



Regional Report Latin America and the Caribbean

**Paradigms Lost.**  
**New opportunities for transformation?**

by Peter Thiery

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# Regional Report

## Latin America and the Caribbean

### Paradigms Lost.

### New opportunities for transformation?

by Peter Thiery\*

Overview of the transformation processes in Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Trinidad and Tobago, Uruguay and Venezuela



This regional report analyzes the results of the Bertelsmann Stiftung's Transformation Index BTI 2022 in the review period from February 1, 2019, to January 31, 2021. Further information can be found at [www.bti-project.org](http://www.bti-project.org).

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## Introduction

During the period under review, transformation in Latin America and the Caribbean was marked by two developments that have shaken the region and will have a lasting impact on it for years to come. The COVID-19 pandemic, which has catalyzed growing public discontent with unresponsive governments that are clinging to their sclerotic policies, and massive protests, many of which broke out in 2019. The growing incompatibility of entrenched policies and the interests of large segments of the population – a fact noted in previous BTI regional reports – has resulted in widespread doubts regarding the promises of two very different economic and social policy models: the “neoliberalist” paradigm embodied by Chile and the “counter-paradigm” of “Bolivarianism” seen in Venezuela. Both “paradigms” seem to have exhausted themselves, at least in their current form. Accompanied for a long time by a kind of “silent loyalty” or silent acquiescence and interrupted only sporadically by isolated protests, both paradigms have now faced open and determined rejection. This has culminated in the turmoil witnessed in Chile in 2019 and further waves of protest in countries such as Ecuador, Colombia and Panama.

The fact that the October 2019 revolt in Chile erupted over a seemingly marginal issue – a hike in metro fares in Greater Santiago equivalent to some €0.03 – sheds a telling light on the depth of divisions found in (almost) all Latin American societies. While conflicts elsewhere in the region have been less severe, few countries have been spared of violence. In addition, persistent or growing polarization, as that observed in Bolivia and Brazil, and volatile election results, as those in El Salvador and Peru, point to a similar state of affairs. While the pandemic is not the root cause pushing these paradigms to their limits, the crisis has highlighted these limits more starkly than anything previous. Given the region’s social imbalances, neither paradigm offers any hope of delivering viable solutions to either immediate or long-term issues, that is, responding effectively to the coronavirus crisis and effectively steering their societies (over the medium and long term) toward socially and ecologically sustainable as well as genuinely democratic development. Nearly all countries have fallen short of their development potential, causing the region to fall further behind in global comparison. Immutable power structures, even within reasonably stable democracies, account for this fact. In addition, ineffectual structures of political association and communication, and party systems in particular (some of which appear to be hyperstable while others are extremely volatile), have precluded any satisfactory manifestation of democratic responsiveness.

Brought into intense focus by the magnifying glass of the coronavirus pandemic, Latin America’s oft-cited economic structural weaknesses – extreme inequality, weak economic productivity and fractured social systems – have once again been exposed. Latin America and the Caribbean are considered to be the hardest hit region in terms of the pandemic’s direct effect on the population and its economic impact. By mid-2021, the region, which comprises 8.4% of the world’s population, recorded more than 1.26 million COVID-19 deaths, accounting for 32% of all cases worldwide. According to the International Monetary Fund (IMF), the average decline in growth for the region in 2020 was at 7%, marking the biggest slump among all regions. The United Nations Economic Commission for Latin America and the Caribbean (ECLAC) reports a decline in gross domestic product (GDP per capita) of 8.5% for the region. Even though a rapid (overall) economic recovery is forecast for most countries, fundamental changes are on the horizon for the region.

The COVID-19 pandemic has left the region in a state of shock with lasting consequences for all aspects of transformation. Although the region’s democracies, overall, have proved surprisingly resilient to feared setbacks, some countries have rigidly imposed states of emergency or continued with questionable practices (such as ruling by decree without oversight). Although the scores for the BTI 2022 register only a slight decline in the quality of democracy, they nonetheless mark a historic low in this regard. We see a similar trend with economic transformation, where the lowest scores since the BTI 2006 have

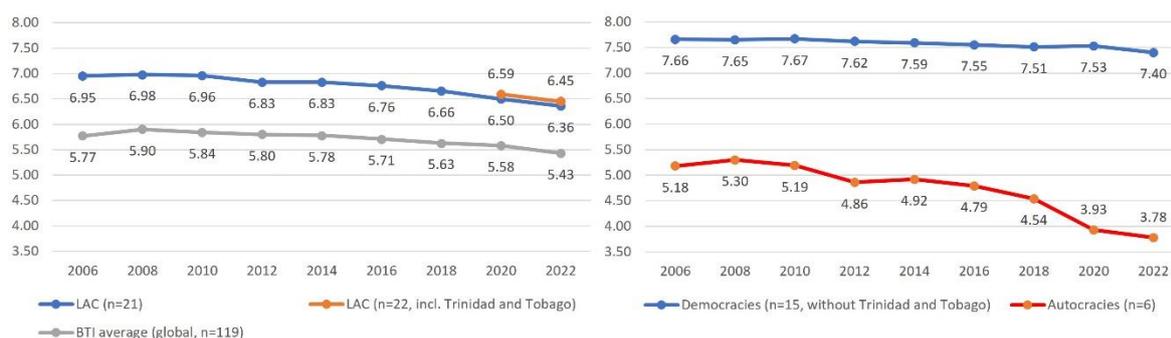
been recorded. The slump in growth registered for 2020 accounts only superficially for this low point. In fact, we see a continuous decline underway since the BTI 2010 that has been driven by the steadily weakening performance of the region's economies. However, this downturn must be seen in the context of structural issues insofar as losses in growth, high levels of inequality and a lack of social mobility opportunities reinforce each other. Only a few countries (e.g., Paraguay) emerged relatively unscathed from the first year of the pandemic, while others, most notably Panama, Peru and (once again) Venezuela, numbered among the biggest losers.

Recent events and developments have also created new challenges for governance. These can be divided into roughly two – ultimately interlinked – sets of problems. First, the diminishing viability of established paradigms means that problem-solving strategies are no longer sufficiently integrated into a conceptual design of governance. Again, Chile and Colombia stand out in this regard where governments were so driven by immediate developments and pressures that they failed to take a more strategic approach to planning. But the lack of coherent governance also applies to Brazil, Panama or Peru. The aforementioned socioeconomic developments and the attendant demands of increasingly larger segments of the population are jutting up against the routinized leadership of elites, who are increasingly less responsive to the demos. Second, the challenges posed by the pandemic have exacerbated these problems. Hardly any government in the region has demonstrated consistently sound crisis management throughout this period, though few reacted as poorly as the Brazilian government under President Jair Bolsonaro or the Nicaraguan regime under President Daniel Ortega. Thus, while several governments, such as those under Presidents Alberto Fernández in Argentina or Sebastián Piñera in Chile, reacted promptly and prudently during the first phase of the pandemic, this momentum was soon lost as the severe effects of prolonged lockdowns began to take shape.

## Political transformation

The political turmoil observed in the majority of Latin American countries is also reflected in the continuing decline in the quality of democracy, though the region is in step with the general trend seen among all BTI countries (see Fig. 1). A positive aspect to highlight is that no further authoritarian regression was recorded for this edition, unlike the BTI 2018 (Nicaragua) and BTI 2020 (Guatemala and Honduras). At the same time, however, there have been no transitions (back) to democracy during the BTI 2022 assessment period; the election victory of opposition candidate Xiomara Castro in Honduras came afterwards in November 2021. Instead, the region's six autocratic regimes have either continued with business as usual or, as evinced by Nicaragua in particular, hardened. Under an increasingly dictatorial Ortega regime, Nicaragua, along with Haiti, has joined the group of hard-line autocracies, which includes Cuba and Venezuela, whose authoritarian regimes have only further consolidated. Haiti's and Nicaragua's downhill slide accounts in part for the region's downward trend. While the region's 16 democracies proved surprisingly resilient to the effects of the coronavirus crisis, preexisting or emergent governance practices also contributed to the overall negative trend.

**Fig. 1: Political Transformation in Latin America and the Caribbean and worldwide (BTI 2006-BTI 2022)**



In terms of political transformation dynamics in Latin America and the Caribbean, Chile is emblematic of a country in which the dashed hopes of democratization are leading – or at least could lead – to a fundamental shift in direction. Chile was once lauded as a showcase example of a country which, despite the difficult circumstances it faced at the end of the Pinochet dictatorship in 1990, came close to consolidating its democracy within a mere 10 years. But things grew increasingly difficult as the actor constellation of 1990 – the anti-Pinochet coalition manifest in Concertación versus status-quo-oriented right-wing forces – appears to have frozen in time. As successful as both sides' parties were in depolarizing social conflicts through a “culture of agreements” (i.e., consensus-based politics) in the 1990s, they have nonetheless ended up alienating citizens and civil society alike.

Over the last decade, social movements in the country have begun to articulate their discontent, demonstrating the extent to which society had liberated itself from the parties' leadership. Chile's party-political elites have failed to respond to the widespread alienation felt across the country, thus fueling either the growth of political apathy or pent-up frustration among large segments of the population. In October 2019, this mounting frustration exploded into massive social protests that reinforced the political divide between “the people” and “the (old) elites,” exposing the country's crisis of representation. The steady erosion of Chile's party system chronicled by the BTI (BTI 2010: 9; BTI 2022: 6), which has detailed this divide and the weakening mechanisms of mediation between society and the political system, has only advanced since the Constituent Assembly elections held in May 2021.

The significance of these events lies less in the fact that Chilean democracy has suffered a (de facto marginal) loss in quality. In the BTI 2022, apart from the indicator for party systems, the country lost points on only two indicators as a direct result of 2019's protests and violence (on both sides): civil rights (3.4) and freedom of association and assembly (2.3). This relatively positive assessment is due in part to the fact that, even with the havoc wreaked by the pandemic, most of the country's relevant actors complied with the procedures provided for in their country's constitution. And they did so even though this could result in an entirely new set of rules and players. But it is also due to the fact that the BTI had already registered negative tendencies in previous years (such as in the party system) that pointed to a growing instability in Chilean democracy.

The real significance of these events lies in their capacity to influence developments elsewhere. Although the region's fading transformation model still has enough substance to use its institutional strengths in the transition to a new economic and political order in Chile, it must contend with the reality of having been overtaken by history in the face of social upheaval. For democracies across the rest of Latin America, excepting Costa Rica, Uruguay, Trinidad and Tobago and possibly Jamaica, this signals a far more worrisome development, because institutions in these countries feature, on the whole, either no or only a limited capacity to channel such divisive conflicts. Developments in Peru before and after the election of outsider Pedro Castillo as president in June 2021 point to fierce confrontations ahead – also in other countries – over basic questions regarding the type of political, economic and social order people want to live in.

In an effort to make sense of these diverging cases, Table 1 groups the region's countries according to specific dynamics observed during the review period. There are: (1) seven countries in which, like Chile, governments faced widespread protests that were accompanied in part by massive violence and which led to policy changes; (2) four countries featuring pronounced political polarization and in which populist governments are (further) dismantling democracy; (3) five autocracies that suppress protests with more or less brutal methods; and (4) six countries which, despite the pandemic, experienced relative stability. It's worth noting that after the period under review, Guatemala, Paraguay and - downright iconic - Cuba were rocked by massive protests involving violence and are thus gravitating toward the first group.

**Tab. 1: Dynamics of political transformation 2019-2021**

	South America	Central America/Mexico	Caribbean
Political crises (massive protests, use of violence)	Bolivia Chile Colombia Ecuador Peru	Panama	Haiti
Polarized confrontation	Argentina Brazil	El Salvador Mexico	
Authoritarian stagnation/regression	Venezuela	Guatemala Honduras Nicaragua	Cuba
(Relative) stability	Paraguay Uruguay	Costa Rica	Dominican Republic Jamaica Trinidad and Tobago

Colombia also saw a broad protest movement emerge rather surprisingly during the review period. Directed ostensibly at the policies of the government under President Iván Duque, like the Chilean protests, these demonstrations essentially signaled a rejection of the country's development model. Over and over again, the protests resulted in militant clashes, spiraling violence and, significantly, episodes of massive state repression. To be sure, Colombia has suffered plenty of violence in the context of (anti-) guerrilla warfare over the past few decades. However, the country has not seen this kind of violence pitting the state against protesting citizens and vice versa for nearly three decades. The massive anti-government protests witnessed in 2019 were rooted in what can best be described as a broad sense of disquietude regarding various unwelcome developments that include socioeconomic disparities, corruption, the violence waged by security forces, and the failure to implement the decisions reached in the peace agreement with the FARC guerrilla movement. It's no coincidence that demonstrators marched in the streets holding flags of Chile and Ecuador while carrying banners reading "South America woke up." The protests continued through 2020 and into 2021, with the protests in April 2021 forcing the government to roll back its tax reform. This has all taken place amid a perfect storm involving the coronavirus crisis, escalating violence against civil society groups in areas once controlled by guerrilla forces, and the regrouping of individual FARC factions who feel betrayed by the government. Democracy in Colombia thus faces a serious stress test, albeit with a much less stable institutional framework than that seen in Chile.

Ecuador, Panama and Peru each contend with a similar – though less foreboding and violent – situation. In 2019, Ecuador saw widespread protests, overshadowed by deaths at the hands of the police force, that forced then-President Lenín Moreno to roll back a cut in gasoline subsidies that were included in the country's IMF agreement. These developments, and the increasingly tense atmosphere fueled by former President Rafael Correa during the 2021 election campaign, revived polarization dynamics in the country that had been on the decline since 2017. As a result, Ecuador's new, right-wing president, Guillermo Lasso, now faces an adversarial left-wing parliament. In Peru, ongoing conflicts between the executive branch and Congress led to the ouster of President Martín Vizcarra, which was followed by protests that were met with violence, the forced resignation of an interim government, and then the appointment of another government under Francisco Sagasti. And all of this took place in the midst of the pandemic. The farcical nature of Peruvian politics, which is rooted in both institutional and systemic issues (Thiery 2021), finally culminated in the 2021 presidential runoff election, in which only the extreme

political poles of either the left-wing populist Pedro Castillo or right-wing conservative Keiko Fujimori could be elected. Peru thus also faces an uncertain future with regard to its political and economic arrangements. Panama experienced comparatively less violent, but unusually frequent, civil protests under the government of President Laurentino Cortizo, who was elected in 2019. In this case, it is primarily the frustration of youths, who see few future prospects in a system characterized by horrendous corruption and inequalities, that has led some to adopt anti-system attitudes. The protests in 2019 put a stop to the executive branch's efforts to reform the constitution. In 2020, additional groups joined the demonstrations to protest the government's pandemic policy and the instances of corruption that had been made public in the process. At the end of 2020, President Cortizo called for a national dialogue to create a "Bicentennial Pact" designed to ensure a "more just" Panama.

Escalating violence and the disconnect between revolving-door governments and their publics are the common denominator between Bolivia and Haiti, and the before-mentioned countries. Bolivia, which was already deeply divided between those who supported and those who opposed Ex-President Evo Morales and his MAS party and thus has characteristics associated with the second group (extreme polarization), underwent a turbulent period after the 2019 presidential elections, which ended with Morales' forced resignation when the military refused to support him. Analysts disagree as to whether this constituted a coup or a popular uprising of sorts. In any case, political clashes continued to wreak havoc during Jeanin Áñez's right-wing interim government, which was also overwhelmed by the pandemic. New elections in November 2020, which had been postponed twice because of the pandemic, ushered the MAS back into power with a clear victory for Luis Arce, bringing an end to the country's institutional crisis – for the time being. But Bolivia continues to struggle with a high degree of political polarization that is also taking its toll on the country's already frail judiciary.

The situation in Haiti, which the BTI had already in previous editions classified as an autocratic or failing state, deteriorated dramatically during this review period. President Jovenel Moïse, who came into office in 2017 and was never accepted by the population as a legitimate head of state, was also burdened from the outset of his presidency with allegations of corruption in connection with the Venezuelan-fed PetroCaribe funds. Moïse's failure to hold the scheduled parliamentary and local elections in 2019, which left the country without a functioning parliament as of January 2020, put wind in the sails of the protests against him. Given that the judiciary was for the most part rendered ineffectual, Moïse was able to rule by decree without oversight. At the same time, the country was gripped by escalating civil and political violence marked by waves of kidnappings, arbitrary killings and massacres in the capital's most densely populated slums. These incidents only exacerbated the political crisis, eliciting repeated calls for Moïse to step down. Ultimately, the tense situation resulted in Moïse's assassination on July 7, 2021 (after the review period) under conditions that remain unclear. Presidential and parliamentary elections originally scheduled for November 2021 have been postponed.

The countries in the second group ("polarized confrontation") are largely responsible for the continued decline in scores observed among the region's democracies: Argentina (-0.45; once again a defective democracy), Brazil (-0.35), El Salvador (-0.50), and Mexico (-0.10; now a highly defective democracy). In Argentina, the Peronists returned to power in 2019 after four years of Mauricio Macri's right-wing government, amid another deep economic and financial crisis with galloping inflation and exploding public debt. So-called vice-presidentialism has become characteristic of government in the country. In a shrewd move, controversial former President Cristina Fernández de Kirchner (CFK) renounced a possible presidential candidacy against incumbent Macri, letting her colleague Alberto Fernández – a moderate – run as the Peronist candidate with herself as the vice-presidential candidate. Vice presidents normally play only a marginal role in government. However, CFK has leveraged her position – as vice president she is ex officio also president of the Senate and has a well-organized following – to assert her agenda, also against President Fernández. All of this has taken its toll, particularly on the rule of law and the stability of democratic institutions. The kirchnerismo's relentless attacks on the "politicized"

judiciary, which is accused of waging “lawfare” against CFK and Peronist functionaries, have further undermined the rule of law in Argentina.

**Tab. 2: State of political transformation**

consolidating democracies Score 10 to 8	defective democracies Score < 8 to 6	highly defective democracies Score < 6	moderate autocracies Score ≥ 4	hard-line autocracies Score < 4
Uruguay	Argentina ▼	Mexico ▼	Honduras	Haiti ● ▼
Chile	Bolivia		Guatemala	Nicaragua ▼
Costa Rica	Brazil			Cuba
Trinidad and Tobago	Ecuador			Venezuela
Jamaica	Dominican Republic			
	Panama			
	El Salvador			
	Paraguay			
	Peru			
	Colombia			

The table follows the BTI 2022 index scores. Countries are ranked according to their system categorization and respective score in political transformation status assessment. Arrows mark a change of category compared with the BTI 2020, dots mark failing states.

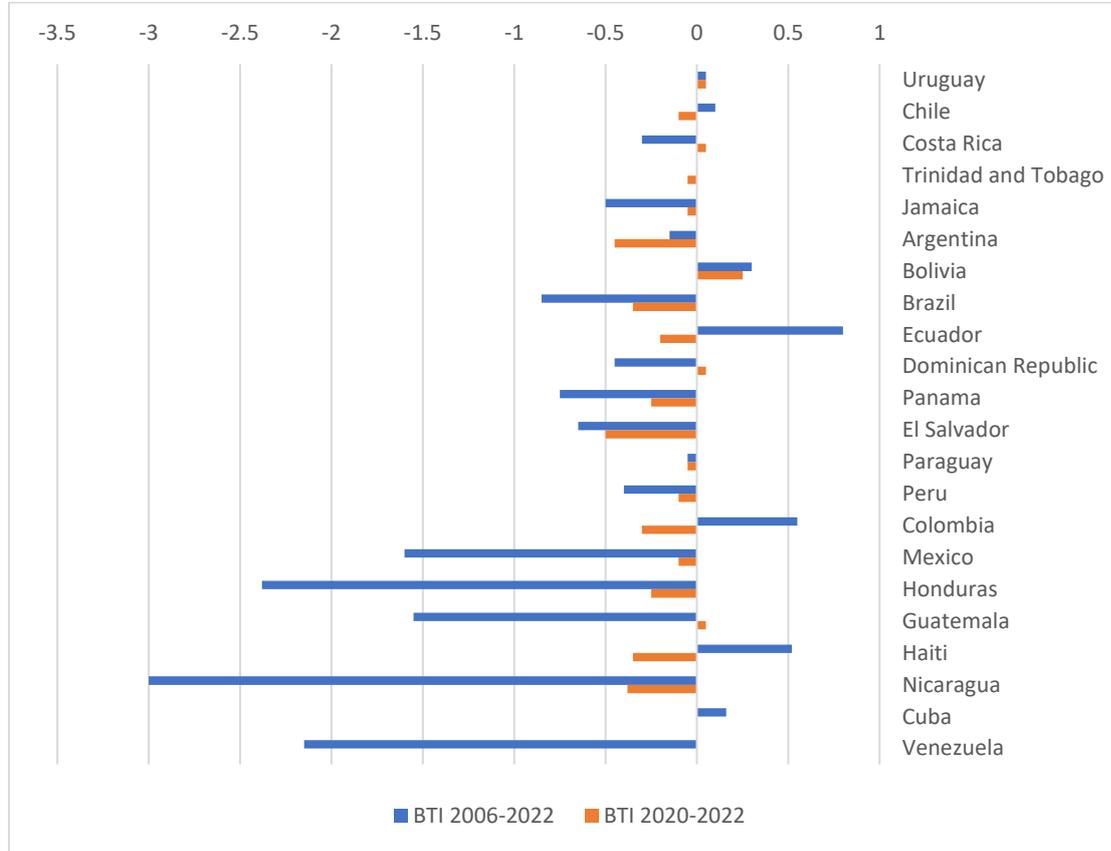
Under populist President Bolsonaro, Brazilian democracy has been subject to further erosion and severe political polarization in which hate speech, discrimination, human rights abuses and attacks on freedom of the press have become commonplace. And while the judiciary has become the object of verbal attacks on the part of Bolsonaro and his supporters – who have called to have the Congress and Supreme Court shut down – it has so far proved itself resilient to these assaults. In several cases, the Supreme Court has declared government decrees and various measures unconstitutional and thus reversed them. Nonetheless, criticisms of the judiciary are well-founded, as demonstrated by the overturned convictions of former President “Lula” da Silva, which exposed his sentencing (and the fact that right-wing politicians had been spared) as having been subject to partisanship and politicization. Continued polarization also offers little hope of a strengthened judiciary any time soon.

Democratic trends in El Salvador are similarly dispiriting following the election in 2019 of President Nayib Bukele, who responds to critical media and checks and balances with autocratic rhetoric and measures. In the runup to the parliamentary elections, which were postponed to February 2021, many of his actions were of a more “symbolic” nature (e.g., bringing military officers with him to address a parliament that had denied a line of credit for military equipment). However, after his party won a two-thirds majority in the election, he began taking steps with actual impact, dismissing on May 1, 2021, the attorney general as well as magistrates in the Constitutional Chamber of the Supreme Court. In similar ways, the third “strongman” in the group with Bolsonaro and Bukele, Mexican President Andrés Manuel López Obrador, is responsible for his country’s continued downturn to its current status as a highly defective democracy. Although the score difference relative to the BTI 2020 is marginal, this decline is compounded by a steady loss of democratic quality (see Fig. 2) that runs parallel to the country’s ineffectual efforts, since 2006, to battle the drug cartels that have infected nearly all areas of democracy.

The countries in this group of strongly regressing democracies thus include the region’s three heavyweights Argentina, Brazil and Mexico, while the “islands of tranquility” in this overall sea of political turmoil include a number of mostly smaller countries that have a longer democratic tradition to draw upon (Costa Rica, Jamaica, Trinidad and Tobago and Uruguay). Although the Dominican Republic and Paraguay also remained relatively stable during the review period, their battles with high levels of inequality and corruption suggest a greater risk of instability. The combination of strong polarization dynamics and deep divisions between society and the state raises doubts as to whether the resilience of Latin American democracies attested to in earlier BTI editions can be sustained. Although the declining

regional score for democracy that has been underway since the BTI 2006 is largely attributable to autocratic regressions (see Fig. 2), the defective democracies in particular have repeatedly shown themselves to be susceptible to oscillations, while commitment to democratic institutions in the democracies has since weakened significantly (-0.87).

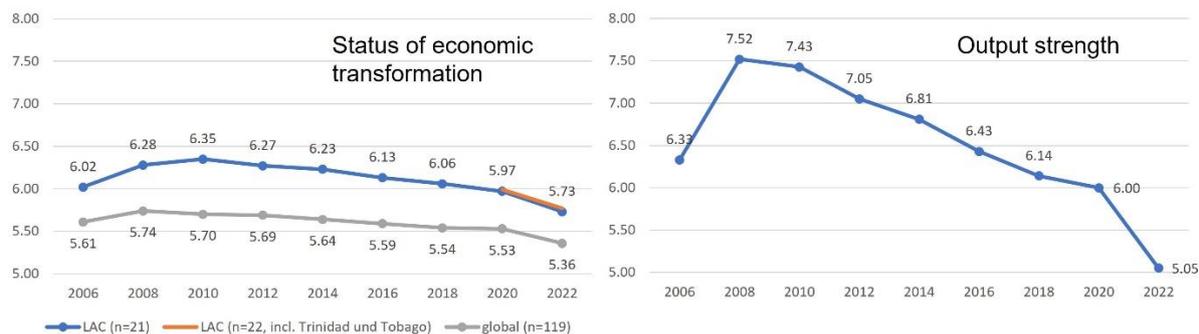
**Fig. 2: Political transformation: score changes 2006-2022 and 2020-2022**



### Economic transformation

If the effects of the pandemic on political transformation in Latin America were rather indirect, they were by contrast quite direct for the region’s economic and social development. A sharp decline in growth, rising poverty rates and overstretched social services, combined with growing discontent among broad sections of the population, have together led the region to the crossroads alluded to above. As noted in previous BTI editions, most of the region’s countries are largely market-oriented and have reasonably sound economic systems. However, many have failed to engage in fundamental economic policies that could have helped them emerge from a low-productivity trap – for instance, by placing a strong focus on improving education. In some countries (especially Chile, Colombia, Peru), political and economic elites have relied too much on the course set by the “first-generation reforms” implemented in the 1980s and 1990s. In others, economic policies have been incoherent at best (Argentina, Ecuador). In a category of their own are Cuba’s no more than hesitant moves toward liberalizing its statist economy, as well as the miserable results of Venezuela’s “socialism of the 21st century.”

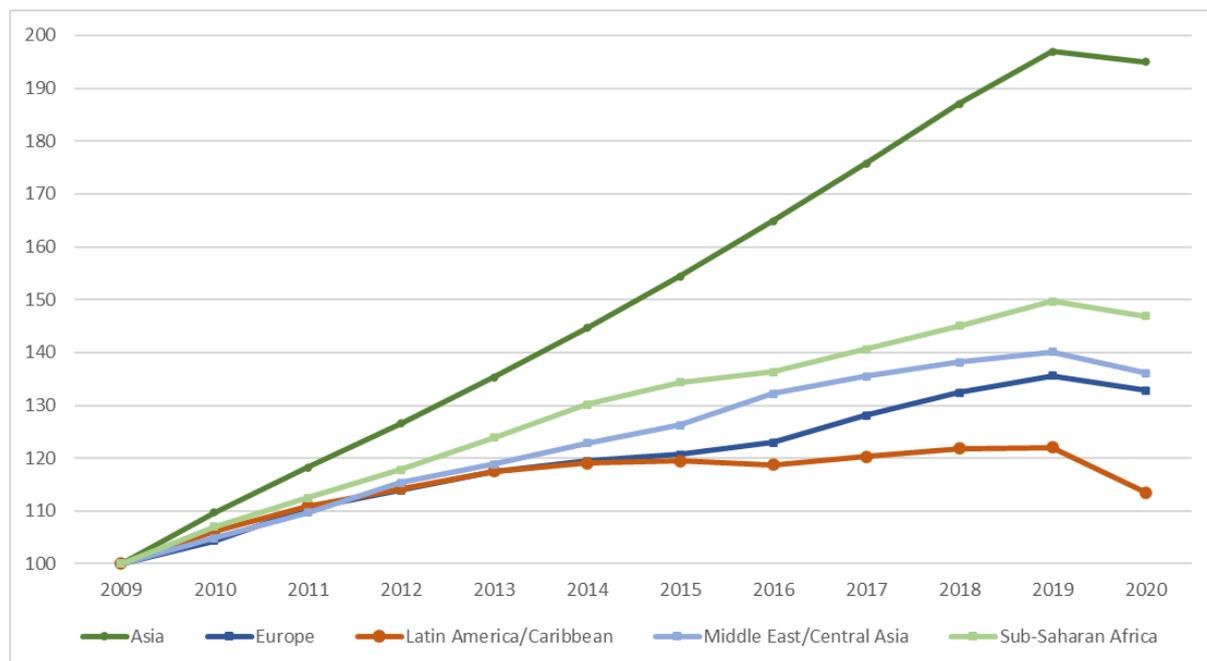
**Fig. 3: Economic transformation and performance trends (BTI 2006 – BTI 2022)**



In all these countries, the current crisis is now challenging the established structures. They have facilitated and further entrenched excessive inequality, thus curtailing upward mobility among broad segments of the population and diminishing opportunities for development within the region as a whole. As yet, it remains a matter of speculation as to whether the crisis will ultimately be used as an opportunity for a change in direction. For their part, the democracies currently appear to be too enmeshed in political trench warfare to do so. In fact, Latin America has fallen to an all-time BTI low in terms of progress toward a socially and environmentally sustainable market economy (Fig. 3, left). Among the BTI regions, it still ranks second behind East-Central and Southeast Europe, and just ahead of Asia and Oceania. Yet it has gradually moved closer to the global BTI average. To a large extent, this development is due to the significant decline in economic performance in the region (Fig. 3, right). Before 2010, many of these economies experienced a significant increase in output, driven by a boom in natural resource revenues. However, average performance on this indicator has steadily weakened over the last decade.

The popular discontent described in the analysis of political transformation becomes understandable when viewed through this lens. As economic performance has declined in individual countries, citizens' own fears of losing social status, or even of being pushed into poverty, have risen correspondingly. IMF economic growth data show Latin America gradually falling behind other emerging and developing areas (see Fig. 4), both over the course of the last 10 years and during the economic travails of 2020.

**Fig. 4: GDP growth in emerging and developing regions, 2010 – 2020**



Authors' calculations (2009 = 100); data source: IMF 2021

To be sure, the spectrum of performance within Latin America is quite wide, as will be seen below. But overall – in part due to the emergence of internal dissent (such as broad social protests) – the region’s development model, based on a passive integration into the world economy, has largely been exhausted. Though the circumstances differ, this applies to Cuba as well. There, Miguel Díaz-Canel’s government has initiated far-reaching reforms, although observers indicate that they may be coming too late to prevent greater upheavals in the future.

Therefore, as in the BTI 2020, the situation in most countries remains essentially unchanged. From Mexico to Brazil, the region’s countries find themselves caught in the so-called middle income trap, a position characterized by low productivity, low investment levels, slow growth in the secondary sector, limited industrial diversification and unfavorable labor-market conditions, among other factors. In many countries, a very large informal sector has served as a drag on further development, while at the same time being a consequence of failed modernization policies. By and large, nearly all countries in the region rely on resource-driven growth predicated on access to cheap labor and capital. Most have taken only isolated steps toward a growth model based on high levels of productivity and innovation.

This conceptual stagnation is again reflected in the countries’ middle-of-the-pack rankings in the BTI (see Table 3), with most of the countries falling into the category of limited economic transformation. However, even the decline in economic performance outlined above has not translated into fundamental shifts in status. Only Peru has fallen back from an advanced to a limited level of development with regard to its economic transformation (tumbling from an aggregate score of 7.11 to 6.68). Aside from Peru, Argentina (-0.68) and Panama (-0.46) saw the most significant declines. While Panama felt the effects of the pandemic particularly keenly due to its extensive international integration and the role of the Panama Canal in international shipping, Argentina saw its domestic economic impact amplified by an ongoing state of crisis. The country has been consistently teetering on the brink of national bankruptcy for some time. With little ability to borrow on international capital markets, the government has been deadlocked due to internal dissent over economic and fiscal policy. It thus stumbled into the 2021 election year with a further decline in performance (having fallen from 9 to 4 points since the BTI 2008). As in Peru, the country’s level of socioeconomic development also declined. Only Paraguay and Guatemala came through the crisis relatively unscathed, albeit at a limited or very limited level of economic transformation.

**Tab. 3: State of economic transformation**

highly advanced Score 10 to 8	advanced Score < 8 to 7	limited Score < 7 to 5	very limited Score < 5 to 3	rudimentary Score < 3
Chile	Costa Rica	Peru ▼	Guatemala	Haiti
Uruguay		Brazil	Nicaragua	Venezuela
		Colombia	Cuba	
		Trinidad and Tobago		
		Panama		
		El Salvador		
		Jamaica		
		Mexico		
		Paraguay		
		Dominican Republic		
		Argentina		
		Ecuador		
		Bolivia		
		Honduras		

The table follows the BTI 2022 index scores. Countries are ranked according to their respective score in economic transformation status assessment. Arrows mark a change of category compared with the BTI 2020.

The long-term trend since the BTI 2008– the previous peak in the average regional score – has been one of decline over the past decade, exacerbated further by the effects of the pandemic. Among the market-based economies, Argentina is among those showing the biggest declines from this perspective too, joined by Mexico (both -1.07 points since the BTI 2008) and Brazil (-1.25). Only Venezuela (-2.43) and Cuba (-1.46) have fared worse, while Nicaragua under Daniel Ortega (-1.04) and Haiti (-0.93) have also shown worrying downward tendencies, particularly in recent years.

As previously indicated, trends in GDP growth also vary considerably within the region, but fit largely into this picture (see Table 4). Three points are to be emphasized here: 1) Four of the five countries with the most dynamic economies through 2019 (index value >130: Dominican Republic, Panama, Peru, Bolivia) suffered 2020's sharpest declines; however, they are considered candidates for rapid recovery. Paraguay, with its agricultural export-oriented economic structure, is more dependent than the others on climatic conditions, which were very favorable in 2020. 2) Numerous countries (names in italics in Table 4) have shown low or even slightly declining growth rates over the years (2019: <125). 3) Three countries (Mexico, Ecuador, Brazil) have fallen back almost to their 2009 levels, and five countries have slipped even further. This latter group includes Haiti (back to 2008 levels), Argentina (2005), Jamaica (pre-2000), Trinidad and Tobago (2004), and Venezuela (?).

**Tab. 4: Cumulative growth (GDP per capita) 2009-2020**

	2009	2011	2013	2015	2017	2019	2020
Dominican Rep.	100	109	115	128	140	154	142
Paraguay	100	113	118	125	133	133	130
Panama	100	114	129	139	148	153	124
Bolivia	100	106	115	124	130	135	123
Costa Rica	100	107	112	118	125	128	121
Uruguay	100	113	121	125	128	128	120
Peru	100	113	125	129	134	137	120
Colombia	100	110	118	124	124	128	118
Nicaragua	100	108	118	126	134	122	118
Guatemala	100	103	107	112	115	119	116
Chile	100	110	118	121	121	123	115
El Salvador	100	105	110	113	117	122	112
Cuba	100	105	111	117	119	122	111
Honduras	100	104	107	110	116	120	107
Mexico	100	106	108	112	115	115	104
Ecuador	100	108	117	117	115	112	102
Brazil	100	110	113	108	104	106	101
Haiti	100	99	100	102	103	101	96
Argentina	100	115	114	111	110	103	92
Jamaica	100	99	98	98	100	102	91
Trinidad and Tobago	100	102	104	103	94	92	85
Venezuela	100	100	103	92	66	39	28

Author's calculation (2009 = 100) using data from the World Bank's World Development Indicators 2021.

The data for Cuba (2020) and Venezuela (2015 – 2020) have been supplemented by ECLAC data due to a lack of WDI data, and at least show the trend reliably. IMF data on real GDP growth (i.e., not per capita) for Venezuela seem to confirm the trend there (with an index value of just 25 in 2020). The difference between these figures and the per capita data is due to the massive exodus of Venezuelans in recent years.

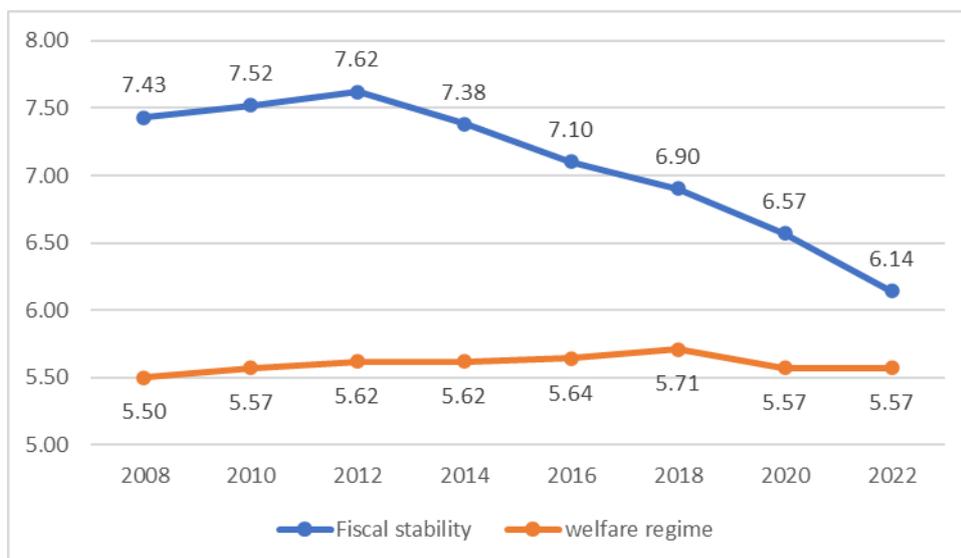
These developments have had an appreciable impact on the level of socioeconomic development. Although absolute figures in this criterion are less dramatic, they are nonetheless meaningful: From a high of 5.14 in the BTI 2010, the average regional score has today fallen to 4.57. Here too, it is significant

that the region has dropped from second place (behind East-Central and Southeast Europe, which had an average regional score of 7.56 in the BTI 2010) to fourth place in both the 2020 and 2022 editions of the BTI, behind East-Central and Southeast Europe (7.25), Post-Soviet Eurasia (4.85), and Asia and Oceania (4.71). Generally speaking, only one-third of Latin American countries have socioeconomic development scores above 5 points, a level that indicates a somewhat more substantial amount of social inclusion. One crucial factor here is the still-high level of inequality. While such imbalances are even more severe in southern Africa, for example, Latin American countries overall perform significantly worse in this area than do counterparts in similar income groups. Brazil and Colombia in particular stand out, with Gini index scores respectively of 53.4 and 51.3 (2019).

Together with low or volatile growth rates, this results in a “double trap,” with the two phenomena reinforcing each other in a vicious cycle, as a recent UNDP study has found (UNDP 2021). This consists in the fact that multifaceted patterns of inequality hamper personal development potential for much of the population – for example, via the unequal quality of education, which also lowers the overall return on investment in education. This in turn depresses the country’s overall growth potential, which entrenches inequality further. Unequal income patterns also help to concentrate power, ultimately reducing incentives for technological innovation. This translates into a lack of high-quality jobs. Low levels of growth in turn create a mismatch between labor supply and demand, while starving the state of the resources needed to enact social policy measures combating poverty and inequality. According to the UNDP, governments sometimes try to address these ills through unsustainable increases in spending, which can then contribute to economic crises that again exacerbate inequality.

Two factors (see Fig. 5) indicate a precarious situation that, particularly given the growing discontent among large sections of the population, will be difficult to overcome without embarking on a new policy course. These issues will also make it more difficult to address the serious social consequences of the pandemic. First, fiscal stability has become significantly weaker (-1.48 as a regional average), and second, welfare regimes have largely stagnated at a rather low level, despite some efforts to expand benefits. With regard to fiscal stability, Brazil, El Salvador and Nicaragua have all been particularly hard hit, losing three or more points on the 10-point scale. By contrast, with the single exception of Uruguay, there have been no improvements in the region since the BTI 2008. In Chile, often regarded as a role model in this arena, the Fiscal Responsibility Law was once the subject of high praise; however, even this has gradually been weakened, with its binding force now appearing to be under threat.

**Fig. 5: Fiscal stability and welfare regimes, 2008 – 2022**



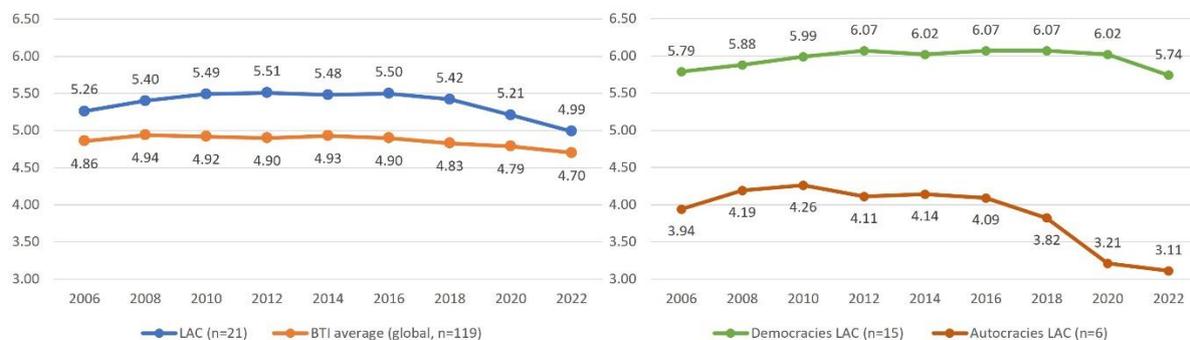
Average scores LAC (n=21, excluding Trinidad and Tobago).

The stagnating average scores across the region reveal weaknesses in national welfare regimes. The few cases of improvement have been minimal, seen mostly in countries with rather rudimentary welfare states to start with, such as Bolivia and Peru; these exceptions do little to change the overall trend. The pandemic crisis has clearly revealed the presence of immense social-system shortcomings, even in the more developed countries such as Chile. For example, even where strict lockdowns or other quarantine measures were rigorously enforced, these policies had little effect in locales where the lack of social safety nets meant the population had to leave their homes simply in order to subsist. However, in some countries, existing anti-poverty programs were able to be used as a vehicle for halfway-effective pandemic aid measures. Examples of this were seen in the Dominican Republic and Brazil, where the Bolsa Família (Family Allowance) social welfare program established under former President Lula da Silva proved to be relatively effective.

## Governance

As in the BTI 2020, governance quality in Latin America and the Caribbean again declined significantly during the BTI 2022 review period, although the region still falls into second place in an interregional comparison. As such, the region's average aggregate governance score has now further approached the global average – or perhaps more accurately, a point of mediocrity. While the region's average aggregated regional governance score hovered around 5.50 between BTI 2010 and the BTI 2016, governance quality has since declined significantly faster than the global average. In the BTI 2020, as previously in the BTI 2018, this development was driven in large part by the Central American autocracies – with Guatemala, Honduras and Nicaragua appearing as new autocracies – as well as the corrupt Maduro regime in Venezuela. In the BTI 2022, on the other hand, the downturn is more clearly attributable to the democracies, particularly Brazil, El Salvador and Argentina.

**Fig. 6: Governance (BTI 2006 – BTI 2022): Latin America and the Caribbean in global comparison**



At its core, the negative development stems from the fact that governments are finding themselves increasingly overwhelmed by the process of finding, or even simply seeking, appropriate solutions to ever more complex problems and tasks. In response, many have sought to take refuge in “business as usual” behavior, or have tried to insulate themselves from these problematic situations. In some cases, they have fallen into unilateral and increasingly authoritarian patterns of governance. The autocracies in the region are mostly rigid and unresponsive, and with the exception of Cuba, are also deeply corrupt. However, the instances of massive violent protest and polarized confrontation described above indicate that governance in the democracies too is increasingly riddled with fault lines. As a result, efforts to reach consensus on transformation goals have become more difficult. Only Chile has managed to shift from an old order to a new one with the help of consensus-building mechanisms, staying largely within the framework of established institutions. Today, in comparable cases, there is little indication that a transformation of this character is possible.

The three countries that have suffered the greatest losses with regard to aggregate governance scores each represent different constellations of social and political deadlock. Brazil under President Bolsonaro experienced this review period's most significant decline in governance scores. This is perhaps unsurprising given the country's recent history and the populism that Bolsonaro has taken to extremes. With a governance score of 4.42 – a loss of 1.15 points compared to the BTI 2020 – Brazil has now fallen behind even Cuba (4.46), and ranks just ahead of the region's five other autocracies. Under the Lula (2003 – 2010) and Rousseff (2011 – 2016) administrations, the country's governance score had gradually improved to well over 7 points by the BTI 2014. Thereafter, beginning during the economic policy turmoil and corruption scandals of Rousseff's second term, and continuing under the succeeding right-wing governments, this score fell steadily to below 6 points in the 2020 BTI. Currently, this represents a loss of 2.46 points relative to the BTI 2006 (the second-largest such decline in the region, behind only Nicaragua), and 2.84 points relative to the BTI 2014.

Following the eruption of social and political conflicts in the wake of the 2013 protest movements, polarization between left-wing and right-wing forces was increasing steadily even before Bolsonaro's arrival on the scene. This in turn made it more difficult to reach a basic consensus on democracy and the direction of economic policy. Bolsonaro has persistently deepened that division, holding steadfastly to an aggressively polarizing approach evoking the political style of former U.S. President Donald Trump. Accordingly, governance elements associated with consensus and cooperation in particular have suffered disproportionately. At the national level, this includes conflict management, civil society participation and reconciliation; however, the shortcomings have been even clearer at the international level, especially with regard to the willingness to engage in international and regional cooperation. The government's credibility has also tumbled, thanks to the government's isolationism, disastrous environmental policies and catastrophic pandemic management, among other factors.

Emerging from a different political perspective, populist-authoritarian patterns have also been evident in El Salvador since Nayib Bukele's assumption of office in 2019. Bukele based his electoral campaign on the rejection of established parties and previous governments, which he accused of corruption and abuse of office. He spread his simple electoral messages – promises to implement ambitious government infrastructure measures and strengthen anti-corruption policies, all wrapped in youthful enthusiasm – through a creative use of social media. Since taking office, he has integrated these same factors into his governing style, along with impulsiveness and a disdain for constitutional procedures. His government has consequently performed relatively poorly in the area of consensus-building. This, combined with unclear prioritization and insufficient policy coordination, has produced the decline in El Salvador's governance score (-0.91).

In Argentina (-0.58), following the polarized 2019 election campaign and the swing of the political pendulum back to the Peronists, any hopes that the political camps might reach even a basic level of agreement have proved illusory. The intransigent attitude of Vice President Fernández de Kirchner's "kirchneristas" is driving a wedge not only between Peronists and non-Peronists, but also between the various Peronist factions. In addition to weakening the government's steering capability and policy coordination, this dynamic has seriously hampered efforts to combat corruption – a battle in which the vice president, who is herself suspected of corruption, plays a singular role. The persistent lack of consensus within the government has undermined efforts to restore badly needed external confidence, especially on the part of markets and international institutions. In addition, the country's various political and social forces disagree on how to overcome democratic shortcomings, as well as on the importance of institutions and on how they (especially the judiciary) should be strengthened.

**Tab. 5: Quality of governance**

very good Score 10 to 7	good Score < 7 to 5.6	moderate Score < 5.6 to 4.3	weak Score < 4.3 to 3	failed Score < 3
Uruguay	Trinidad and Tobago	Bolivia	Honduras ▼	Haiti ▼
Chile	Dominican Republic	Argentina ▼	Guatemala	Nicaragua
Costa Rica ▲	Jamaica	Panama ▼		Venezuela
	Paraguay	Colombia ▼		
	Peru	Ecuador		
	El Salvador	Mexico		
		Cuba ▲*		
		Brazil		

The table follows the BTI 2022 index scores. Countries are ranked according to their respective score in the Governance Index. Arrows mark a change of category compared with the BTI 2020.

\* Cuba: Cuba's upgrading is largely due to the methodological change of not prescribing maximum scores for autocracies in the "steering capability" criterion for the first time. While Cuba would have been assigned to the weaker category according to the old calculation with 4.09 points (2020: 3.95), it now reaches the lower end of moderate governance with 4.46 points.

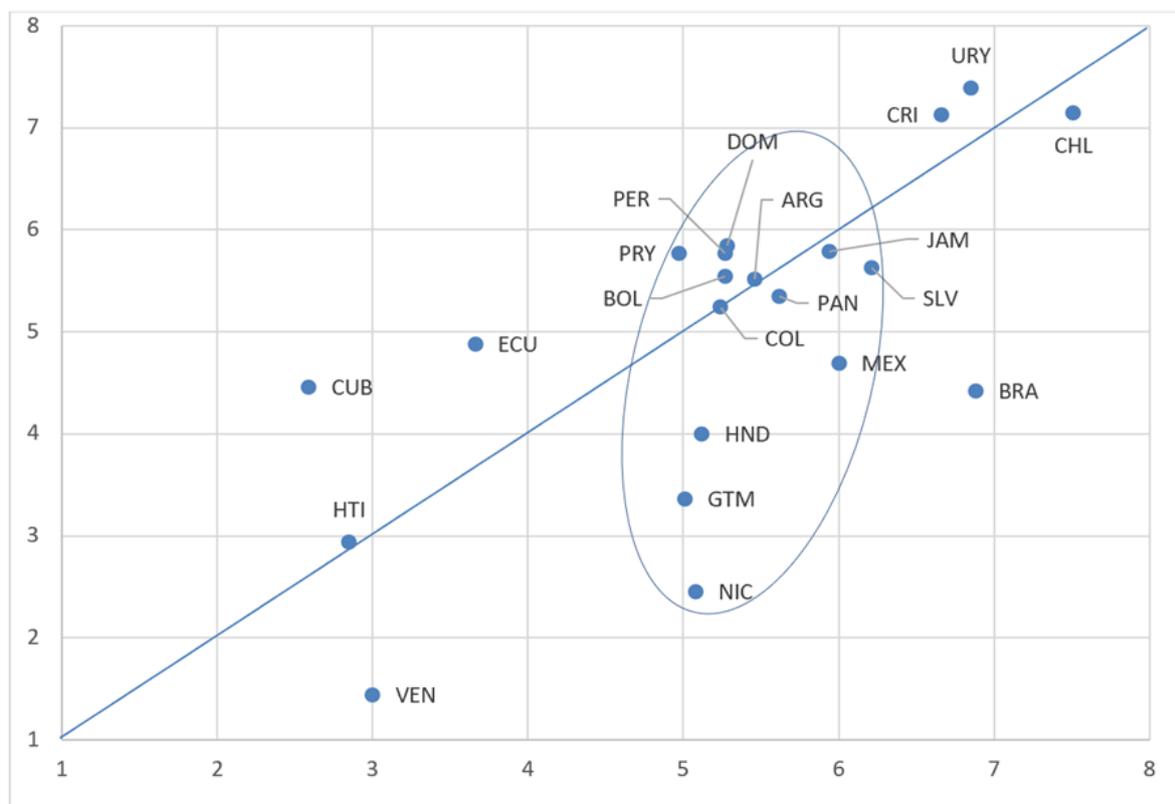
While these three countries have lost significant ground, a number of others in the region have also seen their governance scores decline (in the range of -0.47 to -0.32) since the BTI 2020, for various reasons. Along with Argentina, Panama and Colombia have been relegated to the category of moderate governance quality. Honduras is now classified as having weak governance, while Haiti falls into the "failed" category. In Colombia, Haiti and Panama, the conflicts discussed above represent the flip side of weaker governance capacity and consensus-building, while in Honduras the government's efforts to retain power had a similar effect. In Ecuador, lame duck President Lenín Moreno found it difficult to bring any steering capability or policy coordination to bear, while in Mexico, López Obrador's tendency to "govern alone," along with his less than concrete goals for his proclaimed "fourth transformation" for Mexico, have also translated into a decline in governance quality. Finally, in Nicaragua, the Ortega regime has become still more rigid and isolated, further diminishing a governance quality that had already fallen into the "failed" category.

However, the pandemic era has also featured some positive examples of governance in Latin America. Most prominent here are Uruguay (7.39; +0.06), Chile (7.15; -0.18) and Costa Rica (7.13; +0.21), which are respectively ranked at second, fourth and fifth place in the overall BTI 2022 Governance Index. In all three countries, these rankings testify to the existence of evolved structures of governance, even if future developments are somewhat uncertain in the case of Chile. In that country, the social disruptions that followed the 2019 protests diminished the Piñera government's steering capability, increasingly driving the president to make decisions for political reasons (abandoning or deferring other goals in the process). In Uruguay, the conservative Luis Lacalle Pou took the state's reins after 15 years of Frente Amplio leadership. Unlike in many other countries, this shift at the top did not result in an interruption in the quality of governance. This was achieved despite the fact that the new government was thrown into the pandemic crisis just two weeks after taking office, and consequently had to modify its policy agenda swiftly. Its relative success was helped by the presence of functioning institutional structures (an integrated health care system, unemployment insurance, social policies), as well as by the establishment of a volunteer scientific advisory group that lent credibility to health care policy and enhanced transparency vis-à-vis the opposition and the public. Finally, the parliamentary opposition proved cooperative, enabling the rapid adoption of a package of crisis-management measures with the support of all parties. In Costa Rica, President Carlos Alvarado's government also proved capable of achieving important goals, for instance by enacting long-needed reforms designed to enhance fiscal policy sustainability.

In the Dominican Republic, governance has been improving in recent years after several prior periods of fluctuation. While it was ranked 49th among 119 countries in the 2006 BTI in this area, it now ranks 29th among 137 countries, and fifth in the region. Noteworthy here is the fact that two successive governments – under President Danilo Medina and again under President Luis Abinader, who took office in August 2020 in the midst of the crisis – managed to respond effectively to the pandemic. Overall, the country is (as of the time of writing) emerging from the crisis relatively unscathed, a testament to the government’s prudent policies and ability to carry out a well-coordinated, multistage response plan that included the procurement of vaccines. That said, vaccination rates leveled off after initially remarkable progress; by mid-September 2021, about 44% of the population had received two doses of vaccine, compared with around 73% in Chile and Uruguay. Only Costa Rica lagged behind for quite some time. However, it too has closed much of the gap in terms of first vaccine doses.

Finally, Figure 7 compares governance quality scores in the BTI 2006 with those in the BTI 2022. In sum, it presents a rather sobering picture. Looking purely at the absolute scores, Uruguay, Chile and Costa Rica still stand out clearly from the rest of the region. While Uruguay and Costa Rica have improved their governance quality, Chile has seen a slight decline. Chile and possibly Costa Rica may be on the brink of more radical breaks with the past, the consequences of which will be evident only in the BTI 2024. At the other end of the scale – looking at the changes that have occurred since the BTI 2006 – paths have clearly diverged. While Venezuela has collapsed into a fully corrupt regime, Raúl Castro has ushered Cuba increasingly away from the charismatic leadership of his brother Fidel, steering the country’s governance more strongly into institutional channels. For its part, Haiti has remained largely at a standstill.

**Fig. 7: Aggregate governance scores compared: BTI 2022 and BTI 2006**



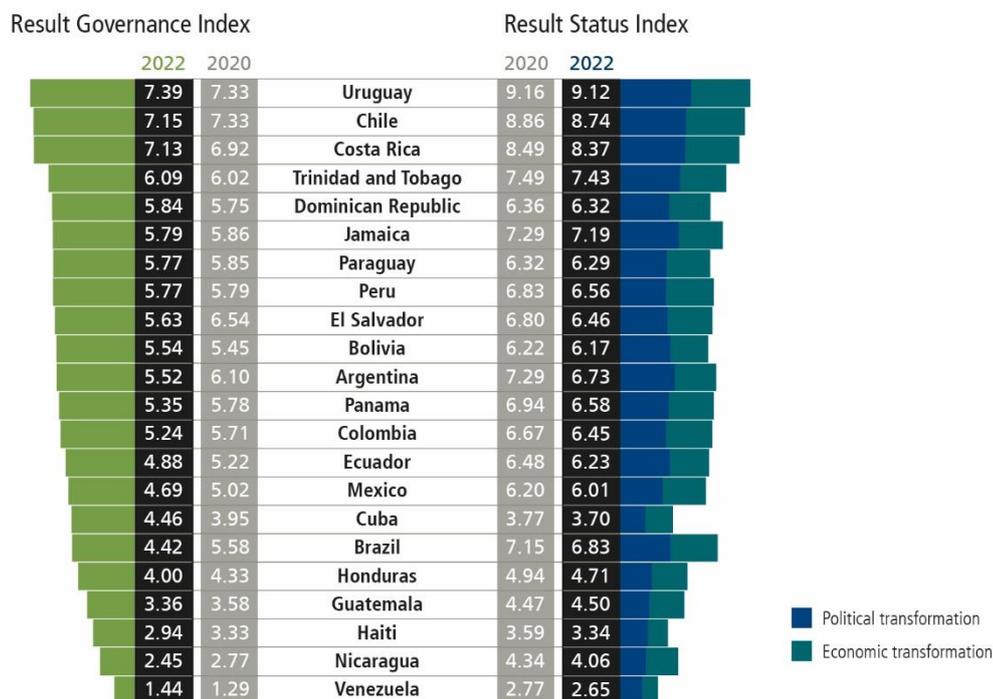
*The x-axis reflects each country’s Governance Index scores in the BTI 2006, while the y-axis indicates BTI 2022 scores. Countries below the diagonal line have seen a decline in governance quality, while those above have seen an increase in quality.*

However, the 13 countries circled in the figure are worth a closer look. Constituting the significant majority of the region’s countries, all had relatively tightly clustered governance scores in the BTI 2006,

ranging between 4.97 (Paraguay) and 6.21 (El Salvador). What was at that time an indistinguishable clump of stars has since evolved into a veritable constellation – something like a mixture between Orion and the Big Dipper, but without a real pole star. This scattering is due in part to the three Central American countries' slide into a corrupt authoritarianism, as well as the gradual erosions in Mexico's governance quality and El Salvador's descent under Bukele. On the other hand, the broader distribution is also attributable to the slight gains made by several countries which, in the past, featured only moderate governance quality, including the Dominican Republic, Paraguay and Peru. The decline among some democracies is worrisome. Brazil's negative governance developments have been explained above. Colombia, like Argentina, has fallen back to the governance level of the mid-2000s – that is, the level seen under the first Uribe government (2002 – 2006). Thus, under the Duque government, it has lost all progress made to the point of the BTI 2018. After a fall of 0.43 points in the BTI 2020, this trend continued with a further decline of 0.47 points in the current edition. This reflects the eruption of conflicts during the BTI 2022 review period, as well as delays in implementing the peace process with FARC.

## Outlook

The Latin America and Caribbean region has experienced a considerable amount of turbulence over the last two years. Political upheavals in a number of countries were followed by the immense impact of the pandemic, which accelerated some of the trends that had been underway for some time. Given these conditions, it has been difficult to discern any real progress in terms of political and economic transformation or governance.



The pandemic itself, along with the associated pandemic-management policies, certainly produced dramatic economic and social consequences. Yet initial fears of democratic regression and even collapse proved largely unrealized. The region has suffered massive deteriorations in economic performance, and government budgets have been placed under extreme stress. Yet the region's basic market-economic regulatory frameworks – to the extent these were already in place – at least did not deteriorate

further. Even the slightly weaker average governance performance must be considered in the view of the pandemic's immense challenges. Governments in most countries had to contend with inherited imbalances, for example in the health and social welfare sectors, or the high degree of informality in many economies.

However, this also points to the fact that structural deficits have become entrenched in most countries, and that many policymakers have tended to close their eyes to such problems despite repeated warnings from sources such as ECLAC. When policy changes were made in the past, they were mostly minor course corrections, implemented without serious consideration of more fundamental alternatives. The only laudable exception is Uruguay, where a strong civil society – grounded in a long democratic tradition – was able to win for itself a greater participatory role in policymaking, and was thus able to help push through more inclusive reforms as early as the 1990s. With some caveats, this also applies to Costa Rica, where the 1949 constitution created a solid political foundation, and to the comparatively prosperous Trinidad and Tobago; nevertheless, these countries have also had to contend with specific problems (too high a debt burden here, a lack of economic diversification there). Given the pent-up frustration across the region, it should come as no surprise that populations elsewhere are now demanding change after years of governmental inaction, especially considering that these popular demands have been clearly articulated for some time. However, the waves of protest described above – apart from their ugly face of excessive violence, perpetrated by some demonstrators as well as security forces – have also underscored the resilience of defective democracies insofar as they are demonstrating their ability to allow previously unrepresented interests voice their demands for greater responsiveness from the political classes. To be sure, the fact that this kind of progress has required explosions of popular protest also highlights the reality of serious deficiencies in representation. Yet this fact too could be incorporated into future learning processes.

Thus, the region is once again at a crossroads that calls for the exploration of new development paths. There is no simple blueprint for this, unlike in the 1980 and 1990s, with the neoliberal script that was considered to be without alternative at the time – an unjustified assumption, as the example of Uruguay shows. In any case, post-neoliberal arrangements are unlikely to materialize in the absence of efforts to include a broader swath of civil society and other popular voices in political, economic, social and governance debates. Crucial reforms that aim to shrink the informal sector, expand or restructure mostly fractured education and health sectors, incentivize political participation and create more representative public debate and consensus-building processes are nothing new – the reform of the legal framework regulating political parties in Peru bears testimony to this – but they represent essential milestones along this path. As frequently emphasized here, this also applies to the Achilles heel of Latin American democracies: the rule of law, and the elimination of corruption and clientelism. Conversely, so-called post-socialist arrangements are unlikely to be able to avoid a significant expansion of market competition, as Cuba's recent experiences show.

Ultimately, however, country-specific negotiation processes producing viable and sustainable solutions will be needed to prevent the creation of new inclusion problems from the outset. This will be a hard road, and established powers with interests in retaining the status quo will have to be involved or overcome. Peru's current experience illustrates this quite clearly. In short, changing a country's path requires extraordinary governance capacities which, in turn, demand a high capacity to learn along with an equally robust ability to build consensus. Whether or how quickly this is possible will depend on the constellations of political and economic forces in each country. That said, the painful experience of the pandemic represents a critical juncture, and thus also a window of opportunity for the future. The results of the BTI point to likely roadblocks as well as opportunities.

For the countries that have undergone violent political crises, the odds are comparatively favorable (whether this is despite or because of the experience of violence is a separate debate). As previously noted, the paradigmatic case in this regard is undoubtedly Chile, which has already traveled a part of

the path described here, and will have completed it by the next BTI – although the ultimate outcome remains uncertain from this distance. This opportunity is also (still) open to Colombia, Ecuador, Panama and Peru, although learning processes in these states remain in the early stages of development at best. Panama has at least set its sights in this direction with its national dialogue and the launch of its “state pact.” The Dominican Republic and Paraguay, which were assessed as stable in this edition of the BTI but nonetheless display profound societal fault lines, would be two other candidates. The former can at least build on its comparatively effective pandemic response measures. Prospects for a new path are less rosy in Bolivia, even should this be pursued. Experiencing significant conflict, the country’s high level of polarization gives it little chance of reaching a point of consensus. This is also true of the equally highly polarized countries of Argentina, Brazil and Mexico. Indeed, one might note that Argentina has already undergone many paradigm shifts – but that this has been precisely the problem.

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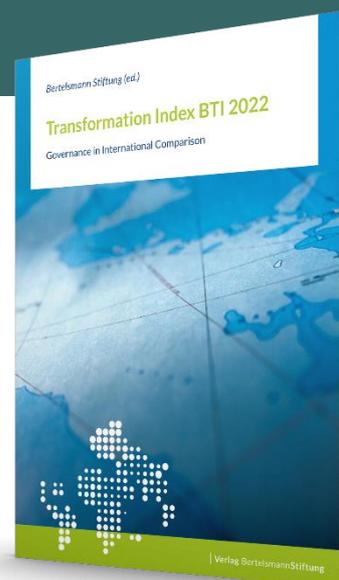
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