lead institutions to rely on a wide variety of actors, such as private consultancy firms, interest groups (or ‘lobbies’), NGOs or think tanks. The transparency register, which lists all contacts in communication with the Commission, records around 700 think tanks interacting with the institutions⁶.

There are two types of think tanks relevant at the European level. The first category are the **organisations based in Member States or third countries that deal with European issues**. Some of these centres are among the most recognised on EU matters: the European Council on Foreign Relations (ECFR, based in four European capitals), Clingendael (Netherlands), the Jacques Delors Institute (Paris, Berlin and Brussels), the Peterson Institute for International Economics (Washington), the Brookings Institution (Washington), the German Marshall Fund, the Carnegie Endowment for International Peace (Washington, Brussels and Berlin), the EU Tax Observatory (Paris), Think Tank Europa (Copenhagen), etc. **A number of these have branches in Brussels⁷.**

The second category, and the one this study focuses on in particular, concerns **the few dozen think tanks based in Brussels** that work directly with the European institutions. These structures have evolved in tandem with the Union since the 1980s and their focus reflects the various phases of European integration.

The Centre for European Policy Studies (CEPS), one of the first Brussels-based think tanks founded in 1983, was established to support the consolidation of the single market under the Delors Commission. The European Policy Centre (EPC) and Friends of Europe, established in 1996 and 1999 respectively, reflect the expansion of the Union’s competences, its geographical enlargement, and its increasing politicisation. Similarly, the eurozone crisis provided an opportunity for the Bruegel Institute – founded in 2005 by French economists Jean Pisani-Ferry and Nicolas Véron – to consolidate its reputation and network within the institutions on issues of macroeconomic governance⁸.

⁵ This approach to openness and outsourcing is even enshrined in the legislative process, as the ‘Better Regulation’ procedure governs stakeholder consultation prior to the drafting of legislation and mandates *ex ante* and *ex post* evaluation practices.

⁶ See the European Commission’s ‘[Transparency Register](#)’.

⁷ As for French institutes based in Brussels, these include Confrontations Europe, the Robert Schuman Foundation, the Institute for Climate Economics (I4CE) and IRSEM Europe. On the German side, the main political foundations such as the Konrad Adenauer Foundation, the Friedrich Ebert Foundation, the Friedrich Naumann Foundation and the Heinrich Böll Foundation have branches in Brussels, as does the German Institute for International and Security Affairs (SWP).

⁸ Coman R. (2019), ‘Why and how do think tanks expand their networks in times of crisis? The case of Bruegel and the Centre for European Policy Studies’, *Journal of European Policy*, vol. 26(2), pp. 286–301.

Table 1 – Classification of expert bodies at EU level

Analysis and evaluation of public policies within the EU institutions	Consultancy firms, service providers to the institutions	Interest groups	Research institutes and think tanks
<ul style="list-style-type: none"> - Commission’s Joint Research Centre (JRC) - Research Service of the European Parliament (SPRE) - Commission’s DG IDEA - Court of Auditors of the EU - Eurostat - European Union Institute for Security Studies (EUISS) - <i>ad hoc</i> reports (Draghi, Niinistö) 	<ul style="list-style-type: none"> - International generalist firms: Deloitte, PWC, Ernst & Young - specialist firms: Ecorys, Technopolis, Ramboll 	<ul style="list-style-type: none"> - NGOs - business representatives (sectoral federations, national federations) - trade unions - foundations 	<ul style="list-style-type: none"> - academic centres - think tanks dealing with European issues in Member States or third countries - national think tanks from Member States or third countries, with branches in Brussels - think tanks based in Brussels, working with the European institutions

Source: author

Today, **Brussels-based think tanks cover a wide range of topics**, reflecting the diversification of the EU’s areas of activity. The growing prominence of **climate, migration and digital issues** during the 2010s, for example, has led to the emergence of centres specialising in these areas: the Institute for European Environmental Policy (IEEP), Europe Jacques Delors⁹), the Centre for Regulation in Europe (CERRE), the Lisbon Council, the Centre for Future Generations, the Migration Policy Institute, etc. More recently, **issues related to defence** have become more prominent, as shown by the creation of the Brussels Institute for Geopolitics (BIG) by Dutch political scientist Luuk van Middelaar in 2023 and the establishment of a branch of the French Ministry of the Armed Forces’ Institute for Strategic Research at the École Militaire (IRSEM) the following year.

The influence of a think tank is difficult to measure. Firstly, **these institutes aim to influence different audiences**: whilst the Centre for European Policy Studies (CEPS) and the European Policy Centre (EPC) seek to be heard by the Commission, the Brussels Institute for Geopolitics, due to its focus on more sovereign matters, is more oriented towards the

⁹ Pons G., Lamy P. and Valverde E. (2024), ‘Manifesto for a European Ocean Pact’, Europe Jacques Delors, April.

Council of the European Union. Similarly, more explicitly political institutes such as the Eurosceptic think tank MCC Brussels and party foundations – the Wilfried Martens Foundation, the European Liberal Forum and the Foundation for European Progressive Studies (FEPS) – engage with the European Parliament.

The degree of contact with decision-makers – which is only partially reflected in the transparency register – may be a more measurable indicator of influence. **These exchanges with the Commission sometimes take place at the highest level and in an institutionalised manner.** The Chief of Staff to the Commission President, Björn Seibert, met frequently with members of think tanks during the last term of office, bringing them together, for example, ahead of the State of the Union addresses¹⁰.

Whilst this is evident in the case of certain institutes, particularly foundations associated with European political parties (Wilfried Martens, FEPS, European Liberal Forum), **the political stance of think tanks lends itself poorly to an objective assessment**, especially as individual researchers often possess a significant degree of intellectual and political independence. Based on the publications, events and profiles of the researchers within the ecosystem, **the latter appears, on the whole, to be relatively ideologically homogeneous, with, unsurprisingly, significant support for policies encouraging greater European integration.**

The question of positioning **cannot, in this regard, be separated from the issue of funding** (see below). As the European institutions constitute one of the main sources of funding for think tanks – whether through funding for civil society such as Commission grants or research projects – this could explain the relatively pro-European nature of these organisations as a whole. Furthermore, **the long-standing presence of foundations with a rather ‘progressive’ stance** – the Bill & Melinda Gates Foundation, the Open Society Foundations (the network of funds established by George Soros), and the European Climate Foundation – may have tended to steer the discourse produced in Brussels in a **pro-European direction, supportive of climate action, distanced from conservative views, yet marked by a certain Atlanticism**¹¹.

¹⁰ IDEA (n.d.), ‘[Call for Expression of Interest Fellowship Programme on China](#). IDEA/AD/2023/FELLOW’, Inspire, Debate, Engage and Accelerate Action.

¹¹ It should be noted that causality is, in this case, highly indirect and complex: individual researchers and *think tanks* often turn to foundations of their own accord to fund freely chosen projects. It is therefore through the greater availability of grants for certain types of projects and the aggregate effect of this phenomenon that one can speak of a form of bias favouring certain angles and themes.

However, more significant divisions are emerging on certain other **issues, particularly regarding the extent of regulatory intervention** by European public authorities (environmental and digital standards) and measures aimed at industrial sovereignty (European preference, trade protections)¹². This is reflected, for example, in positions regarding the regulatory simplification agenda implemented by the Commission since 2024, where only a few think tanks commenting on the subject are firmly opposed **to the first Omnibus package** on green finance, whilst another minority supports it, with the rest taking a more nuanced stance. A similar distribution of opinions emerges on the issue of digital services regulation¹³.

There has notably been a recent **rise in the influence of an alternative ecosystem of expertise, closer to the Eurosceptic and conservative positions** of parties situated outside the political ‘cordon sanitaire’, such as Patriots for Europe and the European Conservatives and Reformists. **Hungarian actors are currently playing the leading role in this sphere**, through the opening in 2023 of a **Brussels branch of the Mathias Corvinus Collegium (MCC)**, a network of cultural and educational institutes funded by a foundation that holds shares in Hungary’s leading oil company, MOL. With annual funding of €6 million, MCC Brussels ranks as **the third best-funded think tank in Brussels**, giving it significant clout within the ecosystem from the outset. Although it is entirely funded by an entity close to the Hungarian government, this institute has a team that is diverse in terms of nationality, with a strong British and German presence (20% each)¹⁴.

The **near-total dependence of this ecosystem on funding linked to the Hungarian government** raises questions, including that of the independence of its research, but also of **its sustainability** with the advent of a new political majority in Budapest, which has signalled its intention to cut funding for organisations associated with the previous

¹² See, in this regard, the work of Laurent Warlouzet, in which the three different visions for European integration are more or less represented within the intellectual ecosystem, even today: he contrasts the ‘liberal’, ‘mercantilist’ and ‘social’ visions, with the first having gained the upper hand over the other two: Warlouzet L. (2018), *Governing Europe in a Globalising World: Neoliberalism and its Alternatives following the 1973 Oil Crisis*, London, Routledge; Warlouzet L. (2022), *Europe contre Europe. Entre liberté, solidarité et puissance*, Paris, CNRS Éditions.

¹³ See Mariniello M. (2025), ‘[The European Commission’s Digital Omnibus could increase risks, not growth](#)’, Bruegel, article dated 13 November; Martens B. (2025), ‘[The European Union needs more than the digital omnibus to make digital services competitive](#)’, Bruegel, *Analysis*, No 38/2025, December; TEPSA (2025), ‘[Simplification of EU legislation: A complex matter](#)’, Trans-European Policy Studies Association, article dated 18 December; Lausberg P. (2026), *GLOBSEC Competitiveness Tracker. Tracking Progress in the EU’s Simplification Effort*, GLOBSEC, February; Schnurr D. (2025), ‘[The digital omnibus: Positive steps, but unclear strategy](#)’, Center on Regulation in Europe, November.

¹⁴ See the ‘[Our team](#)’ page on the MCC Brussels website.

government. Given the think tank's alignment with certain positions of the current US administration, the possibility of alternative funding from Washington arises.

2. Analysing *think tank* funding

2.1. A key issue

Although there is no strict causal link between funding and the research carried out within these institutes, **funding can have a framing effect**, introducing, in aggregate, biases or foci into the research produced if adequate governance is not put in place. Our aim is not to question the independence of individual researchers, but rather to understand **the structural effect of research funding**.

Whilst European institutions are a significant source of funding, it appears that **the majority of this funding does not come from EU institutions (excluding European political parties)**, but from national, philanthropic or private-sector players. The fact that government or private actors can invest in think tanks with relatively limited transparency requirements makes these organisations **potentially attractive channels to exerting influence**. Being a funder offers advantages: in some cases, it may provide privileged access to resources, such as access to researchers, or sometimes imply greater visibility at events organised by the think tank.

Most think tanks are registered under Belgian law as international non-profit associations (AISBL), and are encouraged to maintain a certain degree of transparency regarding the source of their funding, though **this varies greatly depending on the organisation**. Whilst some institute, go so far as to disclose the identity and the amount contributed by each donor in their annual report¹⁵, others prefer to remain vague.

By definition, this means it is almost impossible to obtain comprehensive data on all the actors investing in private research in Brussels, nor to produce a definitive ranking of the largest funders based on open sources. The available information does, however, provide **an overview of the funding models** of the most influential think tanks and **an insight into the relative magnitudes** of contributions from different funders.

¹⁵ See Bruegel (2025), *Annual Report 2024*, May.

2.2. A wide variety of funding sources and models

Based on a detailed analysis of annual reports, **the following six sources** can be identified:

1. funding from **European institutions**: from the EU's Citizens, Equality, Rights and Values (CERV) programme for civil society, multi-annual research funding like Horizon (the EU Framework Programme for Research), and one-off projects;
2. contributions from **Member State governments**;
3. contributions from **third-country governments**;
4. contributions from **private companies**;
5. **private foundations and endowments** (the Bill & Melinda Gates Foundation, the Soros foundations, the Bertelsmann Stiftung, the Mercator Stiftung, the King Baudouin Foundation, etc.);
6. **European political parties and their associated foundations** (mainly German: Konrad Adenauer, Friedrich Naumann, Heinrich Böll, etc.).

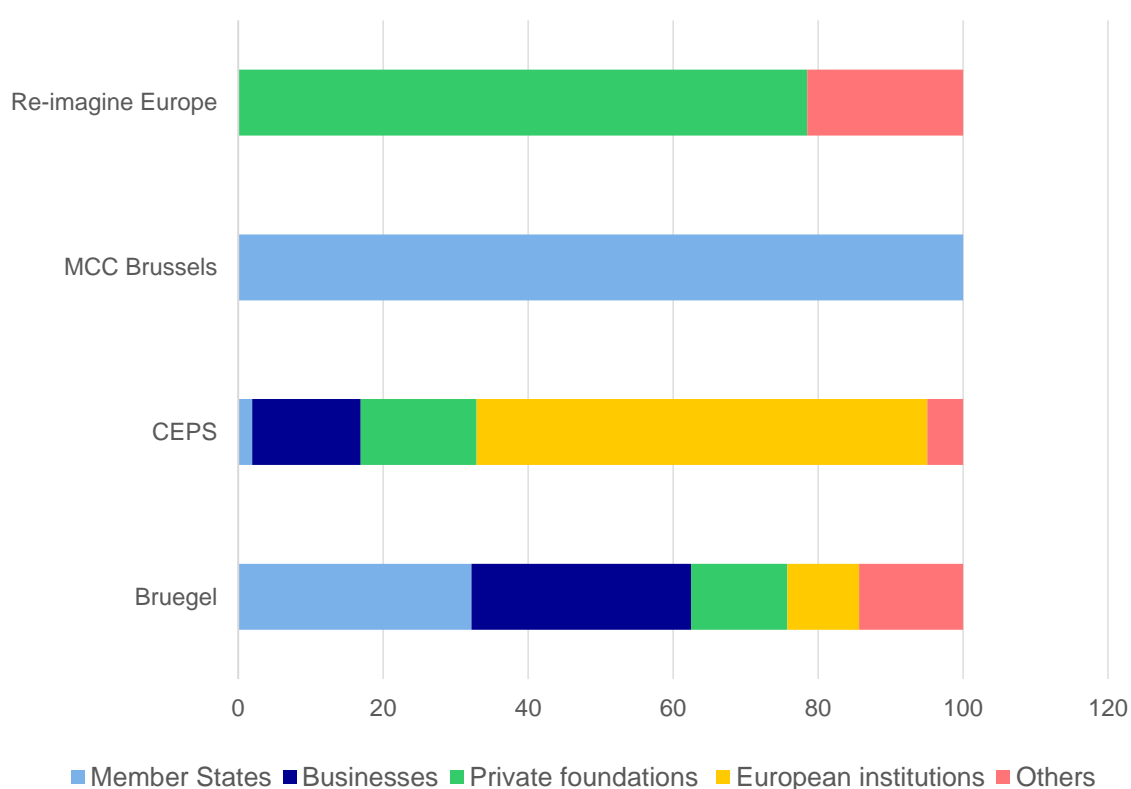
A closer analysis of the reported funding mix **reveals three** distinct **models** (see Figure 1). The first, exemplified by the European Policy Centre (€5.7 million per year) and the Centre for European Policy Studies (€6.2 million per year), is heavily reliant on European institutional funding, **which is often earmarked** for specific projects.

By contrast, the Bruegel Institute (€7.8 million per year) has opted for a model based primarily on **regular, non-earmarked contributions from its members**, with a fixed fee for different types of members (governments, businesses, institutions). The institute has made **a deliberate choice to be far less dependent on European Union funding and to diversify its sponsors as much as possible** in order to ensure its independence by limiting the share of funding – and thus the potential influence – of each member, a model that a number of other centres have sought to emulate. Contributions from Bruegel's members account for 70% of its budget, whereas many other think tanks rely predominantly on project-related funding.

The third model is to rely **overwhelmingly on a single donor**. Think tanks such as Re-Imagine Europa and the Centre for Future Generations are primarily funded by one or two foundations (the Bill & Melinda Gates Foundation in the case of the former, and two Dutch foundations in the case of the latter). Similarly, MCC Brussels is fully funded by the Hungarian state, and the European Centre for International Political Economy (ECIPE) operates mainly on public and private funds from Sweden.

From the perspective of research quality and independence, it seems that **non-earmarked, diversified and/or multi-year funding is generally considered best suited to enabling high-quality, unbiased research**. Conversely, funding from a single source or an excessive need to renew it increases the likelihood of this dependency being used as a lever of influence and heightens the vulnerability of the organisation’s activities (see below).

Figure 1 – Examples of *think tank* funding models, by donor category (based on funding for the year 2024)



Sources: estimates based on activity reports published by think tanks and information available in the European Commission’s transparency register

Table 2 – Ranking of *think tanks* by degree of funding diversity

Rank	Think tank	Number of funders	Number of types of funders	Diversity score
1	Bruegel	60	5	1
2	European Policy Centre (EPC)	31	5	0.754
3	Centre for European Policy Studies (CEPS)	42	4	0.722
4	Friends of Europe	26	5	0.712
5	European Roundtable on Climate Change and Sustainable Transition (ERCST)	23	5	0.687
6	Institute for European Environmental Policy (IEEP)	16	5	0.627
7	RAND Europe	11	5	0.585
8	Centre for Regulation in Europe (CERRE)	29	3	0.488
9	Wilfried Martens Centre	8	3	0.31
10	Brussels Institute for Geopolitics (BIG)	6	3	0.293
11	Lisbon Council	8	2	0.185
12	Migration Policy Institute	3	2	0.142
13	European Centre for International Political Economy (ECIPE)	2	2	0.134
14	Re-Imagine Europe	1	2	0.125
15	Europe Jacques Delors	6	1	0.043
16	Centre for Future Generations	3	1	0.017
17	Trans-European Policy Studies Association (TEPSA)	2	1	0.009
18	MCC Brussels	1	1	0
	European Liberal Forum	1	1	0
	Foundation for European Progressive Studies (FEPS)	1	1	0

Note: a score between 0 and 1 was developed for the two diversity criteria, enabling *think tanks* to be ranked according to the total number of funders and the number of types of sources. An average score was then calculated to produce a composite indicator incorporating these two criteria equally, in order to rank the institutes.

Sources: activity reports published by the think tanks and information available on the European Commission's transparency register

In order to assess more specifically the degree of funding diversity in think tank funding, **a diversification score was developed** to rank the think tanks in our sample according to this criterion (see Table 3)¹⁶. This indicator incorporates both the total diversity of sources and the number of types of funders (Member States, non-Member States, companies, foundations, European institutions, political parties). This approach makes it possible to identify the most diversified organisations whilst avoiding to overrate those that rely on a large number of funders belonging to the same category. This ranking highlights **the advantage enjoyed by three think tanks (Bruegel, CEPS, EPC) due to their visibility**, which may also reflect the high barrier to entry for new institutes seeking to diversify their funding.

2.3. Funding as an insight into the Brussels market of influence

When open-access funding data is analysed and aggregated, certain funders emerge as dominant, **based on an estimate of the relative scale of their contributions**. Our work is based on **a sample of twenty-one institutes with annual budgets exceeding €500,000**, whose financial statements allow us to identify the main funders, although we are unable to quantify the exact amounts in each case¹⁷. It is important to note that our calculations provide **'lower-bound estimates'** based on confirmed individual contributions, which are **far from representing the total funding**. The actual amounts are therefore potentially much higher.

¹⁶ These estimates were made on the basis of open-source data, drawn from activity reports published by think tanks and information available in the transparency register. These indicators do not reflect any data that may be missing from such declarations.

¹⁷ The think tanks selected for the sample are as follows: Bruegel Institute, Wilfried Martens Centre, MCC Brussels, Centre for European Policy Analysis, European Policy Centre, Centre for Future Generations, Centre for Regulation in Europe, Friends of Europe, Lisbon Council, Institute for European Environmental Policy Studies, RAND Europe, European Roundtable on Climate Change and Sustainable Transition, Migration Policy Institute, European Social Observatory, Brussels Institute for Geopolitics, European Centre for International Political Economy, Europe Jacques Delors, European Liberal Forum, Trans European Policy Studies Association, Re-Imagine Europa and Foundation for European Progressive Studies. The think tanks were selected as follows: their presence in the transparency register; on the basis of a quantitative threshold (institutes with an annual budget exceeding €500,000); on the basis of a qualitative assessment (enabling a distinction to be made between genuine research centres and institutes acting on behalf of private interests). Some actors analysed in the first part of the study were not included because their funding is either too opaque or does not lend itself to an analysis of their donors (the Egmont Institute is an influential centre, but is entirely funded by Belgian public bodies).

US players are the main funders of the European market of ideas

The financial clout of US-based actors in the Brussels arena is striking. A paper by the investigative media outlet *Follow the Money*, the only recent publicly available study on the subject, put the investment by US actors in Brussels think tanks at over €100 million¹⁸. **This would amount to a third of the ecosystem’s total funding**, placing US funders far ahead of actors from EU member states.

However, this impressive figure can be largely attributed to **well-funded, entirely American think tanks that either have a presence in Brussels** (Carnegie, German Marshall Fund, Tax Foundation) or invest in relations with Brussels without maintaining a permanent presence there (Atlantic Council, World Resources Institute). This influence stems from **the historical and structural importance of think tanks within the American system**, which are not included in our sample¹⁹. Furthermore, these organisations have so far played a significant role in **fostering close ties between the Brussels and Washington policy communities**²⁰.

Nevertheless, even without taking into account purely American actors and considering the funding of think tanks dealing primarily with European issues, funding of American origin, **at 4 million per year**, still appears to be dominant – according to our much more conservative estimates based on the financial data of 21 think tanks for the year 2024 – **i.e. at least four times more than funding of French origin** (see below).

These investments come in particular from **major American philanthropic foundations and companies**. As for **foundations**, organisations with a predominantly progressive stance on climate and social issues have so far dominated the Brussels landscape. Organisations linked to billionaires Bill Gates (Breakthrough Energy; Bill & Melinda Gates Foundation) and the Soros family’s Open Society Foundations (OSF) network stand out in particular.

However, there has been **a marked decline in certain philanthropic investments, signalling a broader restructuring of funding for international civil society**: OSF’s investments in Europe and Central Asia, for example, were set to fall from \$209 million to

¹⁸ *Follow The Money* (2025), ‘U.S. donors bankroll Europe’s policy ideas through think tanks’, article dated 23 October.

¹⁹ Blum J. (2025), ‘American think tanks under Trump 2. The “blob” in peril?’, *Ifri Notes – Potomac Paper*, No. 51, June.

\$83 million between 2022 and 2024, whilst Gates Ventures is ending its green technology activities with the closure of Breakthrough Energy’s European office in 2025²¹. Despite its European character, the European Climate Foundation (ECF) relies heavily on US funding (from the Rockefeller, Grantham, Bloomberg, Hewlett and Sequoia foundations, among others), whose commitments on climate action are now more uncertain. This retreat of philanthropic foundations is partly attributable to the withdrawal of US government funding, particularly under the USAID programme, forcing foundations to redirect certain funds²².

A significant French presence, though less systematic than that of its neighbours

French actors have a **presence within the think tank ecosystem**, with at least €1,000,000 invested in the twenty or so prominent think tanks, according to open sources. The main sources of French funding are **the State**, via the Ministry for Europe and Foreign Affairs, the Treasury or other public bodies (Banque de France, Caisse des Dépôts), and **companies, particularly energy firms** (Engie, EDF, Total).

A recurring observation made by those interviewed, however, is that Paris invests less in the sector compared to other capitals, relative to its weight within the Union. Whilst direct contributions from the German federal government are not higher, as far as can be ascertained from open sources, Germany’s greater presence is primarily due to the significance of both private foundations (Robert Bosch, Bertelsmann, Mercator) and political foundations linked to parties (Konrad Adenauer, Heinrich Böll, Friedrich Naumann, Friedrich Ebert), which are key players in German domestic politics and can also act as intermediaries with Brussels-based actors. Numerous studies have already highlighted the significant asset that Germany’s network of foundations represents, both for democratic life in Germany and for its influence, an observation that remains relevant today²³. We also note the significant presence of the Netherlands – also thanks to certain major foundations – Belgium and Sweden.

The influence of the private sector: tech and energy dominate

Even without comprehensive access to the data, there appears to be a **clear predominance of US tech firms** in the field of research funding in Brussels. According to

²¹ <https://www.opensocietyfoundations.org/who-we-are/financials>

²² The United States Agency for International Development (USAID) was the main US development aid agency. Established in 1961 under President John F. Kennedy, it was dissolved by the current administration in 2025.

²³ Oudin J. (1997), *Political Foundations in France*, report to the Prime Minister.

our estimates regarding funding for the twenty or so *think tanks* with a budget of over €500,000, **Google appears to be the main private donor**, with total annual contributions of around €1 million, meaning its funding is **at least as significant as that of all French players combined**. According to the same sources, Apple, Meta, Microsoft and Amazon are also well positioned. Taken together, and again based on particularly conservative estimates, the ten leading US companies in the sector **invest at least twice as much as all French players (public and private) combined**. This massive and sustained presence of the **GAFAM companies is easily explained by the importance they attach to decisions on digital regulation taken in Brussels** (Digital Services Act, Digital Markets Act, Digital Omnibus, Digital Fairness Act, Cloud and AI Development Act, AI Act).

This observation of the tech sector's dominance is consistent with the findings of recent surveys on **the scale of the sector's lobbying in Brussels, which has increased over the past two years** (reaching €151 million annually²⁴: analyses by Corporate Europe Observatory and Lobby Control indicate that the ten most active tech companies spend more than the thirty most active companies in the other main sectors represented (pharmaceuticals, finance and automotive).

In addition to the tech sector, **the energy (EDF, ENI, Shell, Exxon, Repsol), pharmaceutical (Johnson & Johnson, Janssen, Pfizer) and financial (BlackRock, Mastercard, Moody's, Société Générale) sectors stand out**, reflecting the key areas of expertise of EU institutions. The investment made by these players appears to be proportional to the importance of European legislation for their activities. Unlike in the United States, where the defence sector is one of the largest funders of strategic research, these economic players have a limited presence in Brussels, reflecting the near total absence of EU competence in this area²⁵.

The reorientation of funding by the European institutions and its consequences for the think tank ecosystem

In addition to 'Horizon' funding, which is primarily intended for fundamental research and operates through multi-annual projects, the **Citizens, Equality, Rights and Values (CERV) programme—aimed at civil society in the broadest sense** and overseen by the European Commission's DG JUST—represented, until recently, a significant source of

²⁴ Pollet M. (2025), 'Big Tech ups lobbying firepower, €€ in Brussels', Politico, article of 25 October.

²⁵ Freeman B. and Cleveland-Stout N. (2025), "Big Ideas and Big Money: Think tank funding in America", *Quincy Brief*, No. 68, January.

funding for think tanks. The total amount of grants stands at €279 million in 2026 and €299 million for 2027, the majority of which is earmarked for associations and NGOs²⁶.

Whilst the CERV programme has historically been a key source funding for many centres, such as the Jacques Delors Institute or the European Policy Centre (EPC), its function is not strictly speaking to fund research but rather to **'protect and promote the fundamental values and rights of the EU'**, as defined in the Treaty on European Union (promotion of democracy, human rights, minorities, etc.)²⁷. However, this funding is currently under pressure, with significant implications for think tanks and research.

The main pressure stems from the withdrawal of US funding – notably through the USAID programme and the withdrawal of philanthropic foundations (see *above*) – **which is triggering a chain reaction in the way civil society is funded globally, with European think tanks becoming collateral victims**. Interviewed stakeholders confirm that organisations previously funded by the US government – notably through the USAID programme (US\$40 billion per year) – have turned to the Commission for the 2025–2026 financial year, creating increased competition with existing beneficiaries for their European funding.

As a result, some think tanks which were historically dependent on CERV grants are being deprived of a key source of funding: the European Policy Centre, which relies on these funds for 5% of its budget, or the Jacques Delors Institute, a think tank funded 17% by CERV and the leading French centre dedicated to the EU.

More generally, **the principles governing the awarding of grants to think tanks have recently been the subject of scrutiny and criticism** from parties on the right of the political spectrum, ranging from the European People's Party to Patriots for Europe. An enquiry has been established in the European Parliament by MEPs from conservative parties, with the stated aim of requiring the Commission to be more transparent in the allocation of funds and to limit the ideological dimension of grants²⁸. Whilst this campaign

²⁶ See the [document](#) concerning the CERV's work programme for 2026 and 2027.

²⁷ European Commission (n.d.), ['Citizens, Equality, Rights and Values programme overview'](#).

²⁸ Valet C., Walravens E. and Winkel J. (2025), ['NGOs in the crosshairs of the right'](#), *Le Soir*, article dated 9 December.

has a partisan dimension, the call for transparency has been supported by recommendations from the European Court of Auditors²⁹.

2.4. A weakening of the funding model and an increased risk of interference?

It appears that several factors risk undermining the work of Brussels-based think tanks in the medium term, reflecting in many respects **the difficulties facing international civil society** more broadly. In addition to the usual difficulty in persuading private donors to invest in the ecosystem, the withdrawal of certain traditional US funding and the reallocation of CERV grants are contributing to a more unstable landscape.

One of the unintended consequences is that this weakening creates an opportunity for actors seeking to influence European public policy, including those with more dubious intentions. There are some early signs that **non-European actors may be positioning themselves more strongly** in this ‘market of influence’.

Recent indications that **the US government**, whose antagonistic stance towards the EU is now clear, may fund European think tanks aligned with its positions foreshadow this development³⁰. It is conceivable that the US State Department’s role as a potential funder for the newly created Eurosceptic ecosystem could become essential should Hungarian funding be weakened by the change of government. For the time being, what is most evident is **the alignment between the economic agenda of certain major US tech players and that of the US government—which is also driven by ideology—against digital regulations** (DSA, DMA, GDPR).

For its part, **China funds certain institutes**, at a relatively modest but already significant level: as shown by the publicly available activity reports of the institutes concerned, the Chinese Mission to the EU provides funding amounting to tens of thousands of euros to certain institutes, whilst **companies such as Huawei and Shein** provide comparable amounts to

²⁹ Guillot L. (2025), ‘Brussels must overhaul “opaque” funding of NGOs, say auditors’, *Politico*, article dated 8 April; European Court of Auditors (2025), *Transparency of EU Funding Granted to NGOs. Despite Progress, the Overview Is Still Not Reliable*, report, November.

³⁰ *Financial Times* (2026), ‘US government to fund Maga-aligned think-tanks and charities in Europe’, article dated 6 February.

certain think tanks dealing with digital issues (Bruegel, CERRE, EPC and the Lisbon Council)³¹. As studies on this subject have highlighted, civil society is one of the key channels for foreign influence³². China certainly does not have a monopoly over influence operations but it does, however, have the means and, increasingly, the will to carry them out.

Conclusion and recommendations

For many years, the think tank community in Brussels has acted as **a mirror of dynamics shaping the European sphere**. Owing to their hybrid nature, at the intersection of expertise and decision-making, these organisations are particularly sensitive to the political context.

Our analysis shows how this ecosystem reflects the changes the EU is undergoing: a diversification of policy areas (climate, defence, geopolitics, artificial intelligence), sustained investment by US tech companies, the emergence of a more Eurosceptic ecosystem, the discreet but growing presence of Chinese actors, and the withdrawal of progressive American foundations. These trends reflect both a realignment of power dynamics and a weakening of certain economic models based on cyclical or earmarked funding, thus opening up more space for strategies of influence, or even co-optation.

The recent withdrawal of funding from the Commission exacerbates this fragility, with significant consequences for the quality of research. In this context, French actors, both public and private, would do well to **take a more proactive and strategic approach to the issue of think tanks**, particularly if these are the subject of increased investment from actors who are Eurosceptic or hostile to European interests.

● **RECOMMENDATION No. 1 – Make greater use of both French and international think tanks as a resource for decision-making.** Following the example of many countries and European institutions, the French administration could offer more recruitment channels for French or European researchers from research centres. As part of a pilot scheme, the relevant ministries could **offer fixed-term ‘visiting researcher programmes’**, as the Commission currently does, within government departments based on urgent skills needs (geo-economics, trade, defence, regional specialisations, advanced technologies, etc.).

³¹ See European Union (n.d.), ‘[Transparency Register – Organisation data](#)’. This data is available in the 2024 activity reports of these *think tanks*, although the amounts are not always made public.

³² See in particular Charon P. and Jeangène Vilmer J.-B. (2021), *Chinese influence operations. A Machiavellian moment*, IRSEM, October.

● **RECOMMENDATION No. 2 – Develop a more strategic approach to public funding of think tanks, both in France and at European level, in collaboration with public authorities.** The development of this new European influence strategy by think tanks should be preceded **by an in-depth audit of the funding of institutes in France**, in order to better map out public support that is currently scattered, assess its consistency with the state’s priorities, and identify any redundancies or blind spots.

● **RECOMMENDATION No. 3 – Encourage greater transparency among Brussels-based think tanks regarding the sources of their funding.** Whilst some institutes publish an annual report listing not only all donors but also the amount of funding received, this is far from the case for all organisations, some of which publish only the identities of contributors without specifying the amounts received, or do not disclose any information at all. Whilst the degree of transparency depends on Belgian law governing AISBLs, **France could already raise this requirement, alongside other countries, with the Belgian or European authorities.**

● **RECOMMENDATION No. 4 – Encourage the emergence of more powerful national political foundations to serve as a reservoir of expertise and a conduit between research and decision-making.** This course of action essentially proposes following the example of German political foundations, which also serve as pillars of influence abroad, including in Brussels. In this context, an update to the legislation governing the funding of political parties, including a mandatory allocation of a portion of these funds to research, could be considered³³. Another approach would be to redirect part of the budget for the training of elected representatives towards political foundations, given their role as pioneers of public debate and generators of ideas³⁴.

● **RECOMMENDATION No. 5 – Strengthen France’s vigilance regarding Commission’s decisions on the funding of European civil society.** Certain French think tanks are particularly affected by the reorientation of CERV funding (see above). As a net contributor, France could place the issue of funding for these organisations on the agenda for negotiations under the next Multiannual Financial Framework³⁵. It could be proposed to establish a dedicated budget for think tanks dealing with European issues, given their key role, whilst avoiding the risk of confusion with NGO funding. At the same time, France could engage in **discussions** with the Commission and other countries **to reform the**

³³ A bill (“Foundations”) introduced by Senator Jacques Oudin in 1996 proposed entrusting the role of allocating funds to finance political foundations to the administration of the National Assembly rather than to Matignon.

³⁴ Le Pendeven B. and Brookes K. (2014), *The Innovative State (1). Strengthening think tanks*, study, April.

³⁵ The Saint-Geours report, published nearly a decade ago, already called on the State to “assist *think tanks*, on specific projects, in increasing their presence in Brussels” as well as to “lobby in Brussels to ensure that specific funding (...) is earmarked for *think tanks* in European programmes”. See Saint-Geours Y. (2016), *Report on French think tanks. Fact-finding and recommendations mission*, final report, September.

legislation governing the funding of certain non-European public or private actors, in order to reduce the risks of interference.

● **RECOMMENDATION No. 6 – Encourage French companies, particularly those in the digital sector, to invest more in think tanks at the European level, given the significance of European decisions in this field.** The state, through the Ministry for Digital Affairs for example, could initiate a **'coalition for research on digital sovereignty'** aimed at counterbalancing the massive investment by US tech firms at European level and **diversifying the funding sources** for research centres working on digital issues.

● **RECOMMENDATION No. 7 – Encourage the development of expertise more explicitly geared towards the Council of the European Union.** The Council remains under-resourced in terms of research compared to the Commission or the Parliament. Some French funding already granted to Brussels-based think tanks could be redirected towards this end.

● **RECOMMENDATION No. 8 – Complement the strategy for the mobility of French civil servants within the European institutions with a strategy targeting researchers working on issues of interest to France.** This could take the form of implementing hosting programmes similar to those already established between certain ministries – in particular the Ministry for Europe and Foreign Affairs and the Ministry of the Armed Forces – and foreign think tanks, enabling officials to spend several months at a research centre. A comparable arrangement could be envisaged between relevant ministries and agencies, such as the Ministry of the Economy and Finance, INSEE or the Ministry for Ecological Transition, and Brussels-based institutes on topics where France possesses unique technical expertise that would justify such an exchange (defence, nuclear, digital, etc.).