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Executive Summary
Executive Summary

Background, purpose and approach of the Vision 2030 process

Background

Transparency International’s vision is “a world in which government, politics, business, civil society and the daily lives of people are free of corruption”.

As TI marks its 25th anniversary, the Vision 2030 process brings together the Movement to develop an understanding of key challenges and opportunities in the corruption landscape in the coming decade and implications for TI. This process does not change TI’s current vision statement. The Vision 2030 process precedes the development of TI’s new strategy and shall guide the Movement’s next strategic cycle.

Purpose

The TI Vision 2030 process is a collective exercise to understand what the world will look like in the coming decade—defined by the corruption challenges the Movement should address in the coming decade; their cause and contexts; and the likely paths to success and implications for TI.

This comprehensive evidence report brings together the insights from the Vision 2030 process. It outlines findings of Phase 1 of the Vision 2030 process, and has been enriched based on input received from members of the Movement in Phase 2 of the process.

Approach

The Vision 2030 process ran from January to August 2019 and was based on participation and consultation of internal and external stakeholders. The two project phases, the Diagnostic and the Consultation phase, consisted of the following key activities:
- Stakeholder engagement, including interviews, a survey, webinars, and 5 Regional Workshops
- A landscape review of existing research into trends in the wider corruption landscape
Executive Summary

The Vision 2030 process identifies key dynamics in the wider landscape and challenges that will impact Transparency International in the future.

Over the next decade, the world is confronted with increased complexity. Interrelated and contradicting dynamics will shape the future state of the world:

- **Political developments**, such as a more diffuse international order, low levels of institutional trust, and more people living in fragile contexts affected by violence and conflict.
- **Economic shifts**, such as the rise in power of emerging markets, in particular in Asia, and rise in global wealth inequality
- **Technological liberalisation**, through the rise of ICT and financial technology
- **Societal shifts**, driven by widespread ageing and urbanisation
- **Environmental disruption** due to climate change

At the same time, TI will face challenges that are shaping the future role of civil society organisations:

- **Closing civic space** will challenge CSO’s ability to operate effectively
- **The rise of populism** is reducing CSOs’ access to governments and is polarising the political debate
- **Increase in social apathy** and indifference towards corruption rises as the public does not see the value of tackling corruption
- **The decline of the rule of law** both nationally and multilaterally will hamper the ability of CSOs to work freely and safely.
Over the next decade, the corruption landscape will become more complex. Current challenges will continue or accelerate, but there will also be new ways and tools to fight corruption.

**Future drivers of corruption**
- Trends that are currently driving corruption are expected to continue or accelerate.
- The key drivers of corruption in the future are:
  - The **rise of populism**
  - Fragmentation of a rule-based multilateral approach **challenging collective action**
  - **Erosion of global leadership** in fighting corruption
  - **Rise of technological tools**, such as ICT networks, financial technology, artificial intelligence and machine learning
  - The ‘**global North**’ being **complicit** in enabling corruption in the ‘global South’

**Future manifestation of corruption**
- The world of corruption is getting more **complex**. The Movement expects corruption to be **worse and more sophisticated** in the future.
- The Movement continues to see political corruption as the **most serious type** of current and future corruption. Political corruption is expected to become more **systematically ingrained**.
- Corruption will **not be confined** behind national borders, but continue to **cross borders**. **Corrupt money** will be hidden and spent in different places than it is being stolen. Corruption will move into new spaces, such as the **digital space** and **climate finance**.
- A more diverse set of actors will engage in corrupt behaviours, including cross-national organised crime networks and individuals, such as hackers.

**Fighting corruption in the future**
- There is, however, **innovation in anti-corruption tools**, new actors and new ways of fighting corruption.
- **Key opportunities in the future fight against corruption are:**
  - The battle for explaining why corruption is bad has been won. There is **higher awareness** for corruption among the public.
  - Making clear how corruption **affects people’s everyday lives** and connecting with **local communities**
  - An increasingly **values-driven youth** demanding social change
  - **Technologies**, such as **social media and open data**, that can be used to **mobilise people** and increase transparency
  - **Push for enforcement** of anti-corruption conventions that have been adopted across the world

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Executive Summary

Transparency International – Vision 2030
Executive Summary

Consultation with the TI Movement highlights that certain challenges and opportunities for fighting corruption will be more pertinent in some regions, while less relevant in others.

Following Phase 1 of the Vision 2030 process, the Movement was consulted on the key drivers that increase corruption and the key opportunities for fighting corruption in the future through 5 Regional Workshops. Several challenges and opportunities stood thereby out as unique or more pertinent in specific regions. This varying degree of relevance is illustrated in the table below.*

<table>
<thead>
<tr>
<th>Key drivers increasing corruption:</th>
<th>Americas</th>
<th>Africa</th>
<th>ECA</th>
<th>MENA</th>
<th>Asia-Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Populism</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Decline of rule of law</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Technological liberalisation</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>State fragility</td>
<td>●</td>
<td>●</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Wealth inequality</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Organised crime</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key opportunities for fighting corruption:</th>
<th>Americas</th>
<th>Africa</th>
<th>ECA</th>
<th>MENA</th>
<th>Asia-Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civic activism</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>New technology</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Youth</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Checks and balances</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

*Source: The estimated relevance is based on insights from the stakeholder consultation and landscape review.
The Movement has identified political corruption as the most serious type of current and future corruption. Corruption will take on different forms across the regions that TI operates in.

### Manifestation of corruption*

<table>
<thead>
<tr>
<th>Corruption</th>
<th>Global trends</th>
<th>Political corruption</th>
<th>Grand Corruption</th>
<th>Petty Corruption</th>
<th>Corruption Prevention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>⚫⚫⚫⚫⚫</td>
<td>⚫⚫</td>
<td>⚫⚫</td>
<td>⚫⚫⚫</td>
<td></td>
</tr>
<tr>
<td>Africa</td>
<td>⚫⚫⚫⚫⚫</td>
<td>⚫⚫⚫</td>
<td>⚫⚫</td>
<td>⚫⚫⚫</td>
<td></td>
</tr>
<tr>
<td>ECA</td>
<td>⚫⚫⚫⚫⚫</td>
<td>⚫⚫</td>
<td>⚫</td>
<td>⚫⚫⚫</td>
<td></td>
</tr>
<tr>
<td>MENA</td>
<td>⚫⚫⚫⚫⚫</td>
<td>⚫⚫⚫</td>
<td>⚫</td>
<td>⚫⚫⚫</td>
<td></td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>⚫⚫⚫⚫⚫</td>
<td>⚫⚫</td>
<td>⚫</td>
<td>⚫⚫⚫</td>
<td></td>
</tr>
</tbody>
</table>

*Estimates of the manifestation of corruption are based on insights from stakeholder consultation and landscape review.

### Regional themes

- **Americas**: Corruption seen as systemic, linked to organised crime, actors enabling corruption, and political impunity
- **Africa**: Political and systemic corruption undermines political integrity, the electoral process, and criminal justice
- **ECA**: Political corruption as key challenge through misuse of public funds and organised crime
- **MENA**: Political corruption is systemic and includes religious institutions, a strong need to build states’ capacity to build integrity
- **Asia-Pacific**: Cross-border crime driving political corruption, close link between private and public sector corruption
Executive Summary

The challenges and opportunities identified in the Vision 2030 process have implications for TI’s future approach and role in the landscape.

Consultation with the TI Movement and external stakeholders highlighted that TI is seen as well placed and a leading actor in responding to the challenges in the landscape.

Political corruption is most frequently mentioned by stakeholders as the key corruption challenge that TI should address in the next decade. Members of the TI Movement and external stakeholders have similar views concerning which corruption challenges TI should address.

To effectively fight corruption in the future, the Vision 2030 process has revealed several paths to success for TI:
- Deepening its engagement with ordinary citizens and local needs and for this, leveraging TI’s unique access to more than 100 countries across the world as a grassroots activist
- Responding to the challenges of rising misinformation by leading global corruption research, fostering a well-informed debate, and educating the youth as an expert and knowledge producer
- Responding to the rise of technology by becoming a leading tech expert, leveraging it for its own work and helping governments to use it for good.
- Addressing the challenge of enforcing the global anti-corruption conventions and calling out those who disregard them, thereby becoming a driver of accountability
- Respond to the growth in actors fighting corruption by becoming a convenor of corruption fighters who collaborate with diverse stakeholders, including the private sector, to drive change

These paths to success come with different implications for TI’s capabilities and skills, culture and values, governance, and approach to others in the landscape. To effectively respond to the challenges in the landscape, it will be key for TI to set itself up as a responsive Movement, that speaks with one voice and has a governance structure that enables it to pursue the chosen paths to success in addressing the challenges and opportunities in the landscape.
Introduction, methodology, and process
Background and objectives

**Transparency International** (TI) is an international civil society movement with the mission statement: “a world in which government, business, civil society and the daily lives of people are free of corruption”.

As TI marks its 25th anniversary, the Vision 2030 process brings the Movement together to develop a shared, actionable understanding of key challenges and opportunities in the corruption landscape in the coming decade and implications for TI. This process will not change TI’s current vision statement.

The **Vision 2030 process is aligned with the Governance Review Phase II**, which explores how TI’s governance could be improved to keep pace with changes in the landscape and to anticipate future needs.

This comprehensive evidence report brings together the **insights from the Vision 2030 process**. It outlines findings of **Phase 1 of the Vision 2030 process**, and has been enriched based on input received from members of the Movement in **Phase 2 of the process**.
Approach and deliverables for this project

**Phase 1: Diagnostic**

1. **Inception**
   - Kick off workshop with TI's Trends and Vision Committee and TI representatives
   - Develop detailed project plan
   - Put together a document request for internal TI data relevant for analysis
   - Draw together a long list of stakeholders for engagement

2. **Desk research**
   - Desk research into trends influencing the manifestation of corruption in the future
   - Review of the market in which TI seeks to operate in
   - Explore initiatives by competitors, partners and others

3. **Stakeholder interviews & survey**
   - 1:1 interviews with 15-20 primarily external stakeholders and a number of internal stakeholders
   - Run an online survey disseminated to a wider set of internal and external stakeholders
   - Run a limited set of webinars with members of the TI Movement

4. **Report analysis and synthesis**
   - Synthesize findings of the diagnostic phase into a final report that includes key trends in the wider landscape, challenges and opportunities for fighting corruption, and implications for TI

**Deliverables**
- **Kick off workshop** with the Trends and Vision Committee and key TI representatives
- **Inception report**, incl. project plan and long list of categories for stakeholder consultation
- **Document request**

**Phase 2: Consultation**

5. **Early consultation**
   - Engagement with key stakeholders to allow for feedback on the findings of Phase 1 and in preparation for the regional workshops:
     - Webinars that bring together selected members of the TI Movement
     - Call with the Trends and Vision Committee
   - Preparation and conceptualisation of 5 regional workshops

6. **5 Regional workshops**
   - Facilitation and attendance of 5 regional workshops:
     - Americas
     - Sub-Saharan Africa
     - ECA
     - MENA
     - Asia-Pacific
   - The objectives of the sessions will be to test the findings of Phase 1 and create a sense of ownership among the movement

7. **Final report synthesis**
   - Synthesis of the findings from Phase 1 and 2 into a final Vision Note
   - Outlining of a tested picture of the future corruption landscape and implications for the future role of TI

**Main activities**
- Engagement with key stakeholders to allow for feedback on the findings of Phase 1 and in preparation for the regional workshops:
  - Webinars that bring together selected members of the TI Movement
  - Call with the Trends and Vision Committee
- Preparation and conceptualisation of 5 regional workshops

**Deliverables**
- **Final report incorporating findings from Phase 1 and 2**

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**Introduction, methodology and process**
Introduction, methodology and process

In total, 543 stakeholders were consulted in the Diagnostic Phase of the Vision 2030 process

<table>
<thead>
<tr>
<th>Interviews</th>
<th>Survey</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>23 conversations were held between March 22 and April 15, 2019 with:</td>
<td>A qualitative survey was answered by 512 respondents:</td>
<td>3 webinars with 8 internal stakeholders:</td>
</tr>
<tr>
<td>8 Internal stakeholders:</td>
<td></td>
<td>- 7 National Chapter</td>
</tr>
<tr>
<td>- 4 Board members</td>
<td>- 406 TI Movement*:</td>
<td>- 1 Individual Members</td>
</tr>
<tr>
<td>- 4 Individual Members</td>
<td>- 298 National Chapter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- 24 Individual Members</td>
<td>- 106 Externals*:</td>
</tr>
<tr>
<td></td>
<td>- 6 Advisory Council</td>
<td>- 36 Partners/ supporters</td>
</tr>
<tr>
<td></td>
<td>- 53 TI-S/TI-EU staff/ intern</td>
<td>- 70 Stakeholders working on corruption</td>
</tr>
<tr>
<td></td>
<td>- 6 TI Board</td>
<td>- 17 Stakeholders not specifically working on corruption</td>
</tr>
<tr>
<td></td>
<td>- 19 Other</td>
<td></td>
</tr>
<tr>
<td>15 External stakeholders:</td>
<td>Responses were collected between March 28 and April 12, 2019. The survey included open-ended questions and responses were confidential. Quotes are used but not attributed. The survey was published in English, French, Spanish and Arabic.</td>
<td>The webinars were conducted between April 17 and 18, 2019.</td>
</tr>
<tr>
<td>- 3 Partners</td>
<td>Survey responses by region:</td>
<td></td>
</tr>
<tr>
<td>- 2 Academics</td>
<td></td>
<td>Webinar participants by region:</td>
</tr>
<tr>
<td>- 2 Donors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 2 Experts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 2 Peers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 1 Business</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 1 Journalist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 1 Practitioner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 1 Think Tank</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Interviews were based on a semi-structured discussion guide. Conversations were confidential and quotes are used but not attributed.

*Survey respondents self-identified their role in the Movement. TI-S and Board members closely involved in the Vision 2030 process engaged with this process through other means than the survey. In the survey, external stakeholders could select multiple relationship with TI (e.g. ‘partner’ and ‘working on corruption’).
In Phase 2 of the Vision 2030 process, a wide range of members of the Movement were consulted through webinars, 5 Regional Workshops and a Board Workshop.

**Pre-testing webinars**

2 webinars with 4 members of the Movement.

The webinars were conducted on April 30.

Attending participants came from the following chapters:
- TI South Africa
- TI Bahrain
- TI Ireland
- TI Brazil

**Regional Workshops**

5 Regional Workshops with the Executive Directors and Chairs of National Chapters, as well as Individual Members of TI.

The workshops were held across the following regions:

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>Panama City</td>
<td>May 19</td>
</tr>
<tr>
<td>Africa</td>
<td>Nairobi</td>
<td>June 12</td>
</tr>
<tr>
<td>ECA</td>
<td>Berlin</td>
<td>June 19</td>
</tr>
<tr>
<td>MENA</td>
<td>Amman</td>
<td>June 22</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>Kuala Lumpur</td>
<td>June 26</td>
</tr>
</tbody>
</table>

**Board Workshop**

A workshop with the Board on the Vision 2030 process and implications for TI.

The workshop was held on June 14 in Nairobi.

In Phase 2 of the Vision 2030 process, this Evidence Report was enriched based on input received from members of the Movement in pre-testing webinars, regional workshops and a Board workshop. This final report particularly provides an enriched picture on:

- **The state of the world in the next decade**, incl. the rise of populism and the growth in wealth inequality
- **Future drivers of corruption**, incl. the rise in state fragility and organised crime, challenges to democratic governance and the use of information and communications technology
- **The manifestation of corruption**, incl. stakeholders’ views on different types of corruption, particularly political corruption
- **Fighting corruption in the future**, incl. businesses’ approach to anti-corruption, the role of identity politics and gender, and the use of social media for civic activism
- **Implications for TI**, incl. key corruption challenges that the Movement could address over the next decade
Introduction, methodology and process

A diversity of qualitative and quantitative studies have informed the landscape analysis

<table>
<thead>
<tr>
<th>TI Data and Documents</th>
<th>Academic literature</th>
<th>Non-academic studies, reports, and think pieces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal data and documents of Transparency International, among others:</td>
<td>Academic reports, books and other research publications from leading researchers in the field, on themes such as:</td>
<td>External reports, qualitative and quantitative data and indicators, among others from:</td>
</tr>
<tr>
<td>- Current and previous vision work, strategy and planning documents</td>
<td>- Causes of corruption</td>
<td>- International Organisations, such as the UN, World Bank, World Economic Forum, OECD</td>
</tr>
<tr>
<td>- Research undertaken or commissioned by TI on trends affecting the corruption and anti-corruption landscape</td>
<td>- Consequences of corruption</td>
<td>- Think Tanks, such as Brookings and Bertelsmann Foundation</td>
</tr>
<tr>
<td>- Thought leadership pieces by members of the TI community</td>
<td>- Control of corruption and opportunities of fighting corruption</td>
<td>- International NGOs and non-profits, such as Freedom House, World Justice Project, and Civicus</td>
</tr>
<tr>
<td>- Studies on (anti-)corruption published on TI’s Knowledge Hub</td>
<td></td>
<td>- Market research organisations and consulting firms, such as Pew Research Centre, Edelman, and PricewaterhouseCoopers</td>
</tr>
</tbody>
</table>

Data, documents and publications that have been reviewed for this report are referenced on the respective pages and in the list of references in the Annex of this report.
Introduction, methodology and process

Upon commencement of the Vision 2030 process, the Trends and Vision Committee and key internal stakeholders highlighted their key questions

- How is the landscape that Transparency International is facing changing?
  - How is the global political and economic order changing in the coming decade?
  - How is technology transforming society?
  - How will civil society interact in the coming decade?

- What will the fight against corruption look like in the next decade?
  - What will be the root causes and drivers of corruption in the coming decade?
  - Who are new players and networks in the fight against corruption?

- What are the implications of these changes for Transparency International?
  - What is the change that Transparency International wants to see in the coming decade?
  - TI used to coalesce around rule of law, what will TI coalesce around in the coming decade?
  - How can TI engage people in the fight against corruption in the coming decade?
Introduction, methodology and process

Overview – structure of the Phase 1: Diagnostic Vision 2030 report

The diagram below outlines the structure and key questions that underpin this report. Each section starts by outlining stakeholders’ views, which is thereafter complemented by findings of a landscape analysis.

1. State of the world
   - What will the world look like in the next decade?
     - How is the global political and economic order changing in the coming decade?
     - How is technology transforming the way we live and interact?
     - How will society and the environment change over the coming decade?

2. Future drivers of corruption
   - Which factors will shape corruption?
     - What will be the key causes and drivers of corruption over the next decade?
     - Which political, economic, environmental and social developments will make corruption worse or more challenging to fight?

3. Future manifestation of corruption
   - What is corruption in the next decade?
     - Where will corruption take place?
     - Who will be the key actors in the corruption landscape?
     - What will be the consequences of corruption in the next decade?

4. Fighting corruption in the future
   - How can we fight corruption?
     - What are key opportunities to fight corruption in the future?
     - What political, economic and social developments will offer new ways and tools to fight corruption?

5. Implications for Transparency International
   - What is TI’s role and what should it focus on?
     - Which trends in the landscape will have an impact on TI?
     - Which challenges should TI try to tackle over the coming decade?
     - Which opportunities should TI focus on in tackling those challenges?
Introduction, methodology and process

Exploring future trends is necessarily a complex exercise, as reflected in the diversity of stakeholder views in this report

This report brings together the views of external experts and members of the Movement on the future (corruption) landscape and implications for TI. The insights gained through the stakeholder consultation are complemented by a landscape analysis that brings together facts and statistics on key developments surrounding the future (corruption) landscape.

Stakeholder views

The comments and reflections of TI’s stakeholders provided invaluable sources of insight into this report. Many stakeholders highlighted that the future is complex and were often hesitant to make predictions of the future. Several stakeholders stress that how trends develop will strongly depend on how governments and other actors in the landscape respond to them.

Stakeholders offer diverse views in regards to the challenges and opportunities in the future corruption landscape and the implications for TI. However, there was no one specific group of stakeholders (e.g. external stakeholders as opposed to members of the Movement, or stakeholders from a certain region) that consistently had strongly different views than stakeholders from another group. Stakeholders’ insights and perspective were rather shaped by their different professional backgrounds (e.g. if they have been working on technology, climate, or a different field).

Landscape Review

Exploring future trends is necessarily a complex exercise and the trends and developments outlined in the landscape review are often strongly interlinked. One trend can affect corruption while at the same time being influenced by corruption and other trends. When reading this report, these interlinkages between corruption and other variables should therefore be kept in mind.

In addition, more than in other sectors, even a small change in regards to one trend can have implications for several other developments, thereby triggering bigger change to other trends and on a wider scale.
Introduction, methodology and process

Transparency International is a global Movement with one vision: a world in which government, business, civil society and the daily lives of people are free of corruption.

Transparency International is a global Movement with one vision: “a world in which government, business, civil society and the daily lives of people are free of corruption.”

Through more than 100 chapters worldwide and an international secretariat, TI leads the fight against corruption to turn this vision into reality. Its mission is to stop corruption and promote transparency, accountability and integrity at all levels and across all sectors of society.

Transparency International’s current strategy ‘Together against corruption’ outlines 3 main priorities:

- **People and partners**: Creating demand for accountability, and empowering action, engaging partners and inspiring leaders, protecting anti-corruption activists

- **Prevention, enforcement and justice**: Promoting prevention and enforcing anti-corruption standards, achieving justice and ending impunity for corruption

- **Strong movement**: Sharing what works to stop corruption, building a sustainable movement, and ensuring the relevance of the Movement

Findings
The state of the world in the next decade
Summary: State of the World in the next decade

Summary - The state of the world in the next decade: Stakeholder views

Stakeholders offer diverse scenarios of the state of the world in the next decade. Many see the world confronted with increased complexity, with many interrelated and contradicting dynamics playing out. Most stakeholders draw a negative picture of the next 5-10 years. Only a few suggests that the world will be a better place, mainly based on the assumption that the world will rise up to today’s challenges and develop adequate responses, for instance through harnessing the benefits of technology.

The majority of stakeholders point to 4 key challenges that the world will face: Climate change, demographic shifts, inequality and populism. Stakeholders highlight that these key challenges have not yet reached their peak and will pose greater challenges in the future. External stakeholders and members of the Movement point to the same key challenges, however external stakeholders have a stronger sense of urgency and highlight that current responses to the challenges of the world have been insufficient.

Politics
- Most stakeholders see the world in the next decade confronted with new power relations, which could increase political instability.
- Some stakeholders suggest that the world might be on the brink of a significant outbreak of unrest, violence and war, comparing today's world with the 1920s.
- A few stakeholders point to the rise in illicit transnational funding for weapons of mass destruction and terrorism as a key challenge.
- Most stakeholders highlight the rise of anti-liberal populism as a new way of politics. They suggest that this could lead to a crisis of ethics in public spaces.

Economics
- The vast majority of stakeholders see the continuous increase in wealth inequality as a key challenge to society, and point to its potentially negative consequences, such as elite capture and social unrest.
- Stakeholders point to the rise of China as an important driver of economic development in the future.

Technology
- The vast majority of stakeholders refer to tech and data as a disruptive force.
- Most stakeholders refer in particular to Artificial Intelligence, Big Data, Cryptocurrencies, Machine Learning and Social Media as the key disruptive forces.
- However, stakeholders find it challenging to predict how its influence will change the world, and if it will be a positive or negative force.

Society
- The majority of stakeholders stress that demographic shifts will be felt across the world and will pose new challenges.
- In this regard, they particular highlight new challenges due to population growth, an ageing society and mass migration.

Environment
- The vast majority of stakeholders refer to climate change as one of the defining challenges of the next decade.
- Stakeholders highlight that the world is currently only dealing with its consequences in a superficial manner – and argue that it will require a much more comprehensive response in the next decade.
**Summary: State of the World in the next decade**

**Summary - The state of the world in the next decade: Landscape Analysis**

<table>
<thead>
<tr>
<th>Politics</th>
<th>Economics</th>
<th>Technology</th>
<th>Society</th>
<th>Environment</th>
</tr>
</thead>
</table>
| - The international order is estimated to be more **diffuse**. Countries that historically fostered control of corruption will have less influence.  
- **2.3 billion people** are projected to live in **fragile context** that face violence and conflict.  
- In 2019, trust in institutions was **less than 50%** across the world. **Trust is shifting** towards relationships with peers and friends.  
- The last 20 years have seen a significant increase in right-wing populist votes, with populist governments being more prone corruption. There is no indication that this trend will not continue over the next decade. | - Global economic power will have **shifted towards emerging markets**, which are set to account for c. **50%** of global GDP.  
- **63%** of the world’s population in 2030 will be middle class, **65%** of which will live in the **Asia-Pacific region**.  
- **Wealth inequalities will rise:** The world’s richest 1% will own two-thirds of global wealth, leading to an increased concentration in power. **Latin America and the MENA region** currently face the highest levels of wealth inequality across the world. | - The world’s population will be more connected than ever and have access to unprecedented amounts of data – however, to varying degree depending on the region.  
- In 2018, 7 of the 10 largest companies in the world were technology firms. **By 2022,** 60% of global GDP is estimated to be digitized.  
- The size of the global AI market is estimated to grow to c. **$90b in 2025**. AI and machine learning will enable the automation of human decision-making processes. | - Widespread ageing and urbanization will change the outlook of society: By 2030, **60%** of the world’s population will live in urban areas, and **16%** will be above 60 years old.  
- **In 6 out of 10 countries** worldwide, civil society currently is under serious attack.  
- The state of civil society in 2030 will depend on a multitude of factors, including the extent of geopolitical stability and governments’ response to technology. | - **Climate change** will have significant consequences on the environment, politics, economics and society.  
- It will lead to an increased severity of natural disaster and accelerate competition for resources and resource scarcity. It could drive migration and lead to political unrest. |
Stakeholders on the state of the world in the next decade
Stakeholder views: The state of the world in the next decade

Stakeholders offer diverse scenarios of the state of the world in the next decade. Many argue that the challenges the world faces today are likely to persist or worsen.

The majority of stakeholders see the world in the next decade confronted with increased complexity, with many interrelated dynamics playing out in the realm of politics, economics, environment, and technology. Many stress that one small factor, e.g., the election of a new US president, could have a significant impact on other dynamics.

External stakeholders and members of the Movement point to similar key challenges, however external stakeholders have a stronger sense of urgency and highlight that current responses to the challenges of the world have been insufficient.

Despite the diversity of scenarios that stakeholders describe, most stakeholders draw a negative picture of the next 5-10 years ahead. They highlight that a number of key challenges of today, such as climate change, the rise of populism and wealth inequalities, have not reached their peak and will likely pose greater challenges in the future.

A few external stakeholders suggest that the world might be on the brink of a significant outbreak of unrest, violence and economic crisis, comparing today’s world with the 1920s.

In contrast, other stakeholders suggest that the world in the next decade will be a better place, mainly based on the assumption that the world will rise up to today’s challenges and develop adequate responses, for instance through harnessing the benefits of technology.

“Just the addition of one extra element could change the entire dynamic of the current trends.” (Interviewee, Journalist)

“We have created something very similar to the 1920s.” (Interviewee, Academia)

“I hope that within the next decade, people will realise that the world is currently going down the wrong path and that it will then reverse the negative leadership.” (Interviewee, Partner)

“We are going to go into five rocky years, where things will not go well, but I believe we will be in a better shape in 2030. It all depends on the response by institutions to today’s challenges.” (Interviewee, Partner)
Stakeholder views: The state of the world in the next decade

The majority of stakeholders point to 4 key challenges that the world will face in the next decade: Climate change, demographic shifts, inequality and populism

**Climate change**

The vast majority of stakeholders refer to climate change as one of the defining challenges of the next decade due to causing natural disasters and accelerating resource scarcity, poverty, and mass migration. Stakeholders highlight that the world is currently only dealing with its consequences in a superficial manner – and argue that it will require a much more comprehensive response.

"The effects of climate change will be more pronounced – This will occupy our mind, this will define how we live and how we do public policy." (Interviewee, TI Movement)

**Demographic shifts**

The majority of stakeholders stress that demographic shifts, such as population growth, an ageing society and mass migration, will be felt across the world.

"A big trend – the issue of migration and displacement of people around the world, both within and across regions. This will have a significant impact on the economy and the functioning of society" (Interviewee, Think Tank)

"Mass movement and urbanisation will continue to force questions around economic, social and environmental sustainability" (Survey respondent)

**Wealth inequality**

Within countries, the vast majority of stakeholders see the continuous increase in wealth inequality as a key challenge to society, and point to potentially negative consequences, such as elite capture and social unrest.

"Individuals are having more money than countries" (Interviewee, Donor)

**Populism**

Most stakeholders highlight the rise of populism as a new way of politics. They suggest that this could lead to a crisis of ethics in public spaces. Related, many stakeholders point to persistent challenges to liberal democratic values, the rise of authoritarianism, and to a lesser extent to a decline in trust in institutions.

“We are seeing a rise of populist politics – politics not based on principles but with more people getting into office whose only claim to leadership is their populist claim to power” (Interviewee, TI Movement)
Stakeholder views: The state of the world in the next decade

The majority of stakeholders see the world in the next decade confronted with new power relations. Some argue that this could increase political instability

Many stakeholders suggest that the global order will be characterized by shifted powers towards the developing world, in particular driven by the rise of China, India and other emerging economies.

As one stakeholder points out this will not just concern governments but also companies: While currently Western companies still hold significant power, this will change over the next decade.

As a consequence, stakeholders suggest that the global order could become more complex and with more diffuse power relations. Many expect the current global norms and international institutions become under pressure, with organisations like the UN and OECD having to work increasingly hard to remain relevant.

A few stakeholders suggest that national governments will come under increased pressure from non-state actors, including companies, secession movements and international coalitions.

“The power balance globally that puts every country in a competitive mode and guided by national interests and crisis. Political instability is going to shape the agenda.” (Survey respondent)

“The undermining /ravelling of post-1945 settlement, will change some of the fundamental pieces of the chessboard.” (Survey respondent)

“There will no longer be a north and south divide, but rather a “dislocation” - There will be some countries in both the developed and developing regions losing ground.” (Interviewee, Partner)

“The main nation states are under stress from above and from below.” (Interviewee, Academia)
Stakeholder views: The state of the world in the next decade

The vast majority of stakeholders refer to tech and data as a disruptive force, but views diverge if this will be positive or negative development

The rise of new technologies and its implications is highlighted by a vast majority of stakeholders. Most agree that technology will impact all areas of our life in the next decade. Many suggest that it will disrupt governance systems, the way we work and interact with each other.

Most stakeholders refer in particular to Artificial Intelligence, Big Data, Cryptocurrencies, Machine Learning and Social Media as the key disruptive forces. Many highlight that it is impossible to predict how new forms of technology will shape our lives in the next decade.

Some stakeholders highlight the positive impact of technologies: by increasing connectivity, transparency, access to information and new forms of community activisms.

Others argue that technology could have more negative impacts, by offering new ways of warfare, undermining formal political structures, bypassing channels of representative democracies, and by offering digital spaces in which it is easy to hide crime.

Several stakeholders point out that technology should be considered as a tool and if it will have negative or positive implications for society will depend on which actors will learn how to use it better.
Landscape Analysis: The state of the world in the next decade - Politics
In the coming decade, the international order will likely be more diffuse. Asia will have surpassed the US and Europe in terms of global power.

By 2030, Asia will have surpassed the US and Europe combined in terms of global power, as measured by GDP, population size, military spending and technological investment.

Emerging markets are estimated to surpass Europe, Japan and Russia in terms of global power. Countries that have traditionally advocated for greater democracy will no longer be the drivers of globalisation.

A study by ESPAS (2015) finds that the absence of one dominant power could lead to increased geopolitical fragility. With increased dispersion of power, multilateral institutions could see their ability to influence and set international norms reduced. Power might increasingly shift to networks, coalitions and non-state actors.

Research by the UK government suggests that as a result, "non-compliance and subversion of international laws are likely to increase".  

The last 20 years have seen a significant increase in right-wing populist votes. There is no indication that this trend will not continue over the next decade.

In recent years, populist governments have risen to power in countries across the world such as Brazil, Mexico, the Philippines and the US, and in Europe. The share of populist votes across 33 European countries has increased from 11.4% in 1998 to 21.5% over the last 20 years, driven in particular by a growth of right-wing votes, according to the TIMBRO Populist Index. A study by Barclays finds that the centre vote share across the world’s advanced economies has declined by 12 percentage points since the 1990s.

Aggregated populist votes in 33 European countries, 1998 - 2018

In 2018, trust in government was less than 50% across the world. Trust has shifted away from institutions and towards horizontal relationships with peers and friends.

In 2018, the Edelman Trust Barometer found that trust in institutions remained low across the world. Distrust is particularly high towards government (48%) and the media (47%).

The OECD (2013) found that the global financial crises contributed to a significant loss of trust in government. The study argues that maintaining trust has moreover become increasingly complicated by “a faster and more diversified flow of information across society”, due to the rise of the Internet and social networks.

Rachel Botsman (World Economic Forum, 2017) argues that trust will evolve over the next decade driven by a shift towards distributed trust in horizontal relationships with peers, friends and colleagues. A trend that is exemplified in:

- The rise of the sharing economy, where people use tech platforms such as Airbnb, and Uber that depend on strangers trusting each other instead of institutions
- Growth of peer review and rating systems (e.g. Amazon, Tripadvisor)

Trust in institutions is a complex concept. Research by van der Meer (2017) and Norris (1999) shows that trust is influenced by corruption, procedural fairness, economic performance, inclusive institutions, and socialisation. Scholars diverge in their interpretation of the consequences of declining levels of trust: Some argue that it can undermine democratic values, while others argue that it can be a positive development, leading to the rise of ‘critical citizens’.
Landscape Analysis: The state of the world in the next decade - Economics
By 2030, global economic power will have shifted towards emerging markets, which are set to account for c. 50% of global GDP and for 70% of global growth.

- China will be world’s largest economy with its GDP estimated to more than double from $11.4t in 2016 to $26t.
- By 2050, China and India together are estimated to account for 35% of global GDP.
- The GDP of the E7 (China, India, Indonesia, Brazil, Russia, Mexico, and Turkey) will grow from around the same size to the G7 in 2015 to double its size in 2040.

The shift in global economic power towards emerging markets will come with increased influence of the E7 on global governance.

Sources: Graph and text: PWC (2017): *The long view: how will the global economic order change by 2050?*, *emerging markets highlighted in bold; Text: HSBC (2018): The world in 2030*
Landscape Analysis: The state of the world in the next decade

63% of the world’s population in 2030 will be middle class, a growth by 48% from 2018. The majority of this growth will occur in Asia.

Driven by the economic growth in emerging markets, the world's middle class is estimated to grow by 48% until 2030. While more people will move out of poverty, the new middle class will be less wealthy and inequalities within countries will increase worldwide.

Developments by region
By 2030, 80% of the world's middle class will reside in developing countries, with the majority of growth concentrated in Asia. Asia’s share of the global middle class is estimated to grow from 46% in 2015 to 65% in 2030. Sub-Saharan Africa and Middle East and North Africa are estimated to continue to have the lowest share of global middle class – amounting to 4% and 5% respectively.

Global population by income group, 2018 and 2030 (in mil.)

Number (in mil.) and share of global middle class by region

<table>
<thead>
<tr>
<th>Region</th>
<th>2015</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>#</td>
<td>%</td>
</tr>
<tr>
<td>North America</td>
<td>335</td>
<td>11%</td>
</tr>
<tr>
<td>Europe</td>
<td>724</td>
<td>24%</td>
</tr>
<tr>
<td>Central and South America</td>
<td>285</td>
<td>9%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>1,380</td>
<td>46%</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>114</td>
<td>4%</td>
</tr>
<tr>
<td>MENA</td>
<td>192</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: Brookings (2018): A global tipping point: Half the world is now middle class or wealthier

Source: Brookings (2017): The unprecedented expansion of the global middle class – An Update
Landscape Analysis: The state of the world in the next decade

Wealth inequalities will rise within and across countries. The world’s richest 1% will own two-thirds of global wealth, leading to an increased concentration in power.

Distribution of global wealth: 71% of the world’s population currently lives in countries where income inequality is rising. Assuming 2008-10 annual growth rates, the world’s wealthiest 1% will grow their share in global wealth from 50% in 2017 to 64% ($305t) by 2030 (UK House of Commons Library, 2018).

Distribution of wealth within countries: The extent to which wealth is unequally distributed within countries varies by region. Latin America and MENA are the two regions with the highest income inequality within countries - with the wealthiest 1% owning 28% and 26% of national wealth respectively. National income inequality is lowest in Europe - with the wealthiest 1% owning 10% of national wealth in 2018.

1. Estimated distribution of global wealth, 2017 & 2030

2. Distribution of wealth within countries: Top 1% National Income Share, 1998 and 2018, by region

Methodological Note:

Graph 1 measures the aggregate total wealth share of the wealthiest top 1% globally.

Graph 2 measures the pre-tax national income share of the top 1% within countries, by region.

Sources: Graph and Text: UK House of Commons Library, April 2018; World Inequality Lab (2018): World Inequality Database; Text: World Inequality Lab (2018): World Inequality Report
Landscape Analysis: The state of the world in the next decade - Technology
By 2030, the world’s population will be more connected than ever before. C.75% of people will have mobile connectivity and c.60% broadband access.

50% of world’s population are now online. This number is set to rise to 60% in 2022 (Cisco, 2017).

However, while more and more people are going online, growth and penetration rates vary significantly across the world: In developed countries, internet penetration grew from 51% in 2005 to 81% in 2018. In developing countries, it increased from 7.7% to 45% (ITU, 2018).

Nevertheless, a survey by the World Economic Forum found that 79% of people believe that 90% of the world’s population will have regular internet access by 2024.

More data and information is freely available and sharable online. However, this trend varies again significantly by region. The World Wide Web Foundation’s Open Data Barometer (2017), which assesses 115 countries globally for the amount of government data available, finds that the top 10 Barometer countries are all developed countries. Many countries across the world continue to struggle with data collection and quality.

Through the increasing access to the Internet, social media, mobile phone technology and Open Data, more individuals can access information, express their opinions, and organise themselves.
In 2018, seven of the ten largest companies in the world were technology firms. By 2022, 60% of global GDP is estimated to be digitized.

In 2008, only one tech company was represented in the top 10 largest companies in the world. Over the last decade, this number has risen to seven in 2018.

The leading technology firms hold significant shares in their respective markets:
- Amazon owns c.50% of e-commerce
- Google owns c.90% of the Internet search market
- Facebook owns c.66% of the social media market

These large technology firms are providing the infrastructure for a significant share of the digital economy, thus exerting power over the market while facing low levels of regulation.

As leading tech firms are driving forward Artificial Intelligence innovations, studies suggest that their power to influence society (e.g. through influencing newsfeeds and search results) and to provide basic services that were previously provided by the government grows.

<table>
<thead>
<tr>
<th>Top 10 largest companies in the world, 2008 and 2018*</th>
<th>2008</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>PetroChina</td>
<td>1st</td>
<td>Apple</td>
</tr>
<tr>
<td>Exxon Mobile</td>
<td>2nd</td>
<td>Alphabet</td>
</tr>
<tr>
<td>General Electric</td>
<td>3rd</td>
<td>Microsoft</td>
</tr>
<tr>
<td>China Mobile</td>
<td>4th</td>
<td>Amazon.com</td>
</tr>
<tr>
<td>ICBC</td>
<td>5th</td>
<td>Facebook</td>
</tr>
<tr>
<td>Gazprom</td>
<td>6th</td>
<td>Tencent Holdings</td>
</tr>
<tr>
<td>Microsoft</td>
<td>7th</td>
<td>Berkshire Hathaway</td>
</tr>
<tr>
<td>Royal Dutch Shell</td>
<td>8th</td>
<td>Alibaba</td>
</tr>
<tr>
<td>Sinopec</td>
<td>9th</td>
<td>Johnson &amp; Johnson</td>
</tr>
<tr>
<td>AT&amp;T</td>
<td>10th</td>
<td>JPMorgan Chase</td>
</tr>
</tbody>
</table>

Sources: Graph: Milford Asset Management (2018)*Technology companies highlighted in blue.; Text: Economist (2018): How to tame the tech giants; Forbes (2018): Apple, Google, Microsoft, Amazon and Facebook own huge market shares
The size of the global AI market is estimated to grow from $3b in 2016 to c. $90b in 2025. AI and machine learning enable the automation of human decision-making processes. Artificial Intelligence are “machines that respond to stimulation consistent with the traditional responses from humans”. AI algorithms are designed to “make decisions, often using real-time data” (Brookings, 2018).

The size of the global AI market is estimated to grow rapidly over the next decade. Tractica’s (2017) Artificial Intelligence Market Forecast (2017) suggest that the AI market could grow to contribute c. US $90b to the global economy in 2025.

Algorithms can supplement and automate human decision-making processes in the public and private sector.

In the next decade, AI combined with automation could significantly transform the labour market. A McKinsey study predicts that it will eliminate up to 30% of the world’s human labour (McKinsey, Global Institute, 2017).

Landscape Analysis: The state of the world in the next decade - Society
Widespread ageing and urbanization will change the outlook of society over the next decade: By 2030, 60% of the world’s population will live in urban areas, and 16% will be above 60 years old.

Higher life expectancy and decreasing rates of fertility are increasing the proportion of older people across the world, thereby increasing pressure on health care systems and changing the outlook of the labour market.

Almost two-thirds of the world’s population will live in cities by 2030, exerting pressure on infrastructure and increasing the size of informal settlement and slum populations if cities do not provide adequate responses to this trend.

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2030</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>World population:</td>
<td>7.6 billion</td>
<td>8.6 billion</td>
<td>9.7 billion</td>
</tr>
<tr>
<td>13% of the population is 60+</td>
<td>16% of the population is 60+</td>
<td>25% of the population is 60+</td>
<td></td>
</tr>
<tr>
<td>55% living in urban areas</td>
<td>60% living in urban areas</td>
<td>68.4% living in urban areas</td>
<td></td>
</tr>
<tr>
<td>33 megacities with +10m people</td>
<td>43 megacities with +10m people</td>
<td>50 megacities with +10m people</td>
<td></td>
</tr>
</tbody>
</table>

In 6 out of 10 countries worldwide, civil society is under serious attack and only 4% of the world’s population live in countries with open space for civic activism.

27% of the world’s population now live in countries with closed space for civil society, while only 4% live in countries with open space for civic activism.

Civil society is under serious attack in 111 countries worldwide. The most frequent violations of civic space are attacks on journalists, censorship, harassment, and excessive force during protests.

Rising levels of inequality, increased regulation, greater reporting requirements and curtailing activities on behalf of the government have been identified as the key drivers of the shrinking space over the last 5 years.

At the same time, technology is opening up new routes of social engagement and grassroots activism.

Number of people (in billion) living in different civil society spaces, in 2018

Landscape Analysis: The state of the world in the next decade

Four scenarios of the state of the world in 2030 outline possible challenges and opportunities that civil society will face in the next decade

<table>
<thead>
<tr>
<th>Mad Max</th>
<th>Transparently Blurred</th>
<th>Turbulence &amp; Trust Deficits</th>
<th>Privatized World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding for civil society stakeholders</td>
<td>Low levels of funding outside of security area</td>
<td>Fluctuating funding for development (fairly steady bilateral-foundation, but volatile private funding)</td>
<td>Low levels of funding due to second major economic crises</td>
</tr>
<tr>
<td>Technology</td>
<td>Tightly controlled by governments</td>
<td>New forms of online activism</td>
<td>The internet is regionally fragmented and governed by a few global companies</td>
</tr>
<tr>
<td>Citizen engagement</td>
<td>Disengaged on global level, highly engaged locally</td>
<td>High level of engagement due to resurgence of social solidarity, but mostly locally</td>
<td>Very diverse engagement globally</td>
</tr>
<tr>
<td>Geopolitical stability</td>
<td>Governments are more nationalistic due to high levels of global insecurity and instability</td>
<td>Following turbulent period, more positive global economic outlook</td>
<td>A turbulent global environment where online conflict, cyber attacks and intellectual property are major concerns</td>
</tr>
<tr>
<td>Environmental issues</td>
<td>Climate change-related disasters are the norm, but overshadowed by national security threats and fossil fuel resource concerns</td>
<td>Climate change-related disasters have begun to emerge, but with high levels of awareness, adaptation is underway</td>
<td>Climate change-related disasters are the norm, and floods and hurricanes have resulted in significant migrations</td>
</tr>
<tr>
<td>Trust</td>
<td>Trust fragmented nationally due to conflict, foreign organizations distrusted. Trust in governments relatively high</td>
<td>Relatively high levels of trust in an increasingly engaged global private sector, particularly in the East and South</td>
<td>High levels of trust in the private sector, low levels of trust in government; businesses take on many public service roles</td>
</tr>
</tbody>
</table>

Source: Adapted from World Economic Forum (2013): The Future Role of Civil Society, p.22
Landscape Analysis: The state of the world in the next decade - Environment
In the coming decade, climate change will have significant consequences on society, driving increased severity of natural disaster and accelerating resource scarcity and migration.

In the coming decade, managing scarcity will be a growing challenge for food and water supply, with demand estimated to rise by c.50% and c.40% respectively by 2030.

Resource scarcity poses the risk of increasing geopolitical tensions and instability as the large-scale exploitation and extraction of natural resources will still be concentrated in a small number of producer countries.

Rising resource scarcity will be accelerated by climate change. Global warming of c. 1.5°C will disproportionately affect the poor and vulnerable. Climate-related political disputes could increase at the national and global level.

Managing the impact of climate change will require unprecedented coordinated efforts and investments on a global scale.

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Climate and resource nexus, 2030

**Energy**
c. + 25% Demand (from 2017 – 2030)

**Climate Change**
c. + 1.5°C
- $2t global GDP
+ 250k annual death (from 2018 – 2030)

**Food**
c. +50% Demand (from 2012 – 2030)

**Water**
c. +40% Demand (from 2018 – 2030)

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Future drivers of corruption
**Summary: Future Drivers of Corruption**

### Landscape Analysis

**Increased pressure on democracy and rise of corruption**
- For 13 years, *global freedom has declined* across authoritarian and partially free regimes and established democracies. This is correlated to a *reduction in barriers to corruption* by weakening state oversight and checks and balances. There has been a particularly strong decline in *rule of law and the freedom of expression*.
- By 2030, 2.3 billion people are projected to live in *fragile contexts facing conflict and violence*, which are prone to corruption. Organised crime – a key driver of corruption – is estimated to expand significantly in size, scope and influence.
- *Anti-liberal populists* are increasingly running political campaigns on the promise of fighting corruption, but *tend to increase corruption*, once in office.

**Fragmentation of rule-based multilateral approach**
- While many countries have adopted conventions to combat corruption, a shift in global power towards non-democratic states could *challenge collective action* and *hollow out the international regulatory framework*.

**Technology**
- *Stakeholders’ views if technology will become a key enabler of corruption are split*. Many stakeholders see the usage of technology for corrupt purposes *still in its infancy*, but argue that *cryptocurrencies, AI, Big Data and Machine Learning* will make it engage in corrupt conduct.

**Climate change**
- *Driven by climate change*, increased resource scarcity, rising levels of inequality and insecurity could further increase the potential for corruption to *flourish*. The *significant amount of resources needed* to mitigate climate change poses additional corruption risks.

### Stakeholder views

**Increased pressure on democracy and rise of populism**
- Many stakeholders see the *rise of populism and the increased pressure on democracy as a key driver making corruption worse*. In particular members of the TI Movement suggest that this contributes to a *sense of apathy* among citizens.

**Fragmentation of rule-based multilateral approach**
- Many external and internal stakeholders point to a *fragmentation of the rule-based multilateral approach and an erosion of global leadership* as key future challenges.

**Technology**
- *Stakeholders’ views if technology will become a key enabler of corruption are split*. Many stakeholders see the usage of technology for corrupt purposes *still in its infancy*, but argue that *cryptocurrencies, AI, Big Data and Machine Learning* will make it engage in corrupt conduct.

**Climate change**
- *Stakeholders highlight that the consequences of climate change, and the efforts to address it, will mean that corruption will take on new forms*. In particular, they stress that corruption could become widespread in the field of *climate and environmental funding*.

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*Firetail © Transparency International – Vision 2030*
Stakeholders on future drivers of corruption
Stakeholder views: Future drivers of corruption

Stakeholders offer diverse views in regards to the most important challenges that might make corruption worse over the next decade. Most of these are not new drivers, but could accelerate or manifest due to trends in the landscape.

Key challenges, risks, and threats that might make corruption worse over the next decade according to a representative sample of survey responses:

- "Political instability that triggers weak law enforcement" (Survey respondent)
- "Expansion of the gap between the rich and poor" (Survey respondent)
- "A crisis of world democracy with an increase in the inequality of economic opportunities, combined with a questioning of fundamental moral values." (Survey respondent)
- "Misuse of new technologies (if law enforcement does not regulate them and use them to its advantage)" (Survey respondent)
- "The growing number of tax havens and offshore companies might make tracing money flow more difficult and can result in increasing global inequality. Moreover, as financial instruments are becoming even more complex, this increases the risks of abuses." (Survey respondent)
- "A crisis of world democracy with an increase in the inequality of economic opportunities, combined with a questioning of fundamental moral values." (Survey respondent)
- "Based on the prediction of devastating effects of climate change and increased (global and local) inequalities, I think corruption in the environmental sector (business interests vs investment in renewables e.g.) but also in refugee / migration field will increase because the highest profits can be made here." (Survey respondent)
- "Rise of far right, repression of freedom of speech/ free press" (Survey respondent)
- "More countries falling to populism, with more protectionism, reducing the potentially positive influence of international fora and organisations" (Survey respondent)
- "Shrinking of civil society space" (Survey respondent)

Many of these developments are inter-connected and manifestations of key underlying dynamics. An example for this is the lack of trust in political systems and the rise of populism, which can both be seen as consequences of rising wealth inequalities.
Stakeholder views: Future drivers of corruption

Many stakeholders see the rise of populism and the increased pressure on democracy as a growing challenge. Related risks are the decline in trust in institutions and acceptance of corruption as a norm.

Increased pressure on **democratic governance worldwide** and the **rise of populism** is mentioned by many stakeholders as a key challenge over the next decade.

**Related challenges, mentioned by most stakeholders, are:**
- a decline in trust in government institutions
- an erosion of rule of law
- shrinking space for civil society, and
- increased challenges to freedom of the press.

Some stakeholders argue that the decline in democracy and rise of populism is contributing to a **sense of apathy among citizens**, as they lose the belief that corruption is being tackled.

Other stakeholders contradict argue that the erosion of the current liberal democratic model has let to **more widespread outreach, anger and activism against corruption among citizens**.

“The one [trend] that is probably dangerous in the short-term is the 'failure of democracy', where a multi-party approach which has been better than anything else so far, has reached a stage where in most countries, this is being opposed” (Interviewee, TI Movement)

“The lack of control and lack of a separation of power will affect the face of corruption, this is not a new trend but still persists.” (Interviewee, TI Movement)

“Cynicism and loss of public confidence that corruption can be put into check.” (Survey respondent)

“Social apathy - diminished citizen willingness to oppose corruption or corrupted governments as a result of impunity; shrunk space for integrity heroes.” (Survey respondent)

“Over the past years, a lot of trust in governmental institutions as well as business has eroded. People see more shitty things happening” (Interviewee, Practitioner)
Many stakeholders point to a fragmentation of the rule-based multilateral approach and an erosion of global leadership as a key driver of corruption in the future.

The majority of stakeholders mention the increased risk of a **decline in the power of established institutions and global standards**. They argue that those countries that have historically been upholding the anti-corruption agenda, such as the UK and US are **moving away from this role**. Several stakeholders suggest that there is **no else filling the spot of a moral global leader**.

As the **international system is becoming more fragmented and opaque**, they suggest that this poses a new **collective action problem** to tackle corruption and is **undermining the rule based global value system**. As the fight against corruption has so far relied on **peer pressure to be enforced**, the absence of leadership is leading to a **decline in pressure to comply with norms**.

“**If it is not just an anomaly, the current relaxation of ethical standards in the leadership of the developed powers (USA), could impact on global standards, generating regressive tendencies that the governments of other countries would embrace with relief.**” (Survey respondent)

“**The established order of institutions and global standards is decreasing in power. It is not clear what will replace them, there is currently a vacuum.**” (Interviewee, TI Movement)

“A lot of anti-corruption codes and standards are followed because people think that there is peer pressure. If we are losing this peer pressure, e.g. if Saudi Arabia […] is playing by a different rule book, no one will care much.” (Interviewee, Partner)

“**Shifts in power are contributing to a greater fragmentation of an already fragmented system, in which common rules are increasingly absent and secrecy is enhanced.**” Further fragmentation might be a plausible scenario.” (Interviewee, Partner)

“**The most important challenge that might make corruption worse is the shift of powers in international fora**” (Survey respondent)

“People think ‘Well China has different standards, so why are we complying’? We have under-estimated that so many things were only done because they are norms, which are now eroding.” (Interviewee, Donor)

“We can no longer depend on developed countries as […] their leadership is weak and disappearing.” (Interviewee, Partner)

“**The loss of legitimacy of international organizations that spend large resources and do not show results**” (Survey respondent)

“It will be more challenging to cooperate, China will grow and will not provide any conditions. [...] The absence of strong leadership in the fight against corruption will be a major trigger of success and failure.” (Interviewee, TI Movement)
Stakeholder views: Future drivers of corruption

Stakeholders see an increased importance of the global dynamics of corruption – with the ‘global north’ enabling and fostering corruption in the ‘global south’

Most stakeholders consider the **same trends driving the global and national corruption landscape**. A few stakeholders point to **distinct trends at the national/regional level**.

### Global drivers

With increased globalisation, most stakeholders argue that key **challenges affect most countries across the world** (climate change, technology, decline in international cooperation, etc.).

Stakeholders in particular point to global dynamics that create fertile ground for corruption with **countries in the ‘global north’ complicit in enabling corruption**.

“Reinforcing corrupt governments – you can find entire countries driven by **neo-colonialist corrupt attitudes**” (Interviewee, TI Movement)

“The corrupt “in the south” but the enablers “in the north”” (Survey respondent)

“In regions like Africa and South America, corrupt money is stolen, but in the West, these people accept money […] really permitting the flow of money from one corrupt region to another. **We need to look at the broader scheme of things.**” (Interviewee, TI Movement)

### National/regional drivers

Stakeholders argue that the **presence or absence of a strong civil society** will be an important determinant of corruption – which varies significantly by country.

Further national drivers that have been pointed out by many stakeholders and vary by region and country are the **strength of governance institutions, an independent judiciary** and free media and related political instability.

**Religion** has been mentioned by a few stakeholders as a distinct regional/national driver.

“In the global south, but not so much globally, there is an agitation for the **decentralisation of power** in governance structure and more privatisation of public goods and services.” (Interviewee, TI Movement)

“The regional situation is different as **Islam shows an important internal issue** on the scene and may be the solution or an input to deepen the crisis.” (Survey respondent)
Stakeholder views: Future drivers of corruption

Stakeholders offer diverse views on the implications of new technological tools on corruption. Some argue that cryptocurrencies, AI, Big Data and Machine Learning will make it easier to steal, hide and spend corrupt money.

Many stakeholders agree that the usage of technology for corrupt purposes is still in its infancy, but that cases of corruption using technology is increasing. They see the key challenge in that corrupt actors are ahead in the usage of technology while for governments and CSO it is still a “black box”.

“There are going to be major changes. We have only just began to see corruption using modern digital methods” (Interviewee, TI Movement)

“I think a lot of corruption will move into technology – be online or so. More [companies] will have machine learning and AI at their core. Which can mean – it is a lot more black box unless we do something.” (Interviewee, Practitioner)

“In regards to the rapid advancement of new technologies, we are lagging behind. Most of those behind new tech have bad motives, this is a major challenge” (Interviewee, TI Movement)

Those stakeholders warning that technology poses a significant risk for the future corruption landscape argue that it will make it easier to steal, hide and spend illicit money and can create new forms of corruption.

“Algocracy – government by algorithm – this is new. We have been using mobile phone since 20 years, but from the political point of view, people in the streets are not aware how they are manipulated by algorithm” (Interviewee, TI Movement)

“The bots that can influence corruption, especially regarding elections, and can also influence media by creating fake news, thus influencing the people’s opinions.” (Survey respondent)

“The rapid development of technology, especially in the cyber arena can influence the world by cyber attacks on high sensitive systems and infrastructures worldwide, including risks of shutting down the websites of leading stock exchange institutions, or leading banks, thus harming drastically the economies of those countries.” (Survey respondent)

“Technologies – cryptocurrencies, there will be new tools to hide money and to make it more complicated to investigate corruption” (Interviewee, TI Movement)

“In 10 years, it isn’t actually moving money around that is the issue. It is about changing data. You will be able to hack into a database and own a £10m house.” (Interviewee, Expert)
Future drivers of corruption: Landscape Analysis
Landscape Analysis: Future drivers of corruption

Over the last 13 years, freedom has declined across the world, including in established democracies. The decline in global freedom indicates that barriers to corruption are weakened.

In 2018, 44% of countries were considered free based on their political rights and civil liberties (2008: 46%). 30% were partially free in 2018 and 26% not free (2008: 22%):

- Authoritarian governments further reduced democratic elements and are reducing the freedom of media and expression.
- Many countries that democratized following the end of the Cold War have regressed due to a breakdown in rule of law and anti-liberal populist movements.
- Well-established democracy have become under increased pressure from anti-liberal populists that reject a separation of state power.

The number of countries with declining levels of freedom has consistently exceeded the number of those with improvements. However, while the global decline in freedom continued in 2018, it has slowed, with more countries experiencing large improvements and fewer large declines.

Number of countries with improvements and decline in global freedom, 2006 - 2018

Research by Saha and Campell (2007), Mungiu-Pippidi (2015) and Kalenborn and Lessmann (2013) shows that sound democratic institutions, including an independent judiciary and media, are crucial to reduce corruption. The decline in global freedom indicates that state oversight institutions are becoming weaker, and freedom of expression is being challenging – which weakens barriers to corrupt conduct.

Landscape Analysis: Future drivers of corruption

Over the last decade, rule of law declined across the world, except in the MENA region. Rule of law has been found to be positively correlated to control of corruption.

The World Justice Project’s 2018 Rule of Law Index highlights that rule of law declined in the most countries around the world from 2016 to 2018.

More countries’ overall rule of law score declined (34%) than improved (29%). The two indicators that declined the most were fundamental rights and constraints on government powers.

Correspondingly, Freedom House’s Freedom in the World Index shows that across its indicators for freedom, rule of law has declined the most over the last 13 years.

Research by Bertelsman shows that rule of law, the predominance of regular law, and citizens’ trust in state institutions and their representatives is crucial for the fight against corruption. In the absence of rule of law, corruption and bribery have been found to be prevalent as citizens are not considered equal before the law.

Landscape Analysis: Future drivers of corruption

By 2030, 2.3 billion people are projected to live in fragile contexts facing conflict and violence, which are prone to corruption.

Around 1.8 billion people currently live in fragile contexts facing conflict and violence:
- In 2016, more countries experienced violent conflict than at any time in the past 30 years
- Around 26,000 people died from terrorist attacks
- 560,000 people lost their lives because of violence
- In 2017, 30.6m people were displaced. The highest number since the end of World War II

Regional developments
The majority of fragile contexts are situated in sub-Saharan Africa, followed by MENA. 20 of all fragile contexts (58) were considered natural resource rich.

The number of people living in fragile contexts is estimated to increase to 2.3 billion in 2030 (OECD, 2018).

Corruption is closely interlinked with state fragility. Corruption creates instability and inefficiency. At the same, fragile states which lack effective checks and balances, are prone to corruption by those in power, which further destabilises the governance system (CMI, 2008).

Tackling corruption in fragile context in the absence of functioning institutions is highly challenging. When addressing corruption in those contexts, organisations can not rely on the rule of law. In light of rising levels of state fragility, developing the tools to effectively address corruption in these contexts will be of increasing importance over the next decade (CMI, 2008).
Organised crime – a key driver of corruption – is estimated to expand significantly in size, scope and influence over the next decade.

Organised crime has **transformed and grown over the last 20 years**. Driven by globalisation and international financial flows facing limited regulation and new technologies, it has become more **globalised and diversified**.

In 2017, transnational crime was estimated to have generated **around US $1.6-2.2 trillion of illicit revenues** (Global Financial Integrity, 2017).

Research by the Global Initiative against Transnational Organised Crime shows that in response, the number of UN Security Council resolutions on organised crime has increased from **8 in 2000 to 37 in 2017**, with most resolutions being concerned with **Africa**.

Europol (2015) depicts the **future state** of organised crime as:

- Being primarily **virtual and global in nature**
- Being driven by **individual criminal entrepreneurs**
- The use of **crime-as-a-service business models**
- Relying on **digital infrastructure**, and **virtual currencies**
- Being fuelled by exploitation of Big Data and personal data for fraud, and increased competition for natural resources

According to a study by TI (2011), “corruption feeds organised crime and organised crime feeds corruption”: Criminal networks use corruption to carry out their criminal acts and avoid prosecution. At the same time, corruption becomes more ingrained in society if commonly used by organised crime. Organised crime is seen as a key driver of corruption in the defence and security sector.
Research by Jong-Sung and Khagram (2005) shows that *inequality fosters corruption by increasing both the opportunities and motivation for corrupt behaviour*:

- Inequality comes with an increase in access to power and influence of the wealthy, thus **offering more opportunities for them to abuse power for their private gain**.

- The wealthy elites can be **motivated to buy political influence and exercise political corruption to protect their wealth**. This may be accelerated if society responds by demanding a redistribution of income and higher levels of taxes.

- With rising levels of corruption among the elites, their wealth is likely to grow further, **leading to a vicious circle between corruption and an unequal distribution of wealth**.

A 2018 survey conducted among UK citizens found that 41% of UK citizens are worried that corruption will increase as a consequence of rising inequality.

*“If global inequality were to rise, which consequences would worry you?”*

Landscape Analysis: Future drivers of corruption

The shift in global power towards non-democratic states and rise in nationalism could in the future erode international anti-corruption norms and challenge collective action.

Research that approaches corruption as a collective action problem understands governments and other stakeholders as self-maximizers, whose behaviour is highly dependent on shared expectations about the behaviour of others. The calculation of the costs of corruption are then derived from the cost of being the first to opt out the norm (Development Leadership Program, 2015).

While countries across the world have now adopted international conventions that aim to strengthen and promote measures to combat corruption, such as the United Nations Convention against Corruption (UNCAC), these documents require in-country implementation of anticorruption measures to effectively fight corruption.

A study by Khaghaghordyan (2014) outlines than countries ratify international treaties due to pressure from the international communities or pressure from donor countries.

As by 2030, the international order will likely be more diffuse and fragile, established democracies that historically fostered control of corruption will have less influence on pushing for the adherence to international anti-corruption norms.

At the same time, non-democratic states may be more able to prevent international collective action.

Landscape Analysis: Future drivers of corruption

Digital currencies, the use of digital information and communication networks, and Artificial Intelligence offer new tools to engage in corrupt behaviour

**Information and communication technology**

Information and Communication Technology (ICT) tools, such as **distributed ledger technology, and big data**, are providing new opportunities for corruption:
- The rise of ICT is enabling the centralisation of financial transaction databases, thereby also concentrating the risk for abuse
- **Big data and the increasing amount of personal data** that is being stored and accessed online, can be abused by corrupt actors
- Well-intended technologies, such as digital public services, can offer **new routes for corrupt behaviour**

**Illicit financial flows**

Between 2005 and 2014, illicit financial flows (IFF) are rising as one of the key challenges in tackling the problem of the movement of illegal funds.

The use of digital information and communications networks as a tool for facilitating illicit financial flows is rising at an average rate of 8.5% and 10.1% a year and are estimated to have accounted for an average of around 14.1% to 24% of total developing country trade.

Research by the U4 Anti-Corruption Resource Centre shows that **access to data** can create a much more sophisticated manifestation of illicit financial flows or tax evasion schemes.

**Artificial Intelligence & machine learning**

A study by the World Economic Forum (2015) estimates that there will be the first AI machine on a corporate board of directors by 2026.

Artificial intelligence and machine learning could **enable a system of corruption that can perpetuate itself without human assistance**, if not designed in an ethical manner.

When governments use AI to make decisions that have previously been made by policy-makers, AI can undermine the accountability and control of governments.

The growing challenges posed by climate change and the continued global mitigation efforts could create new opportunities for corruption over the next decade.

Climate change will pose a significant threat to global development and governance over the next decade. Communities across the world are already experiencing the consequences of climate change and it is expected that droughts, floods, intense weather and natural disasters will intensify in the future.

The World Bank (2019) estimates that an additional 100 million people could fall into poverty as a consequence of climate change. 143 million people could become climate migrants by 2050. Many countries that are vulnerable to climate migration are those that are also facing widespread corruption. Increased resource scarcity, rising levels of inequality and insecurity as a consequence of climate change, could further increase the potential for corruption to flourish in these countries (Transparency International, 2011).

Transparency International (2011) finds that a global response to climate change will require unprecedented levels of international cooperation, economic shifts and resource transfers.

It estimates that total climate change investments in mitigation efforts alone could amount to US$700bn by 2020 and that public investment of around US$250bn annually will flow through “new, relatively uncoordinated and untested channels”. The significant amount of resources needed and new channels through which these investments will be made poses significant corruption risks, which will be accelerated by the urgency of responding to climate change quickly.

The manifestation of corruption in the future
Summary: The manifestation of corruption in the future

Stakeholder views

The majority of stakeholders think that corruption will be worse and more sophisticated in the future, as current trends will manifest and as they see the responses to current threats as inadequate.

Types and definition of corruption

- Political corruption is most frequently cited by both external and internal stakeholders as the most serious type of current and future corruption. Survey respondents see diverse forms of political corruption as the most serious, including campaign and party financing, embezzlement and cronyism. Only a few mention ‘new’ types, such as digital corruption.

- A number of external stakeholders reject the distinction between petty, grand and political corruption and see the different types increasingly as part of an interlinked and systemic problem.

Who will be the key actors driving corruption? Where will it manifest?

- Stakeholders point to non-state actors, such as international networks, individuals and companies as increasingly important actors in the future corruption landscape.

- Many stakeholders suggest that there will be more cross-border corruption in the next decade, while few argue that the rise of nationalism will curb this development.

- Some external stakeholders argue that the international corruption community has so far predominantly focused on where corrupt money is stolen and should adopt a more holistic approach that also considers where it is hidden and spent.

Consequences

- Many stakeholders point to severe consequences of the continued manifestation of corruption, including a decline in trust in governments, rise of violent extremism, and an acceleration of climate change and migration.

Landscape Analysis

Types and definition of corruption

- The definition of corruption has always been a matter of debate. A diversity of definitions of the concept of corruption exist and as corruption has many different faces, how corruption manifests itself is likely to be defined differently depending on the context.

Who will be key actors driving corruption? Where will it manifest?

- In the future, there will be a more diverse set of powerful actors engaging in corruption. Non-state actors will be of increasing importance. Corruption can be increasingly transnational as corrupt actors take advantage of the weaknesses of the global financial system.

- According to the Corruption Perception Index, more than two-thirds of countries are perceived as ‘more corrupt’. In the majority of countries, there was little to no progress compared to previous years.

- In 2030, the majority of economic activities will be in emerging markets that currently have weak control of corruption. 6 of 10 of those countries that will be the largest economies in 2030 currently have negative control of corruption indicators.

Consequences

- The annual costs of corruption are estimated to amount to US $2.6 trillion - accounting for around 5% of global GDP.

- The U.N. lists corruption as "one of the biggest impediments" to achieving the 2030 Sustainable Development Goals.

- 72% of young people think that corruption is holding their country back. A similar percentage of young people thinks that corruption is causing lost opportunities for their generation.
Historically, TI has approached corruption mainly as something that occurs within national borders. In the future, there will be more diverse actors engaging in corruption both within and across borders.

**TI's historical approach to corruption**

**Actors**
Transparency International has primarily focused on the state as the core unit through its flagship projects such as the Corruption Perception Index (CPI) and the Global Corruption Barometer and its work through National Chapters. Key actors driving corruption identified by the CPI are governments that abuse entrusted power.

**Place in value chain**
The focus of Transparency International has historically been on preventing and stopping corrupt actors from stealing, e.g. by pushing for the adoption of laws and conventions that make corruption illegal and by calling out those who have ‘stolen’.

**How corruption is perceived and approached**
Transparency International has historically approached corruption as a policy challenge and has worked with international organisations to address this. It has successfully become a technical expert in the corruption landscape.

**Location**
Transparency International has approached corruption through various approaches. Its Corruption Perception Index approaches corruption as something that occurs within national borders.

**Corruption over the next decade**

**Actors**
There will be a more diverse set of powerful actors. Non-state actors will be of increasing importance, e.g. big companies that are taking on the provision of services previously in the responsibility of governments. Key actors could include wealthy oligarch and individuals acting alone, e.g. through the use of new technologies, and other non-state actors.

**Place in the value chain**
With transnational corruption expanding in the globalised economy, it has to be considered not just where corrupt money is being stolen, but also where it is being hidden and spent.

**How corruption is perceived and approached**
With rising levels of inequality, corruption can be increasingly seen as a social justice issue that constitutes a key challenge in people’s everyday lives, and no longer primarily as a high-level technical policy issue.

**Location**
There could be more corruption on a global level, crossing countries and moving into the digital space. Developed market and democratic countries constitute key recipients of corrupt money.
Stakeholders on the future manifestation of corruption
Stakeholder views: Future manifestation of corruption

The majority of stakeholders think that corruption will be worse and more sophisticated in the future, as they expect current trends to manifest. Only a few stakeholders suggest that corruption will decline.

Many stakeholders highlight that there has been limited or no progress in recent years to tackle corruption. A few stakeholders argue that while there have been some improvements, these have come from unexpected sources. Most stakeholders agree that corruption to some extent will always be there.

Looking towards the future, most stakeholders believe that corruption will become worse, due to negative developments manifesting and accelerating.

Many stakeholders think that the manifestation will not be due to new trends, but rather due to inadequate responses to current threats.

Some stakeholders suggest that corruption will pose an existential threat to society over the next decade.

Only a few stakeholders are optimistic in regards to the future and think that corruption might be reduced in the future.

“We see now ¾ of the world performing badly because corruption is more systemic than ever before, government paying very little interest on fighting corruption. People no longer have corruption on their mind” (Interviewee, TI Movement)

“In my view I don’t think corruption has changed much in the past years […] Lots of people say it has gotten worse.” (Interviewee, TI Movement)

“Gaging the size of the challenge – We face increasing problems that you cannot deal with them all simultaneously” (Interviewee, TI Movement)

“Corruption seems quite stable, it has certainly not gone down.” (Webinar participant, TI Movement)

“The worst case scenario would be accelerating on the path we are already on, taking power of people, rising xenophobia and racism, nothing being done about climate change” (Interviewee, Peer Organisation)

“Corruption is literally the greatest threat faced by human race. I am not convinced we are on path to compete it.” (Interviewee, Expert)

“Even in face of more challenging environment, there is more appetite for reform” (Interviewee, Partner)

“Some countries have gradually done better, but often progress came from unexpected sources” (Interviewee, Academia)
Stakeholder views: Future manifestation of corruption

Political corruption is most frequently cited by survey respondents as the most serious type of corruption currently and in the future.

In the survey, respondents provided a diversity of responses when asked about what they consider to be the most serious types of corruption now and in the future.

However, the most frequently cited type of corruption is political corruption in its different forms, such as corruption by public officials, favouritism, political party finance, revolving door and undue influence.

Stakeholders moreover frequently mentioned:
- illicit financial flows and money laundering
- grand corruption,
- petty corruption, and
- state capture

“What do you see as the most serious types of corruption, currently or in the future, that society faces over the next decade?” - 5 most frequently cited types:

Source: Firetail analysis of survey responses using the Word Cloud function and thorough review of individual answers on Survey Monkey.

Methodological note: This Survey question was an open-ended question, thus answers are based on what survey respondents considered to be ‘types of corruption’. To derive the estimates of most cited types of corruption, the number of occurrence of specific words, was counted. This was complemented by a thorough review of individual answers to account for responses which may refer to a type of corruption, but not use the term itself. For ‘political corruption’, these words also included the following terms: corruption by public officials, favouritism, political party finance, cronyism, revolving door, embezzlement, undue influence, political influence via donations. For ‘petty corruption’, these words also included bribery and wasta. For “illicit financial flows and money laundering”, these words also included: financial crime, offshore funding, global financial corruption, and tax evasion. The numbers should be considered as estimates as survey respondents may have used different terms to refer to a certain type of corruption. Moreover, some stakeholders may have considered one type of corruption as part of another umbrella term for corruption, e.g. grand corruption as a form of political corruption, while others considered them as two separate forms.
Stakeholder views: Future manifestation of corruption

Members of the TI Movement and external stakeholders have similar views considering the most serious types of corruption now and in the future

When comparing the responses by members of the TI Movement with those of external stakeholders, it is clear that both groups have similar views with regards to the most serious types of corruptions are considered.

External stakeholders cite political corruption slightly more frequently than internal stakeholders (57% compared to 47%), and internal stakeholders cite grand corruption slightly more frequently than external stakeholders (14% compared to 9%).

However, overall the distribution of answers is very similar, indicating that external and internal stakeholders have similar views when it comes to the most serious types of corruption.

“What do you see as the most serious types of corruption, currently or in the future, that society faces over the next decade?” - Comparison of responses by internal and external stakeholders:

![Pie chart showing the distribution of answers]

Source: Firetail analysis of survey responses using the Word Cloud function and thorough review of individual answers on Survey Monkey.

Methodological note: This Survey question was an open-ended question, thus answers are based on what survey respondents considered to be ‘types of corruption’. To derive the estimates of most cited types of corruption, the number of occurrence of specific words, was counted. This was complemented by a thorough review of individual answers to account for responses which may refer to a type of corruption, but not use the term itself. For ‘political corruption’, these words also included the following terms: corruption by public officials, favouritism, political party finance, cronyism, revolving door, embezzlement, undue influence, political influence via donations. For ‘petty corruption’, these words included bribery and wasta. For ‘illicit financial flows and money laundering’, these words also included: financial crime, offshore funding, global financial corruption, and tax evasion. The numbers should be considered as estimates as survey respondents may have used different terms to refer to a certain type of corruption. Moreover, some stakeholders may have considered one type of corruption as part of another umbrella term for corruption, e.g. grand corruption as a form of political corruption, while others considered them as two separate forms.
Stakeholder views: Future manifestation of corruption

Across different regions, stakeholders agree that political corruption is the most serious type of corruption now and in the future. A few manifestations of corruption are more frequently mentioned by stakeholders of specific regions.

When comparing stakeholders’ responses by region, it is clear that stakeholders across all regions consider political corruption as the most serious type of corruption now and in the future. Grand and petty corruption are also mentioned frequently across the regions. In addition to these similarities, a few types or manifestations of corruption are more frequently mentioned by stakeholders of specific regions:

<table>
<thead>
<tr>
<th>Americas</th>
<th>Africa</th>
<th>ECA</th>
<th>MENA</th>
<th>Asia-Pacific</th>
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<tr>
<td>Grand corruption</td>
<td>Corruption in the military</td>
<td>Corruption in the cyber space</td>
<td>Weakness of parliamentary institutions</td>
<td>Corruption surrounding climate finance</td>
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<tr>
<td>Obstruction of justice</td>
<td>Human trafficking</td>
<td>Lobbying</td>
<td>Drug trafficking</td>
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<tr>
<td>Narcotrafficking</td>
<td>Arms trafficking</td>
<td>Revolving door</td>
<td>Corruption in the health and education sector</td>
<td>Corruption in the state business nexus</td>
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<tr>
<td>Human trafficking</td>
<td>Natural resource corruption</td>
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<td>Corruption in the military and security sector</td>
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<tr>
<td>Organised crime</td>
<td>Money in politics</td>
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<td>Corruption surrounding arms trade</td>
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<td>Campaign finance</td>
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</table>

Source: Firetail analysis of survey responses using the Word Cloud function and thorough review of individual answers on Survey Monkey.

Methodological note: This Survey question was an open-ended question, thus answers are based on what survey respondents considered to be ‘types of corruption’. The highlighted "types of corruption" are those manifestations of corruption that have been mentioned by stakeholders of specific regions more frequently than in other regions.
Stakeholder views: Future manifestation of corruption

Survey respondents see diverse forms of political corruption as the most serious, including campaign and political party financing, embezzlement and cronyism.

Survey responses on forms of political corruption

Stakeholders see political corruption as the most severe form of corruption now and in the future.

However, survey respondents point to diverse forms of political corruption as key challenges. In particular, they point to campaign and political party financing, favouritism, embezzlement and cronyism. A few include state capture as a form of severe political corruption.

- "Political capture - rising undue influence by economically powerful individual and groups on political decision." (Survey respondent)
- "Political corruption (including State capture, illegal political financing, revolving doors, etc.)." (Survey respondent)
- "Political influence via donations." (Survey respondent)
- "Political corruption -- involving campaign finance and political party finance." (Survey respondent)

Survey responses on consequence of political corruption

Stakeholders in particular highlight the negative consequences of political corruption including the deterioration of political values.

Stakeholders stress that political corruption can undermine people’s trust in democracy and reduces resources available for the provision of public services.

- "Political corruption - ruins lives, countries, takes people’s faith in democracy." (Survey respondent)
- "Political corruption (generates large value abuses)." (Survey respondent)
Stakeholder views: Future manifestation of corruption

A number of interviewees reject the distinction between petty, grand and political corruption and see the different types increasingly as part of an interlinked and systemic problem.

A number of interviewees **challenged the distinction between different types of corruption** and argue that most types of corruption are part of a systemic problem and question the distinction between different types.

Others suggested that there will be **new types of corruption**, such as digital corruption, and more corruption in regards to **the use of natural resources**.

A few other stakeholders **rejected that the concept of corruption will change**.

“Corruption has been **too narrowly defined**, especially as a **transactional exchange between the holder of office and business interests**. I profoundly challenge the distinction between petty and grand corruption, they are vertically linked.” (Interviewee, Expert)

“The grand vs. petty definition is **useless**. For instance if there is a policeman being corrupt does not mean it will only be petty corruption if he has the protection from above” (Interviewee, Academia)

“We probably also need a different definition of corruption. [...] If you want to get involved in discovering where the **real problems lie in global governance** – you have to look at the globalised economy, which has practically become autonomous and does not accept any social control.” (Interviewee, TI Movement)

“Corruption – is such a broad term. It is such a broad term, so **thinking about the different definitions is not that useful**.” (Interviewee, Peer organisation)

“The concept of corruption will not **change**” (Interviewee, TI Movement)

“Defining corruption as something that happens behind borders is wrong. This is excluding the type of corruption that happens in rich countries. It is like defining international narcotics trade, only by looking at street dealing.” (Interviewee, Journalist)
Stakeholder views: Future manifestation of corruption

Several stakeholders argue that corruption will become more ingrained in the system in the form of kleptocracy as a consequence of rising inequality across the world.

Some stakeholders highlight the current trend towards more kleptocratic regimes is likely to continue, **where the powerful elite capture the state in several countries.**

While stakeholders stress that a trend towards elite capture in a country **could change with a new ruler,** some stakeholders think it is **part of a wider trend,** driven by rising inequality that is making corruption more ingrained in the system and leading to the erosion of the rule of law.

According to these stakeholders, fighting corruption that is fully ingrained in the political and economic system of a country, will be **more complex and difficult.**

“Corruption is much more sophisticated and ingrained. It is actually embedded in the systems, making it more difficult to unpick.” (Interviewee, Expert)

“[An important challenge is the] capture of state institutions by moneyed interests” (Survey respondent)

We are living globally through the recurrence of phenomenon that we last saw at end of 19th century, the **capture of institutions by what you could call integrated kleptocratic networks** [...] **The displacement of social values by the sole value of money**” (Interviewee, Expert)

“Social media provides a platform for corrupt individuals to fragment the society and capture the state more easily” (Survey respondent)

“The laws in many countries are skewed to work for the rich and powerful and not for ordinary people. The trend towards elite capture has the biggest impact as wealthy elites are making laws for themselves and capture business interests. You can even see that in amount of taxes that Amazon and other tech giants are paying.” (Interviewee, Peer organisation)
Stakeholders point to non-state actors, such as international networks, individuals and companies as increasingly important actors in the future corruption landscape

**International networks**

“Some international actors that can play this game, institutional and informal coalitions of people” (Interviewee, TI Movement)

“We see the liberalisation of financial flows – apparatus of corruption is not compromised, with new tax havens emerging in Asia” (Interviewee, Partner)

“Ilicit financial flows, money laundering and crime through the banking system [...] Major flows from poor to rich. It all tends to end up in the most respected banks in the North.” (Interviewee, TI Movement)

**Individuals**

“Certainly there will be a new class of corrupt people - hackers.’ (Interviewee, Donor)

“There will be more individuals instead of collective actors” (Interviewee, TI Movement)

“State actors are still a thing, but we will see more individuals and companies acting corrupt.” (Interviewee, Practitioner)

“There are professional individuals that we have not taken care of – that will facilitate corruption in the future” (Interviewee, TI Movement)

**Companies**

“Corporations will continue to take advantage of their alliances with national governments to boost their projects and this will continue to fuel corruption.” (Survey respondent)

“International commercial and financial companies will be playing with the law by using, in particular, all the weaknesses of the national regulations and tax evasion facilities offered by many countries.” (Survey respondent)

“These international companies have battalions of compliance departments. They will be working very hard to find ways in which they can continue to corrupt decision-makers without violating new rules.” (Interviewee, TI Movement)
Stakeholder views: Future manifestation of corruption

Many stakeholders suggest that there will be more cross-border corruption in the next decade facilitated by a rise in international financial flows, while few argue that the rise of nationalism will curb this development

Stakeholders’ views diverge if corruption will increasingly cross borders. Many agree that in the future there will be more cross-border corruption, due to an increase in globalisation and international financial flows. Other argue corruption will not just move offshore but also into the cyber space. This will make corruption increasingly complex and multi-layered.

However, a few stakeholders reject the notion that there will be more cross-border corruption. They argue that due to the rise of nationalism, corrupt activities will shift again towards happening primarily behind borders. Some stakeholders suggest that another factor that might reduce cross-border corruption is the increased establishment of international rules curtailing illicit financial flows.

Cross-country corruption

“The non-national level, operating in between countries, that’s where the big money will be, abuses enabled by corruption” (Interviewee, Academia)

“The scale of illicit financial flows across national borders will be substantially greater than the current annual volume in excess of $1 trillion (i.e. proceeds of governmental corruption, organized crime and tax evasion).” (Survey respondent)

“The world will become much smaller. It will be much easier for not only a large company, but also a small family sized company to have accounts in a tax haven.” (Interviewee, TI Movement)

“Transboundary nature of corruption – currently still used to dealing with corruption within regions [...] but it will increasingly also be cross-boundaries, e.g. Zambia will be connected to Panama where corrupted banks take their money.” (Interviewee, TI Movement)

“Lots of countries only waking up to reality of illicit flows through their systems” (Interviewee, Partner)

“Due to the trend towards nationalism, populism, people will do more bad things behind borders” (Interviewee, Partner)

“Most corruption will remain at national level. We are still a group of states. The money comes from a country government at the moment.” (Interviewee, TI Movement)

“There will be geographic shifts, e.g. tax evasion transcend borders, easier to hid tax evasion in London real estate” (Interviewee, Donor)

“We should not forget that for half of the world, pressing corruption is the corruption in housing, the provision of medicine and other aspects of people’s daily lives” (Webinar participant, TI Movement)
Stakeholder views: Future manifestation of corruption

Some stakeholders argue that there should be a more holistic approach towards looking at the manifestation of corruption by increasingly focusing on where corrupt money is spent

Some stakeholders argue that the international corruption community so far has predominantly focused on **where corrupt money is stolen**, and **less on where it is hidden and spent thereafter.**

These stakeholders highlight that the **rise of illicit financial flows** and **development of new tax haven** exemplifies the importance of considering where money is hidden.

They argue that if governments do not adopt comprehensive laws to curtail these international financial flows, this will strengthen those who hide money through offshore finance.

Several stakeholders point out that **corrupt money is spent in countries that are currently perceived as transparent** and that therefore their active role in the global corruption landscape has **not received sufficient attention** as a manifestation of corruption.

“We need to call out developed countries, we are currently only focused on developing countries” (Interviewee, Partner)

“It is also about how to store money that is stolen, you cannot be rich if you do not have anywhere to put it. One has to consider the enabling and gatekeeper industries and private sector role, not just in terms of banks and advisors but also in terms of governance.” (Interviewee, Partner)

“We have to think about poor countries as being stolen from and about rich countries, that are currently being perceived as more transparent and rule compliant, as fact countries that are facilitating corruption.” (Interviewee, TI Movement)

“The focus should also be on where corrupt money is hid and spent. If a globally respected organisation like TI says, we will put the US, UK and Singapore on top of the corruption index, you will scandalize a lot of people - that would be not just intellectually honest, but also good tactics.” (Interviewee, Journalist)
Many stakeholders point to severe consequences of the continued manifestation of corruption, including a decline in trust, rise of violent extremism, acceleration of climate change and migration.

"The efforts to curb the effects of climate change will play major roles as corruption will take on other forms. Corruption will be widespread in the areas of climate and environmental funding, which are intended to protect communities and mitigate the environmental effects." (Survey respondent)

"Corruption will increasingly become a weapon to win political elections. The minute you win it, it takes another turn and corruption will be trivialised." (Interviewee, Academia)

"Corruption will play a tremendous role in maintaining power and keeping the urban elites rich. We will see a lot of bloodshed, misery and killing in the next 20-40 years" (Interviewee, Academia)

"In response to the manifestation of corruption, there could be revolutions spinning out of control and violent extremism rooted in combatting corruption could erupt" (Interviewee, Expert)

"Corruption is one of the root causes that contribute to continue the vicious cycle of poverty while hinders development." (Survey respondent)

"Corruption will continue to be a core contributing factor to global insecurity, environmental destruction and human rights abuse. The combination of all those factors has an impact on sustainable public trust and leadership." (Interviewee, TI Movement)
The future manifestation of corruption: Landscape Analysis
Landscape Analysis: The future manifestation of corruption

A diversity of definitions of the concept of corruption exist. As corruption has many different faces, how corruption manifests itself is often defined differently depending on the context.

Corruption can be classified depending on the sector in which it occurs, the amount of money lost or the extent to which it is incidental, instrumental or systemic.

Transparency International (2018) defines corruption as the abuse of entrusted power for private gain. This definition captures three elements of corruption:

1. Corruption occurs in both the public and private sectors. Actors can be individuals, companies, or organisations such as political parties.
2. Corruption involves abusing power held in a state or private organisations.
3. Both sides involved in the corrupt act benefit, either in form of money or undue advantage.

The mid-term review of TI’s current strategy highlights that “power needs to be held in check to ensure that no de facto corruption exists” and “any power not kept in check – whether entrusted or hidden – will inevitably corrupt”.

Transparency International distinguishes between three main forms of corruption:

- **Petty corruption**: Small-scale everyday corruption at the interface between public institutions and citizens.
- **Political corruption**: perverts the political process.
- **Grand corruption**: Gross abuse of high-level power for private gain involving leaders and government.

According to the U4 Anti-Corruption Resource Centre, it is however often not clear where one type of corruption ends and another begins, as the small-scale corruption of a government official might be driven by a more systematic corruption scheme in government.

Sources: Website of Transparency International (2018); Mid-Term Review of Transparency International’s Movement Strategy 2020; U4 Anti-Corruption Resource Centre: What is corruption?
Landscape Analysis: The future manifestation of corruption

In the future, there will be a more diverse set of powerful corrupt actors. Corruption can be increasingly transnational as corrupt actors take advantage of the weaknesses of the global financial system.

Historically, the core actor engaging in corrupt behaviour has been the state that is abusing ‘entrusted power’. As companies and other non-state actors are taking on the role of the state and increasing their power and influence, it can be expected that they will also engage in more corrupt behaviour if left unchecked.

The abuse of power to steal money or gain undue influence happens across the world to varying degrees. With the rise of new actors, such as individual hackers, and new sectors, such as climate governance, corruption can be expected to also manifest itself in these areas.

According to Oliver Bullough (2018), modern corruption is inherently transnational as it exploits the weaknesses of the global financial system. Money is hidden in offshore financial systems, exemplified in the manifestation in increased illicit financial flows across the world, as the reach of the law is still limited to states.

Due to the mismatch in national laws but transnational corruption, corrupt money is often spend in countries other than those where it has been stolen, including in real estate and luxury goods markets in countries that have historically been considered as less corrupt.

Source: Firetail Analysis and adaptation of Oliver Bullough, Moneyland (2018)
Landscape Analysis: The future manifestation of corruption

By 2030, the majority of economic activities will happen in emerging markets that currently have weaker control of corruption. More people will live in countries with lower levels of control of corruption.

A study by the World Bank (1997) shows that emerging markets are more vulnerable to corruption as established institutions may not work well, rule of law is less established and civil society is more restricted in these countries.

6 of 10 of those countries that will be the largest economies in 2030 currently have negative control of corruption indicators.

As population growth in these countries also exceeds population growth in established Western democracies, there will be more people living in countries with weaker control of corruption in 2030 – if the countries do not strengthen their ability to control corruption corresponding to their growth.

Control of corruption in those countries that will be the 10 largest economies in 2030, 2017*

Sources: Graph and text: Adapted from World Bank TCdata360, 2019, * control of corruption is defined as “perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption, as well as “capture” of the state by elites and private interests. 2 indicates the highest control of corruption, -2 the lowest control of corruption; Text: World Bank Group (1997): Helping Countries Combat Corruption: The Role of the World Bank
According to Transparency International’s 2018 Corruption Perception Index, more than two-thirds of countries scored below 50 and the average score is just 43.

The CPI shows that despite some progress, most countries continue to fail to improve their control of corruption.

The fact there there has been limited progress despite international and national efforts to curb corruption in many countries suggests that previous efforts have not had the desired impact and that there might be a need to reconsider current approaches in light of their limited effectiveness.

There are no full democracies that score below 50 on the CPI. Similarly, very few countries which have autocratic characteristics score higher than 50.

Source: Transparency International, 2018, * The CPI uses a scale of 0 – 100 where zero is highly corrupt and 100 is very clean
Landscape Analysis: The future manifestation of corruption

The annual costs of corruption are estimated to amount to US $2.6 trillion - accounting for around 5% of global GDP.

Corruption costs the global economy around 5%

It is estimated that more than $1 trillion US Dollar is paid each year in bribes globally and that in total, $2.6 trillion is lost to corruption.

The U.N. lists corruption as "one of the biggest impediments" to achieving the 2030 Sustainable Development Goals.

Corruption depletes public funds that should pay for education, healthcare and other basic services in those countries most affected by it. Corruption erodes trust in government and impedes investment.

According to the World Bank (2018), corruption has a disproportionate impact on the poor and most vulnerable, increasing costs and reducing access to basic services. Studies found that the poor pay the highest percentage of their income in bribes.

According to TI, environmental degradation is another consequence of corrupt systems. The lack of, or non-enforcement of, environmental regulations and legislation means that natural resources are exploited, and ecological systems are ravaged.

Landscape Analysis: The future manifestation of corruption

72% of young people think that corruption is holding their country back. A similar percentage of young people thinks that corruption is causing lost opportunities for their generation.

Corruption is...

Research shows that corruption moreover leads to popular disenchantment with traditional institutions (Uslaner, 2004).

Decreased levels of trust in governance institutions can help the rise of populist leaders, who run campaigns based on empty anti-corruption promises, that they do not implement once in power (Kossow, 2019).

Methodological note: The survey was conducted between 18 September and 22 October 2014. 814 valid responses from people aged 18 – 34 and from 102 countries across the world form the basis of the survey results.

Fighting corruption in the coming decade
Summary: Fighting corruption in the future

Summary: Fighting corruption in the coming decade

Stakeholder views

Stakeholders offer a diversity of views in regards to future opportunities in fighting corruption. Many say there is no longer a ‘one size fits all’ solution.

Engaging grassroots, young people
- Most stakeholders stress that there is a much higher awareness for corruption and that the battle for explaining why corruption is bad has been won.
- However, many stakeholders highlight the need to make a strong link between corruption and the challenges in people’s daily lives. The majority of stakeholders say that new forms and ways of civic activism at a grassroots level will offer important opportunities to fight corruption – in particular through leveraging the support of a value-driven youth.

Technology
- Many stakeholders say that technological solutions, such as blockchain and open data, can be an important tool in the future fight against corruption – if those actors fighting corruption become experts in its usage.
- A few stakeholders suggest that the big international CSOs might come under increased pressure, if unable to shift their focus to external challenges and to regain trust by citizens in their work.

Enforcing anti-corruption commitments
- After the successful adoption of international anti-corruption conventions, the next crucial step is to hold governments’ feet to the fire to ensure their enforcement, according to several stakeholders.

Lessons from others
- Stakeholders point to a diversity of organisations that provide important lessons in regards to effectively connecting with local communities, working with young people, leveraging technology and speaking up boldly. Survey respondents mention most frequently Global Witness and Amnesty International.

Differences between views from external stakeholders and TI Movement
- Many external stakeholders argue that fighting corruption will require stronger responses and a wider focus than previously. They particularly highlight that focusing on states as the main actors and pursuing a rules-driven approach will no longer suffice. In addition, they argue that a stronger approach towards working on a grassroots level, addressing local needs and forcefully calling out those that fail to enforce uphold anti-corruption standards is needed.

Landscape Analysis

Engaging grassroots, young people, women and businesses
- Nearly half of young people see corruption as the most serious issue affecting their country, but 53% do not think that they have the tools they need to fight corruption. The rise in perception of corruption as a major challenge offers opportunities to rally more support for fighting corruption in the future.
- Across the world, levels of political participation by women is expanding, with women’s political participation linked to lower levels of corruption.
- Businesses are increasingly taking on the role of advocates for anti-corruption. 91% of the businesses that are part of the UN Global Compact now have anti-corruption policies and practices in place.

Technology
The rise of new technologies such as open data, e-government and new financial technology offers both new challenges and new opportunities for the control of corruption in the future:
- The size of the Open Data market is expected to grow to €75.7b by 2020.
- The value of blockchain is estimated to reach $462b by 2030.
- The share of countries with low e-government levels dropped by 50% from 2016 to 2018.
- Social media platforms are increasingly being used by social movements to raise awareness and mobilise support.

Enforcing anti-corruption commitments
- As of today, 186 countries have ratified the UN Convention against Corruption. Research suggests there has not just been a rise in anti-bribery legislation, but also increases in anti-bribery enforcement.

Lessons from others
- Global Witness, the #Metoo Movement, and the ‘new’ climate movement offer lessons in regards to fighting a specific issue, engaging youth, working with grassroots, spreading awareness and accelerating social change.
Stakeholders on fighting corruption in the next decade
Stakeholders offer a diversity of views in regards to future opportunities in the fight against corruption. Many suggest that there is no ‘one size fits all’ solution.

Many stakeholders highlight that in an increasingly complex and multi-layered environment, there is no longer a ‘one size fits all’ solutions in terms of good governance, but rather that the fight against corruption has to be adjusted to local circumstances.

Stakeholders offer a diversity of opinions in regards to possible opportunities that might accelerate the fight against corruption in the future.

However, there are a few opportunities that many stakeholders considered as positive developments that should be leveraged:

- Technology and digitalisation
- Civic activism in general and more specifically mobilisation against corruption
- Youth engagement
- Rising levels of education and access to information

And to a lesser extent, but still frequently mentioned opportunities are:

- Global/international partnerships
- Increased whistleblowing protection
Stakeholders views: Fighting corruption in the coming decade

Most stakeholders stress that there is now a much higher awareness for corruption. Bringing it closer to people’s daily lives is seen as an important opportunity to foster popular support for fighting it.

The vast majority of stakeholders agree that there is now a much higher awareness about corruption and its impact. Many point to Transparency International's work as a driver behind this achievement. Stakeholders highlight that now many politicians now win elections based on anti-corruption campaigns and some stakeholders point to an increase in mass movements against corrupt governments.

However, many stakeholders also highlight that while the increased awareness offers more opportunities for engagement, it also poses a risk as the call for fighting corruption is increasingly being abused by populist leaders to win elections. At the same time, many stakeholders argue that although corruption is on everyone’s mind, people do not associate its negative impact with their daily lives. They suggest that making a strong link between corruption and people’s daily challenges will be key to fighting it effectively in the future.

“[The most opportunity that might accelerate progress in anti corruption -] Increasing perceptions of corruption and awareness of the problem among common citizens.” (Survey respondent)

“[The most opportunity that might accelerate progress in anti corruption -] Big leaks, investigations and scandals raising awareness.” (Survey respondent)

“[The most opportunity that might accelerate progress in anti corruption -] We have been caught up in a high-level debate. People cannot relate to corruption causing a loss to the economy of more than £2trillion. We need to break this number down to something they can relate to in their daily lives, e.g. how many water holes have not been fixed in their community due to corruption.” (Survey respondent)

“One reason for hope is that the defining issue of election results across the world in the last two years was corruption. Anti-corruption is on top of the mind for most people.” (Interviewee, Partner)

“[The most opportunity that might accelerate progress in anti corruption -] We have to find ways to bring it back to the average citizen. We were asking too much of the citizen, as there was so much focus on the big scale, but not on what citizens are experiencing on a daily basis” (Interviewee, Donor)

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Stakeholders views: Fighting corruption in the coming decade

The majority of stakeholders say that new forms and ways of civic activism will offer important opportunities to fight corruption – in particular through leveraging the support of a value-driven youth

### Youth - Driven

"In the global south, over 70% of the people are young people [...]. These young people do not have the same hopes compared to our generation. They will **show their frustration with the state**. What young people are looking for now is **believable information to move their issues forward**" (Interviewee, TI Movement)

"The most effective way of responding to the challenges in the corruption landscape is citizen engagement [...] You need to have an awaken citizenship. I think there will be more citizen engagement in 2030 because of the demographic trends in Africa and Asia.” (Interviewee, Partner)

"[The most opportunity that might accelerate progress in anti corruption -] **vibrant youth**" (Survey respondent)

### Value - Driven

"The scale of mass mobilisation will be bigger due to the scale of corruption. [...] **We are seeing mass levels of mobilisation to defend certain good values that we have never seen before** – where this goes, what it produces and how it is channelled is the big question.” (Interviewee, TI Movement)

"[The most opportunity that might accelerate progress in anti corruption -] the **new generation which has greater values.”** (Survey respondent)

"In some ways citizens are able to get more involved at the local level. Millennials **care about this**. [...] In the private sector, employees are beginning to challenge their companies.” (Interviewee, Donor)

### Grassroots - Based

"The engagement of the next generation will be different in terms of how willing they are to participate and the way in which they participate. [...] The massive movements in the street, they are not initiated by political parties, they are initiated by individuals.” (Interviewee, TI Movement)

"Bottom-up approaches will soar and it will be harder for corrupt individuals to have impunity.” (Survey respondent)

"We might see **more organic movements like the student climate change movement.”** (Interviewee, Peer organisation)
Stakeholders views: Fighting corruption in the coming decade

Several stakeholders argue that after the successful spread of international anti-corruption conventions, the next crucial step is to ensure their enforcement.

Many stakeholders, both within the TI Movement and external stakeholders, say that while the majority of states have signed anti-corruption legislation, enforcing these laws over the next decade will be crucial.

A few stakeholders point to examples where civil society organisations have been able to successfully act in court when corruption statues have been infringed, underlining the ability of civil society organisations to enforce implementation.

However, a few other – mainly external - stakeholders suggest that enforcing conventions and laws will not lead to better control of corruption as long as social norms of a society do not change.

These stakeholders argue that a change in norms and a better understanding of society of the harmful consequences of corruption is needed to ensure that the laws will be adhered to.

“[An important opportunity is the] concerted transnational / international cooperation on enforcement of anti-corruption frameworks and policies.” (Survey respondent, TI Movement)

“A key opportunity that exist and is not yet being exploited is to increase enforcement on those who facilitate corruption, e.g. in certain segments of the financial service industry.” (Interviewee, Partner)

“An important opportunity is to ensure that countries that have ratified international conventions actually implement them to realise their potential.” (Interviewee, Donor)

“We have a mountain of anti-corruption legislation, but who is holding the feet against the fire? Most countries that have signed the UNCAC do not do anything.” (Interviewee, TI Movement)

“[An important opportunity is the] enhanced implementation of laws and policies.” (Survey respondent, TI Movement)

“Look at the social norms in the UK: The change in smoking attitudes – it was not the passage of the laws (banning smoking in public places), the law just enabled us to enforce a latent concern in society.” (Interviewee, Expert)
Stakeholders views: Fighting corruption in the coming decade

Many stakeholders say that technology can be an important tool in the future fight against corruption – if those actors fighting corruption become experts in its usage.

The majority of survey respondents see technology as offering important opportunities to fighting corruption in the future. While some interviewees also agree with this assessment, many highlighted that technology is only a tool, which can be used by actors fighting corruption, but also by those engaging in corrupt conduct. Several stakeholders highlight that it is not so much about a certain application, but more about becoming an expert in discovering new tools swiftly, as there will be constantly new ones.

**Open Data and Blockchain**

“Technology can help with more open transactions, e.g. through blockchain. This is the biggest opportunity for the future of corruption” (Interviewee, Partner)

 “[A great opportunity is the] development of open data and civic monitoring mechanisms (hopefully with lower set up and operating costs) to actively engage citizens in corruption monitoring and reporting.” (Survey respondent)

“The transparency revolution – that is the genie in the bottle. More people now know more things than they every have in the past.” (Interviewee, TI Movement)

**Tech companies**

“In all the big technology companies, there is now more pushing towards the ethical use of data and machine learning.” (Interviewee, Practitioner)

“The tech companies have the reach. They can be a force for good.” (Interviewee, TI Movement)

**Social media**

“The rise of hashtag chapters – the hashtag will determine the future. Through twitter governance bills can change, without the need for an institutional framework.” (Interviewee, TI Movement)

“Through the rise of social media, one sees more exposes, leaks, and revelations like the Panama Papers. The question is how to deal with the legitimate vs. the fake exposes.” (Interviewee, TI Movement)

**Transparency of beneficial ownership**

“The hope is that with an increased push towards verified transparency - public registers of ownership will be available for everyone and that the information will be verified.” (Interviewee, Journalist)

 “[A great opportunity are] registries of Beneficial Ownership.” (Survey respondent)

“[A great opportunity are] mechanisms that connect between local initiatives and national change in a way that engages millions of people - the new form of advocacy enabled by social media.” (Survey respondent)
Stakeholders views: Fighting corruption in the coming decade

Stakeholders stress that the closing of civic space, and the related rise of populism, decline of rule of law and social apathy will pose the biggest challenges for CSOs fighting corruption over the next decade.

**Closing civic space**

The majority of stakeholders agree that the shrinking civic space will challenge CSOs’ ability to effectively operate.

However, some argue that the closing space is a positive sign, as it shows CSOs are succeeding in pressuring governments.

“The shrinking of civil society space and financial pressure – it simply impacts the capacities of CSOs to perform its role” (Survey respondent)

“The narrowing space for civil society because populist leaders […] decide to narrow independent voices, will require a lot more thinking” (Interviewee, TI Movement)

“The closing space is more an illustration that our pressure is working – this should continue” (Interviewee, Expert)

**Populism**

Stakeholders see the rise of populism as an important driver behind the closing civic space.

Several stakeholders argue that it will reduce CSOs’ access governments, and lead to an increased polarization of the corruption debate.

“Populism and media-capture will limit or even compromise CSO’s capacities to mobilise citizens” (Survey respondent)

“Our operating space will diminish as you have more populist in office.” (Interviewee, TI Movement)

“The raise of populism in democratic countries is allowing for narratives (e.g. racism, self-interest) that were once a taboo. Civil society organizations must operate in a highly polarized world.” (Survey respondent)

**Social apathy**

In particular survey respondents suggested that citizens might become more indifferent towards corrupt behavior.

However, other stakeholders argue that the demand by citizens for accountability and transparency will intensify.

“Social apathy - diminished citizen willingness to oppose corruption or corrupted governments as a result of impunity.” (Survey respondent)

“Lack of trust in institutions which might affect CSOs if we do not connect again with people and engage citizens in our fight.” (Survey respondent)

“Indifference and social apathy can be […] difficult to tackle, especially when the space for civil society is shrinking and rights are threatened by governments and police state” (Survey respondent)

**Decline of rule of law**

Many stakeholders point to the decline in rule of law as a challenge that will increase over the next decade.

In particular, they point to implications in regards to the safety of activists.

“The weakening of the rule of law globally, which will have an impact on civil society’s work due to: A) the shrinking space for civil society organisations […]; B) state capture; C) the decrease of funding from the public sector.” (Survey respondent)

“The potential further rise of authoritarian regimes poses an enormous danger to the safety of civil society activists and journalists and their ability to work for freedom and for transparency and accountability in government” (Survey respondent)
Stakeholders views: Fighting corruption in the coming decade

Most stakeholders agree that CSOs will continue to play a key role in fighting corruption, while a few argue that the role of international CSOs might decline.

Most stakeholders stress the important role that CSOs will continue to play in fighting corruption in the future. Many stakeholders argue that technology in particular will offer new opportunities for CSOs to engage with people and fight corruption:

- “The technology revolution will equip civil society organizations with stronger tools to monitor the governance.” (Survey respondent)
- “Social media and AI gave so much voice to the powerless to stand up and report corruption, it will be developed more to what I believe will help serve anti-corruption efforts.” (Survey respondent)
- “All factors and developments that lead to greater access to information will have a positive impact to the work of the civil society.” (Survey respondent)
- “Connectivity, ICT, apps that enable much better link to grassroots and citizen engagement”. (Survey respondent)

However, a few stakeholders suggest that the big international CSOs might come under increased pressure, if unable to shift their focus from internal to external challenges and regaining trust by citizens in their work:

- “People want new, fresh, leadership. The old, stuffy, top-down and unaccountable charity is untrustworthy to many people. The era of big INGOs may be coming to an end as local CSOs which are more closely connected to local advocacy efforts become more successful.” (Survey respondent)
- “A common thing that the big NGOs are facing – an uneasiness, middle age crisis of these organisations in terms of governance and internal problems. [...] Why are we all talking about our governance issues instead of being more focused on external issues?” (Interviewee, TI Movement)
- “Civil society has become too dependent on pleasing donors and undertake projects that are "safe" to donor interest even when it serves better to be critical of policies based on how lawful they are” (Survey respondent)
Stakeholders point to a diversity of organisations that TI could learn from. Survey respondents mention most frequently Global Witness and Amnesty International.

Stakeholders point to a diversity of organisations that TI could learn from. In particular, they frequently mention organisations that are effective in connecting with local communities and mobilising grassroots movements, working with young people and investigative journalists, leverage technology successfully and are speaking up boldly.

“TI should also learn from smaller organisations for their dynamic and smart ways of promoting social media engagement.” (Survey respondent)

“The Green Movement has been very successful in working in subtle ways to educate the younger generations. 20 years later, we have a huge generation that are absolutely aware of the green agenda.” (Interviewee, TI Movement)

“Global Witness have a really good model of getting people on the ground.” (Interviewee, Academia)

“Represent Us have been very successful in focusing on the sub-national level and working in a non-partisan way.” (Interviewee, Expert)

6 most cited organisations that TI could learn from according to survey respondents*

Source: Firetail analysis of survey responses. *Numbers are estimates based on a count of specific words used by survey responses. Survey respondents may have used different terms to refer to a certain organisation.
Fighting corruption in the coming decade: Landscape Analysis
As of today, nearly every country is a party to the UN Convention against Corruption. Research suggests there has not just been a rise in anti-bribery legislation, but also increases in anti-bribery enforcement.

The UN Convention against Corruption has been ratified by 186 countries and the number of international and national anti-corruption conventions has increased significantly over the last decades.

The TRACE – Global Enforcement Report (2018) suggest that there has also been an increase in enforcement action against bribery. From 2017 to 2018, the number of open investigations into foreign-bribery allegations grew in Europe by c. 37% and there was a notable increase in the number of open investigations worldwide.

Landscape Analysis: Fighting corruption in the coming decade

Businesses are increasingly taking on the role of advocates for anti-corruption. 91% of the businesses, that are part of the UN Global Compact, now have anti-corruption policies and practices in place.

Over the last 20 years, the corporate social responsibility and ethics sector has significantly grown and a range of benchmarking tools, frameworks and networks now exist in which businesses engage in the fight against corruption, such as the UN Global Compact.

In 2018, 51% of businesses, which are part of the UN Global Compact, had anti-corruption training and awareness programmes for employees and 49% have management systems addressing bribery and anti-corruption in place.

Businesses increasingly collaborate with stakeholders from different sectors to drive forward ethical behaviour. This trend can be expected to continue in the future as businesses are responding to consumer demands with regards to ethical and sustainable practices:

- 97% of companies across the world recognise the importance of operating with integrity, which is seen as a business advantage.
- The number of millennials across the world who believe that businesses are behaving in an ethical manner increased from 52% in 2015 to 65% in 2017.

### Actions taken by companies to implement the UN Global Compact’s anti-corruption principle, 2018

<table>
<thead>
<tr>
<th>Action</th>
<th>0%</th>
<th>20%</th>
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<tbody>
<tr>
<td>Training and awareness programmes for employees</td>
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<tr>
<td>Management systems addressing bribery and anti-corruption</td>
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<tr>
<td>Anti-corruption policy is publicly accessible</td>
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<tr>
<td>Terminate contracts with suppliers if corruption occurs</td>
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<td>Sanction system for corruption breaches by employees</td>
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<td>Anonymous hotline for reporting of corruption instances</td>
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<td>Corruption risk assessment</td>
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<td>Public disclosure of anti-corruption policies and practices</td>
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<td>Supply chain and subcontracting arrangements</td>
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<td>Monitor and evaluate performance</td>
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<tr>
<td>Record instances of corruption</td>
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<tr>
<td>Record facilitation payments and gifts</td>
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<td>Corruption impact assessment</td>
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<tr>
<td>Participate in industry or issue-specific initiatives</td>
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<td>Multi-stakeholder dialogue</td>
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<td>Engage in collective action</td>
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<tr>
<td>Anti-corruption policy is publicly accessible</td>
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</tr>
<tr>
<td>Training and awareness programmes for employees</td>
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</table>

Source: Graph and text: 2018 UN Global Compact Progress Report; Text: Ernst and Young (2018): Integrity in the spotlight; Deloitte (2017): The Global Millennial Survey
Nearly half of young people see corruption as the most serious issue affecting their country. The rise in perception of corruption as a major challenge offers opportunities to rally more support for fighting corruption in the future.

46.90% of young people across the world consider corruption as the most serious issue affecting their country today, according to the World Economic Forum’s 2018 Global Shapers Survey.

On a global level, corruption is still considered to be the most serious issue by 22.7% of young people, and many of the issues that more young people consider the most serious issues are aggravated by corruption, such as climate change (49%), inequality (31%), and poverty (29%).

“What are the most serious issues affecting your country today?”

While many young people consider it to be a key challenge to their lives, they do not think that they have the tools they need to fight corruption.

To what extent do you feel you and your friends have the tools you need to fight corruption in your community?

Source: World Economic Forum (2014): Young people are turning the tide against corruption
The rise of open data, new financial technology and e-government offers new opportunities to enhance control of corruption in the future

The size of Open Data is estimated to increase between 2016 and 2020 by 36% to €75.7b. Governments are making more data openly available. However, the commitment to open data has slowed and stalled across the world.

Open Data can make lobbying more transparent, exposing preferential treatment towards companies, and revealing pattern of corrupt conduct.

In 2017, the value of blockchain was $1.9b and by 2030, it is estimated to reach $462b.

Studies find that transactions in physical cash could fall by 30% within 5 years due to the rise of e-payment systems and cryptocurrencies.

The more traceable and auditable nature of electronic money means its rising usage could reduce bribes and facilitation payments.

Globally, almost two-thirds of the UN Member States now demonstrate high-level of e-government development.

The size of Open Data is estimated to increase between 2016 and 2020 by 36% to €75.7b.

Globally, almost two-thirds of the UN Member States now demonstrate high-level of e-government development.

The share of countries with low e-government levels dropped by 50% from 2016 to 2018.

Research finds that e-government maturity significantly contributes to corruption control by increasing transparency and reducing opportunities for corruption.

Impact on corruption

The rise of open data, new financial technology and e-government offers new opportunities to enhance control of corruption in the future.


*E-government is defined as the use of electronic communications devises to provide public services to citizens
Over the last 60 years, women’s political participation has expanded significantly. Research shows that a high level of women’s political participation is linked to lower levels of corruption.

Research by The Economist highlights that women’s political participation has improved significantly over the past 60 years - more than any other single indicator in The Economist’s Democracy Index.

TI research shows that higher levels of women’s rights and participation have been found to be positively associated with better governance and lower corruption levels.

Recent years did not just see the rise in women’s political participation but also more widely a growth in identity politics, as civic movements – often using social media - are raising awareness about discriminatory behaviour and are driving action towards social change.

This is exemplified in the #MeToo and #BlackLivesMatter Movements that resectively campaign against sexual harassment and systemic racism respectively.

Political participation, by region, 2018: Index score out of 10, 10 being best

Social media platforms are increasingly being used by social movements to raise awareness and mobilize support across the world.

The rise of worldwide internet connectivity has been accompanied by a growth in social media usage across the world, that enables millions of people to connect and communicate on social media platforms such as Twitter, Facebook, Youtube and Instagram.

As the internet enables users to share information in real time and reach millions of people in an instant, social movements are increasingly using social media platforms to campaign for social change.

It offers new opportunities for people to organise themselves, shape the narrative and increase pressure on the international community to drive forward social change.

Hashtag activism, the “discursive protest on social media united through a hashtagged word, phrase or sentence” can have a strong impact on raising visibility and awareness around issues and lead to social change, exemplified in the use of social media by the “Me too’, "Times Up’ and ‘Black Lives Matter’ Movements.

Landscape Analysis: Fighting corruption in the coming decade

Case studies provide examples of organisations TI could learn from around fighting a specific issue, spreading awareness and accelerating change

Global Witness is an international NGO established in 1993 that works to break the links between natural resource exploitation, conflict, poverty, corruption, and human rights abuses worldwide. Global Witness works in around 30 priority countries, and campaigns on specific topics including money-laundering, land rights and conflict diamonds. Its approach focuses on investigations using various new technologies and data analysis, and demonstrating concrete consequences and drivers of exploitation.

Lessons for Transparency International

Global Witness has been seen as successfully engaging local needs and making corruption more tangible for people in their daily lives and for using new technologies effectively.

The ‘new’ climate Movement refers to recent activities in the climate space whereby young people are playing an active, leading role in pushing for action on climate change.

The #Metoo movement is a movement against sexual harassment and sexual assault. The movement was founded in the US in 2006 but spread virally globally in October 2017 as a hashtag on social media following a number of celebrity cases of sexual harassment.

The #Metoo Movement is an umbrella-term embraced by various organisations. Its success stemmed from the fact that individuals used it as a organising concept to speak out against all sorts of sexual harassment.

The climate movement encompasses a range of different organisations, movements and actions. At its core is the initiative taken by young people across the world to protest and advocate for their leaders to take more action on climate change.

The new climate Movement is seen to be driven by a change in social norms and values in an entire generation of young people that the ‘Green’ movement has been educating over the last 2 decades.

The movement has been called an impressive example for bringing a wide variety of individuals to speak out boldly against a particular form of injustice, often in difficult environments.
Implications of the future challenges and opportunities for Transparency International
Consultation with the TI Movement and external stakeholders highlighted that TI is seen as well placed and a leading actor in responding to the challenges in the landscape.

Political corruption is most frequently mentioned by stakeholders as the key corruption challenge that TI should address in the next decade. Members of the TI Movement and external stakeholders have similar views concerning which corruption challenges TI should address.

To effectively fight corruption in the future, the Vision 2030 process has revealed several paths to success for TI:
- **Deepening its engagement with ordinary citizens and local needs** and for this, leveraging TI’s unique access to more than 100 countries across the world as a grassroots activist
- Responding to the challenges of rising misinformation by leading global corruption research, fostering a well-informed debate, and educating the youth as an expert and knowledge producer
- Responding to the rise of technology by becoming a leading tech expert, leveraging it for its own work and helping governments to use it for good.
- Addressing the challenge of enforcing the global anti-corruption conventions and calling out those who disregard them, thereby becoming a driver of accountability
- Respond to the growth in actors fighting corruption by becoming a convenor of corruption fighters who collaborates with diverse stakeholders, including the private sector, to drive change

These paths to success come with different implications for TI's capabilities and skills, culture and values, governance, and approach to others in the landscape. To effectively respond to the challenges in the landscape, it will be key for TI to set itself up as a responsive Movement, that speaks with one voice and has a governance structure that enables it to pursue the chosen paths to success in addressing the challenges and opportunities in the landscape.
Stakeholders on the implications for Transparency International
The majority of stakeholders agree that TI is well placed to respond to the challenges in the landscape and continues to be a leading actor – in a landscape that includes increasingly a multitude of actors.

The majority of stakeholders agree that Transparency International has been the key international CSO in the fight against corruption over the last two decades. Many highlight that TI is still leading the global efforts in this fight. They in particular give TI credit for succeeding in getting the issue on the agenda.

Most stakeholders agree that TI continues to be the most visible actor with a strong brand. Many highlight that TI is well placed for the future due to the fact that it is very well known and has a global spread.

However, many stakeholders stress that TI is now operating in a very different landscape. They highlight that the space of anti-corruption actors is now much more crowded, and includes a diversity of actors, including businesses and CSOs with a stronger grassroots approach.

Many stakeholders suggest that while TI has succeeded in putting corruption on the global agenda, so far levels of corruption have not decreased. Stakeholders therefore argue that TI’s approach could become under pressure if it does not lead to results and if others are better at responding to future challenges and opportunities. These stakeholders suggest that TI’s vision needs to rise to the level of the threat to have an impact.

“TI is one of the best placed, it has a very strong brand.” (Interviewee, Donor)

“TI is still seen as the most visible non-governmental organisation working on corruption. The most visible and the biggest.” (Interviewee, Peer organisation)

“TI has been great in getting the issue on the agenda, has been given it focus, they have been sensitizing the issue.” (Interviewee, Academia)

“The first key thing which TI recognises but struggles with is that they are no longer the predominant actor in the anti-corruption space [...] there are many players now.” (Interviewee, Expert)

“TI can take lots of credit for building public awareness and TI should continue to do that but the idea of corruption is now well known and people in power are still not doing anything ” (Interviewee, Academia)
Stakeholder views: Implications for Transparency International

Political corruption is most frequently mentioned by stakeholders as the key corruption challenge that TI should address in the next decade.

Stakeholders offer a diversity of opinions in regards to what corruption challenges TI should focus on.

Political corruption stands out as the most frequently mentioned corruption issue by stakeholders. This includes electoral corruption, money in politics and weak political institutions and integrity.

Stakeholders moreover frequently mention illicit financial flows, corruption related to climate change and natural resources, corruption in the judiciary, and the lack of government accountability and enforcement of anti-corruption policies as key issues that TI should prioritise in the future.

“Which three corruption issues should be the priority for Transparency International to address between now and 2030?”

[Bar chart showing the number of mentions for different corruption issues]

Source: Firetail analysis of survey responses using the Word Cloud function on Survey Monkey.

Methodological note: The Survey question was an open ended question, thus answers are based on what survey respondents considered to be corruption issues that should be a priority for TI over the next decade. To derive the estimates of the most frequently mentioned corruption challenges, the number of occurrence of specific words, such as 'political corruption', 'illicit financial flows', and climate finance' was counted. This was complemented by a thorough review of individual answers to account for responses which may refer to a specific corruption challenge, but not use the term itself. For 'political corruption', these words also included the following terms: electoral corruption, money in politics, weak political institutions and integrity. For 'illicit financial flows', these words also included the following terms: tax evasion, money laundering and dirty money. For corruption related to climate change that includes corruption related to climate finance, climate change, environment and natural resources. The numbers should be considered as estimates as survey respondents may have used different terms to refer to a certain type of corruption challenge.
Stakeholder views: Implications for Transparency International

Members of the TI Movement and external stakeholders have similar views concerning which corruption challenges TI should address.

“Which three corruption issues should be the priority for Transparency International to address between now and 2030?” – Comparison of responses by internal and external stakeholders:

A comparison between responses by members of the TI Movement and external stakeholders shows that the two stakeholder groups see similar corruption issues as priorities for TI in the future.

Political corruption is most frequently mentioned as a priority issue by both groups.

The distribution of responses varies the most significantly regarding corruption in the judiciary, which is more frequently mentioned by external stakeholders than members of the TI Movement.

Methodological note: The Survey question was an open ended question, thus answers are based on what survey respondents considered to be corruption issues that should be a priority for TI over the next decade. To derive the estimates of the most frequently mentioned corruption challenges, the number of occurrence of specific words, such as 'political corruption', 'illicit financial flows', and climate finance' was counted. This was complemented by a thorough review of individual answers to account for responses which may refer to a specific corruption challenge, but not use the term itself. For 'political corruption', these words also included the following terms: electoral corruption, money in politics, weak political institutions and integrity. For 'illicit financial flows', these words also included the following terms: tax evasion, money laundering and dirty money. For corruption related to climate change that includes corruption related to climate finance, climate change, environment and natural resources. The numbers should be considered as estimates as survey respondents may have used different terms to refer to a certain type of corruption challenge.

Source: Firetail analysis of survey responses using the Word Cloud function on Survey Monkey.
Stakeholder views: Implications for Transparency International

Some corruption issues are more frequently highlighted by stakeholders from certain regions as future priorities for TI, such as the weakness of state institutions in Africa and the erosion of democracy in the ECA region.

The five key corruption issues are frequently mentioned by survey responses across the world. In addition, there are a few corruption challenges that are particularly frequently mentioned by respondents from certain regions:

<table>
<thead>
<tr>
<th>Americas</th>
<th>Africa</th>
<th>ECA</th>
<th>MENA</th>
<th>Asia-Pacific</th>
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</thead>
<tbody>
<tr>
<td>- Corruption related to climate change</td>
<td>- Weakness of state institutions</td>
<td>- Populism</td>
<td>- Weak government institutions</td>
<td>- Economic development and the links between political and economic power</td>
</tr>
<tr>
<td>- New technologies enabling corruption</td>
<td>- Lack of accountability of politicians</td>
<td>- Public apathy</td>
<td>- Potential of violent conflict</td>
<td>- Rising levels of wealth inequality</td>
</tr>
<tr>
<td>- Erosion of democracy</td>
<td>- Lack of political will to fight corruption</td>
<td>- Erosion of democracy</td>
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<td></td>
<td>- Repression of freedom of speech and press</td>
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<tr>
<td></td>
<td>- Corruption related to natural resources</td>
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</tbody>
</table>

Source: Firetail analysis of survey responses using the Word Cloud function on Survey Monkey.

Methodological note: This Survey question was an open-ended question, thus answers are based on what survey respondents considered to be corruption issues that should be a priority for TI over the next decade. The highlighted corruption issues are those issues that have been mentioned by stakeholders of specific regions more frequently than in other regions.
Stakeholder views: Implications for Transparency International

Some stakeholders argue that TI should tackle those corruption challenges that affect most people, while others suggest TI should focus on those that are easiest to tackle.

Stakeholders’ views vary on which approach TI should follow when deciding on the corruption challenges that it should focus on.

Some argue that TI should focus on those challenges that are actionable and can be tackled easily.

Others argue it should focus on those that affect most people or have the most devastating impact. Views diverge if it should focus on a few key priorities or keep a broad approach.

In light of the persistence of certain corruption challenges, such as corrupt businesses, some stakeholders argue that TI should continue to focus on the same issues as it has historically, but strengthen its response to address them adequately.

Other stakeholders suggest that TI should also move into new areas, e.g. by raising awareness of the link between the environment and corruption in light of climate change.

However, most stakeholders argue that instead of focusing on one specific challenge in the future, TI should focus on setting itself up in a way that allows it to effectively respond to the diversity of future challenges, including those that are currently not yet know.
Stakeholder views: Implications for Transparency International

Many stakeholders argue that an important path to success in addressing future challenges will be for TI to deepen its engagement with ordinary citizens and local needs.

Stakeholders suggest that TI has been successful in speaking to international organisations and being seen as an expert that approaches corruption as a public policy challenges. However, many argue that an important future opportunity that TI has not capitalise on is engaging with ordinary citizens and establishing a clear link between corruption and its impact on the daily lives of people.

Most stakeholders highlight that what is unique about TI is its access to more than 100 National Chapters, which provides it with deep local knowledge and access to grassroots. These stakeholders argue that TI should leverage this unique advantage to deepen its engagement with ordinary citizens and local needs.

"Moving from an abstract “corruption is bad and we need to change it” narrative, e.g. marching on anti-corruption day, into a narrative that demonstrates clearly the practical consequences for citizens.” (Interviewee, Expert)

"TI should continue to lead on the anti-corruption arena, but should be much less elitist, should go closer to communities and have an open ear and eye to problems of ordinary people. Instead of boardroom advocacy, TI should focus on people’s needs.” (Survey respondent)

"The shift needs to be from using civil society less as an explanation method but more as a social pressure method. There needs to be a clear link between corruption and the consequences for society” (Interviewee, Expert)

"TI must explain people what they do and why they do it. Take a grassroots approach. Stand next to people.” (Survey respondent)

“We can now speak to ministries and will be heard because they see us as an expert organisation. But in this process, we have lost our contact with the ordinary citizen. In 10 years time, we will be seen as part of political infrastructure. We need to speak to the people and establish a link with ordinary citizen.” (Interviewee, TI Movement)

"One of the lessons from the Arab spring was that this kind of mass mobilisation, did not come from civil society or established organisations, it came from ordinary citizens. How to actually mobilise these movements – that is a key learning point” (Interviewee, Donor)

"Grassroots organisations are enormously important on national level to get politicians to walk the talk. If TI doesn’t understand that and act to support that, then it will fail, however nice it’s work is on global level” (Interviewee, TI Movement)

"TI's ambition should be to be the] vocal voice for the poor and marginalised.” (Survey respondent)

"The problem with TI is that they are treating anti-corruption as a public good. A better way forward would be to engaging citizens in their own life” (Interviewee, Academia)

"TI a bit naively put a lot of weight on international institutions and the setting of norms [...] This might have led to an underinvestment of the country-level work” (Interviewee, Peer Organisation)
Stakeholder views: Implications for Transparency International

Many stakeholders say that TI should respond to the challenges of rising misinformation by leading global corruption research, fostering a well-informed debate, and educating the youth.

A challenges identified by many stakeholders is the rising levels of misinformation and ‘fake news’.

At the same time, many stakeholders point to open data as an important future opportunity as it will mean that people will have more access to information.

Many stakeholders suggest that TI should address the challenge of rising misinformation and leverage the increase in data available to foster a well-informed debate among the public.

A number of stakeholders argue that TI should go beyond informing the public, by educating the next generation about negative impacts of corruption, similar to how the Green Movement educated children about climate change.

“Spreading more information on corruption challenges, shedding light and shaming the corrupt.” (Survey respondent)

“Effectively respond to the changes in the corruption landscape by bringing those new corruption phenomena to the awareness of the public” (Survey respondent)

“Voice out bravely without fear.” (Survey respondent)

“Continue to do research that matters that helps equip these grassroots campaigners.” (Survey respondent)

“The Green Movement has been very successful in educating younger generations. 20 year later, we have a huge generation that are absolutely approach an appointed minister with a code of ethics, if this person has not embedded values of honesty and transparency, it is too late.” (Interviewee, TI Movement)
Stakeholder views: Implications for Transparency International

According to several stakeholders, TI should respond to the rise of technology by becoming a leading expert in its usage, leveraging it for its own work and helping governments to use it for good.

"Those that are first one [in understanding new technologies] will use the lack of knowledge of others to their benefit. People that are adept at using new technologies will be a step ahead. Digital education within civil society goes to the core of TI’s thinking." (Interviewee, TI Movement)

"Take the lead in identifying how technology can be regulated in order to make it a positive driver rather than a negative risk." (Survey respondent)

"As countries look to develop new technology […] there is an opportunity for civil society to influence governments in giving themselves the systems and procedures to prevent corruption from being able to take place." (Interviewee, TI Movement)

"We should be the EXPERTS on all things technology for anti-corruption. Technology should be part of our core strategy." (Survey respondent)

"For technology, we have two different communities that are currently not working together. We need to work with each other" (Interviewee, TI Movement)

Many stakeholders highlight that technology should be seen as a tool: If it will become a primary tool for corruption or anti-corruption will depend on who will learn to use new technological innovations better.

Several stakeholders argue that Transparency International should become an expert in technology, as TI will otherwise be at a disadvantage compared to actors using it for corrupt conduct.

These stakeholders argue that TI should take a lead in identifying and helping governments understand how they can best use technology for anti-corruption purposes, as governments currently struggle to understand this dimension.

Other stakeholders argue that TI should also leverage technology in its own anti-corruption work, for instance by using social networks as tool to raise awareness ("hashtag chapters").
Stakeholder views: Implications for Transparency International

Some stakeholders argue that TI should focus its efforts on addressing the challenge of enforcing the global anti-corruption conventions and calling out those who disregard them.

Many stakeholders, both members of the TI Movement and external stakeholders, have pointed out that while the majority of countries have signed international anti-corruption conventions and national legislation, there remains a significant gap between the legislation and the enforcement of these laws.

According to several stakeholders, closing this gap constitutes the key challenge to be addressed by the anti-corruption community over the next decade.

Several members of the TI Movement as well as external stakeholders argue that TI should play an important role in pushing governments towards better enforcement.

A few stakeholders suggest that TI should adopt a stronger focus on naming and shaming those who fall short of enforcing their laws.

In contrast, a few, mainly external stakeholders, argue that enforcement will only succeed if the attitudes of society towards corruption change, and that changing these attitudes and social norms should be the main approach for TI to address the enforcement challenge.

“There needs to be a real push on enforcement […] Anti-bribery and money-laundering legislation exist in many countries but this needs to be enforced.” (Interviewee, TI Movement)

“We must be seen worldwide at the leading organization that speaks truth to power on corruption - by demonstrating that we are determined to see that enforcement of anticorruption commitments is meaningful, by holding leaders to account” (Survey respondent, TI Movement)

“We are at a point where we have gathered momentum of officials in authority to understand corruption’s role. This gives TI a chance to push for enforcement. […] We do not need more laws, but no is intending to enforce these rules.” (Interviewee, TI Movement)

“International civil society has not been as vigorous as I expected to call out corruption, there have not been enough bold statements and naming and shaming. Where is TI?” (Interviewee, Partner)

“It should ensure implementation of anti-corruption commitments by helping/pushing countries to strengthen their institutions and rule of law. Encouraging political integrity is necessary for this as only non-corrupt leaders will do this.” (Survey respondent, TI Movement)
Many stakeholders highlight that in the future, it will be increasingly important for TI to collaborate with other stakeholders, including the private sector, to achieve success.

Many stakeholders say that **collaborating with other organisations and actors** will offer an **important path to success** for TI in addressing the challenges in the corruption landscape in the future.

In this regard, stakeholders particularly highlight opportunities to continue and deepen its engagement with **other civil society organisations**, the **private sector**, **investigative journalists**, and **governments**.

- **“[TI should deepen the cooperation with investigative journalists and to keep corruption issues in focus of the broad community.” (Survey respondent)“**
- **“[TI must strive and continue to be a catalyst in the global fight against corruption. Working and collaborating with organizations with similar vision will be important to further the cause.” (Survey respondent)“**
- **“Whereas much of the movement’s work up to now has looked at keeping governments in line, in the next decade there will be a big role to play in keeping big business from exerting undue influence on governments, or otherwise arrogating resources and money unto themselves.” (Survey respondent)“**
- **“TI’s main ambition should be to open itself to partnerships and collaborations with civil society, private sector and governments.” (Survey respondent)“**
- **“Engage directly with private sector, particularly with those who have expertise and capacity to support implementation.” (Survey respondent)“**
- **“Effective exchange of experiences amongst anti-corruption forces in different countries and cooperative efforts among governments and international organisations.” (Survey respondent)“**
Stakeholder views: Implications for Transparency International

Several stakeholders argue that TI should take on a bolder role in the landscape. Views diverge if it should focus on a few key priorities or keep a broad approach.

<table>
<thead>
<tr>
<th>A leading role</th>
<th>A focus on diverse issues</th>
<th>A bold approach</th>
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<tbody>
<tr>
<td>“TI should focus on <strong>reinforcing its role as the anti-corruption leader</strong> among civil society both at the international and the national level” (Survey respondent)</td>
<td>“It should be active in <strong>different levels of corruption in different areas</strong> - in developing world the focus is much different than in developed countries, yet the same principles can be applied to support positive democratic development.” (Survey respondent)</td>
<td>“Be bolder and fearless in its anti-corruption efforts. Call out politicians and other corrupt actors in both the public and the private sector. Stand behind the importance of democratic institutions.” (Survey respondent)</td>
</tr>
<tr>
<td>“To build a coalition against corruption to improve the lives of people” (Survey respondent)</td>
<td>“Focus on 3 priorities only. Drop all the rest.” (Survey respondent)</td>
<td>“I think we should be very ambitious, <strong>more bold and creative</strong> globally and at the country level.” (Survey respondent)</td>
</tr>
<tr>
<td>“To be more than an influential think tank, but rather a <strong>hub for tangible action and coordination of anti-corruption</strong>, nationally, regionally, globally and thematically.” (Survey respondent)</td>
<td>“While we should make sure to <strong>keep-up with new trend</strong>, it should not be to the detriment of &quot;classic&quot; corruption issue such as in public procurement […], given that those are far from being solved.” (Survey respondent)</td>
<td>“TI should be <strong>more aggressive</strong> in its approach in the next decade. Don't fear to threaten corrupt governments or rulers, don't fear to unveil the truth, act as an anti-corruption army” (Survey respondent)</td>
</tr>
</tbody>
</table>
Stakeholder views: Implications for Transparency International

Many stakeholders point to TI’s strong brand, global coverage and technical expertise as assets in responding to the changing landscape. Stakeholders consider internal governance aspects as key obstacles to TI’s capacity to change.

### Key assets of TI in responding to changes in the landscape

Many stakeholders point to three key assets in regards to its organisational capacity to respond to the changing landscape: i) Its global coverage through National Chapters, its strong brand and ability to speak with a strong voice, and its technical expertise.

- **“TI is well placed, it has a big voice, access to international bodies and is spread across the world through its national chapters.”** (Interviewee, Business)

- **“TI is the best placed in the landscape to respond to changes and has a strong brand.”** (Interviewee, Donor)

- **“We have a strong brand and are present in more than 100 countries. This is our great advantage and distinguishes from other organisations. We are spread all over the world and in the field”** (Interviewee, Individual Member)

### Obstacles to effectively addressing changes in the landscape

Several stakeholders point to TI’s internal governance challenges, donor policy, and bureaucracy as a key obstacle for its organisational capacity for change and for allowing the Movement to respond to the changing landscape.

- **“One of TI’s problems has been its internal struggles. [...] The challenge TI faces are fundamental: How can you reconcile what you need to do at a global level with the chapter priorities?”** (Interviewee, Expert)

- **“A challenge will be if we continue to take money from donors that do not consider corruption a top priority”** (Interviewee, TI Movement)

- **“TI speaks a lot, in some ways I would like to see them listen more and in this regard, make better use of its chapters”** (Interviewee, Peer organisation)

- **“It will be much more difficult to maintain the big structures in terms of the organisation, a question will be how to maintain our legitimacy”** (Interviewee, TI Movement)
Stakeholder views: Implications for Transparency International

Stakeholders outline ambitious scenarios for what success will look like for Transparency International over the next decade, both in regards to the external corruption landscape and internal perception of TI.

### External indicators of success

- "More and more people around the globe aware, motivated and actively engaged in fighting inequality, corruption and impunity through an all-inclusive approach" (Survey respondent)

- "A society free of corruption at all levels, one that condemns corrupt acts, does not tolerate them and does not make any attempt to commit them, perceiving them as futile and risky (entailing political, economic, legal, criminal or social sanctions), with risks clearly out weighing potential benefits." (Survey respondent)

- "More countries' leaders that are leading effective anti-corruption. Stronger democracies around the world due to less corruption. Achievement of the SDGs due to development projects not losing their funding due to corruption and citizens not being victimised by petty corruption." (Survey respondent)

### Internal indicators of success

- "Global NGO leader in advocacy and anti-corruption expertise" (Survey respondent)

- "Finding a way to speak with one voice, while respecting the unique structure of the movement." (Survey respondent)

- "Achieving more flexibility through the movement, reducing bureaucracy and more actively advocating for the problems of the grassroots on a national, regional and global level" (Survey respondent)

- "Being a leading NGO, providing effective, adjustable and applicable tools to fight corruption nationally and globally for the selected assumed topical priorities. Reinforce a strong identity and recognition with the corruption community" (Survey respondent)
Stakeholder views: Implications for Transparency International

Stakeholders furthermore offered views on internal governance aspects that will be important determinants of a successful response by TI to the future challenges and opportunities.

Cooperation between National Chapters and TI-S

Some stakeholders say that increased complexity demands a stronger “central TI” which can build technical skills around data and technology, as chapters do not have the sufficient resources and capacities.

Related to this, many stakeholders argue that TI should facilitate the sharing of best practices across the Movement.

“More sharing across the movement in general, in terms of strategies. We should consider how well national chapters can represent the secretariat in their local contexts.” (Survey respondent)

“The movement should draw from its members more. Best practices are developed almost everyday and we fail to make the best of it.” (Survey respondent)

Speaking with ‘one voice’

Stakeholders underline that TI should focus on organising the organisation so it can be responsive and speak with one voice, rather than having diverse approaches and focal themes.

“TI should have the ambition to increase trust and collaboration within the movement so that we can act as a global player. I would like to see TI develop ‘one voice’, a culture that offers a space to talented individuals to develop and share skills, insights and capacities.” (Survey respondent)

“The TI movement should become a true movement, not the sum of its parts like it currently is. We are divided and so we are weak” (Survey respondent)

Expand to further countries

Some stakeholders highlighted that TI currently has no representation in some countries with lower standards of corruption and that it should expand to cover all regions and key countries, to expand its reach and impact.

“There are areas of the world where we don’t have significant presence and where there is a huge need; China, India and the US, Japan. We have either zero or poor presence in those countries.” (Interviewee, TI Movement)

“It should be present on every part of the globe and engage at all levels of the society.” (Survey respondent)
Annex
## Annex

### High-level overview of external stakeholders consulted through in-depth interviews

As part of the Vision 2030 process, 23 in-depth interviews were conducted with 8 members of the Movement (4 Board members and 4 Individual Members), as well as 15 external stakeholders. The background and area of expertise of external stakeholders consulted are outlined below.

<table>
<thead>
<tr>
<th>Stakeholder group</th>
<th>Organisation</th>
<th>Area of Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics</td>
<td>Colgate University</td>
<td>Corruption, democratisation and development</td>
</tr>
<tr>
<td>Academics</td>
<td>Hertie School of Governance</td>
<td>Good governance, democratisation, anti-corruption</td>
</tr>
<tr>
<td>Business</td>
<td>Unilever</td>
<td>Anti-corruption, business integrity</td>
</tr>
<tr>
<td>Donor: Foundation</td>
<td>Luminate</td>
<td>Civic participation, financial transparency, accountability</td>
</tr>
<tr>
<td>Donor: Government</td>
<td>DANIDA</td>
<td>International development</td>
</tr>
<tr>
<td>Expert</td>
<td>Independent</td>
<td>Financial integrity, investigative journalism, organised crime</td>
</tr>
<tr>
<td>Expert</td>
<td>Independent</td>
<td>Anti-corruption, international development</td>
</tr>
<tr>
<td>Journalist</td>
<td>The Guardian</td>
<td>Money laundering, financial crime, Russia</td>
</tr>
<tr>
<td>Partners</td>
<td>Financial Transparency Coalition</td>
<td>Fiscal policy</td>
</tr>
<tr>
<td>Partners</td>
<td>Global Alliance for Vaccines and Immunization</td>
<td>Corruption, fiscal policy, international development</td>
</tr>
<tr>
<td>Partners</td>
<td>World Bank</td>
<td>Financial markets, integrity, anti-money laundering policy</td>
</tr>
<tr>
<td>Peer organisation</td>
<td>Global Integrity</td>
<td>Governance, transparency, accountability, development</td>
</tr>
<tr>
<td>Peer Organisation</td>
<td>Oxfam</td>
<td>International development, advocacy</td>
</tr>
<tr>
<td>Practitioner</td>
<td>Wikimedia</td>
<td>Data, transparency</td>
</tr>
<tr>
<td>Think Tank</td>
<td>Southern Voice</td>
<td>Sustainable development</td>
</tr>
</tbody>
</table>
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