

2003 | 2006 | 2008 | 2010 | 2012 | 2014
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Bertelsmann Stiftung (ed.)

Transformation Index BTI 2018

Governance in International Comparison

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Responsible:

Hauke Hartmann, Sabine Donner, Robert Schwarz

Translation:

Barbara Serfozo, Berlin

Copy editor:

Josh Ward, Berlin

Production editor:

Christiane Raffel

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Arne Weyhardt, Hamburg (p. 5; Aart De Geus)
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Andy Kristian, Lancaster PA (p. 73)
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Barnabás Szabó, Budapest (p. 93)

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Foreword

In the 14 years since the Bertelsmann Stiftung launched the first Transformation Index (BTI), debates about the values underpinning social change have become increasingly polarized. At the beginning of this century, the objectives of democracy and a market economy appeared to have globally established themselves as normative goals worth targeting. Debates at that time focused primarily on determining which policies and strategies might best facilitate these objectives. But, today, the “virtuous twins” of democracy and a market economy appear to be subject to unprecedented controversy.

In this new edition of the Transformation Index, the average global scores for the “approval of democracy” and “commitment to democratic institutions” indicators have fallen to their lowest level ever. Indeed, democracy is facing a legitimacy crisis worldwide. First, democracy is questioned in terms of its performance capacity. Many citizens doubt their government’s ability or willingness to govern inclusively, efficiently and in such a way as to deliver and implement effective responses to global challenges, such as climate change, migration and rapid technological change. Second, the substance of democracy itself is subject to erosion. In many countries, the rule of law, civil rights and opportunities for political participation are not sufficiently ensured and have been weakened by the actions of populist leaders. Third, aggressive authoritarian forces are rolling back the

democratic achievements of the past. In several autocracies, we see repression extending its reach while authoritarian governance is presented as a more effective alternative to allegedly weak and chaotic democratic rule. In sum, this is the fifth BTI edition in a row to register a decline in the global average for the quality of democracy. This means that, in the last ten years, the number of people with less political freedom has increased considerably.

Furthermore, despite the ongoing growth of the global economy, the concept of a market economy that has long served as a normative measure of economic and social development has come under severe pressure. This is in part a result of the negative effects of economic globalization, such as fluctuating prices, external shocks on financial markets and bank failures, which have had a devastating impact on many citizens. However, the fact that many states have only partially implemented market-based regulations and have failed to ensure fair conditions for competition also accounts for the eroding popularity of market-based economic frameworks. Obviously, decision-makers in many countries have an interest in opening up their markets – yet too many demonstrate too little interest in ensuring equal market access. Elites who seek to maintain an inward-looking status quo while lining their own pockets stand in the way of a transparent, fair and reliable regulation of free-market competition. Equally worrisome is

the fact that, in many cases, these elites also block socioeconomic policies targeting social inclusion and empowerment. Although the number of people living in poverty fell globally – primarily as a result of China’s economic growth – socioeconomic gaps have actually widened in many countries. As a result, the level of socioeconomic development has fallen to an all-time low in the BTI 2018.

Given these developments, there are good reasons for the growing dissatisfaction with policymakers observed in many countries. Indeed, the BTI 2018 documents that the capacity and political will among government leaders to build consensus and de-escalate conflicts has eroded in recent years. At the same time, many political leaders are losing credibility in terms of their willingness to cultivate peaceful relationships, target reforms and promote cooperation in international affairs. In addition, they frequently perform poorly in terms of their steering capability and resource efficiency, particularly when it comes to combating corruption. Only a few of the democracies upholding the rule of law and fostering political participation are proving able to ensure sustainable and socially inclusive transformation processes. Elsewhere, the quality of governance is faltering as authoritarian tendencies grow. These developments make it difficult to build a visionary transformation policy that is embedded in consensus. They have a compromising effect on global trade, stabil-

ity and peace, and undermine the global community's ability to develop shared solutions to the global challenges we face.

Mismanagement and the failure of elites to deliver on the promise of democracy and economic growth have fueled populist sentiments that, in turn, breed nationalism and segregation. The consequences are grave, as the growing popularity of populism deprives the rule of law, democratic institutions and minority rights of their foundation. The emotional alarmism expressed in the liberal Western response to these developments is justified, particularly given the erratic behavior of U.S. President Donald Trump, the illiberalism of Hungarian Prime Minister Viktor Orbán, and the isolationism expressed by UK voters through Brexit. However, it is nonetheless true that populism's current success has been built in many cases on the mistakes made by former governments that failed to steer policies in the right direction or pursued policies that undermined social cohesion.

Instead of lashing out at illiberal trends, jingoistic rhetoric or deliberate efforts to break taboos, policymakers and think tanks alike should take a close look at mistakes made in order to present socially just, inclusive and sustainable policies with tangible impact.

Thus, as insufficient political freedom is linked with insufficient economic regulation, the focus of governance needs to be recalibrated. In past centuries, govern-

ments have been faced with the challenge of establishing rule-based societies with free markets. In the 21st century, governments instead face the challenge of building rule-based markets while preserving free societies. The only way forward is to ensure greater participation, more legally regulated fairness and expanded inclusion. If we achieve these objectives, we can halt polarization and the conflicts it generates.

Meeting the so-called illiberal turn head-on requires a vibrant and commanding narrative in favor of governance that is people-centered, that guarantees societal sustainability, and that is driven by the principles of democracy and a social market economy. It is our hope that the BTI 2018 may contribute to achieving these objectives. We wish you an engaging read.



Aart De Geus
Chairman of the Board,
Bertelsmann Stiftung




Stefan Empter
Senior Director,
Bertelsmann Stiftung



Executive Summary

The quality of democracy, market-economic systems and governance in developing and transformation countries has fallen to its lowest level in 15 years. The Transformation Index of the Bertelsmann Stiftung (BTI) identifies three developments that account for this trend. First, several governments no longer effectively counter growing domestic tensions. Second, in recent years, many elites have failed to respond to global challenges with economic policies that ensure stability and social inclusion. Third, governments in a number of relatively advanced transformation countries are hollowing out the rule of law and political freedoms.

Findings for the BTI 2018 depict a world of increasing political instability and a rapid decline in the acceptance of democratic institutions. In more and more countries, government leaders are deliberately undermining the checks and balances designed to hold the executive accountable – thereby securing not only their power, but also a system of patronage and the capacity to divert state resources for their own personal gain. At the same time, protests against social inequality, mismanagement and corruption are growing.

For many years now, we have witnessed a growing conflict intensity in many societies. This is in part due to the lack of compelling responses among governments to growing social exclusion and fading economic opportunities, which has devastated public confidence in established political systems. Populist movements and their anti-establishment slogans have flourished under these conditions. However, in many countries, protests against clientelist and erratic leadership are generally mobilized along existing ethnic, religious or social

cleavages. Elites in these countries then instrumentalize these cleavages to foster polarization and the consolidation of their power. In such a context, increasingly few on all sides demonstrate a willingness or ability to engage in dialogue.

More and more countries are poorly governed

Among all governance indicators, the global average for conflict management has recorded the most significant decline in the last 12 years. In 57 states, current governments are less willing or able to defuse social conflicts. During the survey period (February 2015 to January 2017), this has been true for Burundi and Turkey in particular.

Most governments in Arab countries – in particular Bahrain, Libya, Syria and Yemen – are deliberately aiming to exploit social conflicts. However, scores for conflict management have been falling for years in South and East Africa, as well. Indeed, the region, second only to North Africa and the Middle East, is plagued by the most conflicts in the world. Overall, there is a notable lack of effort among leaders to de-escalate conflicts in the region, not only in the chronically unstable Horn of Africa, but also in Kenya, Lesotho, Mozambique, Uganda and Zambia.

A growing inability or unwillingness to defuse conflicts generally runs parallel to an erosion of the consensus on goals among leaders, a diminishing capacity for civil society to participate in policymaking processes, and a growing influence of anti-democratic veto actors. We see this in East-Central and Southeast Europe, where a climate of polari-

zation and heated populist rhetoric has corroded – more so than anywhere else in the world – the consensus on goals. Deficient domestic consensus-building generally goes hand in hand with a lack of cooperation with international organizations and other states. In the last 12 years, almost one-half of all countries surveyed by the BTI have lost credibility in terms of their willingness to act as reliable partners. In an era demanding greater international cooperation in addressing global challenges, influential states – such as Mexico, Russia or Turkey – are losing their ability to play a key role as reliable, peace-oriented agents of positive change.

Global average scores for the efficient use of available resources and anti-corruption policy remain the lowest among all governance indicators (on a scale from 1 to 10, 4.71 and 4.27, respectively). A total of 91 out of 129 governments have proven either wholly unable or only partially able to make efficient use of their administrative and financial resources. And 103 states either lack the will or capacity to fight corruption effectively. Democratically governed countries perform much better on both indicators than do autocracies, particularly in terms of battling corruption.

Poor economic governance in autocracies

Overall, democracies perform better in terms of governance as well as in terms of their long-term steering capability and ability to make efficient use of available resources. Both of these qualities play a key role in ensuring macroeconomic stability and social

inclusion. To be sure, the continuing decline in commodity prices accounts in part for the growing instability, weakening performance and increasing inequality seen in many economies around the world in recent years. But bad economic policies and the lack of economic reforms, particularly in autocracies, are equally to blame.

The global average for the level of socio-economic development, generally the weakest of all factors in economic transformation, fell to a new low in this year's BTI (4.26). Within the last ten years, the share of BTI countries achieving a moderate to good level of social inclusion has fallen from one-third to one-fourth. This includes 26 of 71 democracies, but only nine of the 58 autocracies surveyed by the BTI. On global average, democratically governed countries have invested significantly more in social safety nets, while authoritarian regimes have done little in this regard.

The global average for economic performance has also worsened significantly in the last ten years (-0.95). Within this period, macroeconomic indicators have fallen in 71 countries and increased in only 17 states. Only seven autocracies were able to coordinate and pursue with consistency policies targeting currency and price stability.

Already small in number, the list of successful modernization dictatorships has been shortened once again. This includes countries with developed market economies, such as Malaysia, Qatar, Singapore and the United Arab Emirates, as well as the developmental dictatorships working to catch up from the middle (China) or low (Rwanda) levels. However, democracies are also faltering on this front. Indeed, the level of economic transformation achieved in several democracies, such as Brazil, Hungary, Mexico, Nigeria, South Africa and Turkey, has been rolled back – in some cases considerably. It is also the case that each of these countries has been subject to severe mismanagement and an erosion in the quality of democracy.

Democracy under pressure

The state of political transformation has reached a new low on global average. Where-

as the setbacks recorded in the BTI 2016 were primarily attributed to growing repression in hardening autocracies, the decline recorded for this edition derives in large part from the efforts of governments in defective democracies to consolidate their power by undermining the rule of law and political participation. The extent to which governments in Bangladesh, Lebanon, Mozambique, Nicaragua and Uganda have succeeded in doing this means that we can no longer classify them as democracies. These states have crossed a threshold that the defective democracies of Honduras, Hungary, Moldova, Niger, the Philippines and Turkey are nearing, though to varying degrees. Poland, too, though much further away, is inching its way downward. Overall, the share of the world population that enjoys democratic governance has fallen from 59.3% to 56.5%. For the first time ever, more than 3 billion people in the world are subject to autocratic governance.

In a good one-fifth of all surveyed countries, the quality of democracy has declined. Less free and fair elections, constitutional amendments allowing the executive to consolidate its power, and the circumvention of checks and balances account for this trend. In addition, oppositional forces and civil society actors are increasingly excluded from participating in the political process. In terms of political transformation, scores for association and assembly rights have declined the most since 2006, followed closely by freedom of expression. This shrinking of the civic space is accompanied by a manipulation of civil society that privileges pro-government organizations and discredits critics of the government, thereby granting leaders discursive authority in a controlled political environment.

The normative transformation goals of democracy and a market-economic system have never been subject to so much controversy or threatened by internal forces as they are today. When democratic systems fail to ensure the rule of law and provide opportunities for political participation, and when market-economic systems fail to ensure fair competition and social inclusion, they will lose their capacity to attract support and increasingly take on the features of an illiberal and

clientelist system. The foundations of democracy and market economic frameworks are thereby sapped of their substance.

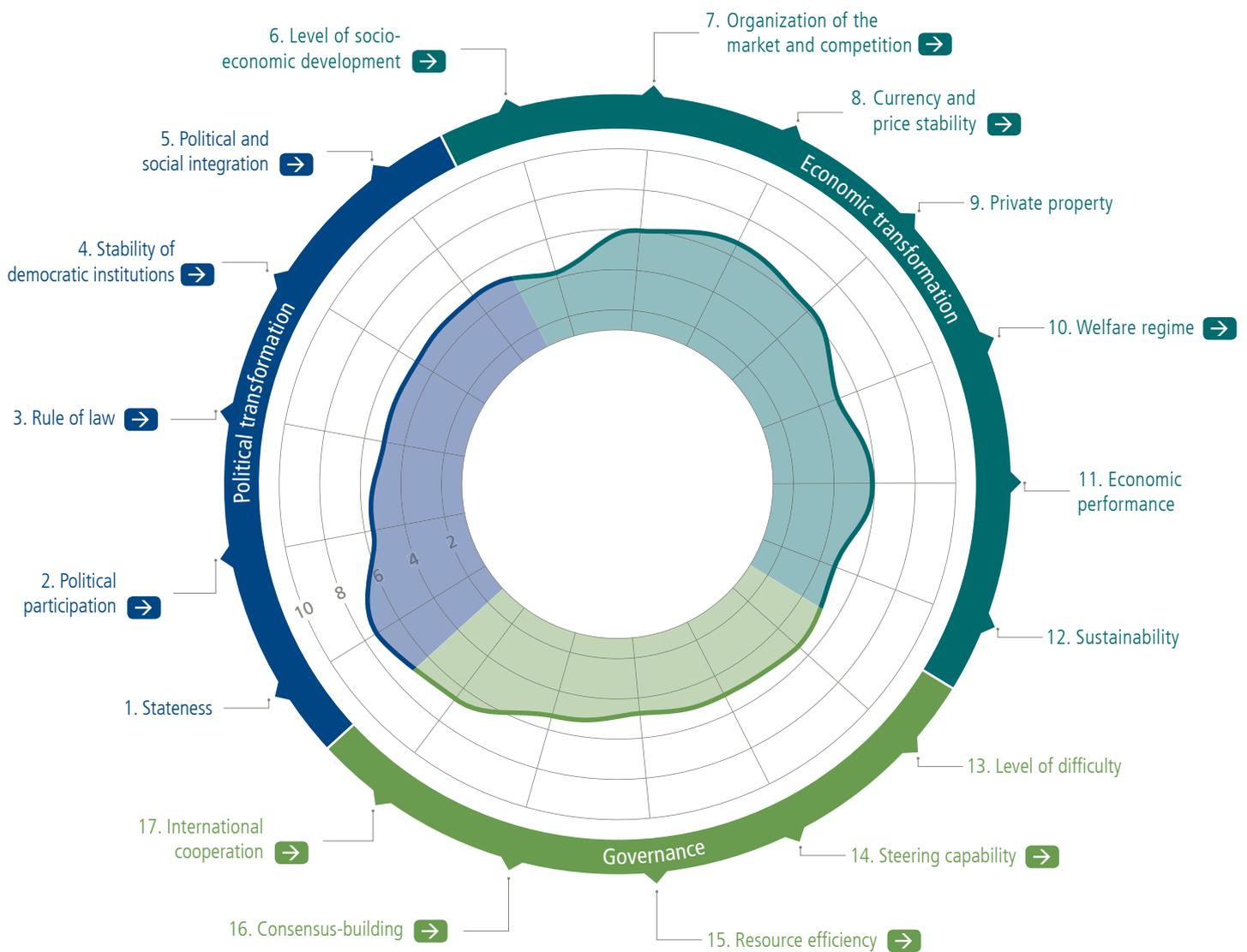
Despite the global economic turmoil and rise in populism in recent years, one-fifth of all BTI countries surveyed proved able to protect and, in some cases, deepen their institutional foundations. Botswana, Chile, Estonia and Taiwan stand out in this regard. Each of these countries has numbered among the top performers in each BTI dimension since 2006. They illustrate how good governance in developing and transformation countries can foster resilience when confronted with instability and crisis.

Political transformation		
1	Uruguay	9.95
2	Estonia	9.75
3	Taiwan	9.55
4	Lithuania	9.45
5	Czech Republic	9.40
6	Slovenia	9.25
7	Chile	9.20
8	Costa Rica	9.05
9	Latvia	8.75
10	Slovakia	8.60

Economic transformation		
1	Czech Republic	9.64
2	Estonia	9.29
3	Taiwan	9.29
4	Slovenia	9.11
5	Lithuania	9.04
6	Singapore	8.89
7	South Korea	8.64
8	Latvia	8.61
9	Poland	8.61
10	Slovakia	8.57

Governance		
1	Estonia	7.44
2	Uruguay	7.36
3	Chile	7.33
4	Taiwan	7.33
5	Lithuania	7.18
6	Botswana	7.09
7	Czech Republic	7.03
8	Latvia	7.00
9	Costa Rica	6.85
10	Slovenia	6.78

The BTI 2018 at a Glance



2. Political participation: Free and fair elections; Effective power to govern; Association / assembly rights; Freedom of expression

Free and fair elections → are increasingly less common. Elections in nearly one-fourth of all countries are less free and fair than they were two years ago. Incumbents frequently manipulate the political system to their advantage long in advance of the next election.

4. Stability of democratic institutions: Performance of democratic institutions; Commitment to democratic institutions

Commitment to democratic institutions → is waning in many regions, particularly in East-Central Europe, South and East Africa, and Central America. Liberal democracy's opponents are proving themselves increasingly efficient mobilizers.

6. Level of socioeconomic development: Socioeconomic barriers

Socioeconomic barriers → continue to grow. Once again, this indicator has the lowest average score among all BTI indicators (4.26). In the last ten years, the share of BTI countries not burdened by massive social exclusion (≥ 5 points) has declined from roughly one-third to one-fourth of all countries surveyed.

8. Currency and price stability: Anti-inflation / forex policy; Macrostability

Macrostability → has been losing traction since 2008, showing a clear decline in average score. Whereas 56 states in the BTI 2008 featured governments that targeted debt reduction and fiscal consolidation effectively (8–10 points), this is now true of only 30 countries, seven of which are autocracies.

14. Steering capability: Prioritization; Implementation; Policy learning

Prioritization → has worsened during the review period in 30 countries, reaching the lowest score for this indicator since the BTI 2008. The largest score declines were registered in East-Central and Southeast Europe and in South and East Africa.

16. Consensus-building: Consensus on goals; Anti-democratic actors; Cleavage / conflict management; Civil society participation; Reconciliation

Conflict management → has recorded the largest decline among all governance indicators since the BTI 2006. Today, governments in nearly one-half of all BTI countries are less able or willing to defuse social conflicts. Only Latin America and Post-Soviet Eurasia show regional averages that have not fallen.

3. Rule of law: Separation of powers; Independent judiciary; Prosecution of office abuse; Civil rights

Civil rights → are embedded in comprehensive protections in just four countries, but are losing ground in many others. Overall, the assault on basic civil rights continues, most notably in the Middle East. West Africa stands out as a positive exception.

5. Political and social integration: Party system; Interest groups; Approval of democracy; Social capital

Party systems → have never been particularly stable, representative or socially embedded in most developing and transformation states. Due in large part to further declines in some Latin American countries, this indicator now records the lowest average score among all political indicators (4.66).

7. Organization of the market and competition: Market-based competition; Anti-monopoly policy; Liberalization of foreign trade; Banking system

Market-based competition → is poorly developed in most countries. Regulations that foster fair and reliable competition have been poorly established in more than one-half of all BTI countries, and have been weakened further during the period under review in 25 countries, 13 of which are in Africa.

10. Welfare regime: Social safety nets; Equal opportunity

Social safety nets → have been expanded substantially in recent years in some countries, such as El Salvador, Mongolia, Rwanda and Turkey. On global average, democratically governed countries show a significant increase in social safety net investment, while most authoritarian regimes show little or no change in this regard.

15. Resource efficiency: Efficient use of assets; Policy coordination; Anti-corruption policy

Efficient use of assets → remains the second-weakest (following anti-corruption policy) of all governance indicators. Governments in 91 countries either fail or prove only somewhat capable of using the available human, financial and organizational resources efficiently. Only 7 autocracies receive 6 or more points for this indicator.

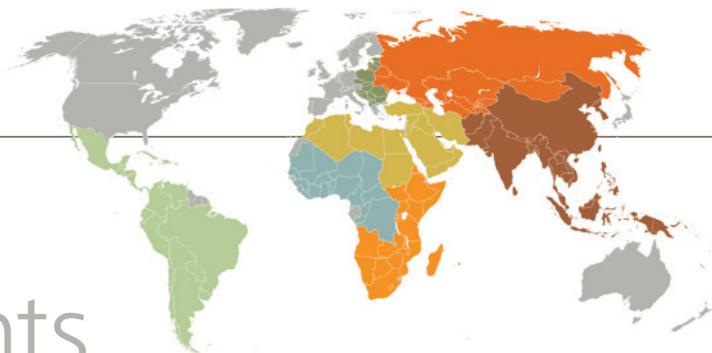
17. International cooperation: Effective use of support; Credibility; Regional cooperation

Credibility → among many states in international cooperation has softened. Some 59 states have scaled back their commitment to multilateral initiatives and are considered to be less reliable partners than they were 12 years ago. Countries recording the largest decline for this indicator include Hungary (–4), Mexico, Russia and Turkey (–3 for each), and Brazil and Kenya (–2 for each).

Political transformation	
Global Ø	5.56 (e.g., Turkey)
Top-ranking country	Uruguay
Positive trend	Burkina Faso, Sri Lanka
Negative trend	Mozambique, Turkey, Uganda, Yemen
Regime distribution	→ 71 democracies → 58 autocracies

Economic transformation	
Global Ø	5.53 (e.g., Ecuador)
Top-ranking country	Czech Republic
Positive trend	Argentina, Ukraine
Negative trend	Namibia, Venezuela, Yemen
State of development	→ 26 developed/functioning market economies → 53 market economies with functional flaws → 50 poorly functioning/rudimentary market economies

Governance	
Global Ø	4.80 (e.g., China)
Top-ranking country	Estonia
Positive trend	Argentina, Sri Lanka
Negative trend	Brazil, Poland, Turkey, Yemen
Quality of governance	→ 43 countries with very good/good governance → 39 countries with moderate governance → 47 countries with weak/failed governance



Acknowledgments

The BTI 2018 is a product of the combined efforts of nearly 300 people who have contributed in various ways to its development, creation, evaluation and communication. A project of this magnitude could never succeed without the expertise, enthusiasm, creativity and attention to detail of all those involved.

Over the years, the BTI team has benefitted from the support, advocacy and counsel of many transformation experts and practitioners. But we extend special thanks and gratitude to our council of scholarly advisers, the BTI Board, which is unequalled in its commitment to providing us with rigorous and collegial support. Within the BTI Board, the regional coordinators deserve special mention, as they monitor not only the creation and review process for each report, but are also responsible for the calibration of results within their region and, together with us, across regions.

The country experts also play a key role in creating the BTI, as it is their knowledge and experience that our cross-national analysis is built upon. Their commitment to an extensive production and review process, and the critical feedback they provide along the way, have helped build a better and more accurate Transformation Index.

The quality and accuracy of the language in our in-depth reports for 129 countries and seven world regions is of considerable importance. A special thanks goes to managing editor Barbara Serfozo and her team for their tireless and diligent efforts in taking on – for the seventh time – the challenge of editing the large volume of BTI reports. And we very much appreciate Josh Ward’s meticulous care in proofreading this volume.

Ensuring the integrity and consistency of country-report sections and scores has been an enormous effort supported by a group of highly skilled young academic professionals.

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We place considerable value on ensuring full transparency of our analytic process and providing clear and intuitive access to our data. Our tool to this end, the Transformation Atlas, provides an interactive visualization of thousands of scores as well as broader results of our analysis. Thanks to the creativity and assiduous dedication of information architect Dieter Dollacker and cartographer Dirk Waldik, the Transformation Atlas continues to serve us well in this regard.

Special thanks go as well to the graphic designer Veronika Döpjohann and her colleagues (Agentur kopfstand, Bielefeld, Germany). Her ideas have shaped the project’s image in all its features, from this report to the design of brochures and other materials. We are grateful for the journalist and communications consultant Jens Poggenpohl’s helpful support in developing and preparing the contributions for this report.

At the end of the seven regional overviews, outstanding political leaders and opinion-makers share their perspectives on the current BTI findings. We thank these members of the group of Transformation Thinkers, a joint

initiative of the Bertelsmann Stiftung and the Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ), for their contributions. Since 2003, this interregional dialogue on the issues of democracy and good governance has yielded a superb network of 140 alumni from 76 countries.

The scope and complexity of an instrument such as the BTI must undergo continual development and improvement. We are committed to the regular evaluation of our methodology and process, and will always benefit from the critique, suggestions and input of a variety of individuals. We thank you all and look forward to your continued feedback and further constructive dialogue.

Sabine Donner

Hauke Hartmann

Robert Schwarz

Sabine Steinkamp

BTI Project Team

BTI Board

<i>Franz-Lothar Altmann</i>	Associate Professor, University of Bucharest; Board Member, Southeast Europe Association, Munich
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<i>Rolf J. Langhammer</i>	Senior Fellow, Kiel Institute for the World Economy; Senior Policy Fellow for China in the Global Economy, Mercator Institute for China Studies (MERICS), Berlin
<i>Wolfgang Merkel</i>	Director, Research Unit Democracy: Structures, Performances, Challenges, Social Science Research Center Berlin (WZB); Professor, Institute for Social Sciences, Humboldt-Universität zu Berlin
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<i>Hans-Jürgen Puhle</i>	Professor emeritus, Institute for Political Science, Goethe University Frankfurt
<i>Siegmar Schmidt</i> ●	Professor and Head, Political Science Department, Institute for Social Sciences, University of Koblenz-Landau, Landau; BTI Regional Coordinator South and East Africa
<i>Robert Schwarz</i>	Project Manager, Bertelsmann Stiftung, Gütersloh
<i>Hans-Joachim Spanger</i> ●	Executive Board's Commissioner, Peace Research Institute Frankfurt (PRIF); BTI Regional Coordinator Post-Soviet Eurasia
<i>Peter Thiery</i> ●	Lecturer, Institute of Political Science, Heidelberg University; BTI Regional Coordinator Latin America and the Caribbean
<i>Jan Claudius Völkel</i> ●	Marie Skłodowska-Curie Research Fellow 2017–2019, Institute for European Studies, Brussels; BTI Regional Coordinator Middle East and North Africa
<i>Uwe Wagschal</i>	Professor and Chair of Comparative Politics, University of Freiburg

Country experts

The BTI's quality stands or falls with the quality and validity of the country reports, which constitute the backbone of all our assessments and scores. We are as happy as we are proud to be able to rely on an invaluable network of almost 300 experts at top academic institutions and civil society organizations around the globe, and we extend our heartfelt thanks to all those individuals who have contributed their expertise.

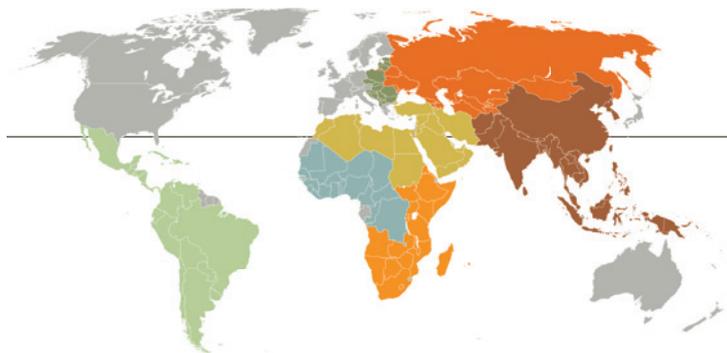
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West and Central Africa · Chabi Imorou Azizou (Laboratory for the Study and Research of Social Dynamics and Local Development LASDEL, Cotonou); Heinrich Bergstresser (Freelance Journalist, Cologne); Racey Bingham (Consultant, Essex); Markus Brunner (Bureau for Institutional Reform and Democracy – BiRD GmbH, Munich); Brett Logan Carter (University of Southern California, Los Angeles); Jan Cernicky (Konrad-Adenauer-Stiftung, Nairobi); Mamadou Diarassouba (Deutsche Gesellschaft für Internationale Zusammenarbeit GIZ GmbH, Eschborn); Helga Dickow (Arnold Bergstraesser Institute, Freiburg); Sebastian Elischer (University of Florida, Gainesville); David Fuamba (University of Tübingen); Felix Gerdes (University of Liberia, Monrovia); Thomas Greven (Freie Universität Berlin); Lena Guesnet (BICC – Bonn International Center for Conversion gGmbH); Paul-Simon Handy (Institute for Security Studies, Pretoria); Christof Hartmann (University of Duisburg-Essen, Duisburg); Claudia Hrubesch (Consultant, Vienna); Hakeem Jimo (Consultant, Lagos); Cédric Jourde (University of Ottawa); Dirk Kohner (GIGA Institute of African Affairs, Hamburg); Peter Körner (GIGA German Institute of Global and Area Studies, Hamburg); Annette Lohmann (Friedrich-Ebert-Stiftung, Dakar); Lutz Neumann (LBN Strategies, Cologne); Giulia Piccolino

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Post-Soviet Eurasia · Kamil Calus (The Centre for Eastern Studies OSW, Warsaw); Byambajav Dalaibuyan (Tohoku University, Sendai); Julian Dierkes (University of British Columbia, Vancouver); Pal Dunay (George C. Marshall Eu-

ropean Center for Security Studies, Garmisch-Partenkirchen); Emilbek Dzhuaraev (American University of Central Asia, Bishkek); Tim Epkenhans (University of Freiburg); Gerelt-Od Erdenebileg (Mongolian National University of Education MNUE, Ulaanbaatar); Grigorii V. Golosov (European University at St. Petersburg); Altay Goyushov (Consultant, Baku); John Heathershaw (University of Exeter); Giorgi Kldiashvili (Institute for the Development of Freedom of Information, Tbilisi); Reinhard Krumm (Friedrich-Ebert-Stiftung, Vienna); Leonid Litra (New Europe Center, Kiev); Shushanik Minasyan (University of Bonn); Veronika Movchan (Institute for Economic Research and Policy Consulting, Kiev); Heiko Pleines (Research Centre for East European Studies at the University of Bremen); Oliver Reisner (Iliia State University, Tbilisi); Bahodir Sidikov (BASIconult, Bern); Arseni Sivitski (Center for Strategic and Foreign Policy Studies CSFPS, Minsk); Vahram Soghomonyan (Political Discourse Think Tank – Diskurs.am, Yerevan); Iryna Solonenko (European University Viadrina, Frankfurt/Oder); Farkhod Tolipov (Non-governmental Research Institution “Knowledge Caravan,” Tashkent); Ulad Vialichka (International Consortium EUROBELARUS, Minsk); George Voloshin (Aperio Intelligence, Paris)

Asia and Oceania · Katharine Adeney (University of Nottingham); Aries Arugay (University of the Philippines Diliman, Quezon City); Joachim Betz (GIGA Institute of Asian Studies, Hamburg); Marco Bünte (Monash University, Kuala Lumpur); William Case (University of Nottingham Malaysia Campus, Semenyih); Paul Chambers (Naresuan University, Phitsanulok); James Chin (University of Tasmania, Hobart); Simon Creak (Nanyang Technological University NTU, Singapore); Sandra Destradi (Helmut Schmidt University, Hamburg); Neil DeVotta (Wake Forest University, Winston-Salem); Nasreen Ghufuran (University of Peshawar); Stephan Giersdorf (Heidelberg University); Christian Göbel (University of Vienna); Ralph Hassig (Consultant, Washington, DC); Thomas Kalinowski (Ewha Womans University, Seoul); Pramod K. Kantha (Wright State University, Dayton); Markus Karbaum (Dr. Karbaum Consulting, Berlin); David Kuehn (Heidelberg University); Jasmin Lorch (GIGA German Institute of Global and Area Studies, Hamburg); Mara Malagodi (SOAS University of London); Anas B. Malik (Xavier University, Cincinnati); Ronald May (Australian National University, Canberra); Katja Mielke (BICC – Bonn International Center for Conversion gGmbH); Marcus Mietzner (Australian National University, Canberra); M. Jae Moon (Yonsei University, Seoul); Lee Morgenbesser (Griffith University, Brisbane); Hai Hong Nguyen (Queensland University of Technology, Brisbane); Stephan Ortmann (City University of Hong Kong); Hyeong Jung Park (Korea Institute for National Unification, Seoul); Smruti S. Pattanaik (Institute for Defence Studies and Analyses IDSA, New Delhi); Ali Riaz (Illinois State University, Normal); Gunter Schubert (University of Tübingen); Kishor Sharma (Charles Darwin University, Sydney); Chandra de Silva (Independent Consultant, Barboursville); Aim Sinpeng (University of Sydney); Mada Sukmajati (Universitas Gadjah Mada, Yogyakarta); Mark Turner (University of New South Wales UNSW, Canberra); Tuong Vu (University of Oregon, Eugene); Meredith Weiss (SUNY State University of New York at Albany); Patrick Ziegenhain (University of Malaya, Kuala Lumpur)

BTI Team

Project Management

Sabine Donner

Senior Expert

+49 52 41 81 81 501

sabine.donner@bertelsmann-stiftung.de

Hauke Hartmann

Senior Expert

+49 52 41 81 81 389

hauke.hartmann@bertelsmann-stiftung.de

Robert Schwarz

Project Manager

+49 52 41 81 81 402

robert.schwarz@bertelsmann-stiftung.de

Office Management

Sabine Steinkamp

+49 52 41 81 81 507

sabine.steinkamp@bertelsmann-stiftung.de

Bertelsmann Stiftung

Shaping Change: Strategies of

Development and Transformation

Carl-Bertelsmann-Straße 256

D-33311 Gütersloh

www.bti-project.org