



Regional Report Middle East and North Africa

## PR stands for political repression

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# Regional Report BTI 2024

## Middle East and North Africa

### PR stands for political repression

by Jan Claudius Völkel\*

Overview of the transformation processes in Algeria, Bahrain, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, Türkiye, the United Arab Emirates and Yemen



This regional report analyzes the results of the Bertelsmann Stiftung's Transformation Index BTI 2022 in the re-view period from February 1, 2021, to January 31, 2023. Further information can be found at [www.bti-project.org](http://www.bti-project.org).

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## Introduction

Have you recently seen tourist advertisements for Saudi Arabia on television? Spotted “Visit Qatar” sideline advertising in a soccer stadium? Has YouTube suggested videos from influencers in the United Arab Emirates to you? Then you have become the target of the billion-dollar public relations machine operated by various Arab regimes, all of which have one goal: to cast their countries, and the regimes behind them, in a more flattering global light.

Yet if some observers continue to celebrate the advantages of modern autocracies, the BTI’s critical view is likely to dampen the mood considerably. The persistently negative trend seen in recent years continued during the current BTI reporting period. The Middle East and North Africa (MENA) region has reached new lows in all three BTI dimensions. In the area of political transformation, the region lost 0.18 points compared to the BTI 2022. Its current average score of 3.47 on the democracy scale is the worst such figure ever measured in the BTI, across all regions. The average economic transformation score fell by 0.13 points, to 4.70 points. The average regional score in the Governance Index, at 3.76 points, is again the lowest such level ever attained by any region in the BTI.

The reasons for this comprehensive decline have been widely discussed and are thus well known: After the hopeful period of the Arab Spring, repressive regimes have largely worked their way back to power – if in fact they ever lost it – and have cemented their autocratic structures. Local pro-democracy actors have been arrested, driven out of the country or otherwise silenced. International democratization efforts have proved to be inadequate or even wholly misconceived. The difficult economic situation in most countries gave rise to a desire among many people for a strong head of state with unchallenged powers.

Even in Tunisia, formerly the most democratic country in the region, and one in which a positive and hopeful mood was clearly evident after 2011, these developments have brought the reform process to a standstill and have even set a downward trend in motion. For the first time since the BTI 2014, Tunisia is no longer counted as a democracy, but instead as a (moderate) autocracy. This is largely due to the uncompromising autocratization policy pursued by President Kais Saied, who has deliberately delegitimized democratic institutions and persecuted the opposition heavy-handedly since his election in October 2019. Nonetheless, the population there continues to show comparatively high levels of support for Saied. This is one indication of the desperate desire for even tightly controlled political change, a response to the deep economic misery that has afflicted most Tunisians. Yet the enthusiasm for the new strongman becomes more surprising if Tunisia’s dramatic decline in economic status is also taken into account. With a drop of 0.46 points in the past two-year period, the country suffered the MENA region’s most serious economic deterioration. Since the BTI 2020, the decline has even amounted to a whopping 0.71 points.

Türkiye experienced a similarly sharp economic downturn of 0.43 points over the last two years, continuing its distinctly negative trend of the last 10 years. Since the BTI 2014, Türkiye’s average economic transformation score has plummeted from 7.46 to 5.68 points, with dramatic consequences for the population. High inflation rates, declining competitiveness and rising levels of social inequality have plagued virtually every country in the region. The external shock of the COVID-19 pandemic clearly intensified the effects of inadequate governance performance in many countries.

The Governance Index illustrates the overall lack of governance quality. Here, Sudan serves as a negative standout: After realizing the BTI 2022's strongest gains following the successful uprising against long-term ruler Omar al-Bashir in December 2019, the country this time saw its overall Governance Index score fall by 1.75 points following the reestablishment of military rule. As a consequence, it has achieved its worst ranking ever; its score of just 1.30 points on the BTI's governance scale pushes it to 134th place in the overall ranking, equal to Syria in terms of points, and trailed only by North Korea and Eritrea.

Iran, taking 133rd place as another country with failed governance, was rocked by renewed mass protests following the death of 22-year-old Mahsa Amini on September 16, 2022. Three days earlier, she had been taken into custody by the Iranian morality police for allegedly covering her hair inappropriately. According to witnesses, she was tortured to such an extent, unaided by the police officers present, that she ultimately died in the hospital from a traumatic brain injury. The news of her death sparked widespread protests against the Iranian regime and its pervasive oppression of the population. In hundreds of cities and at all of the country's universities, people from all social classes and groups took to the streets to demonstrate against the regime. Their slogan – “women, life, freedom” – was shouted at solidarity rallies around the world.

While in Iran, the regime reacted to the largely self-evident demands of the people with uncompromising repression and once again successfully silenced the protests, most other autocratic regimes have increasingly relied on positive public relations campaigns to convey a positive image of their societies. Nonetheless, oppression, corruption and abuses of power continue to be the dominant characteristics of their regimes. Those holding power in the MENA region seem to have little to set against their blatant abuses other than glittering PR directed outward, and vicious violence directed against their critics at home.

## Political transformation

The tabular overview of the state of political transformation illustrates the massive restrictions on participation and the rule of law in the MENA region. The only country that the BTI still classifies as a democracy is Lebanon. All other 18 countries are governed autocratically, with most falling into the worst category of hard-line autocracies. But even Lebanon has given up ground since BTI 2022, losing 0.10 points to reach an overall total of 5.25.

Tab. 1: 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
		Lebanon	Tunisia ▼▼	Qatar
			Algeria	Morocco
			Kuwait	Egypt
			Iraq	Bahrain
			Türkiye	Oman
			United Arab Emirates	Iran
			Jordan	Saudi Arabia
				Libya ●
				Sudan ●
				Syria ●
				Yemen ●

The table follows the BTI 2024 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 2022, dots mark failing states.

Despite this setback, Lebanon is well ahead of Tunisia. Formerly the most democratic country in the MENA region, Tunisia has taken a significant political step backward under current President Kais Saied. In the 2024 edition of the BTI, it has tumbled by two categories, and is once again considered to be a moderate autocracy. Tunisia achieved its best overall political transformation score to date in the BTI 2022, but has lost 1.57 points since that time. The country slid downward in eight of the 18 democracy indicators, with particularly strong drops in the areas of free and fair elections, the separation of powers, and judicial independence – all core areas of democratic governance. In a particularly bold move during the reporting period, President Saied declared a state of emergency on July 25, 2021, leading to the dissolution of parliament and the ouster of the government led by Prime Minister Hichem Mechichi. Although a government was reinstated in October 2021, it remained largely in the shadow of the president, and has proved unable to develop its own profile. For his part, Saied has little love for cooperation, acting primarily as an autocrat who does not tolerate criticism, and whose security apparatus is quite ready to employ violence against demonstrators. Consequently, the country also experienced setbacks in the area of association and assembly rights, as well as in the freedom of expression. The introduction of a new constitution in July 2022, largely dictated from above, has evoked memories of the era under long-term ruler Zine Abidine Ben Ali, which many thought safely past. This is particularly true considering that the parliament recently elected in December 2022 and January 2023 is primarily composed of toothless representatives lacking the means (and seemingly the will) to ex-

ercise robust oversight over the executive branch. The body is assessed in the BTI as being a non-democratic parliament, and the corresponding indicators of effective power to govern, performance of democratic institutions, and commitment to democratic institutions were also downgraded.

The mass protests in Iran began just over a year after the divisive election of Ebrahim Raisi as president in June 2021. The high-ranking lawyer, who previously held the office of attorney general and later also served as the country's chief justice, is considered to be an ultra-conservative hardliner. In his former functions, he is accused of being responsible for the mass executions of thousands of prisoners, and thus of crimes against humanity. This uncompromising attitude has also characterized his presidency to date. According to Amnesty International, the Iranian state executed at least 582 people in 2022; this was the second-highest such figure in the world after China, and accounted for around 70% of all executions in the MENA region. Security forces also cracked down harshly on the "Women, Life, Freedom" demonstrations. Human rights groups have convincingly documented the mistreatment even of children, and demonstrators have been sentenced to death in show trials. Consequently, by early 2023, most protests had been quelled. However, conditions on the ground for people in the country have not improved. If anything, the few areas of freedom have shrunk even further.

The situation in Sudan has also deteriorated significantly. The country boasted the BTI 2022's greatest gains in the area of political transformation. However, the democratization process was abruptly interrupted after just a few months, and all hopes of overcoming the decades-old autocratic structures now seem to have evaporated. In the current reporting period, Sudan's overall political transformation score fell by 0.97 points back to its pre-revolutionary score, as all achievements from the brief revolutionary period were wiped out. This is reflected in downgrades for 12 of the 18 democracy-relevant indicators, with association and assembly rights and the freedom of expression hit particularly hard. Scoring no higher than four on any political transformation indicator, Sudan is again categorized as a failing state alongside Libya, Syria and Yemen. Indeed, no other region in the world has a higher concentration of failing states.

Türkiye has continued to experience significant deterioration. As it reached the 100th anniversary of its modern statehood (founded in 1923 as the Republic of Türkiye, a successor state to the Ottoman Empire), it has fallen considerably below its former level of democracy, declining by a further 0.57 points during the current review period. Today's overall score of 4.23 is well below Türkiye's previous high of 7.65, reached at the beginning of the last decade. Since the restructuring of Türkiye from a parliamentary to a presidential republic, President Recep Tayyip Erdoğan has resolutely drawn all power into his own hands, controlling parliament, the judiciary, the media, the military and even most opposition forces. Contrary to expectations, the much-anticipated parliamentary and presidential elections in the spring of 2023 did not result in a change of leadership, a result partially secured thanks to the revised electoral law passed by Erdoğan's AKP-dominated parliament in April 2022. Prior to that, in June 2021, the government had initiated proceedings to ban the HDP, which up to that point had been the second-largest opposition party after the Kemalist CHP. This move was aimed in particular at countering the political participation of the Kurdish population, a significant proportion of whom see the HDP as representing their interests in parliament. The country is witnessing repression of social diversity as well as of political diversity. In June 2022, for example, hundreds of participants in the Istanbul Pride March were arbitrarily arrested. The government takes a similar approach to all

demonstrations that it considers to be directed against its desired model of society. By contrast, when it comes to tackling the country's rampant corruption, the government proceeds with caution, particularly if members of its own ranks or associated economic circles are brought into the public eye. The BTI 2024 country report identifies corruption as a major problem in the “new Türkiye,” and one which threatens core state functions.

Only two countries – the identity of which may be surprising to some – experienced overall positive developments in this area: Iraq and Saudi Arabia. In the case of Iraq, these gains stemmed from various minor improvements, beginning with the state's expanded monopoly on the use of force and a reinforced separation of powers. However, the country's fundamental problems remain unresolved. These include, in particular, the challenges in allocating power between the three major population groups (Shiites, Sunnis and Kurds), and the unbroken influence of the numerous militias, especially the Popular Mobilization Forces (PMF). This latter group, which was a key contributor to the victory over the so-called Islamic State (IS), is accused of having perpetrated various serious atrocities against the civilian population, including ethnic cleansing against Sunni Iraqis. The intended integration of the PMF into the regular armed forces is progressing slowly, and the effort has continued to generate tensions up to and including armed conflict. After the horrors of the IS period, with its gruesome executions and rapes, one of the major questions for the future in Iraq is how to deal with the serious crimes against the population, and how to come to terms with the past in a credible and healing way.

For its part, Saudi Arabia has developed from what was once a strict Wahhabi country into an astonishingly dynamic society, even if much of the proudly presented progress and reforms reflect the public relations interests of the elite more than they do actual improvements. Nevertheless, it cannot be denied that the kingdom has changed significantly since Crown Prince Muhammad bin Salman (MbS) took the reins of power, replacing the aging King Salman. Since 2022, he has also served as prime minister. As an unrestricted autocrat, MbS has not only marginalized the once all-powerful Wahhabi clerics, but has also induced liberalization in the fields of art and culture – steps that have proved particularly inspiring to young urbanites who want to break away from the rigid ideas of their parents and present themselves to the world as a progressive society. However, commendable as they may be, these shifts should not be confused with genuine political reforms. On the contrary, Saudi Arabia remains one of the toughest autocracies in the world. With a score of 2.73, it sits at 124th place out of 137 in the overall political transformation rankings. This score is roughly the same as it achieved 10 years ago, and indicates that, despite slight improvements primarily in the area of civil society, the country is trading water politically. Saudi laws still do not grant sufficient freedom of expression, religious practice, demonstration or assembly, and thus leave the authorities broad latitude to act unpredictably against anyone at any time, outside the confines of a restraining legal framework. A number of opposition figures remain in custody as political prisoners, and at least 147 prisoners were executed in 2022 (Amnesty International even said it had counted 196 executions). Despite the cautious cultural opening, religious minorities continue to be the targets of discrimination, while women – despite some changes – are still denied essential basic rights. Russia's war against Ukraine has offered a threefold advantage for MbS's current PR efforts, as Russia's misdeeds are distracting international attention from Saudi human rights violations, Saudi Arabia has become even more important as an oil supplier, and the higher oil prices on the world markets have boosted the Saudi state budget.



Saudi Arabia's double-edged role as a regional hegemonic power remains unchanged. On the one hand, it was among the first signatories of the Abraham Accords, which involve cooperation agreements between specific Arab states and Israel, and additionally contributed to the reconciliation with Qatar. Recently, it has even taken previously unthinkable steps, initiated and supported by Chinese diplomacy, toward rapprochement with arch-rival Iran. Moreover, it no longer aggressively promotes its Wahhabi interpretation of Islam within the Arab world or on the African continent. On the other hand, the kingdom has kept up its inglorious role in the Yemen war, actively intervenes in the politics of many neighboring countries, and not least, has sought to torpedo processes that have appeared likely to give political Islam groups more influence. The failure of the Arab Spring in countries such as Egypt and Tunisia can without doubt be attributed in part to heavy-handed interventions by Saudi Arabia, which, in alliance with the United Arab Emirates and Kuwait, compromised emerging leaders from the Muslim Brotherhood in Egypt and the Ennahda party in Tunisia, and provided financial resources enabling their opponents – including the military-backed regime of Abdel Fattah al-Sisi – to stay in power. Saudi Arabia has thus played a pivotal role in the region's lack of democracy, and the Saudi royal family's current leading lights clearly show no interest in promoting political liberalization among neighboring countries.

## Economic transformation

Iraq and Saudi Arabia are also the only MENA countries making noteworthy progress in terms of economic transformation. But as in the area of political transformation, small changes should not be confused with sustainable reforms. Apart from these two, a familiar pattern can be seen, with the resource-rich Gulf monarchies maintaining their dominance. The United Arab Emirates is now classified as a highly advanced economy, while Kuwait has ascended to the group of advanced economies. The former revolutionary countries, most of which gained their independence from European colonial rule in the 1950s and have since tried to compensate for their lack of innovation with excessive government spending, fall into the middle of the group. However, recent developments in Lebanon, which is on the verge of collapse due to the bankruptcy of the state, and which no longer adequately fulfills essential state functions, have been nothing short of catastrophic. Economic developments in Tunisia and Türkiye have been less existentially threatening, but nonetheless dramatic. Unsurprisingly, the civil-war-torn countries of Libya, Sudan, Syria and Yemen show the greatest economic shortcomings, paralleled by Iran, where religious ideology continues to trump economic policy expertise (see Table 2).

Tab. 2: 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
United Arab Emirates ▲	Qatar Kuwait ▲	Saudi Arabia Bahrain Jordan Türkiye Oman Morocco Tunisia Algeria	Egypt Iraq Lebanon	Iran Libya Sudan Yemen Syria

The table follows the BTI 2024 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 2022.

Despite marginal progress in Iraq, Kuwait, Saudi Arabia and the United Arab Emirates, the overall level of economic transformation in the MENA region fell significantly. The average regional score of the 19 countries fell by 0.13 points to a new all-time low. Six countries, including Lebanon, Morocco, Egypt, Iran, Türkiye and Tunisia, experienced quite considerable economic declines.

In each of these cases, the difficult conditions during and since the COVID-19 pandemic, as well as Russia's war with Ukraine, have been partially responsible for the wretched developments. However, the governments' own failures and poor prioritization decisions also contributed significantly. Lebanon, with its quarrelling elites insisting on their sinecures, is a telling example. Already burdened by the global surge in prices for foodstuffs and raw materials, the nation has been further hampered by elites who, operating within the confines of Lebanese confessionalism, have stubbornly resisted necessary political and economic reforms for decades in favor of pursuing their own power struggles. This reluctance has been the primary cause of Lebanon's

current state of financial crisis. The crisis was already escalating dramatically in 2019 – that is, before the pandemic. One example of Lebanese mismanagement during the current review period was the case of central bank Governor Riad Salamé, who was accused of embezzling over \$330 million, but made no serious effort to help clear his name, at least before he left office on July 31, 2023. In 2021, France and Switzerland opened international investigations against Salamé on grounds of suspected money laundering. In spring 2023, German authorities also issued an international arrest warrant for the banker.

Thus, for decades, Lebanon's central bank was headed by a man who did not enjoy the confidence of either national or international markets, but who was nevertheless supposed to solve the Lebanese economy's central problem, the sharp decline in the value of the Lebanese pound. On February 1, 2023, the central bank devalued the Lebanese pound by 90% against the U.S. dollar in hopes of compensating for the glaring difference between the official and unofficial exchange rate, and with the additional intention of getting a grip on the country's galloping inflation. After a CPI inflation rate of 3% in 2019, this had risen rapidly to an annual rate of 84.9% in 2020, and then further to 154.8% in 2021, according to the International Monetary Fund. According to official figures, the country's national debt, which has for decades been among the world's highest in relative terms, stood at 150.6% of gross domestic product in 2020. GDP per capita fell from \$18,400 in 2018 to \$14,257 in 2021, a decrease of almost one-quarter.

Prime Minister Najib Miqati's transitional government is thus faced with seemingly impossible tasks. In the short term, it must attempt to mitigate the severe economic turbulence, while simultaneously supporting an increasingly impoverished population experiencing conditions of existential need. In the medium term, the confessional political model must be fundamentally transformed, and credible strategies for combatting the country's rampant corruption must be developed and implemented. Under the current circumstances, reform plans of this far-reaching nature seem unlikely to materialize.

Three political heavyweights in the region are experiencing economic tailspins similar to that in Lebanon, albeit at different levels: Egypt, Iran and Türkiye have each deteriorated by 0.43 points since the BTI 2022. However, with an economic transformation score of 5.68 points, Türkiye is still significantly better off than Egypt (4.46) and far above Iran (2.36). As in Lebanon, monetary stability is a significant concern in each of these three countries. The Iranian rial, officially pegged at IRR 42,000 per U.S. dollar for imports from April 2018 to March 2022, was being traded on foreign exchange markets at a rate six times higher, or IRR 260,000 per U.S. dollar. The inflation rate officially reached 52.2% in 2022, but was also reported to be significantly higher in a number of areas highly relevant to the population, such as foodstuffs, for which the rate reached as high as 86%. Overall, some experts said the true core rate could be even twice as high as the official rate. In June 2022, 61 Iranian economists took the remarkable step of publishing an open letter drawing attention to the country's profound economic misery. According to their assessment, the sociopolitical situation in Iran had reached an "explosive level" despite Raisi's pre-election promises regarding a planned economic upturn.

In Türkiye, where President Erdoğan has directly influenced central bank policy on multiple occasions, the CPI inflation rate surged from 12.3% in 2020 to an alarming 72.3% in 2022. A measurement of a basket of producer prices in August 2022 even yielded an estimated inflation rate of 144%. Between September 2021 and October 2021, the exchange rate for the Turkish lira plum-

meted from TRY 8.5 to TRY 18.6 per U.S. dollar. Egypt, which had already partially floated its national currency in 2016, and subsequently suffered significant devaluations, has seen similar trends. Following a full float of the Egyptian pound, its value against the U.S. dollar fell to EGP 32.1 in January 2023, compared with EGP 8.8 at the start of 2016. Partly as a result of this, the inflation rate rose from 4.8% in January 2021 to 21.3% in December 2022. The central bank attempted to counter this pressure with multiple key interest rate hikes, but as of the close of the review period, none had met with significant success. Public debt stocks, which are traditionally high in Egypt, recently reached 89.9% of GDP (2021).

Kuwait represents a particularly interesting case in the BTI 2024. The country's political elite has undergone a period of persistent crisis following the death of long-time ruler Emir Sheikh Sabal al-Ahmad al-Sabah in September 2020. The review period alone saw five governments resign. Nonetheless, the country climbed to the second-best BTI category of advanced economic transformation – where it had already been found in some previous editions of the BTI. In this respect, the category jump is not a genuine advancement, but rather a return to a previous state of affairs. The rise in oil prices on the global markets was the decisive factor here, as Kuwait improved only in the output strength indicator, by one point. This in turn resulted in an improvement in the country's index ranking. However, the country has not made any significant progress with regard to necessary diversification measures, and therefore remains dependent on oil prices.

With regard to overall economic developments, two other countries serve as positive standouts, which, as in the democracy status index, may not have been wholly expected. Once again, these are Iraq (+0.25) and Saudi Arabia (+0.18). While the country on the Euphrates and Tigris lost a full point with regard to the liberalization of foreign trade, it achieved comparable gains in indicators relating to fiscal stability, property rights, private enterprise and social safety nets. The government took the experience of the COVID-19 pandemic as an opportunity to reform the country's Social Security Convention, originally adopted in 1952. However, given the numerous challenges that most Iraqis face in terms of basic socioeconomic security, especially the millions of displaced people in the country, this reform can probably be regarded as just a drop in the ocean. Saudi Arabia also lost one point with regard to the liberalization of foreign trade, but – as a result of MBS's social reforms – gained one point each in the indicators for equal opportunity, education and R&D policy, and output strength.

In most countries in the MENA region, official statistics are best viewed with caution. Even if any functioning institutions able to collect reliable statistics are present, there is a risk that their work may be manipulated in one direction or another for political purposes. This proviso includes Türkiye, where President Erdoğan has been criticized for concealing the true scale of the country's economic misery. Even the country's central statistical office, TurkStat, is suspected of being unable to publish independent statistics. Nevertheless, it is clear that a considerable proportion of people in the MENA region, including the many migrant workers in the rich Gulf states, live in relative or even absolute poverty. Public relations brochures touting Egypt's glittering new administrative capital or Saudi Arabia's Neom project do not address the issue, but themselves symbolize the basic economic policy problem in almost all countries in the region: Economic policy is made for the rich, not for the poor. For example, while the region reached its highest average score for social safety nets at 5.63 in the BTI 2010, – that is, before the Arab Spring – this score fell steadily to 4.63 by the BTI 2018, and has now remained unchanged at 4.79 since the BTI 2020. This has taken place in parallel with a sharp decline in output strength, which reached another all-time low average score of 4.58 in the current BTI 2024, far below the BTI 2010 score of 7.16.

## Governance

Most governments in the MENA region, where some countries have suffered massive declines in their democracy and economic status, are doing too little to tackle the many shortcomings and bring about improvements. A glance at the overview table for the BTI 2024's Governance Index offers a clear reminder of the glaring lack of good governance throughout the region. Apart from the United Arab Emirates and Qatar, which are both rated as having good governance, seven countries fall into the middle ranking, with Saudi Arabia serving as a newcomer here. However, the quality of governance in more than half of all 19 MENA countries is seen as weak or even failed.

Tab. 3: Governance quality

very good	good	moderate	weak	failed
Score 10 to 7	Score < 7 to 5.6	Score < 5.6 to 4.3	Score < 4.3 to 3	Score < 3
	United Arab Emirates	Iraq	Bahrain	Lebanon ▼
	Qatar	Kuwait	Oman	Libya
		Jordan	Türkiye	Yemen
		Morocco	Egypt	Iran
		Tunisia		Sudan ▼
		Algeria		Syria
		Saudi Arabia ▲		

The table follows the BTI 2024 index scores. Countries are ranked according to their respective score in the Governance Index. Arrows mark a change of category compared with the BTI 2022.

In Sudan, following a short-lived upturn, the reestablishment of clientelist military rule following the nationwide protests that brought down long-term dictator Omar al-Bashir in 2019 earned Sudan another record loss of 1.75 points in the Governance Index. Only Myanmar suffered greater declines during the two years of the reporting period covered here. Governance quality in Sudan has thus fallen even below the very low level of the al-Bashir dictatorship. While the country suffered setbacks in almost all Governance Index indicators, these were particularly pronounced (featuring a drop of four points) in the areas of credibility and the effective use of international support – thus, in the broader area of international cooperation. In October 2021, armed forces commander-in-chief Abd al-Fattah al-Burhan assumed de facto control of the state. During the subsequent protests against this military coup, the police and security forces killed at least 124 demonstrators, an outbreak of violence that was sharply criticized abroad. As a consequence, donor countries and organizations halted cooperation projects, and the African Union also suspended Sudan's membership. In December 2022, the new rulers introduced a so-called Framework Agreement intended to govern future political collaboration among the various power elites. However, this definitively collapsed in April 2023 – after the end of the current review period – when armed conflict erupted between al-Burhan's forces and the Rapid Support Forces (RSF) led by General Muhammad Hamdan Daglo, thrusting Sudan once again into civil war. The UN Integrated Transition Assistance Mission in the Sudan (UNITAMS), which was established in 2020 to support the fledgling democratization process, and which additionally played a key role in the drafting of the December 2022 Framework Agreement, was itself caught

between the combatants and had to leave Khartoum due to security concerns. All of this has been extraordinarily damaging for a country that has been unable to establish peace for decades, and whose population continues to suffer due to poor economic performance and major climate challenges.

With its military coup, Sudan joins a number of countries in the Sahel region that have undergone similar recent experiences, in particular Burkina Faso, Mali and most recently (in summer 2023) Niger. If the other military governments in Chad, Eritrea, Ethiopia and South Sudan are added to this list, as well as those in Algeria, Egypt and Libya, it appears that such governance structures are increasingly spreading roots in the broader region, while civilian authorities are being pushed into the background.

Clear setbacks in the quality of governance have also been registered in Tunisia under President Saïed's rule. The country's overall Governance Index score fell by 0.79 points compared to the BTI 2022. The current score of 4.55 points corresponds roughly to the level seen under the final years of Ben Ali, the dictator who was driven out of office and out of the country by the popular protests of 2011. In the current BTI country report, Saïed himself is now described as the "most powerful anti-democratic actor of the last decade," and as someone who has brought the democratization process to a complete standstill. Observers have been surprised that so few in Tunisia voiced objections as the former law professor systematically dismantled the country's democratic achievements, as military courts began retrying critics of the regime, and as even former Saïed allies became increasingly subject to house arrests, travel bans and similar forms of harassment. Even the so-called Quartet of civil society groups that was awarded the Nobel Peace Prize in 2014 – comprising the Tunisian General Labor Union; the Tunisian Confederation of Industry, Trade and Handicrafts, an employer's group; the Tunisian Human Rights League; and the Tunisian Order of Lawyers – failed to put up any significant resistance. Moreover, the government has notched up very few successes. Indeed, the contrary is true: The economic crisis has perceptibly deepened, most young people want to leave the country, and hardly anyone still feels the post-2011 spirit of optimism that buoyed the population for some time. The combined impacts of poor governance, economic challenges, and a lack of mechanisms to address societal conflicts prompted the World Economic Forum to highlight a potential state collapse as one of the top three threat scenarios for Tunisia in early 2023.

Regressions in the Governance Index were also observed in two neighboring countries, Algeria and Morocco, whose relations have been strained in recent years due to the Western Sahara conflict. In both cases, governments managed to paralyze genuine protest movements (taking the name "Hirak" in both countries), initially in the context of the COVID-19 social distancing requirements, and later with strong police repression. This is particularly significant for Algeria because, much as in Sudan, aging long-time ruler Abdelaziz Bouteflika had been compelled to step down in 2019 after months of protests, raising hopes of a sustainable liberalization. However, these hopes have faded, and the old regime, now under the leadership of President Abdelmadjid Tebboune, is back in power. The monarchical regime in Morocco under King Mohammed VI has also consolidated its authority once again. Like Algeria, Morocco has increasingly distanced itself from European national governments and the European Union in recent years, even though it was once awarded "advanced status" and special privileges by the EU for its pro-European orientation.

After the free fall of its economy, Lebanon seems to have reached a low point, assuming the country does not collapse further into civil war. The apocalyptic explosion of improperly stored ammonium nitrate at the port of Beirut in August 2020 was generally taken as a symbol of the state's disastrous functioning. The question now is whether the enormous blast, which destroyed large parts of Beirut and left thousands homeless, should be seen as the final nail in the coffin of the Lebanese state, or instead as an urgent wake-up call for the necessary reform process. By the close of the current reporting period, the country's political elite had shown little evidence of any ability to reform. Those in power seem to have dug themselves too deeply into the confessional governance system, which virtually guarantees them state power and influence. This unwillingness to reform can be seen all too clearly in the judicial system's sluggish response to the explosion. The investigation has been highly politicized. Hezbollah and Amal in particular, the two leading Shiite groups in the country, each with extensive arsenals of weapons, have boycotted the work of the investigating authorities, and their supporters have held violent demonstrations. The new cabinet appointed in 2021 under Prime Minister Najib Miqati is considered to be a "government of national unity," but this means that no decisions of consequence are made, as virtually every population group wields veto power.

In Iran, ideological shortsightedness hampers the formulation of policies aligned toward the common good. The most serious issue here is the ossified system with the theocratic Guardian Council and the all-powerful Ayatollah Ali Khamenei at the top. Previously, the Guardian Council has successfully thwarted the reform efforts of governments considered "moderate" (such as those of Hassan Rouhani (2013 – 2021) and Mohammed Khatami (1997 – 2005) before him). Since Ebrahim Raisi took office as president in the summer of 2021, hardliners have been able to implement the guidelines of the Guardian Council largely unchecked both in parliament and in the government. These primarily ideologically driven guidelines have generally resulted in the perpetuation of the course of conflict with Saudi Arabia, with all of its associated proxy disputes in Syria, Lebanon and Yemen, as well as the uncompromising continuation of Iran's anti-Israel and anti-U.S. policy. It remains to be seen whether the steps toward rapprochement with Saudi Arabia, announced in the spring of 2023 under Chinese mediation, will in fact signal a shift in this confrontational policy. At the time of writing, no more than a first step had been taken in this regard, and there was little to suggest that it would be followed by fundamental changes.

For its part, Saudi Arabia is the only country in the region that has achieved significant progress in the Governance Index. Its increase of 0.37 points is due in particular to higher ratings in the area of steering capability, where the regime's modernization efforts have been particularly evident. In contrast to his predecessor, King Abdallah, MbS is focusing on bold strides rather than incremental steps. As part of the country's Vision 2030 agenda, the strongman is pushing ahead with a planned course of economic diversification, while at the same time focusing on social changes. However, he is doing nothing to address the undemocratic structure of the regime. Advertisements broadcast in various countries for tourist visits to Saudi Arabia provide an unmistakable sign of this intended cosmetic-level change, showing that Saudi decision-makers attribute great importance to the positive perception of these changes abroad. The grandiose plans for the new mega-city of Neom on the Red Sea and the recent increase in high-profile transfers of international soccer stars to Saudi clubs are both emblematic of the Saudi rulers' modernization goals, which take the form of prestige projects, public relations campaigns and symbolism.

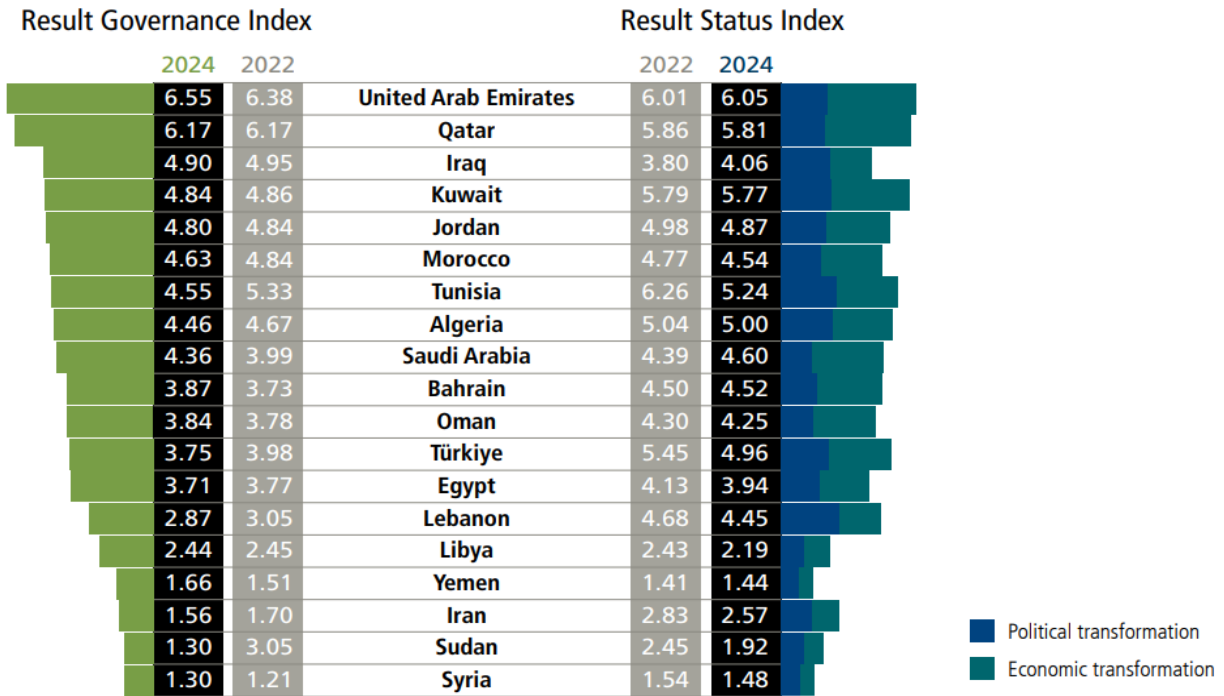
## Outlook

Saudi Arabia is the BTI 2024's big winner within the MENA region. The country has made considerable progress in all three BTI dimensions, and Crown Prince Muhammad bin Salman has indeed initiated a number of changes. Nevertheless, the country remains a hard-line autocracy, and a difficult cooperation partner in many respects. As a key member of OPEC, Saudi Arabia plays a major role in determining the fate of the global oil markets. The smaller Gulf states of Kuwait, Qatar and the United Arab Emirates are more flexible, and in some respects also more innovative. However, due to its size and absolute economic output, as well as its military capabilities, Saudi Arabia is and will remain the leading regional power for the foreseeable future. Embracing this role, it is unabashedly interfering in the internal affairs of other MENA countries.

The country report from the BTI 2024 vividly describes the double-edged nature of Saudi Arabia's role in past and future relations within the region. Since the Arab Spring, it says, the kingdom has developed into an "increasingly aggressive actor" that openly takes action against governments and groups it opposes in other countries (no matter whether they are Sunni like the Muslim Brotherhood, or Shiite like the regime in Iran). The regime is the primary supporter of Egyptian dictator Abdel Fattah al-Sisi, and has bombed Yemen into ruins. In a nearly forgotten 2017 episode, it virtually kidnapped then-serving Lebanese Prime Minister Saad Hariri in a sensational operation and forced him to resign, only to have him claim a few days later that everything had been a misunderstanding. There is no question here: No matter how dazzling Saudi Arabia's latest reform steps may appear to be, its ruling class remains unpredictable.

However, MbS is far from the only figure attempting to mask undemocratic actions with cosmetic reforms. Tunisia's Kais Saied numbers among this group, along with Abd al-Fattah al-Burhan in Sudan, Turkish President Recep Tayyip Erdoğan, Morocco's King Mohammed VI, Abu Dhabi Emir and UAE Prime Minister Mohammed bin Zayid Al Nahyan, and Qatar's Sheikh Hamad. There is virtually no leader in the MENA region who does not pursue his own welfare first, then that of his followers, and only lastly that of his people. But no other figure there has as much influence on the regional and international stage as MbS. A good decade after the Arab Spring, a stock-taking can be made: Even without MbS, the MENA region would probably be more autocratic than democratic. But dictators of the caliber of Egypt's Abdel Fattah al-Sisi would have less support on which to rely almost blindly. The pressure being placed on dissenters would presumably be lower, and there would thereby be greater political and social diversity. The hard-line autocratic regimes in the MENA region derive much of their legitimacy from their portrayal as an alleged bulwark against political Islam and other internal and external enemies. Yet they are the ones who have been holding back democratization efforts across the region from the outset.





This offers little grounds for optimism about the future. In times of escalating economic difficulties, most governments seem to prefer to close their eyes to reality in order to maintain their power rather than introduce well-founded policies responding to the challenges. The climate crisis is having a dramatic impact in more and more countries. Rising summer temperatures are not the only problem; drinking water too is becoming an increasingly scarce resource. However, the state media services in MENA countries continue to unapologetically present their populations with scenarios that most people know are not true. Wherever criticism arises, security forces arrive quickly on the scene to brutally bludgeon any opposition into silence. This type of governance has no answers to the questions of the future, and no glossy presentations about elitist projects for the future will help. Governments invest in public relations in order to white-wash their political repression instead of abolishing it. What if they instead understood PR to mean first and foremost profound reforms, personal rights, parliamentary representation and pluralistic rule?

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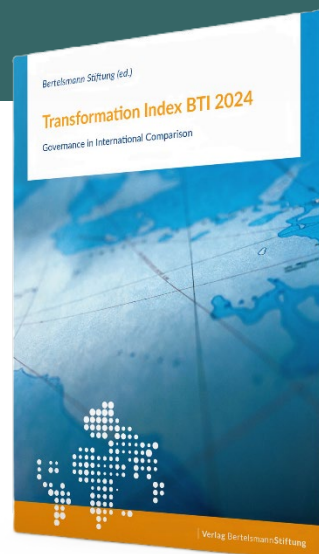
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