Transformation Index BTI 2018
Governance in International Comparison
Bertelsmann Stiftung (ed.)

Transformation Index BTI 2018

Governance in International Comparison
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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, governments 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 polarization 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 socioeconomic 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 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. Whereas 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 such 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.
The BTI 2018 at a Glance

1. Stateness
2. Political participation
3. Rule of law
4. Stability of democratic institutions
5. Political and social integration
6. Level of socio-economic development
7. Organization of the market and competition
8. Currency and price stability
9. Private property
10. Welfare regime
11. Economic performance
12. Sustainability
13. Level of difficulty
14. Steering capability
15. Resource efficiency
16. Consensus-building
17. International cooperation

Governance

Economic transformation
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.

9. Economic transformation: Economic barriers; Macrostability

Economic barriers → have been expanding 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.

12. Social safety nets: 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.

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).
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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 benefited 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.

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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

Franz-Lothar Altmann
Associate Professor, University of Bucharest; Board Member, Southeast Europe Association, Munich

Matthias Basedau
Professor, University of Hamburg; Associate Research Professor, Peace Research Institute Oslo (PRIO); GIGA Institute of African Affairs, Hamburg; BTI Regional Coordinator West and Central Africa

Christoph Beier
Vice-Chair of the Management Board, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Eschborn

Klaus Bodemer
Associate Professor, GIGA Institute of Latin American Studies, Hamburg

Martin Brusis
Associate Professor, Faculty of European Studies, Babeș-Bolyai University, Cluj-Napoca; BTI Regional Coordinator East-Central and Southeast Europe

Aurel Croissant
Professor, Institute of Political Science, Heidelberg University; BTI Regional Coordinator Asia and Oceania

Sabine Donner
Senior Expert, Bertelsmann Stiftung, Gütersloh

Bernd Eisenblätter
Former Chairman of the Management Board, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Eschborn

Stefan Emptner
Senior Director, Bertelsmann Stiftung, Gütersloh

Jörg Faust
Director, German Institute for Development Evaluation (DEval), Bonn

Hauke Hartmann
Senior Expert, Bertelsmann Stiftung, Gütersloh

Sebastian Heilmann
Director, Mercator Institute for China Studies (MERICS), Berlin; Professor, Center for East Asian and Pacific Studies, University of Trier

Eberhard Kienle
Directeur de Recherche, Centre National de la Recherche Scientifique (CNRS), Paris; Director, Institut français du Proche-Orient, Beirut

Rolf J. Langhammer
Senior Fellow, Kiel Institute for the World Economy; Senior Policy Fellow for China in the Global Economy, Mercator Institute for China Studies (MERICS), Berlin

Wolfgang Merkel
Director, Research Unit Democracy: Structures, Performances, Challenges, Social Science Research Center Berlin (WZB); Professor, Institute for Social Sciences, Humboldt-Universität zu Berlin

Franz Nuscheler
Professor emeritus and Senior Fellow, Institute for Development and Peace (INEF), University of Duisburg-Essen, Duisburg

Hans-Jürgen Pohle
Professor emeritus, Institute for Political Science, Goethe University Frankfurt

Siegmund Schmidt
Professor and Head, Political Science Department, Institute for Social Sciences, University of Koblenz-Landau, Landau; BTI Regional Coordinator South and East Africa

Robert Schwarz
Project Manager, Bertelsmann Stiftung, Gütersloh

Hans-Joachim Spanger
Executive Board’s Commissioner, Peace Research Institute Frankfurt (PRIF); BTI Regional Coordinator Post-Soviet Eurasia

Peter Thiery
Lecturer, Institute of Political Science, Heidelberg University; BTI Regional Coordinator Latin America and the Caribbean

Jan Claudius Völkel
Marie Skłodowska-Curie Research Fellow 2017–2019, Institute for European Studies, Brussels; BTI Regional Coordinator Middle East and North Africa

Uwe Wagschal
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.

Latin America and the Caribbean - Moises Arce (University of Missouri, Columbia); Otto Argueta (Interpeace, Guatemala); Emelio R. Betances (Gettysburg College); Peter Birle (Ibero-American Institute, Berlin); Ilan Bizberg (El Colegio de México, Mexico City); Klaus Bodemer (GIGA Institute of Latin American Studies, Hamburg); Daniel Brieba (Universidad Adolfo Ibáñez, Santiago); Harry Brown Arauz (Centro de Iniciasivas Democráticas CIDEM, Panama); Daniel Chasquetti (Universidad de la República Uruguay, Montevideo); Maya Collomبون (Sciences Po Lyon); Liliana De Riz (Universidad de Buenos Aires); Jorge I. Domínguez (Harvard University, Cambridge); Ludovico Feoli (Tulane University, New Orleans); Viviana García Pinzón (GIGA German Institute of Global and Area Studies, Hamburg); Bert Hoffmann (GIGA German Institute of Global and Area Studies, Hamburg); Karl-Dieter Hoffmann (Consultant, Eichstätt); Anita Isaacs (Haverford College); Stefan Jost (Konrad-Adenauer-Stiftung, Mexico); Thomas Kestler (University of Würzburg); Kai Enno Lehmann (Universidade de São Paulo); Ralf J. Leiteritz (Universidad del Rosario, Bogotá); Horace Levy (University of the West Indies, Kingston); Leiv Marsteintredet (University of Bergen); Fernando Masi (Centro de Análisis y Difusión de la Economía Paraguaya CADER, Asunción); Pedro Morazán (Consultant, Bonn); Detlef Nolte (GIGA German Institute of Global and Area Studies, Hamburg); Richard Ortiz Ortiz (UDLA – Universidad de Las Américas, Quito); Yves-François Pierre (Consultant, Port-au-Prince); François Pierre-Louis (Queens College CUNY); William Forth (Pontificia Universidad Católica de Chile, Santiago de Chile); Hans-Jürgen Puhl (Goethe University Frankfurt); Lucio Renno (Universidade de Brasília); Francisco Sánchez (University of Salamanca); Martin Tanaka (Instituto de Estudios Peruanos – IEP, Lima); Hannes Warnecke-Berger (University of Leipzig); Judith Wedderburn (Friedrich-Ebert-Stiftung, Kingston); Friedrich Welsh (Universidad Simon Bolívar, Caracas); Jonas Wolff (PRIF – Peace Research Institute Frankfurt); Guillermo Zúñiga-Arias (Inter-American Institute for Cooperation on Agriculture IICA, San José).

West and Central Africa - Chabi Imorou Azzou (Laboratory for the Study and Research of Social Dynamics and Local Development LASDEL, Cotonou); Heinrich Bergstresser (Freelance Consultant, Cologne); 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, Munich); Brett Jackson (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 (Loughborough University); Thomas Richter (GIGA Institute of Middle East Studies, Hamburg); Abdoukarim Saidou (University of Ouagadougou); Alexander Stroh (Bayreuth University); Mahaman Tidjani Alou (Université Abdou Moumouni de Niamey); Denis M. Tull (Institute for Strategic Research IRSEM, Paris); Dirk van den Boom (Consultant, Saarbrücken); Christina Wagner (Consultant, Bamako).

South and East Africa - Awol Kassim Ali (Keele University, Newcastle-under-Lyme); Jutta Bakonyi (Durham University); Matthias Basedau (GIGA Institute of African Affairs, Hamburg); Nicole Beaworth (University of Warwick, Coventry); Nic Cheeseman (University of Birmingham); Lehlononola Chefa (Policy Analysis and Research Institute of Lesotho PARIL, Masera); Phil Clark (SOAS University of London); Carlos Cuinhane (Universidade Eduardo Mondlane, Maputo); Kurt Hirschler (Freelance, Hamburg); Nicole Hirt (GIGA Institute of African Affairs, Hamburg); Jan Hofmeyr (Institute for Justice and Reconciliation, Cape Town); Peter Justin (African Studies Centre, Leiden); Mathias Kamp (Konrad-Adenauer-Stiftung Uganda & South Sudan, Kampala); Koos van der Pijl (University of Konstanz); Alphonse Nkareng Letsie (Policy Analysis and Research Institute of Lesotho PARIL, Masera); Gabrielle Lynch (University of Warwick, Coventry); Vijay Makhan (Consultant, Port Louis); Henning Melber (The Nordic Africa Institute, Uppsala); Ken Menkhaus (Davidson College); Peter Mort (Trier University, Bad Honnef); Mwiza Nhika (University of Malawi, Zomba); Andrea Ostheimer de Sosa (Konrad-Adenauer-Stiftung, Berlin); Eva Palmins (European Centre for Electoral Support ECES, Antananarivo); Justin Peace (University of Cambridge); Ralph-Michael Peters (Political and Electoral Analyst, Nairobi); Juvene F. Ramsay (University of Tomasina); Lloyd Sachikonye (University of Zimbabwe, Harare); Abdulkader Saleh Mohammed (University of Oslo); Beatrice Schlee (Arnold Bergstraesser Institute, Freiburg); Jon Schubert (University of Geneva); David Sebodubudu (University of Botswana, Gaborone); Locarida Shayamunda (University of Freiburg); Claudia Simonis (Heinrich-Böll-Stiftung, Berlin); Rainer Tetzlaff (University of Hamburg); Heribert Weiland (Arnold Bergstraesser Institute, Freiburg); Martin Welz (University of Konstanz); Volker Weyel (Consultant, Bonn).

Middle East and North Africa - Samer Abboud (University of Arcadia, Philadelphia); Salma Abdalla (Consultant, Khartoum); Ebtesam al-Ketbi (Emirates Policy Center EFC, Abu Dhabi); Naoual Belakhdar (Freie Universität Berlin); Filippo Dionigi (London School of Economics); Aisem El Difraoui (Candid Foundation gGmbH, Berlin); Ingrid El-Masry (Philips-Universität Marburg); Paul M. Esber (University of Sydney); Georges Fahmi (Robert Schuman Centre for Advanced Studies, Florence); Tamiriche Fakhoury (Lebanese American University, Byblos); Aybars Gorgülü (Center for Public Policy and Democracy Studies PODEM, Istanbul); Mohammad Reza Kazemi (Defense Language Institute DFUCLC, Monterey); Behrouz Khosrozadeh (Georg-August-Universität Göttingen); Christian Koch (Gulf Research Centre Foundation, Geneva); Mohamed Liman (Collège Méditerranéen pour la Recherche Scientifique CMRS, La Marsa); Tilmann Lüdtke (Arnold Bergstraesser Institute, Freiburg); Driss Maghraoui (Al Akhawayn University, Ifrane); Elham Manea

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East-Central and Southeast Europe · Attila Āgh (Convis University, Budapest); Dace Akule (Consultant, Riga); Daunis Auers (University of Latvia, Riga); Dimitar Bechev (University of North Carolina, Chapel Hill); Davor Boban (University of Zagreb); Zhisda Daskalovski (Center for Research and Policy Making CRPM, Skopje); Aleksandra Djurović (Belgrade Open School BOS); Vanja Dolač (Belgrade Open School BOS); Jelena Dzankic (European University Institute, San Domenico di Fiesole); Arloida Elbasani (New York University NYU); Semir Elbasani (Economic Consultant, Tirana); Mihailo Gagic (Belgrade Open School BOS); Petra Guasti (Goethe University Frankfurt); Anna Gwiazda (King’s College London); Bulcsú Hunyadi (Political Capital, Budapest); Sorn Ionta (Expert Forum EFOR, Bucharest); Dashmir Ismajli (AAB College, Pristina); Attila Juhasz (Political Capital, Budapest); Dragan Koprivica (Center for Democratic Transition, Podgorica); Alenka Kradovec (University of Ljubljana); Damjan Lej (University of Ljubljana); Renzi Lani (Albanian Media Institute, Tirana); Robert László (Political Capital, Budapest); Darina Malova (Comenius University, Bratislava); Zdenka Mamsfeldova (The Czech Academy of Sciences CAS, Prague); Elitsa Markova (Open Society Institute – Sofia); Claudia Matthes (Humboldt-Universität zu Berlin); Grigorij Mesežnikov (Institute for Public Affairs, Bratislava); Csaba Molnár (Political Capital, Budapest); Vladimir M. Pavlovic (Belgrade Open School BOS); Zdravko Petak (University of Zagreb); Vello Pettai (University of Tartu); Martin Potůček (Charles University, Prague); Denisa Sarajlic (Foreign Policy Initiative BH, Sarajevo); Christian Schuster (Babeș-Bolyai University, Cluj-Napoca); Allan Sik (University College London); Zilvinas Šilnienė (Lithuanian Free Market Institute, Vilnius); Jasminka Simić (Radio Television of Serbia, Belgrade); Marc Stegherr (Ludwig-Maximilians-Universität, Munich); Patrik Szücherle (Political Capital, Budapest); Katalin Szitás (Political Capital, Budapest); Dane Taleski (Consultant, Skopje); Bodo Weber (Democratization Policy Council, Berlin); Vezna Wesoenaert (Political Capital, Budapest); Boyan Zahariev (Open Society Institute – Sofia); Darius Žeruolis (Freelancer, Vilnius); Edit Zgut (Political Capital, Budapest)

Post-Soviet Eurasia · Kamil Calus (The Centre for Eastern Studies OSW, Warsaw); Byambajav Dalaiybu (Tokohu University, Sendai); Julian Dierkes (University of British Columbia, Vancouver); Pal Dunay (George C. Marshall European Center for Security Studies, Garmisch-Partenkirchen); Emilbek Dzhuraev (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 Kidisadvili (Institute for the Development of Freedom of Information, Tbilisi); Reinhard Krumm (Friedrich-Ebert-Stiftung, Vienna); Leonid Litva (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 Reiser (Ilia State University, Tbilisi); Bahodir Sidikov (BASConsult, Bishkek); Arseni Sivitski (Center for Strategic and Foreign Policy Studies CSFPS, Minsk); Vahram Soghomonyan (Political Discourse Think Tank – Diskur.am, Yerevan); Iyna Solomonenko (European University Vidihrna, Frankfurt/Oder); Farzad 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 Ghafur (University of Peshawar); Stephen 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, 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); Pranav Momin (Queensland University of Technology, Brisbane); Hai Hong Nguyen (University of Malaya, Kuala Lumpur); George Pepper (Queensland University of Technology, Brisbane); Simon Creak (Nanyang Technological University NTU, Singapore); Bente Scheller (Heinrich-Böll-Stiftung, Beirut); Smruti S. Pattanaik (Institute for Defence Studies and Analyses IDSA, New Delhi); Lee Morgenbesser (Griffith University, Brisbane); Hai Hong Nguyen (Queensland University of Technology, Brisbane); Stefan Ortmann (City University of Hong Kong); Hyeong Jung Park (Korea Institute for National Unification, Seoul); Smruti S. Pattanak (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