

Belarus Tajikistan
Latvia Estonia
Uzbekistan Moldova Armenia

STRATEG**EAST**
WESTERNIZATION
INDEX
2020

Azerbaijan Georgia
Turkmenistan Kazakhstan
Ukraine Lithuania
Kyrgyzstan

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Latvia Estonia
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ABOUT STRATEG EAST



StrategEast is a strategic center whose goal is to reinforce the values of rule of law and private property protection in Eurasian and Baltic countries through the transition from natural resources-based to knowledge-driven economy.

Our work is focused on the 14 countries, which proclaimed or restored their independence after the collapse of the USSR: Armenia, Azerbaijan, Belarus, Estonia, Georgia, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan.

StrategEast is a registered 501(c)3 organization based in the United States.

LEARN MORE AT OUR WEBSITE:

www.StrategEast.org

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INTRODUCTION



Photo by MSC/Michael Kuhlmann

Dear Reader,

The publication of the 2020 Westernization Index, which documents the state of transition of 14 post-Soviet countries towards Western political and economic standards, comes at a very timely moment. The Index is released just a few months after we celebrated a truly remarkable anniversary — remarkable for the post-Soviet region covered in the Index, and for Europe as a whole: Thirty years ago, on November 9, 1989, the Berlin Wall came down — and with it vanished the dividing line that had separated both Germany and Europe for several decades.

This moment, many believed, would be the starting point of a comprehensive transformation process. A process that would see post-Soviet countries, including Russia, embrace Western standards of democracy, rule of law, and human rights protection. A process that would eventually give rise to a pan-European security architecture, a durable order of peace.

And in fact, the 2020 Westernization Index documents that much has been achieved in the past 30 years: Many post-Soviet countries have moved towards more democratic and market-oriented institutions. But the report also demonstrates that much remains to be done: From ensuring individual freedoms and independent courts to protecting human rights — the process of transition that started 30 years ago is far from completed. And there is nothing automatic about this process. In fact, since

2018, when the Index was launched, many post-Soviet countries experienced backsets.

By highlighting this, the Index draws much-needed attention not only to the region's transition itself. It also reminds us of the challenges that remain for European integration and for efforts to build a Euro-Atlantic order of peace. Sure: the European Union and NATO integrated many Eastern European states, thereby contributing to peace, democracy, and prosperity in the post-Soviet region. Yet, many countries are still struggling to find their place in the European order and the Western world.

In this regard, the Index is also a forceful reminder of the West's responsibility for the future of the region and its ongoing transformation — and of the fact that if the West fails to act, other powers will not hesitate to jump in. By deciding not to open accession talks with North Macedonia and Albania, the EU has certainly not lived up to its responsibility.

But the greatest stumbling block to regional transformation and to efforts to build a durable European security order is posed by the dismal state of Western relations with a country that is absent from the Index: Russia. It is a pity that the vision of a 'Common European Home,' as expressed by former Soviet President Mikhail Gorbachev, never materialized — a home to all including Russia. What began in 1989 in Germany still remains incomplete. The objective of "a Europe whole, free and at peace" as formulated by US Presidents George H.W. Bush and Bill Clinton has still not come to fruition.

In documenting the state of transition of the post-Soviet region, the Westernization Index is a forceful reminder of the aspirations that came alive in 1989. In reading the results, we should be reminded of the pan-European project that we embarked on almost 30 years ago — and of the merit of continuing this journey.

Ambassador Wolfgang Ischinger,
Chairman of the Munich
Security Conference

A handwritten signature in black ink, appearing to read 'Wolfgang Ischinger'.



Photo by Alexander Kozachenko

While presenting the second edition of the Westernization Index for post-Soviet states, I would like to remind the reader about the story of its inception. We at StrategEast conceived this Index as a product for internal use, as a measuring instrument allowing us to apply our efforts in the most efficient way when analyzing the Westernization of 14 countries which gained or restored independence after the breakup of the Soviet Union. And also, to find the points for application of our efforts and measure their result. But two years ago, after we saw the findings produced by experts who worked on preparing the Westernization Index, we decided to make this Index a public product—and this decision has paid off. During the intervening two years, StrategEast has released a large number of reports, analytical articles, and policy papers, but the Westernization Index remains our standard-bearing product—the only product presenting at a glance, the entire picture of what is going on in the region we analyze.

During the past two years, the Index became a useful tool for a large number of public institutes, both in the Post-Soviet, Not-Russian (PSNR) region itself, and in the West, where it is used by international financial institutes working with post-Soviet states and where Western think-tanks and analysts can base their findings on its data and conclusions. Thanks to the advent of the Index, which considers 14 post-Soviet countries as a single space, many institutes (both

financial and analytical) began viewing this space as a single region, applying their models and solutions, which were previously applied only to one particular country or group of countries, to the entire region, thus significantly increasing the effectiveness of cooperation these Western institutes have with the region.

The new edition of this Index, released two years after our first attempt to measure the degree of the region's Westernization, retains its unique features:

- it is still the only report to analyze the 14 countries of the PSNR region as a whole;
- it measures each country's wholesale integration into the Western world across many sectors;
- it is prepared for the West by experts from the region.

However, the present edition of our Index also has a fundamentally different quality: it now reveals not only a static but also a dynamic picture of Westernization in the PSNR region. The second edition shows trends in political, economic, and legal Westernization, and by extension, the effectiveness of efforts by Western institutions operating in the region. The Westernization Index dynamics indicate where we have been able to succeed, where even greater efforts must be applied, and where we perhaps even chose the wrong way.

Nevertheless, being one of the first to see the findings of the 2020 Westernization Index, I can assure you that overall, we—Western institutes working with post-Soviet states—have chosen the right way. The Westernization dynamics revealed by the present edition of our Index indicates that this region not only has a common past but also a common future, and whether this region—as a whole—moves in the “right” direction: toward traditional Western values, such as transparency, the rule of law, and private property protection.

Sincerely, Anatoly Motkin
Founder and President,
StrategEast

INDEX METHODOLOGY

HOW THE SCORE IS DETERMINED

Westernization is a process of social change whereby societies adopt Western patterns of political development, legal functioning, economic relations, cultural discourse, and lifestyle. The Westernization Index is a tool aimed at measuring the level to which the post-Soviet countries and societies, except the Russian Federation, have adopted, accepted, or were permeated by the Western culture in all the key areas for each country. The Index is based on a series of elements and benchmarks that helped us to assess the adoption and implementation of the Western model by looking at five key areas:

1. Political Westernization.
2. Economic Westernization.
3. Legal Westernization.
4. Language and cultural Westernization.
5. Westernization of lifestyle.

We limited the Index to the five areas we believe are most critical to examine, although we accept that we could have expanded this to include even more areas for even more robust analysis. Each area (which has multiple sub areas) is weighted differently within the Index to capture the relative importance of each sector to the overall Western transition. The weight of each of the first three areas is 25%, the fourth 15%, and the fifth 10%. The maximum possible score is 100%, which represents full Westernization.

The Index is based on two types of analysis which complement each other. First, we rely on qualitative expert assessments provided by our researchers, and second, on quantitative data publically available from open sources. These two methodologies are combined in order to reflect the complete status of Westernization. Our organization partnered with local experts who authored the qualitative assessments, and a local research firm, the New Europe Center, which compiled the data collection.

In order to ensure that the experts' analysis is consistent across countries, evaluations were given common guidelines and data sources to use in their reports. Based on these guidelines and the combined quantitative and qualitative data, experts assigned scores within each sub-area of a country. These scores were then reviewed in two steps: first by the project coordination team, and then by the third-party expert. The two-tier review is meant to decrease the likelihood of subjectivity and to ensure that the data are comparable.

Scoring was carried out through a multistage process which included analytical contributions from different research teams to make the scoring process balanced. The experts preparing country profiles calculated and suggested preliminary scores according to strict indicators. The proposed points were reviewed and adjusted independently by two research teams in the New Europe Center and StrategEast. This allowed unbundling of the research and scoring process and calibrating and weighting scores to avoid possible bias of the country experts.

The scoring process is based on the tested methodology used in the Nations in Transit Report by Freedom House and the Bertelsmann Transformation Index of the Bertelsmann Foundation. The scores reflect the consensus of each section's author, the StrategEast research team, the New Europe Center research team, and reviewers and academic advisers. In cases when consensus was not reached, the score was decided by the New Europe Center and StrategEast.

The overall process was organized into four phases. First, the data collection and experts' assessment takes place. Second, the data and qualitative analysis are subjected to the two-step review. Third, changes to each country profile are made so that the data and the scores are comparable. Fourth, the data and the assessment are analyzed and compared across all countries and sectors to ensure all trends, similarities, and differentiations are identified.

The Westernization Index was developed by a team of more than 20 people, consisting of the experts from the countries studied and the project management group.

WESTERNIZATION INDEX SCORING RUBRIC

POLITICAL WESTERNIZATION, 25 POINTS

DEGREE OF POLITICAL FREEDOM, 10 PTS

High: 8–10 | Mid: 3–7 | Low: 0–2

A “High” score (8–10) indicates:

- Free and fair elections
- High levels of media and press freedom
- No restrictions to new political party formation/registration

PRO-WESTERN PARTIES IN THE PARLIAMENT, 8 PTS

High: 6–8 | Mid: 3–5 | Low: 0–2

A “High” score (6–8) indicates:

- Parliamentary parties support European integration
- Parliamentary parties support NATO integration
- Parliamentary parties support trade with Western powers

PUBLIC OPINION OF WESTERN CIVILIZATION, 7 PTS

High: 6–7 | Mid: 3–5 | Low: 0–2

A “High” score (6–7) indicates:

- Public opinion polls indicate high support for EU integration
- Public opinion polls indicate high support for NATO
- Public opinion favors strong alliances with Western powers

LEGAL WESTERNIZATION, 25 POINTS

COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION, 6 PTS

High: 5–6 | Mid: 2–4 | Low: 0–1

A “High” score (5–6) indicates:

- High level of compliance with the international standards of the Venice Commission
- Close cooperation and engagement with the Venice Commission and its recommendations

INDEPENDENCE OF THE COURTS, 7 PTS

High: 6–7 | Mid: 3–5 | Low: 0–2

A “High” score (6–7) indicates:

- A strong, independent judiciary system with little corruption or external pressure from political actors
- A high ranking on the World Justice Project Rule of Law Index

LEGISLATION IN THE AREA OF HUMAN RIGHTS, 6 PTS

High: 5–6 | Mid: 2–4 | Low: 0–1

A “High” score (5–6) indicates:

- Legislation protecting human rights
- Enforcement of legal human rights protections
- Favorable reviews from human rights organizations

NUMBER OF ACQUITTALS, 6 PTS

High: 5–6 | Mid: 2–4 | Low: 0–1

A “High” score (6–7) indicates:

- Judges display a willingness to conflict with prior prosecutions in appropriate situations, rather than simply duplicating indictments

ECONOMIC WESTERNIZATION, 25 POINTS

EU AND WTO MEMBERSHIP OR ASSOCIATION, 7 PTS
High: 6–7 | Mid: 3–5 | Low: 0–2

- A “High” score (6–7) indicates:**
- Membership in the European Union
 - Membership in the World Trade Organization

EASE AND TRANSPARENCY OF DOING BUSINESS, 6 PTS
High: 5–6 | Mid: 2–4 | Low: 0–1

- A “High” score (5–6) indicates:**
- High ranking on the Doing Business Index
 - High ranking on the Corruption Perception Index

WESTERN SHARE IN THE SALES OF GOODS, 6 PTS
High: 5–6 | Mid: 2–4 | Low: 0–1

- A “High” score (5–6) indicates:**
- Major trading partner with Western nations and the EU

WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY, 6 PTS
High: 5–6 | Mid: 2–4 | Low: 0–1

- A “High” score (5–6) indicates:**
- Support for Western foreign direct investment (FDI)
 - Western FDI contributes a major portion of total FDI

LANGUAGE AND CULTURAL WESTERNIZATION, 15 POINTS

USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE, 2 PTS
High: 2 | Mid: 1 | Low: 0

- A “High” score (2) indicates:**
- The native language uses a Latin script
 - English signage is frequently used in public

PROFICIENCY IN THE MOST COMMON LANGUAGES OF THE WEST, 6 PTS
High: 5–6 | Mid: 2–4 | Low: 0–1

- A “High” score (5–6) indicates:**
- Proportion of the population proficient in the most common languages of the West (English, German, French, Spanish)
 - Government promotes the study of foreign languages

SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATRES AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER), 7 PTS
High: 6–7 | Mid: 3–5 | Low: 0–2

- A “High” score (6–7) indicates:**
- Western TV dominates airtime
 - Western movies dominate cinema showings
 - Wide use of Western social media channels like Facebook
 - Western social media is not blocked by the government

WESTERNIZATION OF LIFESTYLE, 10 POINTS

PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES, 5 PTS
High: 4–5 | Mid: 2–3 | Low: 0–1

- A “High” score (4–5) indicates:**
- High share of the population has travelled to the West
 - High share traveling abroad for business or education
 - High share traveling abroad for vacation

PRESENCE OF WESTERN FRANCHISE COMPANIES, 3 PTS
High: 3 | Mid: 1–2 | Low: 0

- A “High” score (3) indicates:**
- Strong presence of Western restaurants and fast-food chains
 - Strong presence of Western supermarket chains
 - Strong presence of Western clothing brands

MOBILE INTERNET COVERAGE, SMARTPHONE USAGE, 2 PTS
High: 2 | Mid: 1 | Low: 0

- A “High” score (2) indicates:**
- A high share of the country has smartphones
 - A high share regularly access Internet on their phone

WHY THIS RESEARCH DOES NOT INCLUDE RUSSIA

While academic and research interest in Russia has always been significant, such interest in other former Soviet states has been limited. The StrategEast Index, by focusing on all post-Soviet countries except Russia, is intended to help generate balanced and multi-faceted attention on the region. By excluding Russia, we do not assume that Russia is more or less Westernized than other post-Soviet states and societies. Rather, the objective is to draw attention to all other former Soviet countries and to the development they have undergone since the collapse of the USSR.

METHODOLOGICAL LIMITATIONS

Every Index, including this one, has certain methodological limitations which are inevitable and derive from the difficulties described below. However, the goal is not to cover every possible aspect of the Westernization of life in the countries of the former USSR, but rather to analyze major trends and create a propitious foundation for robust and in-depth research in the future. Further, the report aims to create a more informed basis for policy debate about how to support the transition of PSNR countries and elevate attention to the region. We encourage readers to use this index with these points in mind.

While writing this report, the research team identified several issues that make it difficult to compare data and trends. These include the following:

YEAR/PERIOD COVERED BY THE DATA

Certain authors proposed data covering all of 2018; others gave figures for the first half of 2019 or the first quarter of 2019. For example, this inconsistency is visible in the data on investments, trade, and other areas that require concrete data. Thus, it should be noted that the report does not provide data for the entirety of 2019 since the data were not yet released at the time of analysis. While the authors focus their analysis primarily on the trends of recent years they also cover the effects of Westernization which were caused by events that happened much earlier (for example, in the 1990s).

THE DATA ON FOREIGN DIRECT INVESTMENT (FDI) BY ORIGIN

Although the authors refer to the official data provided by statistics offices, this data does not specify when FDI is actually the result of domestic money reinvested through countries with a special fiscal regime such as Cyprus, the Netherlands or Austria. This may explain the high levels of FDI in certain countries and the experts give their own perspective on the (reinvested) FDI.

LACK OF DATA ON CERTAIN CRITERIA

There is no data in certain countries, e.g. Moldova, Belarus, etc, on knowledge of foreign languages. Therefore, the author for Moldova had to rely on observations and other related trends in the country. Other country experts have found data on foreign language, but these differ by source. For instance, in the case of Belarus the data are provided from the country census and opin-

ion polls, while most of the experts for other countries refer to the English Proficiency Index. In some other countries, like Estonia, in addition to the country census, country experts also refer to the European Statistic Office—Eurostat.

LACK OF DATA FOR ALL COUNTRIES

Some data comes from sources that do not include all 14 countries of the PSNR. For example, Armenia, Azerbaijan, Tajikistan, and Turkmenistan were not included in the 2019 World Justice Project Rule of Law Index and therefore the authors had to cite other data. Turkmenistan was also not included in the Ease of Doing Business Report of the World Bank, which made it more difficult for cross country comparison.

DIFFERENT PUBLIC OPINION DATA SOURCES

We encountered a similar problem when measuring public opinion of Western civilization. While all the authors have provided data about citizens' attitudes towards the West, these data are derived from different types of surveys. Moreover, the questions are often asked differently from one country to another. Since there is no survey that covers the entire PSNR region and uses the same methodology, we had to use the most appropriate source for each country.

DATA IS EXPRESSED IN DIFFERENT FORMS

In certain cases, the data we collected were reflected in absolute form—for instance the trade of goods in Tajikistan. In others, the data are expressed in relative terms, as in the case of most of the countries presented in the current Index.

LACK OF EXTERNAL SOURCES

Several authors could not cite external sources for data in the entertainment sphere (for example, the number of US or European films in cinemas or on TV). The markets in these countries may be too small to be analyzed by monitoring media/communications companies. In these situations, we chose to rely on the observations made by local authors who are deeply familiar with the situations in their home countries.

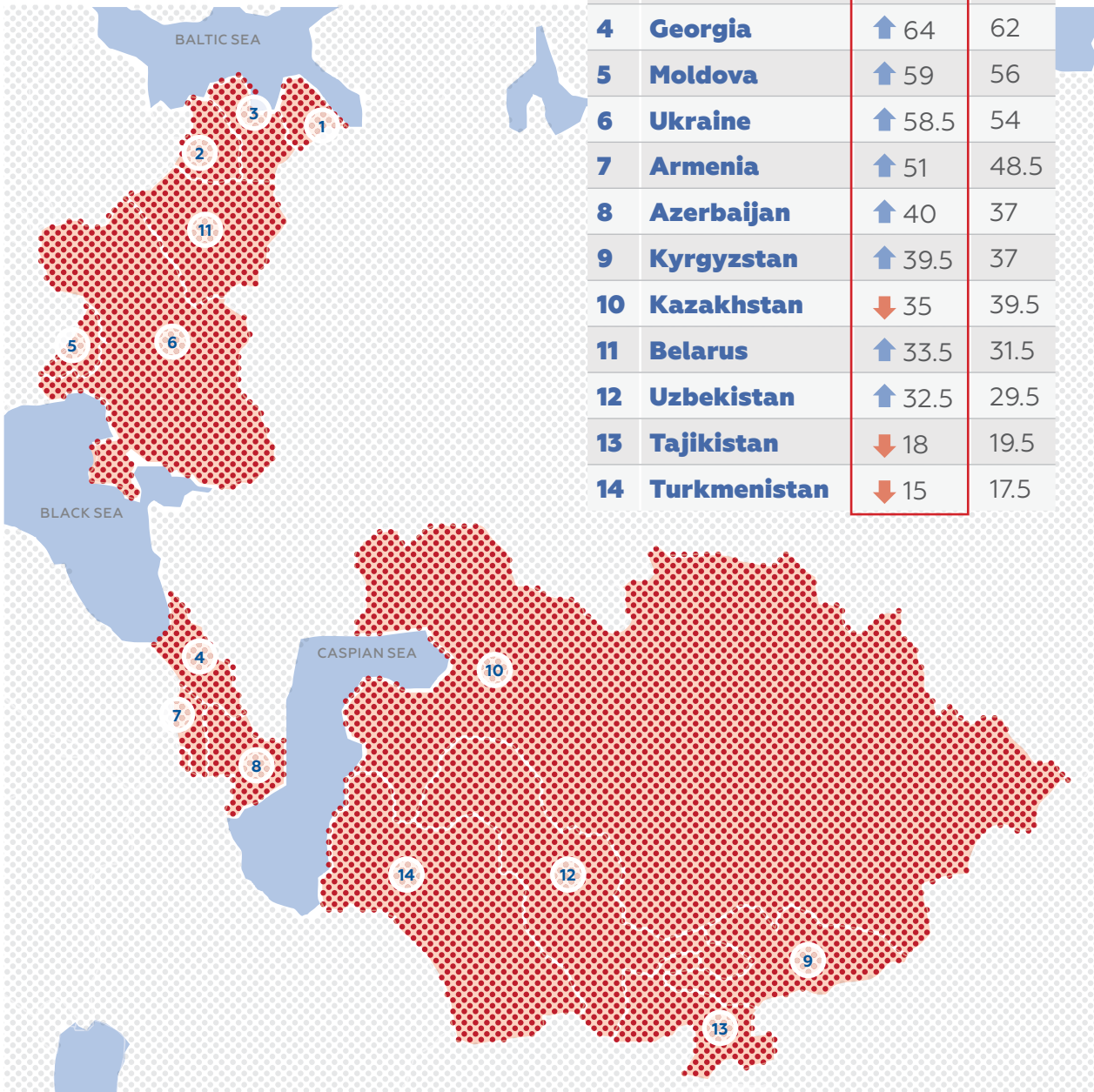
In some very rare and singular cases, the authors obtained information from informal discussions with officials, but they are not able to refer to the data since there was no agreement on citation. Moreover, in some cases it is difficult to cite a source for a certain observation or phenomenon. Countries like Ukraine or Lithuania benefit from various sources of news and a diverse media environment. In the case of Turkmenistan and Tajikistan, there are fewer sources that provide reliable data on daily basis.

QUANTIFICATION OF TRAVEL TO WESTERN COUNTRIES

The production of consistent data on Western travel represents another methodology issue. Considering that a large number of travelers use air transportation, and the majority of them use multiple connecting flights, there is no reliable data regarding travelers' final destinations. Many people from the PSNR region travel for work and not necessarily for tourism. Also, the numbers could include multiple trips by the same person, which could be misleading.

SUMMARY OF 2020 EDITION

SCORES
(BASED ON A 1-100 SCALE)



WESTERNIZATION INDEX,
BY CATEGORY, POINTS

		Political out of 25	Legal out of 25	Economic out of 25	Language and Cultural out of 15	Lifestyle out of 10
1	Estonia	22.5	23	25	13	9
2	Lithuania	22.5	20.5	25	13.5	8.5
3	Latvia	21.5	20.5	24	12	9.5
4	Georgia	19.5	15.5	15.5	8.5	5
5	Moldova	15	12	16.5	9	6.5
6	Ukraine	17	11.5	14.5	8.5	7
7	Armenia	13	14.5	12	7.5	4
8	Azerbaijan	6	7.5	13.5	8	5
9	Kyrgyzstan	11	11.5	8.5	5.5	3
10	Kazakhstan	5	7.5	13.5	5.5	3.5
11	Belarus	7	6.5	9	6.5	4.5
12	Uzbekistan	7	6	10	6.5	3
13	Tajikistan	3.5	3	5.5	4	2
14	Turkmenistan	3	3	4	3.5	1.5



CROSS-COUNTRY ANALYSIS

1 | POLITICAL WESTERNIZATION

POLITICAL WESTERNIZATION, POINTS OUT OF 25

Estonia	22.5
Lithuania	22.5
Latvia	21.5
Georgia	19.5
Ukraine	17
Moldova	15
Armenia	13
Kyrgyzstan	11
Belarus	7
Uzbekistan	7
Azerbaijan	6
Kazakhstan	5
Tajikistan	3.5
Turkmenistan	3

FOUR MEGATRENDS OF THE REGION

The current Westernization Index offers a wide perspective of the transformation process that takes place in the PSNR region. Although it might look similar to the previous edition, looking at the depth of changes that have taken place in the region, one has to note four megatrends which are either new developments or changes that are more intensive than it was few years ago. The “4M” megatrends of the region are: (1) Multi-speed westernization; (2) Multipolar influence; (3) Multilateralism and; (4) Mobility.

1. **Multi-speed westernization** has been taking place across the region at a variable pace. In most cases it is possible for the PSNR countries to “westernize” and adopt the values and practices of liberal democracies. However, to paraphrase Yelstin’s saying about “taking as much sovereignty as you could carry,” most of the countries from the region prefer to take as much westernization as they can carry without damaging the power vertical. The Baltic countries represent a notable exception to the region, where competition and the western blueprint of organizing the legal system as well as political, economic, and cultural life is a genuine process. For the rest of the countries, some make certain efforts to westernize by an “a la carte” model, preferring to keep the appearances of a true process of westernization but in fact still resorting to practices which are inherited from the past. This group is represented by countries such as Armenia, Georgia, Kyrgyzstan, Moldova, and Ukraine. Other countries such as Azerbaijan, Belarus, Kazakhstan, and Uzbekistan do not pretend to engage in a process of westernization, at least when it comes to the political arena. And even when they do, with minor exceptions, their other actions demonstrate the contrary. Instead, the leaders of these countries try to maintain a degree of legitimacy by mimicking a pluralist political environment. Based on the Index indicators, Tajikistan and Turkmenistan remain the countries which have very little in common with the westernized model. Although the conventional group is formed only of two countries, the next Index might add some more information if the situation gets worse in a series of countries from the previous group.

2. **Multipolar influence** is a relatively new phenomenon for the region. For years the only game in town was the Kremlin, whose power derived from Russian hegemony over the PSNR countries, except the Baltic countries, which, though, are still slightly under pressure due to significant Russian minority. Over the course of the post-Soviet period, the West, mainly through the presence of the EU and/or the US, created competition for Russia and diluted its dominance. The penetration of the West has been widely slow and has occurred at different speeds—mainly taking place in the countries that have been willing to reform. After 30 years of a bipolar region, there is another player emerging with a great force. China has been quietly and without fanfare engaging efficiently with the governments in the region. The countries in China’s geographic proximity were first to engage with Beijing on a series of projects of economic nature. The economic might of China has impacted the political establishment and won the hearts and minds of the people. In many countries such as Tajikistan, Kyrgyzstan, Kazakhstan, Armenia, Turkmenistan, and Uzbekistan, China is either a top trade and investment partner or a top sympathy of public opinion. The increasing presence of China could limit western influence, especially in economic terms. However, it will also weaken Russia’s grip on the region and its ability to influence Central Asia and the South Caucasus. That said, countries in the region have now more alternatives to avoid relying on a single power.
3. **Multilateralism** refers to the tendency of countries, especially small ones, to ally with other countries, through membership in various organizations, to defend their interests. The increasing expansion of the Russia-led project of the Eurasian Economic Union, which now covers Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia, is set to grow even more. The potential new candidates are Tajikistan and Uzbekistan. Other countries such as Georgia, Ukraine and to some extent Moldova are willing to join the EU, although the chances are close to zero as of today. The three Baltic countries are already fully integrated with the West. All the countries, despite their geopolitical orientation are interested in trade and economic opportunities and therefore, membership in the World Trade Organization (WTO) is either a fait accompli, or an ongoing process. Other organizations present in most of the region are the Organization

for Security and Co-operation in Europe (OSCE) and to some extent the Council of Europe and some of its institutions. In fact, many countries, especially in Central Asia are particularly entangled with Russia in both political and economic areas. But these countries declare their will to have a multi-vector policy that would be oriented towards Russia, China, and the EU. However, the lack of resources and the strategic domination of Russia are limiting their chances. The only country able to question Russia's supremacy in the region is China, which has a low-profile but efficient policy in the region. In 2019, the leaders of Central Asian countries met for the second time for a summit. They underlined from the very beginning that the summit is not meant against anyone, trying to send a clear message to Russia which would not support such regional multilateralism that could hinder Russia's influence.

- 4. Mobility.** There are few countries in the PSNR region that offer the possibilities of developed western states. That is why there has been an intense outflow of migration and mobility in the region. As EU members, Estonia, Latvia, and Lithuania enjoy the visa-free regime and the EU labor market is open to these countries. That has led to a situation where many citizens left Baltic countries and are working and living in the EU or elsewhere. The visa-free regime with the EU is also in place for Georgia, Moldova, and Ukraine, which has significantly increased the amount of travel to the EU states. For example, in Moldova, five years after the visa-free regime has been in place, 60% of the population has traveled at least once to EU countries, many of them for seasonal work. The visa-free regime also allowed for more investments into transport infrastructure, with the most visible effect in Ukraine—many low-cost airlines opened routes connecting Ukraine to EU countries. Belarus is also a very “mobile” state despite not having a visa-free regime with the EU. For many years, Belarus was the country with the highest number of Schengen visas per capita. But for many countries, the West remains a difficult destination to reach because of visas and distance. Most of the migration flows from Central Asia are directed to Russia, which hosts millions of migrant workers from the former Soviet Union. It is interesting to note that some countries in Central Asia, like Kazakhstan, are encouraging the migration of students by offering them funds to cover their studies abroad (quasi-majority in the western

TABLE 1.1
Degree of Political Freedom
Points, out of 10

Estonia	9.5
Lithuania	8.5
Latvia	8
Armenia	7
Georgia	7
Kyrgyzstan	7
Ukraine	7
Moldova	6.5
Uzbekistan	3
Belarus	2.5
Kazakhstan	2
Azerbaijan	1.5
Tajikistan	1
Turkmenistan	0.5

countries). Many people dream about the possibility of working and living in the EU or the US and they often resort to such programs like the US Diversity Visa Program (Green Card) which saw a boom of applications from the region. In 2018 over 5 million people from the PSNR region applied for a Green Card, of which over 2 million came from Uzbekistan and almost 1.5 million from Ukraine. Sadly, there are countries which still limit the mobility of its citizens. Turkmenistan still imposes exit bans for over 30 thousand Turkmens.

1.1 DEGREE OF POLITICAL FREEDOM

The region is undergoing a political transformation which takes the form of a systemic effort to introduce democratic practices and the rule of law. Despite the efforts, only a few countries have managed to achieve a full-fledged democracy, while others have had sporadic attempts to get rid of the Soviet heritage and modernize the country by following a western model. There are also countries which so far proved to be unwilling to engage in democratic transformation—which is reflected in the scores of the current Index.

Despite the fact that Estonia, Latvia, and Lithuania are named by some post-Soviet countries, the current Index shows that these countries westernized so much that there is almost no trace of its Soviet past. Like in the previous Index, these three countries recorded the best results in terms of Westernization and especially in political westernization. Most importantly, their westernization is sustainable and does not oscillate depending on various factors.

Multiparty systems are legally envisaged in all countries covered by this Index. Few countries, like the Baltic ones, developed a competitive and sustainable environment for a genuine multi-party system. Other countries, de facto mimic the multiparty system. In Tajikistan and Turkmenistan, the genuine opposition parties are in exile and all the “hostile” parties have been prohibited. To some extent, although to a lesser degree, the same situation is visible in Uzbekistan and Kazakhstan. Serious limitations are also in place in Belarus and Azerbaijan. There are also countries with genuine opposition and institutionalized parties that compete for power. However, parties in Ukraine, Georgia, Moldova, Armenia, and Kyrgyzstan represent a type

of hybrid democracy which, despite political competition, often tend to be under the influence of oligarchs and economic-financial groups. Despite this, the power change takes place through elections—predominantly by peaceful means.

Some countries, like Kazakhstan, could not embark on open democratic competition to elect their leader and preferred to resort to a managed transfer of power. The stage-managed transfer of power from President Nazarbayev to President Tokayev prompted protests in the country and criticism from defenders of democracy. A similar process appears to be taking place in Turkmenistan, where the current president, Gurbanguly Berdimuhamedow, is preparing to hand over power to his son, Serdar Berdimuhamedow. Some other leaders such as Aleksandr Lukashenko of Belarus are said to be preparing his successor as well—in this case his son Nikolai—although Lukashenko denied this information and said that his successor will have a new constitution with checks and balances. While others, like the president of Azerbaijan, Ilham Aliyev, is allegedly preparing as his successor his wife Mehriban Aliyeva, who was appointed as vice-president. There is already a tradition in Azerbaijan to manage the transfer of power, given that Ilham Aliyev succeeded his father Heydar Aliyev in 2003. Tajikistan is also no stranger to this scenario. After serving as president since 1992, Emomali Rahmon is preparing his son Rustam Emomali, who is currently the mayor of Dushanbe, to succeed him at some point. Although some might think that the transfer of power was inspired by the Yesltsin-Putin transfer in 1999, in fact the events in Uzbekistan have been crucial for the development of this scenario. The sudden death of Islam Karimov in 2016 and the following fight for power represent a development that the long-standing leaders of the PSNR region would not like to see in their own country. Therefore, the unfolding events in Uzbekistan following the death of Karimov generated more attention to successor projects.

Managed control of power is not the only instrument to imitate a pluralistic political life. In countries such as Turkmenistan, Tajikistan, Uzbekistan, and Kazakhstan, the institutionalized opposition parties which are represented in the parliament are a product of the power. This means that even the political regimes which are far from democracy standards are seeking legitimization towards their own people and towards the West.

TABLE 1.2
Pro-Western Parties in the Parliament
Points, out of 8

Lithuania	7.5
Estonia	7
Latvia	7
Georgia	6.5
Ukraine	6
Moldova	4.5
Armenia	3
Kyrgyzstan	2
Uzbekistan	2
Belarus	1.5
Azerbaijan	1
Kazakhstan	1
Turkmenistan	1
Tajikistan	0.5

However, in other countries the transfer of power was a result of fierce competition. Notably, Ukraine elected the comedian Volodymyr Zelensky who is a newcomer in politics, but managed to secure a landslide victory and his party managed, for the first in the history of independent Ukraine, to get a majority in the parliament. The peaceful transfer of power in Ukraine, which is at war with Russia is a particularly good sign for Ukrainian democracy. Also positive, but slightly more problematic, was the transfer of power in Moldova which managed to send away the oligarch and de facto leader of Moldova Vlad Plahotniuc and install a government led by democracy-committed Maia Sandu. Amid disagreements with the president over the reform of judiciary, the Sandu government was dismissed and a new government was installed. One has to note the peaceful 2018 Armenian Revolution against the President Serzh Sargsyan who was supposed to become Prime Minister and the most powerful person in the country. Although there were some minor incidents, including one-night arrest of the leader of the opposition Nikol Pashinyan, the transfer of power was legal and peaceful and Sargsyan stepped down as PM and refused to engage in any violent scenario. Half a year later, Pashinyan won 70% of votes in the parliamentary elections.

In almost all the countries, with few notable exceptions, media is under political control or influence. Against this background, social networks and the internet are increasingly becoming a source of information which also breaks the monopoly of certain political regimes to influence the public opinion—this has led to more attempts on the part of government to control information diffused through the internet.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT

The quasi majority of MPs from Estonia, Latvia, and Lithuania are Western oriented, and this is no surprise for an EU and NATO member country. At the same time, there is a certain feeling that democracy (and the pro-Western commitment) might be at risk if the populist parties increase their presence in the parliament. Although populist parties did not officially express their anti-Western stance and position themselves as Eurosceptic, some of their statements raise questions. At the last elections in Estonia, the Estonian Conservative People's Party

(ERKE) made it into the coalition government and generated a few incidents by criticizing the EU on several occasions. In Latvia, the Harmony party, which is believed to have links with Russia and have anti-West feelings won 23 votes out of 100. In addition, the populist party KPV.LV won another 16 seats. Despite the fact that both these parties remained in opposition and do not pose a risk so far to the Western orientation of Latvia, these parties have an increasing presence. Lithuania is no exception to the trend, having its own Eurosceptic parties, although expressed in a softer manner.

Parties represented in the parliament in Georgia, Moldova, and Ukraine remained widely pro-Western, although there is a different accent in all these countries. First, the majority of MPs in Ukraine are representing the new party of the president, "Servant of the People" which declares itself as a pro-Western party willing to join the EU and NATO. However, the foreign policy orientation is often secondary and there have been many examples of conflicting messages from various MPs. Despite these minor incidents, the parliament of Ukraine remains widely pro-Western. This is also the case with the parliament of Georgia, whose MPs are pro-Western, despite the fact that there are several individual cases of contradictory statements and a few small parties which have anti-Western messaging. For Moldova, the situation is more difficult. Despite having a declarative pro-Western majority in the parliament, some MPs are suspected of making the pro-Western narrative a political dictum without any substance. In addition, the clearly anti-Western party of Socialists, which belongs to the president of the country, Igor Dodon, has 36 mandates of 101 which is a substantial share in the legislature. An interesting development took place in Armenia after the 2018 December elections when "My Step Alliance" of Nikol Pashinyan won 88 seats out of 132 in the National Assembly. Although the majority of MPs from the party, My Step Alliance, used to have a pro-Western (pro-EU) stance, after becoming MPs they underwent a transformation which resulted in not raising the foreign policy agenda but instead focusing on domestic reforms. Still, many consider My Step Alliance as a pro-Western party despite not being able to position itself as such.

In the case of other countries from the PSNR region, one cannot speak of the presence of pro-Western parties and

TABLE 1.3
Public Opinion of Western Civilization
Points, out of 7

Latvia	6.5
Lithuania	6.5
Estonia	6
Georgia	6
Moldova	4
Ukraine	4
Azerbaijan	3.5
Armenia	3
Belarus	3
Kazakhstan	2
Kyrgyzstan	2
Tajikistan	2
Uzbekistan	2
Turkmenistan	1.5

MPs in the parliament. In most of the cases, the countries portray their foreign policy as a multi-vector policy aimed at maximizing economic benefits. De facto, the parliaments of these countries do not have any pro-Western presence at all, or the voice is marginal. Russian sympathies dominate over other policy options and the multi-vector policy is more a dictum than a reality. But one has to note that in these countries there are no clear-cut anti-Western positions. A new development is that China has been getting more attention from MPs in these countries. For instance, in Tajikistan the influence of China in economic and security arenas has increased significantly in the last few years. This development led to the increase of Tajik MPs' statements which more often criticize the West and Russia. Such a development could happen in other countries as well, especially where China is particularly strong.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION

Public opinion of the West is widely positive, and often more positive than their governments. The West is seen primarily as an economic entity and thus positive. For countries such as Estonia, Georgia, Latvia, Moldova, Ukraine, and Lithuania, the West tops sympathies among the public. It is interesting that in such countries like Armenia and Azerbaijan and to some extent Belarus, there is a strong pro-Western mood in society.

At the same time, public opinion in Kyrgyzstan, Turkmenistan, Tajikistan, Kazakhstan, and Uzbekistan is positive-to-neutral about the West. In most of the cases, they see the West as an economic powerhouse. However, it is quite difficult to give an exact assessment given that the question about the West is not part of the opinion polls and in some countries the surveys do not take place at all.

Across the region, there are also different levels of sympathies towards the West about dependence of the western institutions. Unlike in the case of the EU which has a widely positive image across the entire region, NATO and the US are generating mixed feelings in some of the countries. Also, some values which are associated with the West are contested in certain countries, mostly in Central Asia but not limited to this region. It is mostly about such topics as LGBTQ rights and fem-

inism, which are skillfully manipulated by politicians and are widely popular with members of the public.

The emergence of China in the region is creating a multipolar environment. Aside from its economic influence, China has been gaining more political leverage by engaging with more governments in the region and winning the sympathies of the public.

Unlike in the previous Index, this time China has been portrayed as an actor with growing soft-power in the region. In many countries, especially in Central Asia and the South Caucasus, China won the hearts and minds of the public and enjoys vast support, often comparable to that of Russia. This development will likely alter the “traditional” sympathies of the public.

One has also to note that, like in the previous Index, in countries with higher democratic scores, the foreign policy actions of the governments converge to a greater extent with public opinion. That is the case with Latvia, Lithuania, and Estonia, and also to some extent with Ukraine, Georgia, and Moldova.

2 | LEGAL WESTERNIZATION

LEGAL WESTERNIZATION, POINTS OUT OF 25

Estonia	23
Latvia	20.5
Lithuania	20.5
Georgia	15.5
Armenia	14.5
Moldova	12
Kyrgyzstan	11.5
Ukraine	11.5
Azerbaijan	7.5
Kazakhstan	7.5
Belarus	6.5
Uzbekistan	6
Tajikistan	3
Turkmenistan	3

Judging by their declarations and legislation, PSNR states demonstrate adherence to the rule of law and protection of their citizens' rights. But in fact, only the Baltic states boast high indicators of legal Westernization. The situation in the countries of Central Asia—Tajikistan and Turkmenistan—is much worse. But at the same time, positive trends in certain indicators of legal Westernization area can be observed. Thus, the “number of acquittals” indicator in Armenia is growing apace. Ukraine and Moldova make efforts to reform the judicial system, albeit no visible effect has been achieved yet. Some countries make decisions in the judicial sector to attract foreign investors. At the same time, in these countries the protection of citizens' rights leaves a lot to be desired.

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION

The European Commission for Democracy through Law (Venice Commission) continues to play an important role in harmonizing legislative provisions with the best standards, where the rule of law occupies the paramount position. This influential institution provides recommendations to countries in the region not only in the area of constitutional changes but also on a whole number of other legislative initiatives which may cause domestic political disputes. In some instances, commentaries from the Venice Commission perform an arbitration function, helping resolve contradictions not only inside the country but sometimes even between countries. Thus, the Ukrainian government requested assistance from European legal advisors in evaluating Ukraine's education law that caused fears in Hungary concerning possible impairment of rights of the Hungarian ethnic minority in Ukraine. At the time of preparing the 2020 Westernization Index, the parties were unable to reach an understanding. In Georgia, where the government disregarded the Venice Commission's recommendations in the course of electoral reform, widespread protests broke out in the fall of 2019. Countries of Central Asia remain the weakest link, not showing any desire for cooperation with Venice Commission

TABLE 2.1
Compliance of the Constitution with the Requirements of the Venice Commission
Points, out of 6

Estonia	6
Lithuania	6
Latvia	5.5
Armenia	5
Ukraine	5
Moldova	4.5
Kyrgyzstan	4
Georgia	3
Azerbaijan	2
Belarus	1
Kazakhstan	1
Tajikistan	1
Turkmenistan	1
Uzbekistan	1

TABLE 2.2
Independence of the Courts
Points, out of 7

Estonia	7
Lithuania	6.5
Latvia	5.5
Georgia	4.5
Azerbaijan	2.5
Belarus	2.5
Kazakhstan	2.5
Armenia	2
Kyrgyzstan	2
Moldova	2
Ukraine	2
Uzbekistan	1
Tajikistan	0.5
Turkmenistan	0.5

experts: usually, this interest is minimal and only declarative. The sole exception in the Central Asian region is Kyrgyzstan. In Turkmenistan, the president again declared in 2019 that the country needs constitutional reform. It is doubtful that the country’s leadership would want to seek the advice from experts from the Venice Commission: when the last constitutional reform was implemented in 2016, Ashgabat ignored recommendations from international experts (at that time from experts from the OSCE ODIHR).

2.2 INDEPENDENCE OF THE COURTS

The absolute leaders in terms of this indicator are Estonia, Lithuania, and Latvia, closely followed by Georgia. In the judicial sector, there is a genuine desire in various countries in the region to implement changes which could increase trust in the justice system. Many countries realize, first of all, that they need to bring in foreign investors, who are often unwilling to go to PSNR states out of fear of losing their business because of unfair rules of the game in the market. In this context, this indicator of the Westernization Index is visibly improving in, for instance, Belarus, Kazakhstan, and Azerbaijan. Uzbekistan’s indicator went up as well, albeit insignificantly. Even though Belarus and Kazakhstan have serious problems in the justice system, their World Justice Project rankings are better than in many countries of this region. They are ahead of Ukraine by more than ten spots and of Moldova and Kyrgyzstan by almost twenty spots. Several events which can affect the justice system in Azerbaijan took place in 2019. The salaries of judges were raised to improve social security of the “servants of Themis.” In addition, the law on mediation, which regulates the procedure of amicable resolution of disputes, was passed. This law will apply to civil and commercial disputes (including disputes involving foreigners). In Kazakhstan a court based on the principles of common law of England and Wales was established. The Kazakhstani government admits that the main purpose of this initiative is to attract foreign investments (since this court was established only recently, it is too soon to assess its effectiveness). The situation is worst in Tajikistan and Turkmenistan, where the judicial corps is de-facto answerable to the president.

TABLE 2.3
Legislation in the Area of Human Rights
Points, out of 6

Latvia	5.5
Estonia	5
Georgia	5
Lithuania	5
Armenia	3.5
Kyrgyzstan	3.5
Moldova	3.5
Ukraine	3.5
Azerbaijan	2
Belarus	2
Kazakhstan	2
Uzbekistan	2
Tajikistan	1
Turkmenistan	1

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS

In the area of human rights, no PSNR state was able to achieve the maximum score of 6 points. Problems related to the protection of citizens' rights exist in every country, but the degree of threats and restrictions is different. The situation in Latvia, Estonia, Lithuania, and Georgia looks much better than in Tajikistan and Turkmenistan. Armenia, Kyrgyzstan, Moldova, and Ukraine have the average score. The scores of Azerbaijan, Belarus, Kazakhstan, and Uzbekistan are below the average, and the worst situation is in Turkmenistan and Tajikistan.

At the same time, the degree of problems in each of these groups of states is different: while the Baltic states stress upon the need to protect the rights of the LGBT community, in many other countries of the region the rights of the majority of citizens are violated as well. Belarus does not fall under the jurisdiction of the European Court of Human Rights and deprives its citizens of the opportunity to seek justice from this influential institution. One of the acute points in the human rights discussion in Armenia is ratification of the Council of Europe Convention on preventing and combating violence against women and domestic violence. A similar problem exists in Ukraine and Moldova. Human rights activists in Azerbaijan report about political prisoners. Among the main human rights violations in Kazakhstan are political prisoners and censorship. In some countries, human rights are not guaranteed in the occupied territories: in particular, parts of the territory of Ukraine, Moldova and Georgia are controlled either directly by Russia or by local representatives loyal to Russia.

At the same time, legislation in all of the countries stipulates protection of the fundamental rights of their citizens and the states became signatory parties to many international documents guaranteeing such protection, but in practice, the situation leaves a lot to be desired.

TABLE 2.4
The Number of Acquittals
Points, out of 6

Estonia	5
Armenia	4
Latvia	4
Georgia	3
Lithuania	3
Kazakhstan	2
Kyrgyzstan	2
Moldova	2
Uzbekistan	2
Azerbaijan	1
Belarus	1
Ukraine	1
Tajikistan	0.5
Turkmenistan	0.5

2.4 THE NUMBER OF ACQUITTALS

In most PSNR states, the situation with the low number of acquittals did not change, but nevertheless, there are several success stories. Very often, judges do not question the arguments presented by the prosecuting party, which makes the current state of affairs in the justice system little different from the one that existed in the Soviet period. The situation in this regard has improved in Armenia, which became the most vivid manifestation of the positive trend in this area. Thus, compared to the average indicator for the last four years, the share of verdicts of acquittal has increased from 5% to over 8%, whereas in the earlier period it did not exceed 1%. The situation in Latvia has improved as well. The number of acquittal verdicts entered in the country is steadily growing. Positive changes can also be observed in Uzbekistan (almost 2%), where the percentage of acquittals is higher than in, say, Ukraine (less than 1%).

3 | ECONOMIC WESTERNIZATION

ECONOMIC WESTERNIZATION, POINTS, OUT OF 25

Estonia	25
Lithuania	25
Latvia	24
Moldova	16.5
Georgia	15.5
Ukraine	14.5
Azerbaijan	13.5
Kazakhstan	13.5
Armenia	12
Uzbekistan	10
Belarus	9
Kyrgyzstan	8.5
Tajikistan	5.5
Turkmenistan	4

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION

Since the time of releasing the previous edition of our Index, the main disposition of forces in terms of degree of economic Westernization largely remains the same. There are three countries which are members of both WTO and the European Union (EU) (the Baltic states). There are three WTO member states also “associated” with the EU: Ukraine, Georgia, and Moldova. They are currently implementing the Association Agreement with the EU, which has at its core the Deep and Comprehensive Free Trade Agreement (DCFTA). Another three countries—Armenia, Tajikistan, and Kyrgyzstan—are WTO members and connected to the EU Generalized Scheme of Preferences for exports to the EU.

The remaining countries are not WTO members, although many of them continue the accession talks with various degree of progress. Despite the participation in the EU’s Eastern Partnership initiative, which had its tenth anniversary in 2019, Belarus still does not have a basic bilateral Partnership and Cooperation Agreement with the EU, whose ratification was frozen back in 1996. Because of human rights abuses, the European Parliament has for many years blocked the basic Partnership and Cooperation Agreement between the EU and Turkmenistan as well.

Among the visible trends observed in the last two years is Armenia’s obvious preference for initiatives within the Eurasian Economic Union (EAEU) framework. This trend has become especially apparent since the change of political leadership in the country and the formation of a new government. In Azerbaijan there were efforts to sign the long-nursed Strategic Partnership Agreement with the EU, but this document was not signed at the Eastern Partnership Summit in May 2019.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS

In many instances, the improvement in rankings of post-Soviet states in the World Bank’s Doing Business index became a visible trend. The countries which improved their Doing Business rankings include, in particular, Belarus, Ukraine, Georgia, Uzbekistan, Lithuania, Kyrgyzstan, and Kazakhstan.

In particular, Kazakhstan climbed from the 36th spot in 2017 to 25th. The Astana International Financial Center (AIFC) opened in Nur-Sultan, which is operated by a special executive authority and has a special legal regime and court, separate and independent from the Kazakhstan Judiciary, to resolve civil and commercial disputes,

TABLE 3.1
EU and WTO Membership or Association
Points, out of 7

Estonia	7
Latvia	7
Lithuania	7
Georgia	4.5
Moldova	4.5
Ukraine	4.5
Armenia	3
Kyrgyzstan	3
Tajikistan	2.5
Azerbaijan	2
Kazakhstan	2
Uzbekistan	2
Belarus	1
Turkmenistan	0.5

TABLE 3.2
Ease and Transparency of Doing Business
Points, out of 6

Estonia	6
Georgia	6
Lithuania	6
Azerbaijan	5
Latvia	5
Armenia	4
Belarus	4
Kazakhstan	4
Moldova	4
Ukraine	3.5
Uzbekistan	3.5
Kyrgyzstan	2
Tajikistan	0.5
Turkmenistan	0.5

and was established to promote the inflow of investments in the country. Even Tajikistan was included in the list of the top 20 reformist countries in the World Bank's Doing Business-2020 index.

The most impressive example is Georgia, which in the 2019 Doing Business index was ranked seventh, surging 11 spots ahead of the leader in Westernization, Estonia (ranked 16th). Georgia is also the country with the best regional indicators in Transparency International's corruption perception rating, in which it ended up above three EU member states: Malta, Slovakia and Italy. At the same time, Estonia is the only country in the world to offer e-residence to citizens of other countries, allowing them to launch and develop a business according to a simplified scheme.

In some countries, such as, for example, Belarus, the improvement of rankings has continued for several years. After surging in the 2017 index, Belarus kept its rankings intact in recent years, significantly simplifying the procedures of registering and doing business.

An exception to this trend is Armenia, which, on the contrary, went 6 points down in the Doing Business index. However, it is important to note that high rankings in the Doing Business index does not always correspond to an overall level of transparency. Thus, for example, Latvia is ranked 19th in the Doing Business index but only 41st in Transparency International's corruption perception rating, and it still has problems with corruption and transparency (even though nowhere as big as, for instance, in Ukraine which is ranked in 120th spot or Moldova, which is ranked 117th in the corruption perception rating).

In addition, we continue to observe the trend when authoritarian regimes do not present an obstacle to the ease of launching and operating a business, while certain democratic regimes are still unable to achieve a significant breakthrough in improving the business climate in their countries. Take, for example, Ukraine: its 64th rank in Doing Business was perceived as a serious achievement as the country climbed up seven spots.

3.3 WESTERN SHARE IN THE SALES OF GOODS

Among all Western countries, EU member states remain the biggest trade partners for post-Soviet states, whereas the share of the United States and Canada is minimal. Thus, for example, the US is responsible for only 4% of Ukraine's trade turnover.

In turn, the Baltic states remain the most oriented toward Western (in particular, EU) markets: over 70% of their trade is conducted with European Union member states.

A curious situation can be observed with regard to the so-called associated states: Ukraine, Georgia and Moldova, each of which signed the DCFTA with the EU and, as could be expected, should have increased their trade turnover with the EU thanks to the implementation of this Agreement. But in fact, only Moldova

TABLE 3.3
Western Share in the Sales of Goods
Points, out of 6

Estonia	6
Latvia	6
Lithuania	6
Moldova	5
Azerbaijan	3.5
Ukraine	3.5
Georgia	2.5
Kazakhstan	2.5
Armenia	2
Belarus	2
Kyrgyzstan	2
Uzbekistan	2
Turkmenistan	1
Tajikistan	0.5

has fully met these expectations: the share of their exports to the EU in 2008 has almost reached 70%, which brings Moldova close to the three leaders in trade with the EU, the Baltic states.

The EU also continues to strengthen its position as the biggest trade partner of Ukraine. During the first nine months of 2019, the turnover of trade with the EU increased by 5% (US 33.8 billion) and amounted to 42% of Ukraine's trade turnover with other countries. However, Azerbaijan has the same level of trade with the EU (41.7% of its trade is conducted with the EU), and Kazakhstan has a similar level (36%); for both these countries, the EU is also the biggest trade partner, even though integration into the European Union is not a foreign political goal for either of these countries and they do not have a DCFTA with the EU. And as for Georgia, the third country associated with the EU, it has a comparatively lower level of trade with the EU. Despite the total growth of trade with the EU, the EU's share as Georgia's trade partner in the total balance of that country's foreign trade did not increase, and presently amounts to 27%. The reason for this situation is that even though the overall trade has increased, trade with the Commonwealth of Independent States (CIS) increased even more, to 35%. Therefore, CIS countries are now the biggest trade partners of Georgia.

Considering the foregoing, one of the most notable about the trade with Western countries is that the level and direction of trade does not always reflect the geopolitical orientation of a particular country. Azerbaijan, which is not going to integrate with the EU, has the same level of trade as Ukraine, which for many years has been declaring membership in the EU as its most important goal. In all fairness, it should be stressed that in the case of Azerbaijan and Kazakhstan, their trade involves, first of all, energy exports. It is also important to note that Kazakhstan's trade with countries of the EAEU was more substantial before the Union was created than after it went operational. And with regards to Armenia's exports, the share of EAEU states has, on the contrary, increased.

Another trend that becomes more visible is the strengthening of China's position as one of the most important trade partners for some countries in the region. Moreover, China is already the number one partner for Kyrgyzstan even today (with Russia in second place). China and Russia remain the main trade partners of Tajikistan. China's position in trade with Kazakhstan also remains strong, and China continues to be the main market for exports from Turkmenistan.

3.4 WESTERN INVESTMENTS INTO THE COUNTRIES' ECONOMIES

The Baltic states remain the unchallenged leaders in terms of inflow of Western investments. In Estonia, investments from six European countries alone (Sweden, Finland, the Netherlands, Luxembourg, Lithuania, and Latvia) amount to over 80% of all

TABLE 3.4
Western Investments into the
Countries' Economies
Points, out of 6

Estonia	6
Latvia	6
Lithuania	6
Kazakhstan	5
Armenia	3
Azerbaijan	3
Moldova	3
Ukraine	3
Georgia	2.5
Uzbekistan	2.5
Belarus	2
Tajikistan	2
Turkmenistan	2
Kyrgyzstan	1.5

foreign direct investments (FDI). In Latvia, investments from the EU and other Western states reached almost 83%.

At the same time, it is worth noting that a trend toward decline in foreign direct investments in principle and from Western countries in particular is now growing in a number of countries analyzed here. It looks somewhat paradoxical, considering the improvement in Doing Business rankings of post-Soviet states. Thus, for instance, the share of foreign direct investments in Azerbaijan in 2018 decreased almost twofold versus 2017 (from US 2.86 billion to US 1.4 billion), even though Azerbaijan itself became the biggest investor in the Georgian economy (while Russia is the biggest investor in Azerbaijan's economy).

Among the countries which experienced a surge in investments is Uzbekistan: from US 98 million in 2017 to US 412 million in 2018. Our experts believe that the increasing inflow of FDIs stems, first of all, from liberalization of the foreign exchange policy in 2017.

Some countries saw an increase in investments coming from other countries of the region, in particular, Russia and China. The growing presence of Russia is visible in, for example, Armenia, where Russia's share increased fivefold during the first half of 2019, while the share of Western countries declined more than threefold. Russia remains the biggest investor in Belarus as well, where the total share of Western investments is at least 41%. But in Ukraine, Russia dropped out of the top five biggest investors, even though in the previous Westernization Index it was ranked third in terms of this indicator.

As in the case of the biggest trade partners, geopolitical orientation of post-Soviet states does not always correspond with the sources of investments. Thus, the three biggest investors in Kazakhstan are three Western states: the Netherlands, United States and Switzerland, investing mostly in the oil, gas, and coal sectors of the country's economy. However, it is worth pointing out that like in the case of Ukraine (where Cyprus is the biggest investor in the country's economy and Western states on aggregate represent a half of all investors), investments from the Netherlands could be funds coming from Kazakhstan's native businessmen or businessmen from other post-Soviet states who simply take advantage of the special fiscal policy in countries like Cyprus or the Netherlands.

As for China, for several years it has been the leading investor in Kyrgyzstan, while Russia and Kazakhstan were overtaken in 2018 by Canada and the United Kingdom, respectively, compared to 2016. China is also the biggest investor in Tajikistan, leaving Russia far behind.

4 | LANGUAGE AND CULTURAL WESTERNIZATION

LANGUAGE AND CULTURAL WESTERNIZATION, POINTS OUT OF 15

Lithuania	13.5
Estonia	13
Latvia	12
Moldova	9
Georgia	8.5
Ukraine	8.5
Azerbaijan	8
Armenia	7.5
Belarus	6.5
Uzbekistan	6.5
Kazakhstan	5.5
Kyrgyzstan	5.5
Tajikistan	4
Turkmenistan	3.5

Like in the previous version of this Index, the Baltic states enjoy the leadership position in terms of cultural Westernization. They are followed by the group of countries participating in the EU's Eastern Partnership initiative: Moldova, Ukraine, Georgia, Azerbaijan, Armenia and Belarus. Cultural Westernization has taken hold the least in Turkmenistan and Tajikistan.

Western culture has been penetrating deeper and deeper in the societies of PSNR states. American- and European-produced films dominate the market in most of these countries. During certain periods, up to 90% of films shown in movie theaters were produced in the United States. Even in countries where the public domain is censored, Western films are one of the main avenues of communicating information about life in the United States and Europe.

Some countries have legislative regulations that favor citizens' access to Western audiovisual products. Thus, mass media in the Baltic states are required to broadcast at least 51% of content that has European origin. Ukraine has imposed a ban on Russian celebrities who violated Ukrainian law (by illegally visiting Crimea, from the viewpoint of Ukrainian law). In addition, Ukraine banned Russian social media and leading Russian TV channels.

In some countries, the local film industry is also on the rise, becoming able to compete with not only Russian but even American films. This phenomenon is hardly widespread at the moment, but recent years saw the emergence of this trend in Ukraine and Latvia.

Western social media are also expanding their foothold in the countries analyzed here. Facebook is the most popular type of social media in most countries, while Russian-based social media, Odnoklassniki and VKontakte are no longer able to retain their past leadership in certain countries. Turkmenistan blocks all social media.

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE

The Latin alphabet is widely used in the public domain of most countries. Even the names of local brands in countries that use the Cyrillic alphabet are often transliterated using Latin script. No changes in terms of this indicator have occurred

TABLE 4.1
Use of the Latin Alphabet
in the Native Language
Points, out of 2

Azerbaijan	2
Estonia	2
Latvia	2
Lithuania	2
Moldova	2
Turkmenistan	2
Uzbekistan	2
Armenia	1
Belarus	1
Georgia	1
Kazakhstan	1
Ukraine	1
Kyrgyzstan	0.5
Tajikistan	0.5

TABLE 4.2
Proportion of the Population Proficient in
the Most Common Languages of the West
(English, French, German, and Spanish)
Points, out of 6

Lithuania	5.5
Estonia	4.5
Latvia	4
Armenia	2
Azerbaijan	2
Georgia	2
Moldova	2
Ukraine	2
Belarus	1.5
Kazakhstan	1.5
Uzbekistan	1.5
Kyrgyzstan	1
Tajikistan	0.5
Turkmenistan	0.5

compared to the previous edition of this Index. Seven countries (Estonia, Latvia, Lithuania, Moldova, Azerbaijan, Uzbekistan, and Turkmenistan) remain unquestionable leaders. Kazakhstan is set to join their ranks after 2025, unless some serious obstacles are encountered during the transition from the Cyrillic to the Latin alphabet.

It is important that in certain countries, the Latin script is not perceived as a manifestation of Westernization, as the adherence to Western culture. For the countries of Central Asia, the Latin alphabet serves as a point of their uniqueness, a departure from the Soviet era.

In the countries using the Cyrillic alphabet, discussions concerning the transition to the Latin alphabet occur but fail to resonate with society. Thus, disputes concerning this matter rise from time to time in Kyrgyzstan. Linguistic contemplations also occur in Tajikistan, not about the transition to the Latin alphabet but about the return to the Perso-Arabic script which was used before Soviet power was established there.

Armenia and Georgia have their own writing systems which did not even change at the beginning of the Soviet era. The Armenian alphabet has been in existence since the fourth century AD. The oldest monuments in the Georgian language date back to the fifth century.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH)

There has been no significant changes in this indicator in the 2020 Westernization Index compared to the previous edition. In a number of countries only a slight improvement of 0.5 points could be observed. Overall, the high level of proficiency in English could be attributed to the Baltic states only. The six Eastern Partnership states (Armenia, Azerbaijan, Georgia, Moldova, Ukraine, and Belarus) are de-facto at the same level, with only Belarus trailing the rest by a half-point.

At the same time, a growing interest in learning English is visible in most countries. The Prime Minister of Armenia, Nikol Pashinyan, said on numerous occasions that his compatriots must try to become fluent in at least two foreign languages.

TABLE 4.3

Share of Western Products in the Nation's Movie Theaters and on TV Channels; Share of Western Internet Sites and Social Media (Facebook, Instagram, and Twitter)

Points, out of 7

Estonia	6.5
Latvia	6
Lithuania	6
Georgia	5.5
Ukraine	5.5
Moldova	5
Armenia	4.5
Azerbaijan	4
Belarus	4
Kyrgyzstan	4
Kazakhstan	3
Tajikistan	3
Uzbekistan	3
Turkmenistan	1

Civil society initiatives aimed to teach children English are being established in Ukraine.

Uzbekistan has a unique experience for this region: the country has universities offering top-quality studies in the English language, including the World Languages University, a branch of the University of Westminster, branches of the Inha University (Korea) and the Management Development Institute of Singapore, and the Polytechnic University of Turin.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATIONS' MOVIE THEATERS AND ON TV CHANNELS; SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, AND TWITTER)

Films produced in Western countries dominate movie theaters in most of the countries analyzed. Even the countries prone to greater influence from Russian culture and which often demonize Western values allow films produced in Hollywood to dominate their film distribution market. The Baltic states integrated in NATO and the EU demonstrate not only a high degree of involvement in the political and economic space of Western associations but also a visible influence in the cultural area. The Baltic states have a legislative act obliging electronic mass media to offer at least 51% of audiovisual products which have European origin. Therefore, European content dominates their television space, followed by the United States and Russia.

The production of local content—films produced by companies of a particular country—is gaining momentum in some countries. Government support is provided in these cases. In particular, local film production has become popular in Latvia and Ukraine. Therefore, the niche for Russian films is becoming even narrower: in the past, Western-made films could be perceived as alien products uninformed about local problems, and therefore, Russian films could fill this gap. In Ukraine, one of the domestically produced films made it into the top 20 highest-grossing films in 2019. A co-director and actor cast in the main role of the film *I, You, He, She* was Volodymyr Zelensky, later elected as the country's president. Moreover, Ukrainian films are becoming popular outside the country. Thus, the TV series *Kriposna* broke the viewing record in Poland.

Facebook remains the most popular social media in the absolute majority of countries. There is a positive trend of lifting the ban on the use of Western social media. Thus, the block on Facebook was lifted in 2019 in Uzbekistan. However, some users there still prefer anonymous accounts, fearing repressions.

In certain countries, Russian social media remain the most popular. That concerns, in particular, Belarus where the reach by VKontakte and Odnoklassniki is higher than that of Facebook. At the same time, the popularity of Western social media is growing in Ukraine and Moldova. And while Ukrainians prefer Western social media mostly because of the ban on Russian social media, Moldova has no such ban. Two years ago, Odnoklassniki had twice as many users as Facebook did. Today, their reach is almost the same: over 65%.

The most deplorable situation is in Turkmenistan, where Facebook, Instagram, Twitter, as well as other social media and messengers, are blocked and unavailable for the broad public.

5 | WESTERNIZATION OF LIFESTYLE

WESTERNIZATION OF LIFESTYLE

POINTS OUT OF 10

Latvia	9.5
Estonia	9
Lithuania	8.5
Ukraine	7
Moldova	6.5
Azerbaijan	5
Georgia	5
Belarus	4.5
Armenia	4
Kazakhstan	3.5
Kyrgyzstan	3
Uzbekistan	3
Tajikistan	2
Turkmenistan	1.5

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES

The positive dynamics of travel abroad remain a common trend for all analyzed post-Soviet states. In the case of Armenia, for example, 12% more people visited foreign countries this year than the year earlier. According to data by the Border Control Agency, more than 10 million Kazakhstani citizens traveled abroad in 2018. However, destinations and purposes of travel are absolutely different.

Even the scant and quite disaggregated data available for various countries shows that travel destinations located in the West—Europe and the United States—are not always dominant even in the case of countries geopolitically oriented toward rapprochement with the West. For example, the majority of travelers from Georgia, a country associated with, and seeking membership in the EU, visited Turkey (39%) and Azerbaijan (23%), and only 13% of them traveled to EU states on the whole. The majority of travelers from Estonia (78%), the most Westernized country according to the previous edition of our Index, who made trips outside the country visited other European Union states, and only 12% traveled to CIS countries. Among the factors limiting travel to the West are high degree of poverty and visa regime. Moreover, visa regime plays its role both in the case of visa requirements for travel to the EU, US, and Canada for most post-Soviet states and in the case of visa requirements for travel to Russia and Belarus for the Baltic states as EU members, which “help” citizens of the latter three countries to decide in favor of traveling in the Western direction.

Unlike in the previous edition of our analysis, this time we can suggest with a greater degree of confidence that the visa-free regime between the EU and Moldova / Ukraine / Georgia had an effect: a growing number of trips to the Schengen States was observed from all three countries. According to data by the State Border Guard Service of Ukraine, the number of Ukrainians who visited Europe as of early June 2019, after two years of the visa-free regime with the EU, increased 4.2 times and reached 2.35 million. Beginning from 2014, when the visa-free regime took effect for Moldovan citizens, 60% of travelers (or 2.1 million persons) visited EU states. The effect of the visa-free regime on the improvement of transportation and logistics infrastructure is also worth noting.

TABLE 5.1
 Percentage of the Population who have
 Visited Western Countries
Points, out of 5

Estonia	4.5
Latvia	4.5
Lithuania	4
Moldova	4
Ukraine	3.5
Armenia	2
Belarus	2
Georgia	2
Azerbaijan	1.5
Kazakhstan	1
Kyrgyzstan	1
Tajikistan	1
Uzbekistan	1
Turkmenistan	0.5

In Ukraine, for example, a boom in the influx of low-cost carriers became an indirect consequence of visa liberalization. In total, 63 new low-cost airline-operated flights were launched in 2019 connecting Ukraine with, in particular, tourist destinations in Europe and the rest of the world.

The choice of destinations in the EU differ across the countries analyzed here. For example, the majority of travelers from Kazakhstan visit Germany, while those from Ukraine travel mostly to neighboring Poland.

As for the purposes of travel to Western countries from post-Soviet states, there are three main reasons: tourist trips, economic migration, and education programs.

Regardless of the degree of development and geopolitical orientation, all post-Soviet states share a common feature: the main destinations for tourist trips are Turkey and Egypt, both of which are affordable for the broad public. Among EU states, perhaps only Greece (and in some cases, Spain) remains a popular destination, being more affordable than other European countries.

Economic migration is a typical phenomenon for the majority of analyzed countries. However, destinations of migrants continue to differ significantly. Russia is increasingly becoming the destination for economic migrants from Central Asia. In 2018, Tajikistan has become Russia's biggest migration donor, replacing Ukraine. By that time, every fourth legal immigrant was coming to Russia from Tajikistan. Those traveling to European countries and the United States are mostly from the more educated part of the country's population, first of all, students and members of the intelligentsia.

Economic migration also presents a challenge for the countries which became EU members. Moldova is a unique case where one million citizens also hold the citizenship of the EU member state Romania, which allows them to legally work in EU states. The most dismal picture can be observed in Lithuania, which since the beginning of the 1990s has lost 24% of its population because of economic migration. And almost half (47%) of all migrants are working in the United Kingdom.

There are curious trends with regards to students from post-Soviet states studying abroad. Overall, the number of students studying under various education programs is growing, and the example of Ukraine is the most telling in this regard. An analysis by New Europe Center shows that during 2014-2018, up to 10 thousand Ukrainians were studying at EU universities under the Erasmus+ program alone, while during ten years preceding the Revolution of Dignity, slightly more than 300 students went to study in the EU under a similar program. Curiously enough, Belarus is becoming an educational mecca for some countries of

TABLE 5.2
Presence of Western Franchise Companies
Points, out of 3

Latvia	3
Estonia	2.5
Lithuania	2.5
Azerbaijan	2
Ukraine	2
Georgia	1.5
Armenia	1
Belarus	1
Kazakhstan	1
Kyrgyzstan	1
Moldova	1
Tajikistan	0.5
Turkmenistan	0.5
Uzbekistan	0.5

Central Asia. Thus, for example, while the number of students from Tajikistan studying in Belarusian universities in 2015 was approximately 300, their number in 2017 has almost doubled.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES

There are two trends simultaneously occurring in most of the analyzed countries: a slow yet steady increase in the number of Western franchise companies, on the one hand, and the popularity of local chains and local manufacturers, on the other. “Made in Ukraine” festivals selling various goods—from food and cosmetics to clothes and footwear—solely from Ukrainian manufacturers and producers are hugely popular in Ukraine. Local manufacturers are at peak popularity in the Baltic states as well.

At the same time, stories like the one that happened to Carrefour in Kazakhstan (which entered the market in 2016 but folded 17 months later due to devaluation of the local currency and fierce competition with local chains) are a rarity. The overarching trend is the expansion of Western franchise companies. In the last two years, Auchan Group expanded its presence in regions of Ukraine and gained a firm foothold in the country’s capital, Kyiv. Overall, Ukraine demonstrated one of the most visible growth dynamics since the previous edition of our Index was released: over 45 international retail chains (in particular, H&M, Under Armour, Zara Home and others) came to the Ukrainian market after 2017. IKEA, a company which in post-Soviet states is perceived as a sort of a marker indicating the absence of corruption and a favorable business climate, has finally announced the opening of its first store in Ukraine. During this period, IKEA also opened a store in Latvia in 2018 and an online store in Estonia.

Another trend, which is especially visible in the Baltic states, is the arrival and expansion of Lidl, a German supermarket chain. In 2018, Lidl opened 11 new stores in Lithuania, which is almost twice as many as other market players. A notable event of 2019 which occurred in Moldova was the opening of two Kaufland hypermarkets in Chisinau.

Like in the previous edition of our Index, perhaps only the presence of McDonald’s was common for the majority of post-Soviet states, while the presence of Burger King has been more limited. KFC has expanded its locations: during the last two years, it opened its first restaurants in Estonia and Kyrgyzstan. The geographic locations of Starbucks is somewhat surprising: they are present in Kazakhstan, Uzbekistan, and Azerbaijan, but absent in the European part of the CIS.

Popular Western clothing brands continued their penetration into the markets of post-Soviet states. In particular, Inditex

TABLE 5.3
Mobile Internet Coverage,
Smart Phone Usage
points, out of 2

Estonia	2
Latvia	2
Lithuania	2
Azerbaijan	1.5
Belarus	1.5
Georgia	1.5
Kazakhstan	1.5
Moldova	1.5
Ukraine	1.5
Uzbekistan	1.5
Armenia	1
Kyrgyzstan	1
Tajikistan	0.5
Turkmenistan	0.5

companies (Zara, Bershka, Stradivarius, Pull&Bear, Massimo Dutti) strengthened their positions.

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE

Overall, the number of Internet users (as well as mobile Internet users) in post-Soviet states is on the rise. In Ukraine, for example, there was almost 5 million more Internet users compared to the previous edition of our Index: today, this figure is 26 million Ukrainians, or over 60% of the country's total population. This figure is more than in Kyrgyzstan (where 40% of the population are connected to the Internet), but less than in Latvia (87%). The case of Tajikistan, where in the past two years (2018-2019) the authorities carried out a consistent policy of making Internet access and mobile communication services more expensive and strengthening government control over the country's telecommunications sector, is a rare exception. In particular, the government introduced a strict limitation on the number of SIM cards a user could have. As a result, the number of Internet and mobile telephone users in the country declined. This area remains problematic in Turkmenistan as well: the high cost of mobile Internet access and the blocking of most information resources and social media nullifies all advantages from the country's mobile coverage.

The use of several mobile phones (or SIM cards) is still commonplace in the majority of post-Soviet states. In many cases, the number of active mobile phones exceeds the country's population. In Georgia, for example, the mobile phone usage rate is 147%. Based on available data, smartphones are used by almost half of the countries' population on average.

However, the figures indicating the use of mobile phones and mobile Internet differ substantially. In Uzbekistan for example, at the time of writing this analysis, there were more than 22 million mobile phone subscribers (i.e., 67% of the country's total population) and 16 million mobile Internet users (i.e., 8 million less). In Moldova, 84% of the population use mobile phone service and about 64% are mobile Internet users. Kazakhstan stands out in this regard, where over 75% of users access the Internet via mobile phone (thanks, according to some sources, to the fact that this country has the second-least expensive mobile Internet access in the world).

In various countries, there is a clear relationship between the number of smartphone users and age: the younger the subscribers, the greater the percentage of mobile Internet access. The figures concerning Belarus are quite telling in this regard: 58.7% of Belarusians use smartphones, but in the age group below 25 years the percentage of smartphone users reaches 92.9%, while that in the age group of 24-34 years is 73.6%.



WESTERNIZATION INDEX OF POST-SOVIET STATES

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
13/25	14.5/25	12/25	7.5/15	4/10

1 | POLITICAL WESTERNIZATION 13/25

1.1 DEGREE OF POLITICAL FREEDOM 7/10

The Office for Democratic Institutions and Human Rights (ODIHR) Election Observation Mission deployed to monitor the elections to the National Assembly of Armenia on 9 December 2018 stated in its final report that despite certain deficiencies, the elections “were held with respect for fundamental freedoms and enjoyed broad public trust... Open political debate, including in the media, contributed to a vibrant campaign... The general absence of electoral malfeasance, including of vote-buying and pressure on voters, allowed for genuine competition... Election day proceed-

ed calmly and peacefully with all stages assessed positively by almost all observers.”⁵ Local observers noted that the past parliamentary elections were the freest and fairest in the history of independent Armenia.

In its Freedom in the World 2019 report, the Freedom House named Armenia among the six countries which achieved the biggest progress in democracy.⁶ According to the Freedom on the Net report by the same organization,⁷ Armenia moved up from the Partly Free to the Free category, surging ahead of all post-Soviet republics except the Baltic states.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 3/8

The overwhelming majority of seats (88) in the newly-elected National Assembly of Armenia is held by the party, My Step Alliance, the bulk of whose MPs are former civil activists, representatives of the expert community and journalists, who before the Velvet Revolution advocated European integration and opposed Armenia’s membership in the Eurasian Economic Union. However, their ascent to power was accompanied by a certain transformation of views: in particular, the team of the current Prime Minister Nikol Pashinyan claims that they are not going to revise the

foreign policy priorities of their predecessors, and name as their main objectives strengthening of democratic institutions, establishing of the rule of law, and fighting against corruption. In other words, they remain committed to Western values (albeit without calling them as such) but do not tie their commitment to the change of geopolitical orientation.

The second most-represented parliamentary faction (26 seats), Prosperous Armenia, sees no alternative to the strategic union with Russia and to Eurasian integration.

The third party which won seats in the parliament after the December 2018 elections (17 seats), Bright Armenia, traditionally positions itself as pro-Western. At the same time, its representatives claim, like the majority of MPs from My Step Alliance, that the democratization agenda of post-revolutionary

Armenia is a priority that pushes the subject of integration to the backstage. Arman Babajanyan, who quit the Bright Armenia faction and declared himself an independent MP, is known as a staunch sympathizer of the United States and the European Union and for being sharply critical of Russia.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 3/7

According to a survey held in May 2019 by the International Republican Institute (IRI), Armenian citizens gave the highest praise to their country's relationship with France (94% of respondents regard it as good and only 1% as bad). The relationship with Georgia ranked second (92% and 3%, respectively), followed by China and Iran (89% of respondents believe that the relationships with these countries are good) and Russia (88%). At the same time, 9% of respondents said that the relationship with the latter country is bad, and with regard to China and Iran, this figure is 2% and 3%, respectively. The relationship with the European Union is characterized positively by 82% and negatively by 8% of respondents, while that with the United States is similarly characterized as 81% positive and 10% negative. Judging by numerous reports in Armenian mass media, it is fair to assume that the motivation of respondents who hold a negative view of Armenia's relationship with Russia stems from the strengthening cooperation between Moscow and Ankara / Baku, particularly in the military area.

At the same time, respondents named Russia as Armenia's most important political partner (78%). In this respect, Russia ranks far ahead of second-placed France (46%). However, 12% of respondents included Russia on the list of biggest threats. Only Azerbaijan and Turkey were regarded as threats by a greater number of respondents (by 85% and 76%, respectively), whereas no respondents considered France a threat; only 2% see the EU as such and 8% judged the U.S. is a threat. Even more telling in this regard are responses to the question about economic partnership and threats, in which Russia was mentioned by 62% and 18%, respectively. Economic partnership with Western countries does not seem to be especially important to the majority of respondents, and the threats from this side are considered minimal, too. A comparison of responses to the questions about the "quality" of relationships and about partnerships suggests that partnership with Moscow is perceived as inevitable but not necessarily the most desirable choice.

2 | **LEGAL WESTERNIZATION** 14.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 5/6

Amendments to the Constitution of the Republic of Armenia introduced on the basis of the 2005 and 2015 referendums were made in close cooperation with, and by accommodating recommendations of, the Venice Commission. The Commission noted that the 2015 draft “was compliant with international standards on democracy.” In their statements made in the wake of the Velvet Revolution, international organizations specifically emphasized that the peaceful change of power

in Armenia stemmed from successful constitutional reform. At the same time, Armenian society remains highly distrustful of both the process of adopting amendments to the Constitution (including voting at referendums) and the content of these amendments (first of all, as regards the principle of division of powers). This stance is shared by the new political leadership of Armenia, who officially announced the preparation for another constitutional reform.

2.2 INDEPENDENCE OF THE COURTS 2/7

The focusing of activity in the post-revolution period on the foreign aspect of political processes had adverse effects on institutional reforms. This applies to the problem of independence of courts as well. Armenia remains excluded from the World Justice Project Rule of Law Index, which complicates the comparison of progress in this area with that in other countries. At the same time, reports published by the Council of Europe’s Group of States Against Corruption (GRECO) indicate the absence of visible progress in fulfilling recommendations during recent years. This conclusion was also included to the 2019 report, which states that out of the ten recommendations related to the judicial sector, only three have been fully implemented, six have been partially implemented and one has not been implemented at all. In the meantime, according to GRECO’s assessment, the country’s judicial system remains prone to corruption and suffers from a shortage of judicial independence and an unclear division of power.

In 2018-2019, the problems of the judicial system were perceived mainly through the prism of processes which involved representatives of the former ruling elite, and primarily, the second President of Armenia, Robert Kocharyan. In addition, there were disciplinary actions and criminal cases against judges, numerous lawsuits in the European Court of Human Rights and media scandals. All the events were judged according to particular political interests. On the one hand, the judicial system was criticized as the last branch of power resisting new democratic and reformist trends. On the other, the new political leadership was accused of a desire to place courts under complete control and of putting unprecedented pressure on them. And finally, when the courts entered judgments contrary to the perceived desires of the new political class (which was impossible to imagine in the past), this was construed as a precondition for the emergence of an independent judiciary system. The contradictions between the country’s new

leadership and the chairman (and most members) of the Constitutional Court became especially acute. These contradictions manifested in

the criminal prosecution of the second president of Armenia and in a number of areas of legal reforms.

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 3.5/6

For many years, there have been heated debates about antidiscrimination legislation (the draft Law on Equal Rights) and legislation on domestic violence. After the Velvet Revolution, the principal parties of this dispute have been the former ruling elite who have a conservative stance, and the new political class, which is inclined to adopt respective law and thus implement the international commitments of the country. The

main subject of discussions has been ratification of the Council of Europe Convention on preventing and combating violence against women and domestic violence (also known as the Istanbul Convention). This dispute must be “refereed” by the broad public, without whose support the present leadership of Armenia is not keen to make decisions, no matter how confident they are in the fairness of these decisions.

2.4 NUMBER OF ACQUITTALS 4/6

Out of the 2,295 verdicts handed down by Armenian courts in 2018, 188 were acquittals. Compared to the average figures for the past four years, the share of acquittal verdicts has increased from

5% to over 8%, whereas in earlier periods, it hardly exceeded 1%. This trend became a direct consequence of Armenia’s cooperation with international organizations in the area of justice.

3 | ECONOMIC WESTERNIZATION 12/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 3/7

Armenia joined the WTO in 2003, which allowed the country to engage in 2011-2013 in productive talks with the EU concerning an Association Agreement, including accession to the DCFTA, and to strengthen economic cooperation with foreign (first of all, Western) countries. However, the decision not to sign an Association Agreement and Armenia's accession to the EAEU resulted in the gradual reorientation of Yerevan's economic priorities. This trend became especially apparent after the change of power in Arme-

nia. In addition to greater cooperation with the EAEU states (first of all, with Russia), the new government is active in its efforts to expand the partnership of this economic union with Iran and countries of South-East Asia, in particular, to further progress talks concerning free trade. While it makes no difference for the new leadership of Armenia where investments in the country come from, as far as the deepening of integration processes is concerned, there is obvious preference for initiatives within the EAEU framework.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 4/6

In recent years, Armenia has consistently ranked among the most advanced post-Soviet republics in the Ease and Transparency of Doing Business category. At the same time, its ranking has fluctuated during the last 10 years. According to the World Bank's annual rating for 2019, Armenia was ranked

47th among 190 economies in terms of ease of doing business. Compared to 2018, the country's rank dropped by six positions.⁸ During the period from 2008 to 2019, Armenia's average rank in this category was 46th, peaking in 2014 (38th) and reaching its lowest level in 2010 (61st).

3.3 WESTERN SHARE IN THE SALES OF GOODS 2/6

During the first half of 2018 and 2019, Armenia's export and import volumes (in thousands of US dollars) amounted to 1,169,356 and 1,168,829 (for exports), and 2,308,892 and 2,340,118 (for imports), respectively.⁹ At the same time, the share of EAEU states in the country's exports increased from 25.7% to 27.5%, as did the share of Asian countries excluding CIS states (from 23.5% to 26.1%), while the European Union's share de-

clined from 31.6% to 23.4%. Almost the same picture can be observed in imports: the share of EAEU went up from 29.8% to 31.0% and from Asian countries excluding CIS states from 32.2% to 35.6%, while that of the European Union dropped from 22.3% to 20.4%. The dynamics of trade with countries of the Western Hemisphere play a negligible role in defining the trends due to their small volume.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 3/6

According to data from the Statistics Committee of the Republic of Armenia for the first quarter in 2019, the total volume of foreign investments in the country increased from AMD 32,220.9 million (approximately USD 68 million) to AMD 47,342.3 million (close to USD 100 million).¹⁰ At the same time, the volume of foreign direct investments has sharply declined. However, one has to bear in mind that the calculated and available data concerns a very limited period of time, and that the methodology of calculating investment volumes used by the Statistics Committee raises a number of questions¹¹. Nevertheless, the reported trend of declining share of the total Western (EU states, United States, Canada, and Switzerland) investments from over a third in the same period of last year to 27.0% in 2019 could

be considered objective. For comparison, the volume of investments from Russia in the first quarter of 2019 increased almost fivefold compared to the same period of last year.

The 2019 report by the United Nations Conference on Trade and Development (UNCTAD) states that the inflow of direct investments in the Armenian economy has been decreasing since 2008, and the sharp drop in the past year and a half was caused by the wait-and-see stance of potential (first of all, Western) investors due to political changes taking place in the country.¹² At the same time (and according to UNCTAD), one of the factors for estimating the growth in investments, namely the increased number of flights to Europe, can be considered realized: Ryanair, Air Baltic, and Wizz Air will commence flights to Armenia in January 2020.

4 | LANGUAGE AND CULTURAL WESTERNIZATION 7.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 1/2

Since the 4th century AD, the Armenian language has used its own alphabet. In some cases, social network users use the Latin alphabet in Armenian-language texts. Although

romanization is widely used in street names, road signs, names of retail and service outlets, use of the Armenian alphabet still surpasses that of the Roman alphabet.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 2/6

The most recent data concerning the Armenian population's proficiency in foreign languages was gathered during the 2011 census. At that time, 3.6% of the population was fluent in English, 0.3% in French, and 0.2% in German. During the intervening eight years, the number of people fluent in English has significantly increased—that concerns, first of all, the younger generation and those work-

ing in the service sector. This trend is driven mostly by the growth of tourism and increased attention to the study of foreign languages in the education sector. Since the knowledge of the most widely used foreign language—Russian—is a consequence of the Soviet past, its usage is shrinking while the aforementioned processes promote the broadening use of European languages. Besides English, there

is a noticeable increase in the use of French, which could be explained, in particular, by the preparation and organization of a Francophonie summit in Yere-

van in the fall of 2018, while the growing interest in Spanish is caused by more frequent trips of Armenian citizens to this country.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 4.5/7

The exhibition of motion pictures in Armenia remains a scantily researched subject. However, even a superficial overview of this market leaves no doubt that American films are unrivaled in the country's movie theaters.

As of October 2019, social media platforms had the following shares: Facebook 62.35%, YouTube 14.69%, Pinterest 11.24%, Instagram 4.7%, Twitter 3.79%.¹³ Odnoklassniki has been steadily losing its users.

5 | WESTERNIZATION OF LIFESTYLE 4/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 2/5

Due to the absence of explicit information about foreign trips of Armenian citizens, the percentage of Armenians visiting Western countries can be estimated only on the basis of indirect indicators. In the first half of 2019, close to seven hundred thousand persons traveled outside the country for tourism (personal purposes), which is 12% more than during the same period of last year.¹⁴ The above figure represents approximately three-quarters of all travelers. The overwhelming majority of the rest visited foreign countries on business. Considering a) that a certain percent-

age of travelers make more than one trip in six months, on the one hand, and the number of those who travel less frequently than once is no lesser, on the other hand; b) the ratio between flights to various destinations and the share of air transportation in the total passenger turnover; and c) the share of Western countries in the list of popular tourist destinations and in trips for personal, business, or study purposes, it is fair to assume that at least half of the Armenian population visited North America and, conditionally, Western Europe including all EU member states.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1/3

Due to a limited market size and low purchasing capacity of the population, many large retail companies, hotel, and restaurant chains have been slow to penetrate the Armenian market. The following chains most extensively represented are Carrefour,

Best Western, Marriott. At the same time, the development of tourism (the volume of which in 2019 has increased by approximately 15% versus the last year) has led to the appearance of several new franchises every year.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1/2

As of December 2018, the number of Internet users in Armenia has increased to 2,126,716. Almost the entire territory of the country is covered by mobile phone network. In late 2018, 4G and 4G+ services were available in the largest cities and tourism centers of Armenia, and mobile operators were working to launch 5G.¹⁵

The World Congress on Information Technology held in Yerevan on 6-9 October 2019, which featured ICT associations representing 83 countries and 90% of the IT industry,¹⁶ became a serious impetus for the implementation of advanced technologies and for investments in this industry.

Azerbaijan

40/100

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
6/25	7.5/25	13.5/25	8/15	5/10

1 | POLITICAL WESTERNIZATION 6/25

1.1 DEGREE OF POLITICAL FREEDOM 1.5/10

In Azerbaijan, 2019 was a critical year in terms of domestic policy. Three rallies were held to protest the lack of democracy and violence against women. These protests were followed by the release of political prisoners.

On January 19, 2019, the National Council of Democratic Forces held an opposition rally in Baku.

On March 16, 2019, to the great surprise of Azerbaijani people and the international community, 400 people including 51 political prisoners were released. This occurred in response to the March 16th decree by President Ilham Aliyev to release 51 political prisoners as part of a broader pardon of over 400 convicted individuals.

According to the World Press Freedom Index published by Reporters Without Borders, in 2019 Azerbaijan was ranked 166 (163 in 2018)¹⁷. In the 2019 Freedom House report Azerbaijan achieved the following scores: aggregate country score 11th out of 100; political rights, 2nd out of 40; civil liberties, 9th out of 60; associational and organizational rights, 1st out of 12; rule of law, 1st out of 16; personal autonomy and individual rights, 5th out of 16. Azerbaijan is on the list of “not free” countries.¹⁸

The most recent report on human rights published by international organizations notes that Azerbaijani authorities continue to limit fundamen-

tal freedoms such as freedom of speech, assembly, and association by using threats and violence against rights advocates, political activists, journalists, and bloggers.

More than 50 political parties are registered in Azerbaijan. Parliamentary elections were held on November 1, 2015. Almost all opposition parties withdrew from the elections before they even started because of restrictive measures. The president’s New Azerbaijan party (YAP) held its 71 seats in the 125-seat parliament. Independent candidates with no party affiliation gained 42 seats, although they are expected to vote along with the YAP, giving President Aliyev effective control over the parliament.¹⁹

In April 2018 President Ilham Aliyev was elected for a fourth term in elections that international observers found a lack of competition, and which “took place in a restrictive political environment and under laws that curtail fundamental rights and freedoms.”²⁰

In early December 2019, the Parliament in Azerbaijan approved a decision to dissolve itself, leading to snap elections. One of the dominant explanations for this was that this move symbolized a struggle between different political groups or clans. The major goal of the dissolution was to strengthen the current President, paving the way for the transfer of pow-

er from Ilham Aliyev to his wife First Vice-President Mehriban Aliyeva in the near future.²¹ She had already met with Russian leadership during the visit to Moscow just a week before the Parliament was dissolved. Another interpretation suggested that the

country wanted to underline its democratic character through early elections because external observers may portray the conflict between Azerbaijan and Armenia as a conflict between authoritarian and democratic regimes, possibly favoring Yerevan.²²

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 1/8

None of the parties in the Milli Majlis (the National Assembly) are in opposition to the country's leadership. Therefore, the position of the incumbent YAP party has the determining voice in the Parliament. This "party of power" echoes the pro-Russian narrative. Depending on the situation, it most often criticizes Western institutions, accus-

ing them of interfering with the internal affairs of Azerbaijan.²³

The ruling YAP's stated ideologies are lawfulness, secularism, and Azerbaijani nationalism. It wants to build a "social-oriented" economy and lists civil solidarity and social justice as the basis of its ideology.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 3.5/7

According to the EU Neighbours East Annual Survey Report 2019, 46% of Azerbaijani citizens have a positive image of the European Union—an increase of 7% when compared to 2018.²⁴ Only 8% of the population hold a negative image about the EU. Thirty-one percent of respondents are neutral, and the rest have not decided on their attitude.

It is noteworthy that over the past four years, the number of positively-minded people has been steadily growing, while negatively-minded people are steadily decreasing.

Most people also look positively at European-Azerbaijani cooperation. Seventy-four percent of Azerbaijanis feel relations with the European

Union are good, up nine percent when compared to 2018. Seventy-five percent of Azerbaijani citizens associate the EU with their personal values.

Half of the respondents agree that the EU seeks to preserve traditional values in Azerbaijani society. A little more than half of the respondents are convinced that the EU is bringing positive changes to the daily life of Azerbaijani citizens. Forty-five percent of people believe in the EU's anti-corruption efforts.

It is noteworthy that the European Union is an international organization that is most trusted in Azerbaijani society (35% of respondents). To a lesser extent, Azerbaijanis trust the UN, NATO, and other international organizations.

2 | LEGAL WESTERNIZATION 7.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 2/6

A referendum to make modifications to the Azerbaijan Constitution was held on September 26, 2016. The Venice Commission, an advisory unit of the Coun-

cil of Europe, said of the referendum: "Many proposed amendments would severely upset the balance of power by giving 'unprecedented' powers to the president."²⁵

2.2 INDEPENDENCE OF THE COURTS 2.5/7

In 2019, two decisions were made that affected the situation in the judiciary. First, on April 3, 2019 President Aliyev signed a decree to deepen reforms in the judicial system. Second, from September 1, 2019, salaries were increased by 50% to further improve the social protection of judges and employees of the court. However, none of these has led to significant changes in the ju-

dicial system towards increasing independence.

In Azerbaijan, meanwhile, a Law on Mediation was adopted in March 2019 with a view to enable alternative dispute resolution mechanisms to operate in commercial, civil, family, labor, and other disputes. Azerbaijan has also begun establishing specialist commercial courts to provide entrepreneurs with access to efficient dispute resolution.²⁶

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 2/6

Azerbaijan's appalling human rights record did not improve in 2019. According to Ogtay Gulaliyev,²⁷ the coordinator for the Center for Protection of Political Prisoners, more than 120 human rights defenders, journalists, political, and religious activists remained imprisoned, while dozens more were detained or under criminal investigation, faced harassment and travel bans, or fled Azerbaijan. Restrictive laws continued to prevent nongovernmental organizations (NGOs)

from operating independently. Other persistent human rights problems included systemic torture, undue interference in the work of lawyers, and restrictions on media freedoms.²⁸ Azerbaijan's international partners criticized abuses but did not condition ties with Azerbaijan on improvements.

The situation remains dangerous for LGBTI activists and independent journalists. The ILGA-Europe, an organization tracking the violation of LGBT rights, ranked Azerbaijan in last place (49th).²⁹

2.4 NUMBER OF ACQUITTALS 1/6

The lower courts of the republic considered 12,539 criminal cases on 14,931 people in 2018, of which 12,433 were convicted on 10,172 people and 106 or 0.7 % were acquitted in 89

cases. In 2018, the total number of convicts decreased by 1,300, or 9.5% compared to 2017, and the number of acquitted persons remained the same.³⁰

3 | ECONOMIC WESTERNIZATION 13.5/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 2/7

Azerbaijan applied for membership to the WTO in 1997. The accession negotiations are ongoing. Also, Azerbaijan still has not signed the Comprehensive Agreement with the EU. Azerbaijan's relationship with the EU is based on the Partnership and Cooperation Agreement that took effect in 1999.

By launching negotiations on a new comprehensive agreement in February 2017, the EU and Azerbaijan reaffirmed their commitment to an ambitious agenda of cooperation and dialogue. Together with the ongoing negotiations for a new bilateral agreement, four main areas of cooperation (strengthening institutions and good governance; economic de-

velopment and market opportunities; connectivity, energy efficiency, environment and climate action; mobility and people-to-people contacts) under the partnership priorities were formally approved by the European Union and Azerbaijan, and then adopted on September 21, 2018.³¹

Despite a signed document on July 11, 2018 listing four priority areas for partnership, a long-awaited European Union–Azerbaijani strategic partnership agreement was not signed at the Eastern Partnership’s tenth anniversary summit on May 13–14, 2019. So far, negotiations on

the final partnership agreement are yet to be completed. Ongoing talks between Brussels and Baku focus on the two parties’ political obligations, investment and trade, as well as sectoral issues.

The European Parliament adopted a resolution on 4 July, 2018, reiterating its commitment to strengthening ties with Azerbaijan, but not at the expense of human rights.³² In fact, parliament members said they would not ratify any agreement with a country that fails to respect fundamental EU values and rights.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 5/6

The Doing Business-2019 report states: “Azerbaijan as a part of the European and Central Asian region set up a record among ten countries with their best indices by having carried out reforms in 8 areas in 2017-2018 and thus promoting the business activity.”³³

The EU-funded EU Business Climate Report Azerbaijan 2018, published by the German-Azerbaijani Chamber of Commerce (AHK), suggested that new and consistent reforms are required in the tax and customs system, as well as in the legal and education system.³⁴

3.3 WESTERN SHARE IN THE SALES OF GOODS 3.5/6

The EU is Azerbaijan's main trading partner, accounting for around 41.7% of Azerbaijan's total trade. The EU continues to be Azerbaijan’s biggest export and import market with a 54.37% share in Azerbaijan's exports and a 20.35% share in Azerbaijan's imports in 2018. CIS countries account for 5.85% in imports and 24.96% in exports. Other countries’ share in import operations was 39.78% and in export was 54.7%. The top three countries in trade turnover were Italy (20.11%), Russia (11%), and Turkey (8.25%). Relatively, Italy (30.22%) and Turkey (9.38%) are the main partners in exports and Russia (16.44%) and Turkey (13.75%) were the main partners in imports in 2018.³⁵

EU imports from Azerbaijan chiefly consist of mineral products (fuels), vegetable prod-

ucts, chemicals, machinery, and base metals. EU exports to Azerbaijan are dominated by machinery, precious metals and articles thereof, chemicals, base metals and articles thereof, transport equipment, foodstuffs, beverages and tobacco, optical and photographic instruments, miscellaneous manufactured articles, and plastics, rubber and articles thereof. The EU supports closer trade and economic integration with Azerbaijan through the European Neighborhood Policy and its Eastern Partnership policy. The current Partnership and Cooperation Agreement does not include tariff preferences, but eliminates trade quotas between the two and aims to gradually approximate Azerbaijan's standards to those of the EU.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 3/6

According to the 2019 UNCTAD World Investment Report,³⁶ Azerbaijan received USD 1.4 billion in FDI inflows in 2018, a significant drop from 2017 (USD 2.86 billion). This drop is in line with FDI inflows to transition economies in South-East Europe and the Commonwealth of Independent States. Azerbaijan's inflows focus on the oil and gas sector, although one of the top priorities of the Azerbaijani Government is to diversify the country's economy and attract FDI to agriculture, transportation, tourism, and information/communication technology. FDI inward stocks in Azerbaijan were estimated at USD 31 billion in 2018 by the UNCTAD, representing 68.4% of the country's GDP in 2018. Russia is the main source of FDI, but beyond that Azerbaijan

is part of the customs union between Russia, Kazakhstan, Armenia, Kyrgyzstan, and Belarus that, in terms of volume, is the most important in the region and is almost exclusively involved in major projects for oil/gas pipelines and related services.

Turkish investors, except for some years, have always maintained a leading role in Azerbaijan's non-oil sector. Additionally, there were investments from the US, UK, UAE, German, French, and Russian companies as well. However, the country has seen a sharp growth in investments from Russian, Turkish, and Swiss companies in the past 2-3 years after the drop in non-oil FDI inward stocks in 2015: out of \$1.7 billion FDI stock, \$1.04 billion, or 61%, fell to the share of these three countries.

4 | LANGUAGE AND CULTURAL WESTERNIZATION 8/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 2/2

The Latin alphabet is used in Azerbaijan.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 2/6

According to the English Proficiency Index 2019,³⁷ Azerbaijanis are among the worst when it comes to knowledge of the English language. Azerbaijan was

among countries with a "very low" level of English proficiency and ranked 85th out of 100 countries where the study was conducted.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 4/7

Hollywood movies dominate in the Azerbaijani movie theaters, with smaller niches occupied by Turkish motion pictures and domestic films. After the introduction of new rules requiring the dubbing of all movies into the national language in 2014, the share of foreign TV series dropped greatly. At the present

time, TV channels broadcast domestic TV series.

According to GlobalStats studies, in October 2019 the most popular social network in Azerbaijan is Facebook; its market share is 43.39% (1.8 million users); Twitter 15.77%; Pinterest 14.53%; Instagram 12.10%; Youtube 10.29%; VKontakte 1.29%.³⁸

5 | WESTERNIZATION OF LIFESTYLE 5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 1.5/5

According to Azerbaijan's State Committee for Statistics,³⁹ in the first nine months of 2019, 4,201.5 Azerbaijani citizens travelled abroad. Of those, 36.3% visited Iran, 29%

Georgia, 17.5% Russia, 11.8% visited Turkey and 5.4% other countries. The population who have visited Western countries accounted for less than 5%.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 2/3

None of the world's top 10 grocery retailers have a presence in Azerbaijan. The Azerbaijani grocery chains are strongly present in the market.

Of the worldwide-known fast food chains, only McDonald's, Starbucks, Gloria Jeans, Travelers, Burger King, Cinnabon, Paul, Sec-

ond cup, and KFC are currently doing business in Azerbaijan; risks and monopoly on the Azerbaijani market may be deterring factors. Among restaurants widespread in the United States and Europe, only Hard Rock Cafe operates in Azerbaijan.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1.5/2

According to the report on Internet World Stats, in June 2019,⁴⁰ 79.8 out of 100 Azerbaijanis use the Internet.

Broadband usage in Azerbaijan is 19.76 per 100 persons. In this category the country ranks 53rd, and ahead of Russia, Turkey, Iran, Kazakhstan, and Armenia. Moreover, Azerbaijan has improved its world ranking in terms of the number of mobile broadband Internet sub-

scribers, moving up from the 68th spot to the 60th out of 156 spots. In 2017, the number of Internet users in Azerbaijan totaled 7.8 million people, which is three quarters of the country's population.

There are 110 mobile phones per 100 residents; however, the number of smartphone users is no more than 4 million people—less than half of the population of Azerbaijan.

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
7/25	6.5/25	9/25	6.5/15	4.5/10

1 | POLITICAL WESTERNIZATION 7/25

1.1 DEGREE OF POLITICAL FREEDOM 2.5/10

Belarus belongs to countries with a low degree of political freedom, which was apparent during the past parliamentary elections in November 2019. The OSCE election observation mission stated in its report that the elections “did not meet important international standards for democratic elections. There was an overall disregard for fundamental freedoms of assembly, association and expression.”⁴¹

According to the 2019 report by Freedom House (USA), Belarus was categorized as a “not free” country with the total integral freedom rating of 6.5 points on a 7-point scale, where 7 means the lowest level of democratic progress.⁴²

Out of the 180 countries featured in the World Press Freedom Index, published by Reporters Without Borders, Belarus ranked 153rd in 2019, remaining among the countries with the most severe restrictions on freedom of the media.⁴³

According to the 2018 Bertelsmann Transformation Index (Germany), Belarus is placed into the group of moderate autocracies with the rank of 86th among 129 countries.⁴⁴ The most recent (2018) Belarus Human Rights Report by the U.S. Department of State notes that “citizens were unable to choose their government through free and

fair elections, ...human rights issues included torture; arbitrary arrest and detention; life-threatening prison conditions; arbitrary or unlawful interference with privacy; undue restrictions on free expression, the press and the internet, including censorship, site blocking, and criminal libel and defamation of government officials; violence against and detention of journalists; severe restrictions on freedoms of assembly and association”⁴⁵

The system of political pluralism is virtually nonexistent in Belarus. Out of the 15 officially registered political parties,⁴⁶ only seven can be considered fully independent from the state in the full sense of this word and only one party had its representative in parliament during 2016-2019. In 2018, Belarus decriminalized activity of political parties and civil society organizations without official registration (Article 193-1 of the Criminal Code of Belarus), but administrative liability in the form of fine was left in place.⁴⁷ Registration procedures for political parties, civil society organizations, and religious communities are extremely complicated. Many of them operate without official registration, and some civil society organizations have to file their registration outside Belarus.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 1.5/8

According to the Freedom in the World 2019 report by Freedom House, “there is effectively no opportunity for genuine opposition candidates to gain power through elections.”⁴⁸ Before the November 2019 elections, only two out of the 110 seats in the lower house of the Belarusian parliament, the National Assembly of the Republic of Belarus, were taken by members representing independent political/civil society organizations in Belarus (Anna Kanopatskaya for the United Civic Party and Yelena Anisim for the Belarusian Language Society). Both these organizations proclaim a pro-Western orientation, declaring that Belarus “is a part of Europe and perceives itself as a part of Europe,”⁴⁹ and “accession to the European Union is a long-term strategic goal of Belarus.”⁵⁰ Other opposition parties and movements in Belarus also have an explicit pro-Western orientation, sharing the goals of rapprochement with the European Union to the

accession to the EU. At the same time, not all of them share the goal of Belarus joining NATO; only the Belarusian Popular Front (BPF) Party strongly advocates the country’s membership in NATO.⁵¹ Pro-government political and civic organizations maintain an anti-Western rhetoric, supporting integration of Belarus into the EAEU and deeper cooperation with Russia.

At the same time, the Belarusian leadership was able to achieve, beginning from 2015, a significant improvement in its relationship with the West, including an increase of financial assistance from the EU,⁵² restoration of diplomatic contacts with the United States,⁵³ and the first (in many years) official visit of President Lukashenko to EU states.⁵⁴ Tensions between Belarus and Russia have been rising since late 2018 and have centered on the attempt of Russia to coerce Belarus into a deeper integration in exchange for restoration of a preferential regime in energy trade.⁵⁵

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 3/7

Pro-Western sentiments in the country are strong, especially considering the restrictions on independent mass media, intense anti-Western propaganda in state-owned media, and the influence of Russian propaganda.⁵⁶ Public opinion traditionally swings between the choice of integration with the EU and integration with Russia. According to sociological

surveys held in 2019, 25% of Belarusians prefer integration with the EU, 54.5% prefer to live in the union with Russia, and slightly over 20% have no specific preferences. For comparison, in August 2018 pro-Russian sentiments were nine percentage points higher and pro-European were five percentage points lower.⁵⁷

2 | LEGAL WESTERNIZATION 6.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH RECOMMENDATIONS OF THE VENICE COMMISSION 1/6

With the rare exception of certain insignificant provisions in electoral legislation, Belarus has been ignoring all recommendations of the European

Commission for Democracy through Law (Venice Commission). When the present version of the Constitution of the Republic of Belarus was amended

in 1996 and 2004, the Venice Commission stated that the proposed constitutional amendments “fall

short of the democratic minimum standards of the European constitutional heritage.”⁵⁸

2.2 INDEPENDENCE OF COURTS 2.5/7

According to the World Justice Project Rule of Law Index 2019, Belarus was ranked 66th among 126 countries, slightly improving its standing compared to the previous period.⁵⁹ The 2018 Bertelsmann Transformation Index (BTI) gives Belarus 4.0 points on a 10-point scale in the rule of law category, where 1 indicates the least progress in this area. The BTI report states, in particular, that “the judicial branch remains almost entirely dependent... The courts are organized by the executive branch and the president is directly responsible for appointing, dismissing and determining judges... The regime also abuses judicial power as a tool of punishment and repressions against the opposition.”⁶⁰

After issuing a series of assessments and recommendations for Belarus, the Group of States against Corruption (GRECO) declared in 2019 that Belarus remains “non-compliant with the anti-corruption standards,” noting in particular that, “far-reaching presidential powers are criticized for not complying with principles of pluralist democracy, the rule of law and the protection of human rights, which are fundamental for GRECO as a Council of Europe body. Of central importance are the extensive powers accrued by the President not only in respect of the executive branch at central and local levels, but also in respect of legislative competences as well as over the judiciary, combined with a strong law enforcement perspective and immunity and procedural privileges.”⁶¹

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 2/6

Belarusian law stipulates the guarantee and protection of human rights and freedoms; however, neither legal mechanisms of implementing these guarantees nor their actual implementation in practice are compliant with international standards. Belarus is not a member of the Council of Europe (CoE), nor a signatory party to a number of CoE conventions (in particular, the European Convention for the Protection of Human Rights and Fundamental Freedoms), nor does it fall under the jurisdiction of the European Court of Human Rights.⁶² International organizations (United Nations, Council of Europe, Venice Commission, OSCE, and others)⁶³ as well as most Western governments have continuously criticized Belarusian legislation and the regular practice of human rights abuse in Belarus. Due to

continuous abuse of human rights in Belarus, the United Nations Human Rights Council appointed in 2010 a Special Rapporteur on the situation of human rights in Belarus. In 2019, its mandate was extended for another year.⁶⁴ The latest report in 2019 by the Special Rapporteur states: “Over the past few years, various international human rights mechanisms have called on the Government of Belarus to harmonize legislation, the policy and practices with its commitments as regards the international human rights law. The reviews recently made by treaty bodies concerned with human rights indicate that the level of implementing these recommendations remains extremely low. Systemic problems still need to be solved, and deep reforms are yet to be carried out.”⁶⁵

2.4 NUMBER OF ACQUITTALS 1/6

The percentage of acquittals entered by Belarusian courts is extremely low: 0.2-0.4% of all cases.⁶⁶ In the first half of 2019, acquittal verdicts were entered in only 0.3% of all criminal

cases brought before courts (50 out of 18,830 cases).⁶⁷ The reason for such a state of affairs is the prosecutorial nature of justice⁶⁸ and the absence of judicial independence in Belarus.

3 | ECONOMIC WESTERNIZATION 9/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 1/7

Belarus is not a member of the WTO, even though membership talks have been conducted since 1993. In 2015, talks regarding Belarus's accession to the WTO intensified. During the last meeting of the Working Party on the Accession of Belarus in July 2019, the Belarusian delegation "reaffirmed the strong intention of Minsk to complete WTO accession negotiations by the next WTO Ministerial Conference, which will take

place in June 2020."⁶⁹ Belarus is one of the six member states of the EU's Eastern Partnership initiative, but it is not striving to sign an Association Agreement with the EU. Belarus does not have a bilateral agreement on partnership and cooperation with the EU; its ratification was frozen in 1996.⁷⁰ Belarus does not desire accession to the EU, opting instead for integration into the Eurasian Economic Union.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 4/6

After surging in the 2017 World Bank's Doing Business rating from 63rd (2014) to 37th (2017) position, Belarus has kept its rankings in recent years. In 2019, Belarus was again ranked 37th in the Doing Business rating of 190 countries.⁷¹ Belarus has significantly simplified the procedures of registering and doing business, holding high rankings in such indicators as "property registration" (5th in the world), "enforcing contracts" (29th), and "business registration" (29th). At the same time, Belarus has relatively

low rankings in "taxation" (99th) and "getting credit" (85th). According to a survey of small and medium-sized enterprises, the most serious problems for doing business in Belarus include high tax rates, burdensome administrative procedures (licensing, certification, inspections, etc.), unequal conditions for operation of private enterprises compared to those in which state enterprises operate, and constantly changing legislation (including tax law). The level of corruption is deemed to be moderate.

3.3 WESTERN SHARE IN THE SALES OF GOODS 2/6

After a significant decline in the volume of trade between Belarus and the EU from 2013 to 2016, their trade turnover went on the rise (from EUR 7.9 billion in 2016 to EUR 10.9 billion in 2018). The EU is Belarus's second-largest trade partner after Russia with a 24% share of Belarus's total trade turnover with other countries (share of imports from the EU: 30.2%, share of exports to the EU: 18.5%; share of imports from Russia: 58.9%, share

of exports to Russia: 38.4%). Belarus's exports to the EU primarily include raw materials and low-tech products: petroleum products, potassium and nitrogen fertilizers, and metal products.⁷³ The main importers of Belarusian goods among EU member states are the United Kingdom, Poland, Germany, Lithuania, the Netherlands, Latvia, and Belgium.⁷⁴ The United States' share in Belarus's trade turnover is insignificant, not exceeding 1.1%.⁷⁵

3.4 WESTERN INVESTMENTS IN THE COUNTRY'S ECONOMY 2/6

In 2018, foreign direct investments in the Belarusian economy amounted to 1.5 billion dollars.⁷⁶ According to data from the National Statistics Committee, the biggest investors in

the Belarusian economy in 2018 were Russia (38.3%), United Kingdom (25.7%), and Cyprus (7.8%). The total share of Western investments was at least 41%.⁷⁷

4 | LANGUAGE AND CULTURAL WESTERNIZATION 6.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 1/2

The Latin alphabet is not officially used, except for transliteration of geographic names.⁷⁸ In practice, the Latin alphabet is used to duplicate the names of Metro stations and some street names; it can also be found in the names of cafes, bars and restaurants in Belarusian cities.

The names of cities, streets, and road signs use the Belarusian language. In response to requests from Belarusian citizens, the State Property Committee requested Wikipedia in 2019 to use Lacinka (the Belarusian Latin alphabet) in Belarusian geographic names.⁷⁹

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 1.5/6

The level of proficiency in foreign languages in Belarus is low, which is largely a legacy of the Soviet school of language study. According to

sociological surveys, 27.9% of the population can understand and speak one foreign language (in addition to Russian and Belarusian), and a

further 7.7% are fluent in two or more foreign languages.⁸⁰ The data concerning proficiency in commonly spoken European languages can be found only in the 2009 census. According to

the 2009 census, only 450 thousand persons (or some 5%) were fluent in English, and another 138 thousand Belarusians were fluent in German (or about 1.5%).⁸¹

4.3 SHARE OF WESTERN PRODUCTS IN THE COUNTRY'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN WEBSITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 4/7

The overwhelming majority of films shown in Belarusian movie theaters and on Belarusian TV are produced in the West (mostly in Hollywood); these are followed, in terms of total volume, by Russian-produced films, series, and TV programs. Among the top 100 most popular films shown in 2017, 80 were Western-produced and 20 were Russian-produced films.⁸²

According to Internet World Stats data, the Internet penetration rate in Belarus in 2019 has reached 74%, or seven thousand regular Internet users.⁸³ In January 2019, the social media audience in Belarus (including duplication) was 3.5 million persons aged between 15 and 74 years, or 82% of reach.⁸⁴ The most popular social media platforms were VKontakte, YouTube, Odnoklassniki, Facebook, and Instagram.⁸⁵

5 | WESTERNIZATION OF LIFESTYLE 4.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 2/5

According to sociological surveys held in 2019, Belarusians traveled abroad most often for tourism (52.6%);⁸⁶ economic migration to the EU exists, but it is not significant. In absolute figures, according to the official statistical data, 850 thousand persons traveled outside Belarus for

tourism in 2018, mostly to countries outside the CIS (680 thousand), including over 240 thousand persons who visited Western countries.⁸⁷ Belarus is ranked among the six countries whose citizens were issued the largest number of Schengen visas (more than 676 thousand visas in 2018).⁸⁸

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1/3

A number of international brands and franchise corporations are represented in Belarus, the majority of which are clothing brands and fast food restaurant chains.⁸⁹ Among the renowned global restaurant chains operating in Belarus

are McDonald's, KFC, Burger King, Domino's Pizza, Sbarro, and Papa John's. In 2017-2018 LPP SA brands (Reserved, House, Cropp, Mohito, Sinsay), Inditex brands (Zara, Bershka, Pull&Bear, Stradivarius, Massimo Dutti), as well as Calzedonia

and Intimissimi entered the Belarusian market and opened their stores in the country.⁹⁰ Leroy Merlin, a large French home improvement retailer, is expected

to launch its operations in Belarus by 2020.⁹¹ Overall, international companies became more active in the Belarusian market during the last three years.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1.5/2

The number of mobile phone users in Belarus is 11.6 million, or 1226 per 1000 persons (which means that many people use services of several mobile operators).⁹² The coverage area of mobile telephone service is 98.2%. The percentage of the population using mobile service of LTE standard (a standard for wireless broadband

communication for mobile devices and data terminals) is 75.7%.⁹³

According to the Connected Consumer Survey by Google, 58.7% of Belarusians use smartphones: in the under-25 age group the percentage of smartphone users reaches 92.9%, while in the age group of 25-34 years it reaches 86.3%.⁹⁴

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
22.5 /25	23 /25	25 /25	13 /15	9 /10

1 | POLITICAL WESTERNIZATION **22.5**/25

1.1 DEGREE OF POLITICAL FREEDOM 9.5/10

There is no change in political freedoms in Estonia compared to the 2018 report. Overall, political rights and civil liberties are very well guaranteed, which is also reflected in the fact that Estonia continues to maintain the highest position compared to other post-Soviet countries in all main international democracy and freedoms rankings.⁹⁵ Estonia also belongs to the freest countries in the world in terms of press freedom⁹⁶ and internet freedom.⁹⁷

In early 2019, Estonia held parliamentary elections which were remarkable for several reasons. First, two new parties emerged shortly before the elections but failed to exceed the 5% threshold to enter the parliament. Estonia 200, a new liberal party consisting largely of previously politically unaligned members and engaging to some extent with ethnic Russian-speakers, was close to the threshold (4.4% of all votes); whereas Richness of Life, a new green party whose leader is the former chief of Estonian Free Party (now almost dissolved), remained firmly below (1.2%). Second, the 2019 election broke a record when 28% of all eligible voters cast their vote online.⁹⁸

Third, in a somewhat unlikely turn of events, the post-election negotiations brought to power the coalition of the Estonian Center Party, Pro Patria and, for the first time, the populist far-right Estonian Conservative People's Party (EKRE), thus leaving the Reform Party (the winner of the elections) in opposition. The first six months of the new government

have been a period of adjustment, marred by several incidents with respect to personnel issues as well as policy decisions. For example, the most recent occasion to spark controversy among the Estonian public was the release of the Minister of Rural Affairs Mart Jarvik (EKRE) from office following an inquiry which revealed that he had exceeded his authority in his domain of responsibility. As part of the political deal struck in the coalition, the Secretary General of the respective Ministry who had informed both the police as well as the press about the inconsistencies in Jarvik's actions, was also released from office, the formal reason being the "lack of cooperation" with the Minister. This incident has raised some concerns about the freedom of speech and action of civil servants, as well as about the potential emergence of politicization of officials in Estonia.⁹⁹ However, at the time of writing, it is too early for a more substantial assessment of the new government's performance on a broader scale. In addition, given that media has been diligent in exposing various cases of misinformation and conflicts of interest in politics and business, there is no basis for concern over the freedom of press.

The only shortcoming with political participation remains the proportion of noncitizen population (6.6% hold Russian citizenship, 5.9% have no citizenship, according to most recent data)¹⁰⁰ who are ineligible to vote in general (parliamentary) elections.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 7/8

There are currently 14 parties in Estonia;¹⁰¹ approximately eight are actively involved in politics. As a result of the most recent parliamentary election (March 2019), five parties are represented in the parliament. All five have confirmed adherence to Western integration, including EU and NATO membership. At the same time, the populist EKRE has criticised the EU on a number of occasions and insisted on taking back control from the EU. For example, Mart Helme, the leader of the party and the Minister of Interior Affairs, caused a stir in the Estonian media after congratulating Boris Johnson on

being elected the leader of the Conservative Party in the UK and offering the experience of Estonian people “in restoring its sovereignty” from a “union they never wanted to be a member of,” thus comparing the EU to the Soviet Union.¹⁰²

EKRE has also questioned multiple EU initiatives, including the negotiations over the terms of the European Stability Mechanism¹⁰³ and the climate neutrality 2050 target.¹⁰⁴ Nonetheless, the party uses the opportunity to communicate their positions to their voters and so far these have not resulted in any substantial policy decisions.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 6/7

Public opinion about Western institutions and integration with the West continues to be positive. According to a recent survey conducted in Estonia, 74% of respondents support EU membership, while 16% oppose it. Respondents’ views varied across demographic characteristics. Support was lower among non-graduates, non-ethnic Estonians, and lower income groups. It is significant that support

is consistent across party lines, with 54% of populist EKRE voters (the lowest score) also in favor of EU membership.¹⁰⁵ Regarding defence, support for NATO membership in general has remained consistently above 70%, but it is significantly higher (90%) among Estonian respondents and considerably lower (approximately 44%) among respondents from other nationalities.¹⁰⁶

2 | LEGAL WESTERNIZATION 23/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 6/6

The Estonian Constitution is in compliance with the requirements of the Venice Commission and Estonia has a representative in the

Commission. Estonia has not submitted any legal requests to the Venice Commission in the past two years.

2.2 INDEPENDENCE OF THE COURTS 7/7

Estonia’s judicial independence is strong despite recent criticism from the right-wing populists (EKRE) regarding court decisions and the alleged bias in the Prosecutor’s Office.¹⁰⁷ EKRE has proposed to change the Estonian judicial system

by introducing elements of common law, e.g. to elect judges and establish a jury institution.¹⁰⁸ EKRE’s rhetoric is not shared by other political actors and can be considered to have minimal impact. According to the latest survey data (2016-

2017), 93% of judges say they have not been under pressure to take a decision in a case in a specific (i.e. biased or tilted) way in the past two

years.¹⁰⁹ Estonia ranks now 10th in the world in terms of rule of law according to the World Justice Project Rule of Law Index 2019.¹¹⁰

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 5/6

All international human rights are guaranteed in Estonia. LGBT rights remain a point of conflict, since the provisions of the Cohabitation Act, which would also apply to same-sex couples, will not be approved by the current parliament. As a result of strong pressure from the populist EKRE (in the form of both rhetoric and protests), funding to LGBT organisations¹¹¹ as well as support for the legal rights of same-sex couples have been under attack. Although there have been no

changes with respect to legislation affecting the LGBT community, both the parties and society remain conflicted about the issue.

There have also been concerns about the legal status of mass surveillance in the case of national emergencies. The President filed an appeal to the Supreme Court of Estonia to declare amendments to certain legislative acts unconstitutional on the grounds of restricting personal privacy. The Court is expected to rule on the matter.¹¹²

2.4 NUMBER OF ACQUITTALS 5/6

In 2018, 15,299 criminal case proceedings were filed in the court of first instance. In the circuit courts, 1,917 criminal case proceedings, and in the Supreme Court, 997 criminal and misdemeanour cases were submitted.¹¹³ Of the cases brought to the circuit courts, 5.3% of decisions made in the first

instance remained unchanged, 0.3% were completely overruled, and 1.3% partially overruled.¹¹⁴ While there is no consistent and adequate statistics on acquittals, a report from 2017 (based on 2015-2016 data) estimates the acquittal rate is 8% which is in the same rank with other Western countries.¹¹⁵

3 | ECONOMIC WESTERNIZATION 25/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 7/7

Estonia is a full member of the EU (joined in 2014), the WTO (1999), as well as the OECD (2010). Despite some interventions in the Estonian EU policies on be-

half of the EKRE members of government, Estonia's strong commitment to the EU remained unchanged both in terms of rhetoric as well as policy positions.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 6/6

According to the World Bank's report, Doing Business 2019, Estonia ranks 16th in the world regarding ease of doing business.¹¹⁶ It is the only country in the world which allows e-residence to citizens of other countries, which enables them to have a legal relationship with the Estonian state

and thereby also allows them to start and develop a business in Estonia. In terms of corruption perception, Estonia is 18th out of 180 countries, having risen three places compared with the previous year.¹¹⁷At the same time, Estonia has faced multiple money-laundering scandals recently (which

occurred between 2007 and 2015 due to lax laundering regulations) where millions of euros of dubious origin from various countries was moved through the Estonian branches of multiple Scan-

dinavian private banks. Despite a stalled start, the Estonian financial authorities have initiated investigations and proposed changes in the legislation for a more transparent system.

3.3 WESTERN SHARE IN THE SALES OF GOODS 6/6

The Western share in trade remains high and Estonia has been able to diversify its trade partners. In 2018, the biggest share of Estonia's total exports was made up of EU countries (68%); the share of EU countries in total imports was 78%. In both cases, this indicated a small increase from the previous year. Trade in goods with non-EU countries grew more (27% in exports and 37% in imports, in

both cases especially with the USA and Singapore). Compared to the year before, exports to Russia declined and the share stood at 6% (Estonia's sixth biggest trade partner), whereas imports from Russia increased (9% of all imports, its fifth biggest trade partner). China does not feature among the top ten main export partners for Estonia and it is the ninth biggest import partner for Estonia at 4%.¹¹⁸

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 6/6

According to the most recent data from June 2019 FDI into Estonia has decreased but EU countries are responsible for the highest share in FDI in

Estonia. Sweden, Finland, the Netherlands, Luxembourg, Lithuania, and Latvia make up over 80% of Estonian FDI.¹¹⁹

4 | LANGUAGE AND CULTURAL WESTERNIZATION 13/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 2/2

Estonian language is the official state language and it uses the Latin alphabet. English signage in

parallel to Estonian is widespread in public spaces (e.g. tourist areas).

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 4.5/6

According to a study by Eurostat from 2017, 98.5% of pupils at the lower secondary school level in Estonia learn a foreign language, and 95.4% of them learn more than one language. The most common languages are English (96.5%) and Russian (63.6%).¹²⁰ In order to graduate from upper secondary school, students are expected to take a foreign language examination in either English, German, Russian or French and receive the level of an independent user (B-level according to the Common Eu-

ropean Framework). Based on the results of the most recent census (2011), 856,225 respondents (approx. 66% of the entire population) speak a foreign language, 291,961 speak two foreign languages. The most commonly spoken foreign language is Russian (approx. 42%), followed by English (38%)¹²¹.

As reported by the EF English Proficiency Index survey conducted among respondents interested in learning a foreign language, Estonia ranks 28th (high proficiency of English) out of 100 countries.¹²²

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 6.5/7

According to the Media Services Act of Estonia, at least 51% of the television program content broadcast per annum should be reserved for audiovisual works of European origin, i.e. produced in one of the EU member states or by a third party affiliated with them. Much of the rest comes from the US, as well as Russia. The most popular TV channel in terms of viewers (October 2019) is ETV (Estonian State Television) with roughly 15.4% of daily share, followed by private Estonian channels Kanal 2 (8.3%) and TV3 (8.2%). The most popular Russian channel is PBK (5.4%), followed by RTR Planeta (4.3%). Streaming platforms such as Netflix, HBO and others are popular

among younger cohorts, although in the case of Netflix, the subscription gives access to limited content.

Use of Western websites and social media is widespread. According to the report Digital 2018, internet penetration in Estonia is 97% and social media is used by 55% of the population. The top websites by number of visitors in January 2018 were (in decreasing order) Google, YouTube, VKontakte, Facebook. Approximately 55% of the population are active Facebook users and approximately are 24% Instagram users.¹²³ Of Russian social networks, Odnoklassniki was used by approximately 35% and VKontakte by 28% of the population in 2017.¹²⁴

5 | WESTERNIZATION OF LIFESTYLE 9/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 4.5/5

In 2018, Estonian residents travelled abroad 3.6 million times; 78% of trips were to the EU, and about 12% to CIS countries (no individual level data available). Per specific countries, the most visited countries were Finland (18% of

all travels), Latvia (12%), Russia (9%), Sweden (7%), and Germany (6%).¹²⁵ The number of trips to holiday destinations such as Egypt, Greece, Turkey, and Bulgaria has been on the rise every year.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 2.5/3

Estonia is relatively well-covered by major Western franchise corporations in the areas of retail sales, clothing, and food services. In a long-awaited move, IKEA has opened an online store in Estonia and is set to open a physical

store in the near future. The first KFC restaurants opened in 2019. Due to the small size of the market, some companies in financial difficulties (such as Stockmann or Marks & Spencer) have chosen to downsize or leave Estonia.

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE 2/2

Mobile internet is widely available in Estonia. According to Eurostat, in 2018 71% of individuals aged 16-74 said they used internet on the move.¹²⁶ The share of mobile phones used to access the

internet has increased 45% compared to the previous year.¹²⁷ Altogether, 90% of Estonian households have Internet access at home which is above the EU average.¹²⁸

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
19.5/25	15.5/25	15.5/25	8.5/15	5/10

1 | POLITICAL WESTERNIZATION 19.5/25

1.1 DEGREE OF POLITICAL FREEDOM 7/10

According to the Freedom House report, Freedom in the World 2019, Georgia is a partly free country with a rating of 63 points on a 100-point scale, where 100 stands for freest and 0 the least free. In the political rights section, Georgia is assigned a score of 3 out of 7. The report notes that generally, people in Georgia can form political parties without much interference. However, it is also stressed that since the 2000s, single-party dominance has characterized the country and this inhibits the development of competing groups. Constitutional changes from 2017, which prohibited small parties from forming electoral blocs to overcome a 5% threshold to enter the parliament from 2024 onwards, will reduce the chances of a fragmented opposition.¹²⁹ In terms of media freedom, according to the World Press Freedom

Index, Georgia ranks 60th out of 180 countries, marking an improvement compared to previous years. Georgian media is characterized as pluralist but not yet independent and very polarized, while owners oversee the editorial content.¹³⁰ As the OSCE noted in the final report of the 2018 presidential election in Georgia, contestants had numerous opportunities to present their views in the media but the “polarization of major media outlets required voters to consult several media outlets in order to form an opinion.” While the public broadcasters, GPB-1 and TV Adjara provided candidates the same amount of free airtime, Rustavi 2 favored the opposition party, the United National Movement (UNM), while Imedi TV showed bias towards the Georgian Dream-backed candidate.¹³¹

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 6.5/8

Out of 150 members of the parliament, the ruling Georgian Dream (GD) party holds 107 seats, the former ruling party (which split into two)—European Georgia holds 20 seats and the UNM holds 7 seats, the Alliance of Patriots of Georgia holds 6 seats, the Industry Will Save Georgia holds 1 seat and independent candidates hold 8 seats. The majority of the ruling party GD, as well as the former ruling party (European Georgia and the UNM), are pro-Western despite some individual GD members

occasionally making some contradictory statements.¹³² GD members might differ slightly from the former ruling party as the latter exclusively promotes pro-Western policy while the GD (and for example its presidential candidate Salome Zurbishvili, who was an independent MP before presenting herself as a candidate) advocate moving close to the West but without antagonizing Russia.¹³³ Generally, of the two political parties in Georgia that most frequently spread anti-Western messages, the United Demo-

cratic Movement and the Alliance of Patriots, only the latter is represented in the parliament. However, according to the 2019 study by the Media Development Foundation, in 2018, unlike previous years, the Alliance of Patriots outstripped the United Democratic Movement in the number of messages with the narrative that the West gives Georgia instruc-

tions and imposes unacceptable Western values on the country.¹³⁴ The Industry Will Save Georgia similarly belongs to the group of anti-Western parties but with only one member in the parliament. Overall, openly anti-Western members do not compose more than 10% of the MPs, while more than 90% remain pro-Western at least in their rhetoric.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 6/7

The majority of the Georgian population supports the government's pro-Western foreign policy but not in exclusive terms. According to the International Republican Institute (IRI) public opinion polls from June 2019, while 30% of Georgians propose that Georgia's foreign policy course should be only pro-European Union and Western, 47% prefer a pro-Western direction while at the same time maintaining relations with Russia. There is low support (2%) for strictly pro-Russian relations and only 8% support for pro-Russian relations that simultaneously maintains relations with the West. When it comes to Georgia joining Western institutions, the majority is supportive. Seventy-five percent of the Georgian population supports Georgia joining the Europe-

an Union (compared to 85% in 2018 and 90% in 2017), while 12% oppose it (9% opposed in 2018 and 6% in 2017). At the same time, 68% support the country's membership in NATO (compared to 76% in 2018 and 82% in 2017) and 19% strongly or somewhat oppose NATO membership (18% in 2018 and 13% in 2017).¹³⁵ However, while the West is a political choice for the majority of Georgians, there is more skepticism for Western values and lifestyle. According to the Caucasus Research Resource Centers (CRRC) polls conducted in March 2019, 42% of Georgians think that the EU threatens Georgian traditions. However, it should also be noted that more people disagree (46%) with this statement than agree.¹³⁶

2 | LEGAL WESTERNIZATION 15.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 3/6

The last major constitutional changes in Georgia took place in October 2017, in which a proportional system is set to replace the mixed electoral system, beginning with the 2024 elections. While the Venice Commission welcomed this move, since the mixed system largely led to the monopoly of a single party, the Georgian side considered the recommendations only partially and some key issues were not taken into account. These concerned postponing the introduction of the proportional system until 2024, including the 5% threshold for parties to enter the

parliament (that was too high for small parties) while forming party blocs for the purpose of overcoming this barrier was also prohibited. Critics fear these issues create similar concerns as the mixed system where single parties seized power.¹³⁷

After the June 2019 protests in Tbilisi over Russia, the ruling party appeased the protestors by promising them a constitutional amendment that would introduce a natural barrier (0.67%) for the parties to enter the parliament and would allow for party blocs. However, these changes were only considered

as a transitional provision to the new Constitution, thus only for the 2020 elections. The previous terms would still apply from 2024 unless additional constitutional amendments are initiated.¹³⁸ However, the promised constitutional amendment on moving to the fully proportional system already from 2020

was turned down by the ruling party, which voted against the changes on 14 November. This outcome sparked the resignation of several ruling party MPs and mass protests in front of the Georgian Parliament where protesters demanded the promised changes.¹³⁹

2.2 INDEPENDENCE OF THE COURTS 4.5/7 POINTS

According to the World Justice Project Rule of Law Index, which measures experience and perception of the rule of law by the general public, Georgia is ranked 41st out of 126 countries. With this rank, Georgia has moved up with two levels in the last three years and remains a top performer among the 13 surveyed countries in the Eastern Europe and Central Asia region.¹⁴⁰ According to the last edition of the Public Integrity Index (2017), which also measures judicial independence, Georgia ranked 45th among 109 countries.¹⁴¹ However, these reports still suggest considerable shortcomings with the judicial system in Georgia.

Evaluating a “third wave of judicial reform” in 2019, GRECO notes some improvements compared to previous years but underlines such issues in the judiciary as a lack of clear and objective

criteria for promoting judges, issues in transparency and objectivity of disciplinary proceedings against judges, and personal immunity of judges instead of functional immunity (immunity limited to activities related to their participation in judicial decision-making).¹⁴²

Moreover, the public remains skeptical about the judiciary in Georgia. Some of the criticism about the judicial system is that it is unfair, politicized, under the influence of a few powerful groups, corrupted, and incompetent.¹⁴³ According to the IRI public opinion polls in Georgia, from 2019 only 17% of Georgians assess the performance of courts as open and transparent while 66% consider them as not open or transparent. In a similar vein, only 19% of Georgians regard the work of courts as favorable against 59% who think it unfavorable.¹⁴⁴

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 5/6

Human rights in Georgia are guaranteed under the constitution and the Public Defender of Georgia (Ombudsman) is appointed to overview the enforcement of these rights. Despite being part of the major international treaties and conventions on human rights,¹⁴⁵ a major problem remains with their

adoption into the national law and implementation. According to the Human Rights Watch report from 2019, harsh drug laws, issues in the occupational safety and labor rights laws, discrimination against LGBT people, and media freedom remain major areas of concern in Georgia.¹⁴⁶

2.4 NUMBER OF ACQUITTALS 3/6 POINTS

During 2018, 14,879 criminal cases were heard at the common courts of Georgia out of which 5,107 were heard in essence. Among them, 402 cases were

rendered with the verdict of not guilty. Therefore, the rate of acquittals in criminal cases was 7.9%, which marks an increase of 4% for the past two years.¹⁴⁷

3 | **ECONOMIC WESTERNIZATION 15.5/25**

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 4.5/7

Georgia has been a full member of the WTO since June 2000. Since 2009, Georgia's relations with the EU have developed within the Eastern Partnership (EaP) framework, which is a revised version of the European Neighbourhood Policy. Within this framework, relations are based on the Association Agreement and the DCFTA which entered into force in July 2016, and strives for political association and economic integration of Georgia in the EU.¹⁴⁸ In March 2017 visa liberalization

came into effect for Georgians allowing Georgian citizens to travel to the Schengen zone for a short stay without a visa.¹⁴⁹ Even though Georgia is eligible for EU membership, the current format of relations suggests this is an unlikely prospect. In fact, the EU declared the idea that the EaP participation leads to the EU membership as a myth and rather characterized current policy as an area of cooperation between the EU members and the EaP partner states.¹⁵⁰

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 6/6 POINTS

In the Ease of Doing Business 2019 report by the World Bank, Georgia ranks number 6 out of 190 with a score of 83, while the regional (Europe and Central Asia) average score is 72. In comparison with the previous year, all scores improved, especially those in the categories of Starting a Business and Paying Taxes.¹⁵¹ Georgia has also improved its scores in the Corruption Perceptions Score measured by Transparency International. In 2018 Georgia ranked 41st out of 180 countries and its score increased

from 56 to 58. This gives the country the best score in the Eastern Europe and Central Asia region and places it ahead of EU members such as Malta, Italy, and Slovakia.¹⁵² However, despite this improvement authors of the Transparency International report suggest Georgia is the country to watch because of backward steps it has taken in its democracy with respect to the lack of accountability of law enforcement, corruption in the judiciary, and government attacks on civil society.¹⁵³

3.3 WESTERN SHARE IN THE SALES OF GOODS 2.5/6 POINTS

Georgia's trade with the EU has gradually increased since 2016. Exports have increased from USD 655 to USD 730 million and imports from USD 2.2 billion to USD 2.5 billion. The biggest trade partners from the EU are Germany, France, and Italy. However, despite the overall growth of trade with the EU, the share of the EU trade in the overall foreign trade of Georgia has not increased and comprised 27% of all turnover. This is because Georgia's

overall trade increased and trade with the CIS countries also increased and reached 35% of all Georgia's foreign trade.

During 2018, Georgia's largest trade partners were Turkey (13.7%), Russia (11%), and Azerbaijan (8.8%). Trade with the US comprised 3.7% of all its foreign trade with a 4.5% share of exports and 3.4% of imports. Compared to 2017, both imports and exports with the US increased in 2018.¹⁵⁴

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 2.5/6

In 2018, five of the 10 largest investors in Georgia were Western countries. These include (with their respective share of investment) the Netherlands (16.5%), the United Kingdom (14.1%), the US (8.1%), Czech Republic (5.9%), and Luxemburg (4%). Compared to 2017, investments from all these countries decreased except the US which saw an increase.

The largest investor in Georgia remains Azerbaijan (19.5%) and the rest of the top 10 investors is rounded out, from China (6%), Panama (5.9%), Russia (5.5%) and Turkey (3.9%). Notably, investments from Azerbaijan and Turkey also decreased compared to 2017, while investments from China, Panama, and Russia increased.¹⁵⁵

4 | LANGUAGE AND CULTURAL WESTERNIZATION 8.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 1/2

The official language of the country is Georgian based on the Georgian alphabet written in its own writing system. The Latin alphabet is not used. Russian was widespread during the Soviet period and used as a second language in multiple areas, including in educa-

tion and work. Nowadays, it is mainly the older generation who speaks Russian. However, a recent increase in the number of Russian tourists has, to some extent, renewed interest in the Russian language (visible in increased tourist services available in Russian).¹⁵⁶

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 2/6

According to the CRRS survey "Knowledge and Attitudes Toward the EU in Georgia, 2019," 19% of the respondents reported knowledge of English on an advanced or intermediate level, 20% are at the beginner level, and 58% have no basic knowledge.¹⁵⁷ In the 2017 survey, "Cau-

casus Barometer," only 14% of Georgians reported knowledge of a foreign language, other than English and Russian.¹⁵⁸ However, since the 2000s, English has become a priority in Georgia and in 2011 it became a mandatory subject in schools.¹⁵⁹

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 5.5/7

Georgian movie theaters primarily show movies produced in the West. For instance, on October 21, 2019, out of 22 movies running in the major Tbilisi cinemas, one was Georgian and the rest were Western (mostly American).¹⁶⁰ Based on this small sample, 95% of movies were Western. While some

movies continue to be dubbed in Russian, this has significantly improved compared to the last year and most of the movies shown in Tbilisi feature either the original language or the original language with Georgian subtitles.¹⁶¹ The same applies to TV channels where most of the movies shown are pro-

duced in the West. The trend is different for TV series. Based on the TV series aired on the three most-watched TV channels (Rustavi 2, Imedi, Public Broadcaster), in October 2019, two were Georgian. The remaining televised programs were Turkish (nine), Spanish (two), British (one), Indian (one), and Italian (one). Therefore, Western series comprised 25% of all available TV series.¹⁶²

The frequency of internet use has been gradually rising in Georgia. In the July 2019 nation-wide survey by the CRRC, 56% of Georgians use the internet daily.¹⁶³ Among internet users, 89% name Facebook as the most frequently visited social media site, followed by Instagram (16%). A small minority (3%) use Twitter. Alternative Russian social networks are not widely used (Odnoklasniki—5% and V Kontakte—3%).¹⁶⁴

5 | WESTERNIZATION OF LIFESTYLE 5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 2/5

In 2015, 11% of Georgians said that a member of their household has visited a Western country (the EU or the USA).¹⁶⁵ In April 2019, the share of those who reported having visited any European country at least once since the visa liberalization in March 2017 was 8%.¹⁶⁶ However, it is difficult to ascertain whether individuals had travelled to the

West before or if this was the first time they had traveled there. According to the National Statistics Office of Georgia, the majority Georgian residents over the age of 15 who traveled abroad in the first half of 2019 went to Turkey (39%) and Azerbaijan (23%), followed by the EU countries (13%) (no other western country is mentioned separately).¹⁶⁷

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1.5/3

Out of the 100 top global retailers named by Deloitte in 2019,¹⁶⁸ only Carrefour, Spar and GAP are present in Georgia. Other international clothes retailers that are present (mainly in the capital, Tbilisi) include Burberry, Superdry, Zara, Mango, H&M, Marks & Spencer, Nike, Armani, Calvin Klein, and Lacoste. Tbilisi also hosts sev-

eral international food and beverage operators such as McDonald's, Burger King, Wendy's, Subway, Texas Chicken, KFC, Paul's Cafe, and Dunkin' Donuts.¹⁶⁹ E-commerce is also growing in Georgia, as buyers become more confident with online security, however, there are no accurate figures on this data.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1.5/2

According to the 2018 report on Freedom on the Net, mobile penetration in Georgia is 147%, which means that each person has more than one mobile phone. Reception is widely available in the country, including in rural areas. Even though most of the households access the internet via their PCs or laptops (89%) rather than their mobile phones (59%), the number of mobile internet users has increased

over time. Young people and those outside of the capital are using mobile internet more frequently and the prices for monthly mobile broadband are fairly affordable.¹⁷⁰ More specifically, in 2018 2.9 million Georgians used mobile internet (55% of mobile network users) compared to 2.6 million in 2017 (47%).¹⁷¹ In July 2019, 62% of households reported having a smartphone (with an internet connection).¹⁷²

SCORE, POINTS/OUT OF	Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
	5/25	7.5/25	13.5/25	5.5/15	3.5/10

1 | POLITICAL WESTERNIZATION 5/25

1.1 DEGREE OF POLITICAL FREEDOM 2/10

Kazakhstan has a long record of autocratic rule and severe restrictions on civil and political liberties. Nursultan Nazarbayev, a former Communist Party boss in Soviet times, held supreme power for 30 years—longer than any other post-Soviet leader—by repeatedly orchestrating elections never deemed free and fair by credible observers¹⁷³ and altering the constitution. In March 2019, he stepped down as president,¹⁷⁴ yet retains vast authority over the law enforcement and security services, and effectively controls policies through chairmanship of the country’s Security Council.¹⁷⁵ He also enjoys a constitutional status of Leader of Nation and has lifelong legal immunity for himself and his family.

His successor, former career diplomat and Senate speaker Kassym-Zhomart Tokayev, became interim president. Tokayev’s first decision was to rename the capital city Astana to Nur-Sultan, and name all central avenues in major cities after Nursultan Nazarbayev.¹⁷⁶ Later, in June 2019, he won snap elections with 70% of the votes. As reported by monitors from the OSCE, the election “of-

fered an important moment for potential political reforms, but it was tarnished by clear violations of fundamental freedoms” with “significant irregularities on election day.”¹⁷⁷ The transition period was also marred by a sharp increase in critical voices and peaceful protests, which were stifled and harshly dispersed with hundreds of activists detained for a short time.¹⁷⁸

Legislation puts severe restrictions on freedom of assembly, association, and expression.¹⁷⁹ The media landscape is dominated by outlets funded by the state and regime-friendly oligarchs. Self-censorship is pervasive. Critical websites are often blocked, and social media heavily controlled.¹⁸⁰ Reporters Without Borders ranks Kazakhstan 158th out of 180 countries in its 2019 World Press Freedom index.¹⁸¹ Freedom House’s Freedom in the World report has listed Kazakhstan among Not Free countries since 1998.¹⁸² The same organization’s Nations in Transit report describes Kazakhstan as a “consolidated authoritarian regime,” with a continual decline in scores since 2009.¹⁸³

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 1/8

The party system is overwhelmingly dominated by the Nur Otan party, which is chaired by the Leader of the Nation. Its ambiguous, populist ideology supports the official discourse, rather than the formation of policies. In terms of foreign policy, it holds a discreet stand, reflecting Nazarbayev's "multi-vector" doctrine of balancing between the interests of Russia, China, and the West.¹⁸⁴ The party's program does not specify any priorities in this area, but proclaims "openness to the world" along with devotion to regional integration.¹⁸⁵

Other parties do not represent any meaningful political force, and genuine opposition parties

(many of which had pro-West reformist agendas) have been marginalized, and subsequently banned or dissolved.¹⁸⁶

Currently, three parties sit in the parliament. Nur Otan occupies almost 80% of seats. The two other parties are Ak Zhol, an allegedly pro-business party, and the Communist People's Party, a purely decorative entity that often voices anti-Western sentiments¹⁸⁷ but is hardly taken seriously.

The freedom of association in Kazakhstan is strictly regulated. The legislation on political parties (2002) makes it difficult for a new party to form.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 2/7

There are no publicly available polls about Kazakhstan's perception of NATO or the EU, in large part because membership in these blocs has never been a part of political discourse. Despite the officially stated "multi-vector" policy,¹⁸⁸ Kazakhstan is firmly in the orbit of Russian foreign and military policy. Nevertheless, the government maintains and showcases close relations with the EU¹⁸⁹ and the United States.¹⁹⁰ Top-ranking European and American officials often visit Kazakhstan. Nursultan Nazarbayev has met with five American presidents during his official visits to the US. The symbolic first foreign visit of Kassym-Zhomart Tokayev as interim president was to Russia, reaffirming the priority of this strategic partnership.¹⁹¹

The last Soviet republic to leave the USSR, Kazakhstan has been a founding member of a series of Russia-led integration projects, such as the Collective Security Treaty Organization (CSTO), the Eurasian Economic Union (EAEU) and the Shanghai Cooperation Organization (SCO). Kazakhstan has had a limited collaboration with NATO since 1992.¹⁹² A 2017 poll by Gallup revealed nearly one third of Kazakhstani citizens perceive NATO as a threat.¹⁹³

According to a 2016 study, the country's media positively depicts the role of the EU in the region, portraying the EU primarily as an economic powerhouse. The authors allege that their findings coincide with similar studies about how outsiders perceive the EU.¹⁹⁴ In 2019, the EU presented its new policy on Central Asia, which stressed Kazakhstan's special role in European trade and investment in the region. The partnership and cooperation agreement with Kazakhstan has no provisions on visa-free travel or free trade, but envisages projects in energy, trade, transport, environmental matters, education, democracy, and human rights.¹⁹⁵

In general, the public's attitude to the West is neutral to positive, but Russian television, websites, and social networks are widely popular among Kazakhstanis, as is its propagated stance against "alien values" of the Western civilization. Skillfully manipulated anti-West sentiments (feminism, LGBTQ rights, etc.) enjoy vast support within the Kazakhstani public, competing mainly with traditionalist moods (which are both anti-West and anti-Russia), rather than with a pro-West agenda.

2 | **LEGAL WESTERNIZATION 7.5/25**

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 1/6

In 2012, Kazakhstan joined the charter of the European Commission for Democracy through Law (Venice Commission). Between 2007 and 2018, upon formal requests from Kazakhstan, the Commission issued its opinions on the Ombudsman reform, the Constitutional Law on the Judiciary, and the draft of the Administrative Code.¹⁹⁶

The Venice Commission has never reviewed the Constitution of Kazakhstan, which lacks checks and balances and puts all branches of power in direct or indirect subordination of the president.

In 2017, it evaluated a proposed set of constitutional amendments. Those amendments were widely advertised as a move towards democracy but brought little change to the unbalanced system centered around the president. The Commission confirmed that the proposed amendments did “not represent a change in the nature of the constitutional system of Kazakhstan”, in which “the powers of president generally exceed the presidential prerogatives in most of the Council of Europe countries.”¹⁹⁷

2.2 INDEPENDENCE OF THE COURTS 2.5/7

Although the constitution proclaims the independence of courts in Kazakhstan, it also endows the country’s president with the prerogative of appointing all judges, based on nominations from the Supreme Judiciary Council (SJC), members of which are appointed by president. The president proposes candidacies for the Supreme Court justices, nominated by the SJC, to the Senate. A third of the Senate is appointed directly by president.

The World Bank’s Worldwide Governance Indicators data show a general improvement in the rule of law in the late 2000s, with ups and downs since then, but the overall score has never been higher than 40 out of 100.¹⁹⁸ The 2019 Rule of Law Index by the World Justice Project ranked Kazakhstan 65th out of 126, scoring the worst in constraints on government powers, fundamental rights, and criminal justice.¹⁹⁹

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 2/6

The Constitution of Kazakhstan provides for the equal protection of rights of all citizens, but the legislation contains numerous exceptions, blanket rules, and references to by-laws that, in effect, create obstacles, rather than facilitate the exercise of rights by a citizen.

In 2005, Kazakhstan ratified the International Covenant on Economic, Social and Cultural Rights and the International Covenant on Civil

and Political Rights, and, in 2009, the Optional Protocol to the latter, allowing individuals to file complaints with the UN Human Rights Committee. According to the Kazakhstani Bureau for Human Rights, the country’s leading advocacy group, 26 complaints were filed by Kazakhstan nationals to the Committee since 2010.²⁰⁰ Kazakhstani officials emphasize that the Committee’s decisions are not binding.²⁰¹

In 2016, the UN Office of the High Commissioner for Human Rights (OHCHR) released its observations on Kazakhstan's second periodic report, a decennial self-evaluation of a country's respect for human rights, marking numerous "matters of concern" in almost every aspect of human rights.²⁰² A recent submission to the country's periodic review by Human Rights Watch pointed out a deterioration of the situation since the 2014 review process.²⁰³ In 2019,

the OHCHR's Committee on Economic, Social and Cultural Rights stated its concern over the removal from the Constitution the principle establishing direct applicability of the Covenant to domestic legal order.²⁰⁴

According to the 2018 U.S. State Department's report, the most serious human rights issues in Kazakhstan are torture, political prisoners, censorship, restrictions on religion, free speech, peaceful assembly and association.²⁰⁵

2.4 NUMBER OF ACQUITTALS 2/6

The ratio of acquitted persons in criminal cases with public prosecution ranged between 0.2 and 0.5% in 2009-2016,²⁰⁶ or nearly 1 in 500 trials resulted in favor of the accused.²⁰⁷ More recently, the situation has been improving with the vocal backing from the Supreme Court chairman Zhakip Asanov,²⁰⁸ partly because of the government's aspi-

ration to make Kazakhstan a member in the OECD, a club of wealthy developed countries. According to legal experts, statistics show a rise in acquittals by 2.3% in 2018-2019, although they note that the starting point had been very low.²⁰⁹ At the same time, in an illustrative case in 2019, a judge was fired after acquitting an opposition activist.²¹⁰

3 | ECONOMIC WESTERNIZATION 13.5/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 2/7

Kazakhstan is not a member of the European Union; nor is it a part of the EU Eastern Partnership program. Economic links are facilitated by the diplomatic instrument of Partnership and Cooperation Agreements within the framework of the broader EU–Central Asia strategy. The current strategy, adopted in June 2019, identifies Kazakhstan as the EU's main partner in the region. The current Enhanced Partnership and Cooperation Agreement, signed in 2015, yet not ratified since then, is expected to be updated accordingly. On the other hand, the EU is Kazakhstan's first trade partner and the largest investor, accounting for

almost 40% share in its total external trade²¹¹ and nearly a half of FDI inflow.²¹²

Kazakhstan is a member of the EAEU, since 2014, together with Russia, Belarus, Armenia, and Kyrgyzstan. The bloc is believed to embody an ambition of the Kremlin to restore the Soviet Union, being more of a political instrument, rather than an economic alliance.²¹³ Kazakhstan's trade with EAEU states, including with Russia, is eclipsed by its trade with China and the EU,²¹⁴ while general trade within the EAEU shrank by 5% to USD 28 billion in 2019.²¹⁵ Analysis shows that trade between the EAEU members was higher before the free-trade bloc was formed.²¹⁶

Kazakhstan joined the WTO in 2015 with membership strictly conditioned by the regulations within the EAEU. In 2018, a report by Transparency Kazakhstan, a non-profit organization, revealed nota-

ble discrepancies in statistical data on Kazakhstan's trade under the WTO, which may indicate significant volumes of counterfeit cross-border trade and pervasive corruption in customs agencies.²¹⁷

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 4/6

Kazakhstan has been consistently improving its standing in the World Bank's Doing Business reports, and currently ranks 25th, rising from 36th place in 2017. The authors of this study acknowledge a series of reforms have taken place in the country since 2008.²¹⁸ The overall score of Kazakhstan is higher than average for the East Europe and Central Asia region. The rank is among the highest among the post-Soviet states—only behind Georgia and the Baltic states.

The World Economic Forum's Global Competitiveness Index also praised administrative requirements for its "Business Dynamism" indicator, although noting low entrepreneurial culture and competition.²¹⁹

The term "corporate law" is not used as a formal legal definition in the laws of Kazakhstan,

but the concept is implemented in legislation. The law on joint stock companies (corporations) was adopted in 2003. The Kazakhstan Stock Exchange has operated since 1993 and currently lists 127 companies. The 2019 Doing Business report praised protections for minority investors, enforcement of contracts, and insolvency resolution practices. The government implements corporate governance in state-owned companies.

The Astana International Financial Center (AIFC) in Nur-Sultan has a special legal regime. The AIFC Court, which is separate and independent from the Kazakhstan Judiciary, was set to resolve civil and commercial disputes in the AIFC with its own court of final appeal and procedural rules.²²⁰

3.3 WESTERN SHARE IN THE SALES OF GOODS 2.5/6

Import and export trade with the European countries amounts to nearly 36% of Kazakhstan's total foreign trade, with the EU accounting for almost 34%.²²¹ It reached USD 22.5 billion in January-August of 2019, 54% more than trade with Russia and more than twofold of that with China. These numbers reflect

Kazakhstan's main exports of hydrocarbons and other raw materials. While Russia and China dominate in imports—35% and 16% respectively, the EU accounts for nearly 18% of imported goods. Kazakhstan's trade with the US reached USD 1.4 billion in the same period, or 2.3% of the total trade.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 5/6

Since 2005, Kazakhstan attracted nearly USD 300 billion of FDI. In 2018, USD 24 billion went to Kazakhstan, making the country a leader in the region.²²² The main interest of

investors is in oil, gas, and mining. The Netherlands is the largest investor (27.4% of FDI), followed by the U.S. (22.8%) and Switzerland (13%).²²³

4 | LANGUAGE AND CULTURAL WESTERNIZATION 5.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 1/2

In April 2017, then-president Nazarbayev asked the government to prepare a plan of gradual transition to develop the new Kazakh alphabet by the end of the year. In October 2017, Nazarbayev signed a decree on the gradual transition of the Kazakh language to the Latin script.²²⁴ Initially, he gave the green light to the version of the alphabet²²⁵ that sparked public outrage and mockery, because of an abundant use of apostrophes. In February 2018, the new

amendment replaced the apostrophes with diacritic signs and digraphs.

It is suggested that teaching with the Latin script will begin in 2022, and Kazakhstan must finish the transition by 2025. The process appeared to be more complicated than expected, because of the lack of expert involvement and citizen engagement, so the switchover may now be delayed till 2035.²²⁶ In October 2019, president Tokayev ordered to further improve the Kazakh alphabet in Latin script.²²⁷

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 1.5/6

Since 2007, the authorities have been promoting a trilingual model (Kazakh, English, and Russian) in society. The ongoing reform of the education system presumes that certain classes are to be taught in the English language in all secondary schools and higher educational institutions.²²⁸

According to the 2019 English Proficiency Index, Kazakhstan rests in the “very low proficiency” category. In 2016, it ranked 54th among 63 rated coun-

tries; in 2017, Kazakhstan went down to 67 of 80 countries, and in 2019 it has sunk to 93rd place out of 100 countries.²²⁹

According to the 2009 census, 1.9 million out of 12 million respondents claimed they have basic command of the English language (“oral comprehension”) and 1.2 million said they can read in English.²³⁰ The next census is to take place in 2020.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION’S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 3/7

Movies produced in the United States and the EU dominate the film distribution industry in Kazakhstan. The industry operates indiscriminately for Russian and Western mainstream cinematography. Movies are screened in the Russian language (dubbed) with Kazakh subtitles. Cinemas normally do not run films in original languages. As reported by Kursiv Research, a think-tank, 82% of viewers in 2018 chose foreign movies.²³¹

There are no laws limiting the Western content on television, but foreign ownership of media outlets is banned. Western television channels broadcast over Kazakhstani cable networks, but none of them has a representative office in the country, operating instead through their offices in Moscow. Russian television—and pop-culture in general—is overwhelmingly popular in Kazakhstan.

Internet access has increased significantly over the past decade. According to the most recent government data from February 2018, 77% of the population used the internet.²³² Western online news sites are not popular, due to the language barrier. According to Alexa.com, an internet research organization, websites most visited from Kazakhstan are Google, YouTube, and the Russian social networking platform VKontakte.²³³

According to Brand Analytics agency, there are: 1.8 million active users of Vkontakte, 1 million active users of Instagram, 413,026 active Facebook users and 27,800 active Twitter users. Only 10.6% of Kazakhstanis are not registered with any of the social networks. Combined, popular Western social networks have gained almost 1.5 million users.²³⁴

5 | WESTERNIZATION OF LIFESTYLE 3.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 1/5

There is no data about the number of Kazakhstani citizens who have visited the West for business and tourist purposes. Official estimates of trips to foreign countries show a steady increase. More than 10 million Kazakhstani citizens travelled abroad in 2018, according to the Border Control Agency.²³⁵ There is no up-to-date data on destinations of travelers. As of 2016, nearly one million of them went to countries outside the CIS (mainly, to China, Turkey, and the UAE). In 2016, Russia accounted for over 43% of trips, while Germany was the most popular Western country with 46,000 visitors from Kazakhstan.²³⁶

Nearly 13,000 young men and women from Kazakhstan have studied abroad under the presidential Bolashak (Future) scholarship program since 1993, an overwhelming majority of them choosing destinations in the West.²³⁷ In 2017,

the government stopped issuing scholarships for bachelor degree programs and narrowed the list of supported programs, reducing liberal arts and expanding engineering, IT, and agriculture specialties. At the same time, more students are seeking education abroad independently, many with the purpose of remaining there. As of 2019, over 150,000 young Kazakhstanis are studying in foreign universities.²³⁸

The last 10 years have shown an increased rate of emigration from Kazakhstan, and since 2011 net migration is negative.²³⁹ In 2014-2015, the number of people leaving Kazakhstan permanently was twice more than those coming in, and in 2016-2018 it has been almost three times bigger than the number of immigrants.²⁴⁰ Most leave for Russia and Germany—17,700 and 1,200 respectively, in the first half of 2019.²⁴¹

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1/3

There are Western corporations operating in Kazakhstan under franchise contracts. Foreign retail grocery market players include Metro Cash & Carry (Germany) and Ramstore (Turkey). Carrefour (France) opened its first store in Almaty in 2016, but

pulled out 17 months later, citing a devaluation of the Kazakhstani tenge as well as stiff competition from local retail chains.²⁴²

Leroy Merlin (France) and OBI (Germany) opened their stores in Almaty in 2018. Auchan is expected

to enter the market in the next three years.²⁴³ There are no Russian supermarket chains; local grocery chains are the most robust in Kazakhstan.

H&M, Inditex, Gap, and Marks & Spencer are the world's top apparel and footwear companies from the Deloitte's Global Powers of Retailing ranking, repre-

sented in Kazakhstan.²⁴⁴ International coffee shops and fast food chains include McDonald's, Burger King, KFC, Starbucks, and Costa. The Uber private transportation app is legal in Kazakhstan. Coca-Cola factory has been operating since 1994. British BAE Systems holds half of the national air carrier, Air Astana.

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE 1.5/2

According to officials, there are more than 42 million registered SIM-cards,²⁴⁵ but reportedly only 26.5 million of them are active.²⁴⁶ According to Budde, an ICT research and consultancy site, a developed mobile market in Kazakhstan has made mobile broadband dominate the broadband segment, and this trend is going to continue.²⁴⁷ Seventy-three percent of connections to the internet in Kazakhstan is made via mobile phones.²⁴⁸

According to Content Review, a Russian ICT think-tank, Kazakhstan has the second cheapest mobile broadband connection in the world.²⁴⁹ The Newzoo ranking of countries by smartphone users, released in September 2018, puts Kazakhstan 12th with 11.9 million users (64.9% of total population),²⁵⁰ up from 32nd rank in 2017.

Kyrgyzstan

39.5/100

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
11/25	11.5/25	8.5/25	5.5/15	3/10

1 | POLITICAL WESTERNIZATION 11/25

1.1 DEGREE OF POLITICAL FREEDOM: 7/10

According to data from the Justice Ministry of the Kyrgyz Republic, there were 276 political parties registered in Kyrgyzstan in 2019.²⁵¹ The process of establishing and registering political parties in Kyrgyzstan is not complicated. According to the Law on Political Parties, all that is needed for that purpose is to put together an initiative group consisting of at least 10 citizens, organize a general meeting, approve the party's charter and submit an application to the Justice Ministry. New parties or new alliances of parties are created before almost every parliamentary and local election. New parties regularly win seats in the Jogorqu Kenes (parliament). Thus, for example, six parties are represented in the Jogorqu Kenes

of the 6th convocation (2015-2020), whereas the parliament of the previous convocation featured only five political parties. At the same time, three parties not represented in the parliament of the previous convocation won seats in the Jogorqu Kenes of the 6th convocation.

According to the World Press Freedom Index published by Reporters Without Borders, Kyrgyzstan was ranked 83rd in 2019, improving its ranking comparing to 2018 (98th) and 2017 (89th). In terms of the press freedom, Kyrgyzstan has the best indicators in Central Asia (versus Kazakhstan, 158; Uzbekistan, 160; and Tajikistan, 161) and better than many post-Soviet states, such as Moldova (91), Ukraine (102), and Russia (149).²⁵²

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT: 2/8

Traditionally, for the duration of several parliamentary convocations in Kyrgyzstan, not a single political party having seats in the Jogorqu Kenes has ever publicly declared a pro-Western orientation. On the other hand, there are no blatantly anti-Western political parties in Kyrgyzstan, either. At the same time, constitutional documents of almost all parties represented in the parliament indicate, to a certain degree, the adherence to democratic principles of governance.

From the viewpoint of forming public opinion, NGOs have also traditionally been strong in Kyrgyzstan, many of which profess Western values of democracy and human rights. NGOs are not directly engaged in politics, but by forming public discourse and critical attitudes toward the government they indirectly influence the public mood, and as a result, they are able to influence, via elections, the formation and subsequent activity of bodies of public administration.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 2/7

According to statistical data from the Survey of Kyrgyzstani Residents presented in 2018, respondents believe that Kyrgyzstan has the best relationship with Russia (95%), Uzbekistan, China, and Turkey (78%, 70% and 66%, respectively). Sixty-two percent of respondents believe that their country has a good relationship with the EU, and 42% has the same opinion regarding the relationship with the United States. At the same time, 96% of the Kyrgyz population see Russia as a good economic partner, and

only 6% believe that Russia poses an economic threat to Kyrgyzstan. Thirty-two percent of respondents consider the EU a good economic partner and 13% regard it as a threat. And only 13% of respondents believe that the United States is a good economic partner for Kyrgyzstan, whereas 45% see it as an economic threat. As far as Kyrgyzstan's accession to the EAEU is concerned, 78% of respondents are positive about Kyrgyzstan joining this union and 10% have negative stance in this regard²⁵³.

2 | **LEGAL WESTERNIZATION 11.5/25**

2.1 COMPLIANCE OF THE CONSTITUTION WITH OF THE REQUIREMENTS OF THE VENICE COMMISSION: 4/6

The practice of constitutional development in Kyrgyzstan shows that public authorities do not ignore the opinion and recommendations of the Venice Commission but consider them, at least partially. Thus, for example, in 2015 members of the Venice Commission voiced a number of critical remarks with regards to the planned amendment of the Constitution which was under consideration at that time. Considering the opinion of this organization and in view of broad public criticism of this reform inside Kyrgyzstan, the plans to amend the Constitu-

tion were abandoned. Nevertheless, the President of Kyrgyzstan again initiated a constitutional reform in 2016. The Venice Commission and ODHR again presented their analysis of the proposed amendments and the related recommendations, which subsequently have been partially accepted. In particular, recommendations regarding the provisions concerning the Constitutional Chamber under the Supreme Court of the Kyrgyz Republic and provisions concerning "highest values" have been taken into account.

2.2 INDEPENDENCE OF COURTS: 2/7

According to the World Justice Project Rule of Law Index 2019, Kyrgyzstan is ranked 85th among 126 countries,²⁵⁴ and in terms of judicial independence, the Index of Public Integrity places this coun-

try in 68th position out of 100.²⁵⁵ A public survey indicates that 50% of the country's population have a negative opinion about performance of courts, and only 41% have a positive view in this regard.²⁵⁶

2.3 HUMAN RIGHTS LEGISLATION: 3.5/6

Legislation of Kyrgyzstan is relatively sophisticated with regards to the principles and mechanisms of protecting human rights. As of today, Kyrgyzstan is a signatory party to many international treaties, including the International Covenant on Civil and Political Rights, International Covenant on Economic, Social and Cultural Rights, Optional Protocol to the International Covenant on Civil and Political Rights, and oth-

ers. According to a recent Human Rights Report by the U.S. Department of State, there have been relatively positive changes in Kyrgyzstan with regard to freedom of speech, but as far as human rights are broadly concerned, less has been achieved. The report states that torture and human rights abuses continue in penitentiary institutions, and the rights of women and children are not fully protected in the country.²⁵⁷

2.4 NUMBER OF ACQUITTALS: 2/6

The total percentage of acquittals in Kyrgyzstan is small: slightly under 4%. Higher Courts usually agree with the judgments of lower courts and uphold the sentence. At the same

time, practice shows that the number of acquittals entered by higher courts is slightly greater than that handed down by lower courts by approximately 6.6%.²⁵⁸

3 | **ECONOMIC WESTERNIZATION 8.5/25**

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION: 3/7

Kyrgyzstan is not a member of the EU and does not strive to become one. The country has been a WTO member since 1998. In January 2016, Kyrgyzstan was accorded the GSP+ (Generalized System of Preferences) status provided by the EU. It is worth noting, however, that

WTO membership and GSP+ status has not led to any significant economic integration of Kyrgyzstan with EU member states. The neighboring states—China, Kazakhstan, Uzbekistan, and Russia—remain Kyrgyzstan’s most important economic partners.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS: 2/6

Kyrgyzstan was ranked 70th in the Doing Business 2018 rating, climbing 7 points up compared to the previous year.²⁵⁹ In this rating, Kyrgyzstan is placed between Ukraine (71) and Vietnam (69).

According to an annual survey of members of the Kyrgyz Chamber of Commerce and Industry, the main obstacles to business development are: corruption (65%), absence of government guarantees

of property protection (50.8%) and absence of government assistance to business development (50%). Other problems obstructing business development include: the amount of social deductions (40%), lack of own funds for business development and personnel problems (39.2%), inaccessible financing and complex tax administration (35%), and unstable legislation (34.2%).²⁶⁰

3.3 WESTERN SHARE IN THE SALES OF GOODS: 2/6

In 2019, Kyrgyzstan's top three foreign economic partners continues to be China (USD 873 million), Russia (USD 723 million) and Kazakhstan (USD 463 million). At the same time, Switzerland and Turkey, which in recent years were the country's fourth- and fifth-largest trade partners, respectively, have been replaced by the United Kingdom (USD 406 million) and Uzbekistan (USD 163 million).²⁶¹ The establishment of closer economic ties with Uzbekistan can be explained by the more open policy pursued by the new president of that country. But the growth of the United Kingdom's

share in Kyrgyzstan's foreign trade turnover stems from the fact that the main flows of the sales of gold produced in Kyrgyzstan were redirected from Switzerland to the United Kingdom. And even though exports to the EU are growing every year, the share of Kyrgyzstan's economic partnership with EU member states remains insignificant. Thus, for example, after receiving the GSP+ status, the volume of exports from Kyrgyzstan to the EU has increased twofold over the following three years, but in absolute figures, it amounted to a mere USD 100 million.²⁶²

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 1.5/6

According to data from the Ministry of Economy of the Kyrgyz Republic, the top five countries in terms of FDI in 2018 included: China (39.7%), Canada (11.6%), Turkey (11%), the Netherlands (6.7%), and the United Kingdom (3.2%). The total inflow of FDI from CIS states amounted to 18.3%

(USD 156 million), with Russia having the overwhelming share (USD 124 million). China has, for several years, been the leading investor in Kyrgyzstan, while Russia and Kazakhstan were overtaken in 2018 by Canada and the United Kingdom, respectively, comparing to 2016.²⁶³

4 | LANGUAGE AND CULTURAL WESTERNIZATION 5.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE: 0.5/2

Kyrgyzstan does not use the Latin alphabet. Public discussions concerning the adoption of the Latin alphabet arise from time to time in Kyrgyzstan. The last time a heated debate concerning this matter broke out was in September 2019 when a candidate for the Minister of Education, speaking in the parliament, supported the idea of adopting the Latin al-

phabet in Kyrgyzstan.²⁶⁴ The broad public also got involved in this discussion, splitting into "pro" and "con" camps. But later, responding to this matter and expressing the stance of the country's political leadership, President Sooronbay Jeenbekov said that presently, there is no need to switch from the Cyrillic to the Latin alphabet.²⁶⁵

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH): 1/6

There is a growing interest in studying English in Kyrgyzstan. According to an estimation by SIAR (a Kyrgyz sociological survey company), only 17.3% of respondents surveyed in 2015 positively answered the question whether they want to study English. In 2017, this number has doubled. When evaluating English proficiency, respondents said that after spending several years studying the language (in a school or university), many of them cannot freely express their thoughts or keep a conversation with a

native speaker. The Kyrgyzstanis evaluate their proficiency in the four main foreign language skills as below the average.²⁶⁶ According to the English Proficiency Index 2019 published by English First (an organization evaluating the level of proficiency in English in various countries), Kyrgyzstan was placed in the penultimate spot, 99th out of 100 countries.²⁶⁷ Other European languages most commonly used in the West—German, French, and Spanish—are much less popular in Kyrgyzstan than English.

4.3 SHARE OF WESTERN PRODUCTS IN THE COUNTRY'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN WEBSITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER): 4/7

The cinematography development strategy, Kyrgyzstani Film 2020, notes that as in the past several years, credible statistical and analytical information about the state of the country's film industry is still unavailable. At the same time, it states that foreign films and TV sitcoms form the basis of film exhibition and TV airtime. The majority of foreign films shown in the country are produced in the West. Weekly ratings of film popularity reveal that films produced in the United States or other Western countries comprise the overwhelming majority of these ratings.²⁶⁸ Kyrgyzstan itself produces approximately 100 new

films every year. There are no regular statistics in this regard, but in 2015, for example, the country produced 22 feature films, 28 short films and 34 documentary films.²⁶⁹

The number of social media users in Kyrgyzstan is steadily growing every year. In the last year, the most popular social media were Facebook (30.41%), Vkontakte (11.9%), and Instagram (7.92%).²⁷⁰ According to data by NapoleonCat, there were over 600 thousand Facebook users in Kyrgyzstan as of October 2018,²⁷¹ and in October 2019, their number rose to over 2.2 million users with the country's total population of 6.2 million.²⁷²

5 | WESTERNIZATION OF LIFESTYLE 3/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES: 1/5

There is no exact information about the number of Kyrgyzstani citizens who visited Western countries. According to data by the State Migration Service under the Government of the Kyrgyz

Republic, economic migration is the main reason for traveling abroad. The State Migration Service notes that over 700 thousand people migrate for economic reasons every year. According to

2018 data, the number of Kyrgyzstani citizens registered as migrants in other countries was as follows: 640 thousand in Russia, 35 thousand in Kazakhstan, 30 thousand in Turkey, 15 thou-

sand in the United States, 5.5 thousand in Italy, 5 thousand in South Korea, 5 thousand in Germany, 3 thousand in UAE, 2 thousand in the United Kingdom.²⁷³

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1/3

There are no representatives from the top 10 largest food retailer chains in Kyrgyzstan. Among the large hotel chains present in Kyrgyzstan are Hyatt and Sheraton. A hotel operating under the Novotel brand is expected to open in the near future. Among the renowned fast food chains operating in the country is KFC, which opened a store in 2017. There are no Western restaurant

chains in Kyrgyzstan. With respect to the clothing industry, the Kyrgyzstani market features a broad range of Western brands: Adidas, Ecco, Lacoste, Levi's, Nike, Reebok, and many others. However, these brands are sold via stores operated by local entrepreneurs who buy items marketed under these brands and resell them via their own stores.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1/2

According to data by DataReportal, the number of Internet users in Kyrgyzstan as of 31 January 2019 was 2.49 million within the country's population of over 6 million. Therefore, the rate of Internet penetration within the population was 40%.²⁷⁴

According to data by DataReportal, the total number of mobile phone users in Kyrgyzstan in

2019 (not unique users) was greater than the country's population: 9.38 million. In percentage terms versus the total population, this figure was 152%.²⁷⁵ The percentage of active mobile phone users visiting social media platforms versus the population of Kyrgyzstan was approximately 16%, i.e. almost 980 thousand persons.²⁷⁶

SCORE, POINTS/OUT OF	Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
		21.5 /25	20.5 /25	24 /25	12 /15

1 | POLITICAL WESTERNIZATION **21.5**/25

1.1 DEGREE OF POLITICAL FREEDOM 8/10

According to the 2019 Freedom House report on Freedom in the World 2019, Latvia is free with the score of 87 out of 100. Latvia scores second in all three main categories—freedom rating, political rights, and civil liberties (where 1 is the highest and 7 the lowest level of freedom).²⁷⁷ In the Freedom House 2018 report on Nations in Transit the overall score for democracy in Latvia fell from 2.04 in 2017 to 2.07 in 2018. This decrease reflected the decline in civil society criteria—the increased role of illiberal groups, along with long-term issues in the financial sustainability of the civil sector.²⁷⁸

According to the Latvian business register, as of 5 December 2019 there are 82 registered political parties in the country.²⁷⁹ Formation of political parties in Latvia is relatively easy—a group of 200 citizens over the age of 18 can establish a party for a token payment of EUR 27.²⁸⁰ Any political party is eligible for government funding, if it has received over 2% of the votes in the previous parliamentary elections.²⁸¹ In 2018, Latvia held parliamentary elections, and in 2019, European parliament elections. Sixteen political parties participated in each race.²⁸²

A notable exception regarding the formation of new parties is the law banning former members of Communist parties from engaging in political activities. The OSCE has repeatedly pointed this out as a political problem. In 2006, the European Court of

Human Rights (ECHR) ruled that the restriction is in line with its regulations but recommended that Latvia continue to review this restriction. In 2018, the Central Election Committee banned the Latvian Russian Union from registering as a political party, and the Constitutional Court upheld the rule.²⁸³ Another critique Latvia has received regarding political rights is the number of non-citizens who do not have the right to establish a political party or participate in elections. As of July 2018, non-citizens represented 11% of the population.²⁸⁴

In the 2019 World Press Freedom Index Latvia was ranked number 24 (the same as in 2018) with a global score of 19.73 (from 19.63 in 2018). Although Latvian journalists experience pressure from politicians and the owners of their outlets, Latvia does have a diverse media ownership. The past two years were tainted by scandals involving the National Media Regulator and individual newspapers.²⁸⁵

There is, however, a noticeable foreign influence in the Latvian media environment, in particular in the Russian-speaking media, which are often pro-Kremlin and support the strongest pro-Russian party, Harmony Centre.²⁸⁶ This is a crucial issue since Latvia has a large diaspora (approximately one third of the country’s population) of ethnic Russians and other Slavic minorities that speak Russian in their homes.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 7/8

In 2018, seven political parties were elected to Saeima (Latvian Parliament) resulting in a highly fragmented parliament. Out of the 100 seats available, 23 went to Harmony, the only significant political party with ties to Russia. Harmony has tried hard to rid itself of this image, and in public discourse portrays itself as neither anti-EU, nor anti-Western (in fact, it was also the runner up in the European parliament elections in 2019, and won two seats). Sixteen seats went to the populist KPV.LV, and another 16 to the New Conservative Party. The liberal Development/For! as well as the National Alliance gained 13 seats, while the former power party Unity received a mere 8 seats. The Union of Greens and Farmers got 11 seats.²⁸⁷ This result reflects the global trend of divided societies—liberals vs conservatives vs populists—and the creation of a complicat-

ed and yet delicate coalition. After two unsuccessful attempts, Unity's Krisjanis Karins (former member of the European Parliament) succeeded in creating a functioning, pro-western government, despite his party's low performance in the election. As usual, cooperation with Harmony was not considered a viable option by any of the political parties (apart from populist KPV.LV, which split soon after the election). Perhaps, the most notable outcome of this election was the Union of Greens and Farmers' (widely known as the 'oligarch' party) failure to win any seats in Saeima.

According to the official party lines, there are no anti-western political forces in the parliament. However, this would be an oversimplification as there are certainly MPs that hold Eurosceptic or anti-NATO views (remarkably, Harmony).

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 6.5/7

The "Return to Europe" was the defining trend in Latvia's foreign policy after the collapse of the Soviet Union. This trend simultaneously implied that Latvia was forcefully "taken out" of Europe by the Soviet Union, and that its rightful place was with Western Europe rather than with the Soviet Union's successor—Russia. An ordinary citizen sees Europe as a guarantee of Latvia's development, security,

and prosperity.²⁸⁸ According to the latest Eurobarometer data from June 2019 (published in August 2019) 44% of Latvians believe that the image of the EU is positive (EU28²⁸⁹ – 45%), 46% see it in neutral light (EU28 – 37%), and only 9% see it in a negative light (much worse result than the EU28 – 17%). Furthermore, 76% of Latvians identify themselves as EU citizens (EU28 – 73%).²⁹⁰

2 | LEGAL WESTERNIZATION 20.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 5.5/6

The Latvian Constitution complies with the requirements of the Venice Commission. However, repeated recommendations from the OSCE highlight the large number of non-citizens who do not enjoy the right to vote either on national, local, or European levels.²⁹¹ As of October 2019, the number of non-citizens was 220,491 (approximately 10% of the population). Im-

portantly, following the initiative by the former president Raimonds Vejonis, the law on automatic citizenship for non-citizen children was approved in the Parliament in October 2019 (and will enter into force on 1 January 2020).²⁹² It is crucial to note that previously, citizenship was granted to non-citizen children only after the parents had requested it.

2.2 INDEPENDENCE OF THE COURTS 5.5/7

According to data from Freedom House (2018), Latvia's score on Judicial Framework and Independence has remained the same—1.50 (on a scale from 1 (best) to 7 (worst)).²⁹³ While in general the Latvian judiciary is seen as independent (between 2016 and 2019 around 50% of individuals and companies saw it as independent),²⁹⁴ there is still inefficiency, politicization, and corruption. Lengthy pre-trial detention, along with inconsistent provision of legal aid remain a problem.²⁹⁵ Nevertheless, the 2015 reform to improve the efficiency of the court system appears to be having an effect. In 2016, there were 16 hearings against Latvia, out of which nine violations were found.²⁹⁶ In 2017, the number remained high—14 hearings, out of which 12 violations were found.²⁹⁷ In 2018, the number of hearings decreased to only three judgments and one violation.²⁹⁸ The adoption of the Law on Whistleblowers in October 2018 was an important development, as was the establishment of the whistleblowing mechanism.²⁹⁹

Several high-profile cases made the news in Latvia in recent years. The most publicized are related to insolvency administration, highlighting abuse of power and corruption in the system, for which individuals faced extortion and money laundering charges. In June 2017, several prominent administrators were detained, and a lengthy legal process began. This highlighted their collusion with judges—a handful that had been allocated a disproportionate number of insolvency cases. Following this, however, the Ministry of Justice and the Insolvency Administration have commenced a reform process for the insolvency administration.³⁰⁰ To highlight gravity of the problem, one of the most prominent insolvency administrators, reported to have links with the detainees, was murdered in May 2018 in an order killing (a rare occurrence in Latvia since 1990s).³⁰¹

According to Freedom House, in 2018 Latvia scored 3 on its corruption index (on a scale from 1 (best) to 7 (worst); a result unchanged since 2013, despite the anti-corruption efforts.³⁰²

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 5.5/6

The main human rights issues in Latvia include an inefficient judiciary, poor integration of a substantial non-citizen population, and domestic violence. However, it must be noted that Latvia has adopted Western standards of human rights legislation, and human rights violations by the government are rare and unsanctioned, as well as followed by investigations.³⁰³ Latvia is a member of the core UN and Council of Europe human

rights treaties, most of which were adopted in the 1990s. Although there are still human rights problems, the legislation and practical means for their protection are in place. In addition, the Latvian Parliament has passed a law that ceases the allocation of non-citizen status to the children of non-citizens (in force from 1 January 2020)—perhaps a small, but important step in the right direction.

2.4 NUMBER OF ACQUITTALS 4/6

The overall number of court cases per 100 inhabitants (civil, commercial, administrative, and other) in Latvia is relatively low. From 2015 to 2017, it was around 4 cases per 100 inhabitants.³⁰⁴ In 2018, the Latvian Higher Court heard 2920 cases: 1,336 (civil),

850 (administrative), 734 (criminal).³⁰⁵ According to data from the Prosecutor's Office, the rate of acquittals in Latvia remains relatively low but has been growing over the past few years: 3.56% in 2016, 3.3% in 2017, and 5% in 2018.³⁰⁶

3 | ECONOMIC WESTERNIZATION 24/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 7/7

Latvia has been a member of the World Bank and the International Monetary Fund since 1992. It has been a part of the World Trade Organization since 1999, the EU since 2004, the Eurozone since 2014, and the OECD since 2016. Latvia is fully integrated with Western markets and has a free market

economy. The sanctions that the EU placed on Russia in relation to the annexation of Crimea and the conflict in Donbas resonated in the Latvian market, however, Latvia is still one of the staunchest supporters of the sanction regime until the full resolution of the conflict.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 5/6

In 2019 Latvia ranked 19th in the world in the Doing Business ratings by the World Bank, with a score of 80.3 out of 100.³⁰⁷ Latvia also carried out additional reforms to further improve the business environment.³⁰⁸ The situation is worse (although improves over the

time) with respect to transparency—Latvia is listed 41st out of 180 countries in the Transparency International Corruption Perception index.³⁰⁹ Corruption and lack of transparency remain issues for Latvia, despite constant improvements in those areas.

3.3 WESTERN SHARE IN THE SALES OF GOODS 6/6

In the first half of 2019, Latvian exports to the EU member states accounted for 74.5% of the country's total exports (50.3% to Eurozone), while exports to member countries of the CIS totaled 11.7%, and 13.8% to other countries. In turn, of all imports into Latvia, 75.8% were from the EU

member states (56% to Eurozone), 10.4% from the CIS countries, and 13.8% from other countries. The balance of these shares in export and import has remained similar over the years. Overall, Latvia exported goods to 196 countries and imported from 139 countries.³¹⁰

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 6/6

According to the Bank of Latvia, the FDI into Latvia in 2018 totaled EUR 15.20 billion. The share of FDI originating in the EU was EUR 11.57 billion (76.14%). The share of FDI originating in the EU and other Western countries was EUR 12.56 billion (82.62%). One of the largest individual investors in Latvia was Russia with EUR 1.67 billion (10.99%), while other former Soviet countries invested EUR 396 million (2.60%). A proportion

of FDI to Latvia originated from offshore, outside the EU. It is also worth noting that there are hidden investments via the Cypriot, Moldovan and Austrian financial systems, which might have their origins in the former Soviet Union. The rest of the investments came from other countries, including Singapore (EUR 65 million), Israel (EUR 55 million), and one unidentified country (EUR 70 million).³¹¹

4 | LANGUAGE AND CULTURAL WESTERNIZATION 12/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 2/2

The Latvian language uses the Latin alphabet. However, approximately 30% of the population use Russian as their mother tongue and hence also use the Cyrillic script.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 4/6

Latvia is a multilingual state, and according to the Eurostat data in 2016, only 4.2% of the Latvian population speak no other foreign language. Approximately one-third of the population speaks at least one foreign language, 49.3% speak two foreign languages, and 12.7% of the population speaks three or more foreign languages. This

demonstrates a stable trend with a slight increase in language skills over the decade from 2007.³¹² The most common foreign languages in Latvia are English, Russian, German, Spanish, and French, but in recent years, Scandinavian languages have also gained ground due to Scandinavian corporate interests in Latvia (banking, retail, etc.).

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 6/7

The largest share of movies in Latvian cinemas are Hollywood productions, while local movies increasingly make it into the top 10 most watched lists. In 2018, 5 out of 10 most watched movies were Latvian productions (in 2017 – 2; in 2016 – 2), while the rest were American productions (and one co-production with the UK).³¹³ This does not reflect a state policy, but rather a choice of consumers, as local cinema and culture are genuinely popular in Latvia and receive government funding. Due to the centenary of Latvian independence, more high-standard movies were released in 2018 than ever before. European and Russian films are also popular in Latvian cinemas, especially during movie festivals.

Typically, movies in theaters are not dubbed and have subtitles in both Latvian and Russian. In accordance with national legislation, national and regional electronic media are obliged to ensure

that at least 51% of content (excluding news, sport competitions, games, commercials, and teleshopping) contains European audio-visual products, of which at least 40% must be in the state language. Furthermore, 65% of overall content (excluding news, sport competitions, games, commercials, and teleshopping) has to be in the state language. Content dubbed in the state language is included in this category.³¹⁴ Western and Russian online media are equally accessible in Latvia as there are no legal limitations imposed by the Latvian government regarding the origin of online outlets. There are some Russian outlets and individual journalists that have moved their operations to Latvia as they experience pressure from the regime in Russia.

According to Gemius Global in March 2019, the most popular online sites as defined by average daily audience, were Inbox (an email provider

in Latvian and Russian) with 805,154 real users, followed by Delfi with 800,719 users, and TVNET with 681,941 users (both news sites in Latvian and Russian).³¹⁵ According to research on the use

of social networks, the most popular social media in 2018 in Latvia were Facebook (82%), YouTube (84%), WhatsApp (85%) Instagram (47%) and Google+ (35%).³¹⁶

5 | WESTERNIZATION OF LIFESTYLE 9.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 4.5/5

According to the Central Statistical Bureau, the number of individual multi-day foreign trips taken by Latvian residents in 2018 increased to 1.4 million or by 8.1% compared to 2017.³¹⁷ This does not exclude repeated trips by the same person. While visa regimes with Belarus and Russia limit Latvian

citizens' trips to the East, the country's membership in the Schengen Zone (and the mobility of people in the EU) complicates obtaining clear statistics on the numbers of people travelling to the West. The most common foreign destinations in 2018 were Estonia, Lithuania, Russia, Sweden, Germany, and UK.³¹⁸

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 3/3

Despite its small market, there is a large number of Western corporations in Latvia in the retail, clothing, and catering sectors. With the exception of market size, there are no barriers for Western retailers to enter the Latvian market. However, a share of the market remains occupied by Latvian companies, as currently there is much appreciation for local crafts, clothing,

and food products. Many chains, including Zara, H&M, Clarks, Nike, Rimi, Maxima, McDonald's, Costa, and others are important players in Latvia. IKEA and Lidl entered the Latvian market in August 2018 and August 2019, respectively. Online trade platforms such as Amazon, eBay, ASOS and many other Western trading platforms are widely available in Latvia.

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE 2/2

In 2018, the Internet in Latvia was used by 87% of the population.³¹⁹ It was accessible in 81.6% of all households; 98.1% of households with children had internet access, while in childless households the figure was 76.4%. Eighty-one percent of the population regularly uses the internet in Latvia, with the most active users distributed among younger generations and in the capital and entire Riga region.

However, there are limited differences throughout the country, and overall internet use and access is consistently growing. In 2018, 67% of the population regularly used their smartphones to access internet (a 5% increase from 2017).³²⁰ The mobile Internet networks offered by the three main providers Tele2, Bite, and LMT are accessible to more than 95% of Latvians.

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
22.5 /25	20.5 /25	25 /25	13.5 /15	8.5 /10

1 | POLITICAL WESTERNIZATION **22.5**/25

1.1 DEGREE OF POLITICAL FREEDOM 8.5/10

On May 26, 2019, Lithuania held presidential elections to replace Dalia Grybauskaitė. Gitanas Nausėda, a former economist running as an independent, came out on top with 66% of the vote in the second round.³²¹ Major issues that candidates addressed included national defense, security, social, and economic policies. The new president, Nausėda is pro-West; in his inaugural address he stated “Our strategic course must continue to be clear and consistent: increasingly stronger Euroatlantic integration, close relations with the European Union and the United States of America. We must develop and expand bilateral relations with the neighboring countries—Poland, Latvia and Estonia—as we work together towards energy independence and protect our interests in the European Union and NATO.”³²²

The election provided voters with clear political alternatives, and with fundamental freedoms largely respected, the election was effectively administered and enjoyed public confidence. For the first time, eligible voters in this election could cast a ballot at any polling station in the country regardless of their place of residence. The OSCE ODIHR states that they were satisfied overall with the degree of political freedom during the Lithuanian election.³²³ However, there were several recommendations that have not been acted upon, including that the majority of polling stations were not accessible for persons with reduced mobility.

The Lithuanian media landscape is pluralistic, the majority of the population uses television as their main source for political news, alongside the Internet, followed by radio, and a shrinking print publication sector.³²⁴ The public broadcaster, Lithuanian Radio and Television (LRT) is composed of three TV channels, three radio channels, and one online news portal. Although there are many actors in the media environment, media ownership is concentrated in two private media groups (LNK Group and All Media Group) which control 50% of TV programming. The Constitution and the Law on the Provision of Information to the Public guarantees freedom of expression, and denies broadcasters the right to warmongering and hate speech (with cases of Russian broadcasters being taken off air due to inciting ethnic hatred and inciting war). Defamation continues to be subject to criminal penalties, at odds with international norms on freedom of opinion and expression.

In the 2019 World Press Freedom Index, Lithuania increased its score by 6 points, coming up to 30th in the rankings (as opposed to 36th in 2018). However, Reporters Without Borders noted that “the number of verbal attacks against journalists is increasing” and that at the end of “2018, the media’s access to [the] public registry was restricted by new financial barrier[s].”³²⁵ The Nations in Transit 2018 report on Lithuania states that Lithuania

became slightly less democratic in the civil society sphere. The report notes the change due to a newly

adopted law defining the foundation of a family as a union between a man and a woman.³²⁶

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 7.5/ 8

There are around 40 political parties registered with the Ministry of Justice and currently 8 parties represented in the Lithuanian Parliament, called Seimas. Political parties in Lithuania tend not to stray too far away from the political center, and the major-

ity are pro-Western. However, there are some 'soft Eurosceptic' parties including Order and Justice, Electoral Action of Poles in Lithuania, and the Lithuanian Centre Party, all jointly consisting of 17 Members of Parliament (approximately 10% of the Seimas).

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 6.5/7

The majority of Lithuanians believe that since 1991, aspects of Lithuanian life have improved across every social category including education, standard of living, pride in their country, spiritual values, law and order, health care, and family values. Lithuania has incredibly positive attitudes about the EU, second only to Poland (83% hold a favorable view of the EU).³²⁷ Fifty-nine percent of Lithuanians think positively of their membership in the EU and 62% believe economic integration with Europe has been a good thing for their country's economy. According to the 2019 Eurobarometer public opinion survey, 82% of Lithuanians are happy living in the EU, and 80% of Lithuanians feel they are citizens of the EU.³²⁸

On March 30, 2019 Lithuania celebrated the 15th anniversary of joining NATO, and in 2019 the

Ministry of National Defense of Lithuania commissioned a public opinion poll on NATO membership. Eighty-six percent of the population are in favor of Lithuania's NATO membership, which is the highest percentage in the past five years. A similar number of respondents (83%) approve of NATO allies' presence on the territory of Lithuania, according to a poll in December 2018.³²⁹ Seventy-six percent of the respondents think that the German-led multinational NATO enhanced Forward Presence Battalion Battle Group deployed in Lithuania ensures deterrence against hostile countries and an increasing percentage of the population (75% of respondents in 2018 up from 60% of respondents in 2017) believes that Lithuania should defend and/or render military assistance to other NATO allies in case of an armed conflict.³³⁰

2 | LEGAL WESTERNIZATION 20.5/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 6/6

The Lithuanian Constitution is in compliance with the Venice Commission. As of September 1, 2019, individuals (natural and legal persons) will have the right to directly apply to the Constitutional Court of

Lithuania claiming that a law or other legal act of the Parliament, the President, or the Government are not in line with the Constitution and is breaching their rights.³³¹

This year, Lithuania held two referendums on changes to the Constitution: one on reducing the number of MPs from 141 to 121 and another on dual citizenship for those who left Lithuania after

1990 and took up citizenship in countries meeting European and transatlantic criteria (e.g. EU, NATO, OECD). The current constitution does not allow them to keep Lithuanian citizenship.³³²

2.2 INDEPENDENCE OF THE COURTS 6.5/7

According to the Bertelsmann Stiftung's Transformation Index (BTI) 2018, "The judicial system is independent of the executive and administration is largely free from unjustified party political pressure."³³³ The courts are open and independent; in cooperation with the Lithuanian chapter of Transparency International, the National Administration of Courts has set up a website which tracks the perfor-

mance of all judges and all courts in Lithuania. The initiative is called *atvirasteismas.lt* (open parliament). According to a 2018-19 report by the European Network of Councils for the Judiciary, in Lithuania 13% of judges reported that corruption occurs regularly or occasionally.³³⁴ This percentage is the fourth highest in Europe, after Bulgaria (19%), Croatia (16%), and Italy (14%).

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 5/6

The 2018 Human Rights Index³³⁵ from Freedom Barometer has given Lithuania a score of 7.63 out of a possible 10, and is ranked 23rd, behind Estonia (ranked 18th) and Poland (ranked 19th). The Human Rights Index scored countries in four broad areas (with Lithuania ranked in each)—personal safety (7.52), access to education (7.40), tolerance and inclusion (6.50), and personal rights (9.10). The score for tolerance and inclusion increased drastically, from 5.93 in 2017, and access to education slightly decreased; with a score of 7.52 in 2017.

The European division of the International Lesbian, Gay, Bisexual, Trans and Intersex Association (ILGA) conducted a 2019 Rainbow Index assessing the achievement of LGBTI rights with Lithuania ranking 32nd among 49 European countries. Lithuania's constitution still defines marriage as a union between a man and a woman. The lack of human rights progress in this area maybe due to the largely Catholic majority religion and public discrimination towards LGBTQI.

In a 2019 Eurobarometer Survey on Discrimination in the EU, only 53% of Lithuanians agree that gay, lesbian, or bisexual people should have the same rights as heterosexual people, compared to the EU average of 76%.³³⁶

On May 31, 2018 the European Court of Human Rights ruled in the case of *Abu Zubaydah v. Lithuania*³³⁷ that Lithuania violated their human rights obligations for their part in the rendition, secret detention, and torture and ill-treatment of terrorism suspects.³³⁸ The case concerns the applicant's allegations that Lithuania let the United States CIA transport the applicant onto its territory under the CIA's secret extraordinary rendition program and allowed him to be subjected to ill-treatment and arbitrary detention in a CIA detention 'black site.' Furthermore, a new whistleblower law adopted by the Lithuanian parliament is coming into effect in 2019 and will give protection to individuals reporting cases of suspected corruption within their organizations.³³⁹

2.4 NUMBER OF ACQUITTALS 3/6

Sixty-nine percent of Lithuanians say it is very important to have a judicial system that treats everyone fairly.³⁴⁰ In 2018, there were 24,075

persons suspected of (charged with) criminal offences and 19,779 persons convicted by the courts.³⁴¹

3 | ECONOMIC WESTERNIZATION 25/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 7/7

Lithuania has been a member of the WTO since May 31, 2001, of the EU since May 1, 2004, and of NATO since March 29, 2004. Lithuania is an active part of the NATO Enhanced Forward Presence Battlegroup, led by Germany and contributing nations.³⁴² Currently, there are approximately

1,055 troops (international and Lithuanian) in Rukla, Lithuania.³⁴³ Lithuania is also actively involved in the WTO, contributing EUR 20 thousand in the beginning of 2019 to help increase participation in multilateral trade negotiations in developing and least-developed countries.³⁴⁴

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 6/6

According to the 2019 Index of Economic Freedom, Lithuania scores 74.2, rendering its economy the 21st freest in the 2019 Index (out of 186 countries). However, since 2018, its overall score has decreased by 1.1 points, mainly due to declines in judicial effectiveness, monetary freedom, and government integrity.³⁴⁵

In the Doing Business 2020 Index, which ranks countries against each other based on the regulatory environment conducive to business operations, Lithuania ranks 11th out of 190 countries. Its score increased since the 2019 Index by 2 positions, mainly due to strengthened minority investor protections and by increased access to electricity.³⁴⁶ The 2019 International Institute for Management Development's (IMD) World Competitiveness ranking ranks Lithuania 29th, up three places from 2018.³⁴⁷ According to Transparency International,

Lithuania's Corruption Index is 59/100, with 100 meaning least corrupt. The score has been the same since 2016.³⁴⁸ Invest Lithuania also describes the Lithuanian business environment as friendly, with 56% of the population possessing higher education qualifications and 85% of young professionals proficient in English.³⁴⁹

Lithuania is especially attractive to tech start-ups. According to FDI Intelligence, Vilnius ranks the highest in green-field FDI³⁵⁰ per capita from start-ups in the software and IT services sector between 2016 and 2018. It takes one day to register a business using an e-signature and Lithuania introduced a Start Up Visa in 2017 that simplifies and speeds up the process for non-EU residents to start a business in Lithuania.³⁵¹ Vilnius has a business-friendly regulatory environment and an open data policy which helps new businesses integrate into the city.³⁵²

3.3 WESTERN SHARE IN THE SALES OF GOODS 6/6

During the months of January-September 2019, exports from the EU amounted to 60% of the total export share, and imports from the EU were 68% of Lithuania's total import share. Lithuania's most important trade partners in exports were Russia (13.4%), Latvia (9.6%), Poland (8.2%), and Germany

(7.7%), while for imports the most important partners were Russia (16.5%), Poland (11.8%), Germany (11.5%), and Latvia (7%). The majority of goods of Lithuanian origin were exported to Germany (9.6%), Poland (8.9%), Latvia (7.9%), Sweden (6.6%), and the United States (5.4%).³⁵³

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 6/6

Foreign direct investment (FDI) in Lithuania amounted to EUR 17 billion in 2018. Compared to 2017, Statistics Lithuania reports an increase of 4.5%.³⁵⁴ The largest country investor in 2018 was Sweden (EUR 3.8 billion), followed by the Netherlands (EUR 2.5 billion), and Estonia (EUR 1.7 billion).³⁵⁵ Key attractive sectors for Western investment include information and communication technologies, the engineering industry, biotechnology, laser technologies, Fintech, and renewable energy.³⁵⁶ Newcomers

in 2018 include NKT (Danish cable manufacturer), Hyarchis (Dutch content systems), Yara (one of the largest Norwegian industrial companies), booking.com, and Bazaaarvoice (US marketing technology company).³⁵⁷

The second edition of the Baltic Innovation Fund was signed by the European Investment Fund and the three Baltic states to invest EUR 156 million in private equity and venture capital funds over the next five years.³⁵⁸

4 | LANGUAGE AND CULTURAL WESTERNIZATION 13.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 2/2

The Lithuanian language uses a supplemented version of the Latin alphabet.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 5.5/6

The Official Statistics of Lithuania in foreign language attainment has not been updated since 2016; proficiency in foreign languages include Russian (86%), English (45%), Polish (15%), German (12%), and French (3%).³⁵⁹

According to the English First English Proficiency Index, Lithuania ranks 21st out of 100 countries in English proficiency, up 5 places from 2018.³⁶⁰

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 6/7

In 2017, 73% of Lithuanian households had a computer and 75% had broadband internet access.³⁶¹ Based on the months October-December 2019, approximately 60% of the Lithuanian population uses Facebook, and 21% of the population uses Instagram.³⁶² For Instagram, the highest usage was among people aged 18-24, and for Facebook, people aged 25-34.³⁶³ Facebook Messenger is also a popular feature, with approximately 47% of the population using it. Only about 15% of the popu-

lation uses LinkedIn, with people aged 25-34 being the largest age group.³⁶⁴ As of May 2017 in Lithuania there are approximately 147 thousand Facebook users, 257 thousand VKontakte (Russian social media) users, and 174 thousand OK (Russian social media) users.³⁶⁵

At the time of writing this report, the majority of films in Lithuanian cinemas are produced in the West. Only a handful are of Russian origin, or dubbed in Russian.³⁶⁶

5 | WESTERNIZATION OF LIFESTYLE 8.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 4/5

Since the 1990's, Lithuania experienced a drop of 24% in population mainly due to emigration contributing to a 'brain drain' and a change in Lithuania's demographic structure. In 2017, the main destination for Lithuanian emigrants continues to be the United Kingdom

(47% of emigrants). After the UK, Lithuanian emigrants chose Norway, Germany, Ireland, Denmark, Sweden, the Netherlands, and Russia, respectively.³⁶⁷ From 2015 to 2017 Lithuanian emigration to Russia decreased by over one thousand emigrants.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 2.5/3

Franchising in Lithuania is popular, especially after the establishment of the Lithuania Franchise Centre in 2008. Currently, there are over 160 active franchisors, and over 80% of them are foreign in origin.³⁶⁸

In 2018, Lidl (German-owned retailer) invested in expansions in Lithuania (opening 11

new stores), which amounted to nearly twice as much as the other market players.³⁶⁹ The franchise manager of Burger King established a company in Lithuania, with plans to open Burger King restaurants in the first half of 2020.³⁷⁰

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE 2/2

According to the 2019 Digital Economy and Society Index, 98% of households in Lithuania have 4G coverage and 85% have fixed broadband coverage.³⁷¹ Lithuania achieved better results than the

EU average in terms of 4G coverage and ultrafast broadband coverage. Mobile penetration noted a significant increase and reached 89% compared to 78% a year before.

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
15/25	12/25	16.5/25	9/15	6.5/10

1 | POLITICAL WESTERNIZATION 15/25

1.1 DEGREE OF POLITICAL FREEDOM 6.5/10

Moldova’s political westernization has been unstable due to several major political events that took place in the country in the last two years. Above all, one has to note the fall of the regime of the oligarch Vlad Plahotniuc, who was in control of Moldova via the Democratic party and various law enforcement. As a result of the parliamentary elections held in February 2019, none of the parties had sufficient mandates to form a majority government and in June 2019 the opposition bloc ACUM (Now) formed a coalition government with Plahotniuc’s former junior partner and president of Moldova Igor Dodon, leaving the Democratic party in opposition. The transfer of power occurred peacefully but not smoothly due to Plahotniuc’s inspired attempts with the Constitutional Court to interpret the constitution differently and allow him to dissolve the parliament and call for early elections. In the end, after a week of having de facto two governments, Plahotniuc stepped back and the government of Maia Sandu was installed. The demise of Plahotniuc’s regime was also possible due to an unprecedented and non-conventional cooperation of the US, EU, and Russia which all agreed the oligarch must leave.

After Plahotniuc fled the country it resulted in the decentralization of political control and a more competitive and dynamic political life. The love-hate relations between the collation of Maia Sandu

and Igor Dodon allowed for greater political activity, which was also confirmed by highly competitive local general elections held in October 2019 which showed a very fragmented political power. In November, however, the Sandu government was dismissed by the parliament’s vote of no confidence with the votes of socialists and democrats. The vote came amid a standoff between Maia Sandu and Igor Dodon over the appointment of the prosecutor general and the attempt of Sandu to assume responsibility of the government on appointment of an independent prosecutor general. Shortly after the fall of the Sandu government, a minority government headed by Dodon’s adviser Ion Chicu was installed. The new Chicu cabinet positions itself as a technocratic government, although there are ministers who are members of the socialist party or have close relations with the leader of socialists and president of the country Igor Dodon. Observations of the first steps of the new government suggests this echoes the narrative of former President Dodon and the first visit of the Prime Minister was to Moscow. It is widely believed that the Chicu cabinet is tasked with maximizing the chances of Igor Dodon getting re-elected as president in the fall 2020 parliamentary elections.

Freedom of association is widely respected in Moldova with effective legislation in place and easy procedures to follow. Currently, 46 parties

are registered, of which about 20 participated in the last elections.³⁷² There is also a growing number of civic organizations, although many of them are not active. During 2018-2019, law-enforcement institutions widely respected the freedom of assembly, however, there were several cases of involvement of law-enforcement in peaceful assemblies as well as forced participation in protests. Also, in several cases, the law-enforcement agencies violated the right of peaceful protests in opposition to the government.³⁷³

Media freedom did not improve significantly over the last two years. Some redistribution be-

tween political actors took place after the Plahotniuc regime collapsed, however, control of the media remains concentrated with more than 70% of media belonging to a few political parties and businessmen with political connections.³⁷⁴ Independent media is marginalized, however it enjoyed a period of freedom during the Sandu government. Russian fake news and disinformation are another threat to independent media, although lately the local media is also producing this type of content. The Nations in Transit report shows stagnation for the last years, with Moldova being categorized as “partly free.”³⁷⁵

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 4.5/8

The Moldovan parliament presents a wide variety of views with pro-Western MPs and pro-Russian MPs. With a slight disappointment within the population for the declared pro-EU parties, which were often associated with corruption, the pro-EU majority in the parliament since the last elections is unstable, even though at the declarative level there is a pro-western majority in the parliament. Out of 101 MPs, 26 represent the pro-Western ACUM (Now) bloc, and 30 MPs are from the democratic party which declared itself a pro-Western party however some question this due to its controversial leader, Vlad Plahotniuc and the corruption associated with the former government.

The biggest party—Socialist—with 36 MPs, which is the party of president, clearly positions itself as an anti-western and pro-Russia party. Another party of the fugitive politician and main suspect in the \$1 billion bank fraud, Ilan Shor, has 7 MPs and has a populist agenda. There are also 2 non-affiliated MPs in the parliament.

Despite the unusual coalition for Moldova, the rapprochement with the EU and implementation of the Association Agreement will likely remain the key foreign policy direction given that a significant part of the economy is tied to the EU, regardless of which party governs in Moldova.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 4/7

The majority of public opinion favors Moldova to integrate in the EU (47%) and 37% see the future of Moldova together with the Russian-led Eurasian Union³⁷⁶ The image of the EU slightly improved in the last years after a period of decrease.

In terms of threat, 20% of respondents consider Russia as a threat; 12% consider the US a threat; 4% consider it to be the EU; and an equal number of respondents (3% each) consider Romania and Ukraine to

be a threat to Moldova. When it comes to NATO, only 19% are in favor of joining NATO and 41% against—support for NATO faded away significantly in the last years, compared to 2014 when it was 31%. However, despite the unwillingness to join NATO, it is not seen as a threat because of the neutral status of Moldova. At the same time, there is growing support for a unification with Romania: almost 30% are in favor of unification, which shows a steady increase compared to last year.³⁷⁷

2 | LEGAL WESTERNIZATION 12/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 4.5/6

Moldova is a frequent “client” of the Venice Commission. It happens quite often that the political parties in the parliament ask for the opinion of the Commission when there is disagreement over certain draft laws. In 2017-2018, the Venice Commission issued at least 11 opinions about the proposed reforms. Many of these touch upon important reforms related to change of the electoral system, party funding, fighting terrorism, and expanding the powers of the president to dissolve the parliament.³⁷⁸

Although it is difficult to give an exact assessment on the percent of implementation of the rec-

ommendations of the Venice Commission, one has to note that these depend on how politically sensitive the issue is. Quite often the parliament complies with most of the technical recommendations but less with the political ones. Overall, for the changes to the constitution, Moldova is working tightly with the Venice Commission.

Quite often the recommendations of the Venice Commission, which are non-binding, are reinforced by the position of the EU which often refers to these as a standard and conditions its support depending on reform results and its compliance with recommendations of Venice Commission.

2.2 INDEPENDENCE OF THE COURTS 2/7

The independence of the judiciary is one of the most serious problems in Moldova. In recent years there was a significant legislative reform which should have improved the independence of judiciary. However, the application of the legislation proved difficult and arbitrary. In late 2017, the EU suspended its budget support for justice reforms due to non-implementation of reforms in the justice sector.³⁷⁹

On top of that, there is a chronic distrust from

society towards the courts. This derives from perceptions that the justice sector is highly corrupt in Moldova in which at least 80% of the population does not trust the Moldovan judiciary.³⁸⁰ The distrust in the judiciary creates support for initiatives that risk undermining the independence of the judiciary in the name of “anti-corruption.”³⁸¹ Currently, according to the Rule of Law Index, Moldova is ranked 83 out of 126 countries.

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 3.5/6

Human rights legislation in Moldova is widely in line with the European framework and international conventions to which Moldova adheres. At the same time, implementation remains poor and human rights are systemically breached. As the 2019 human rights report of the Ombudsman notes, the human rights situation remains widely the same, while in some cases it has worsened. The areas

which recorded setbacks are access to justice, freedom of speech, the rights of detainees, the right to elect and be elected, and the right to medical assistance.³⁸²

The situation of human rights violations is clear from the high number of complaints of Moldovan citizens to the ECHR. Moldova currently holds 5th position as the country with most complaints

to the ECHR with 2.29 complaints per 10000 inhabitants. In 2017 Moldova was ranked 7th with 2.13 complaints per 10000 inhabitants.³⁸³ Overall, in only 6 rulings (18%) the ECHR found that Moldova did not violate the Charter. In most of the cases, the convictions are against the Russian Federation for violations in the Transnistrian re-

gion.³⁸⁴ According to the ECHR rulings, the most frequent violations of the Charter are failure to enforce the judgment (old judgments); maltreatment, inadequate investigation of maltreatment and discharge; imprisonment in bad conditions; illegal detention; and irregular cancellation of the irrevocable court decision.

2.4 NUMBER OF ACQUITTALS 2/6

In the lower courts, out of 13,900 cases, there were 257 acquittals. The rate of acquittals in 2018 was 1.84%, which is more than in 2017 (1.65%) but less than in 2016 (2.27%), and less than in 2009 (2.1%). As in the previous years, the categories of offences on which acquittals were issued were

mainly related to offenses against patrimony, offenses aimed at violating the rules of security of the movement of the means of transport, offenses committed by persons who hold public office, and related offenses on the illegal circulation of narcotic substances.³⁸⁵

3 | ECONOMIC WESTERNIZATION 16.5/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 4.5/7

Moldova has been a WTO member since 2001, which has helped the country to engage better in trade and economic cooperation with other countries as well as create proper conditions for other trade agreements.

Within the last 10 years, all the governments in Chisinau declared their desire to join the EU. However, pursuit of membership has been

broadly declarative since it does not reflect in the implementation of key reforms. At the same time, the EU is not ready to engage in an enlargement process.

In 2014 Moldova and the EU signed the Association Agreement, which also includes the Deep and Comprehensive Free Trade Area and provides many opportunities for bilateral trade.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 4/6

Doing Business ranks Moldova in 48th place with 74.4 points. Moldova performs best on such indicators as starting a business (ranked 13th), paying taxes (ranked 33rd), trading across borders (ranked 38th), and protecting minority investors (ranked 45th). However, as in previous years, the biggest

problem which affects the overall score is construction permits where Moldova is ranked 156th; although this shows a slight improvement compared to 2018 (when it ranked 165).³⁸⁶

The business environment is also considered unfavorable due to the widely held perception that

courts are corrupt and there is a high level of corruption in the country. The Corruption Perceptions Index ranks Moldova 117th out of 180 countries.³⁸⁷ The Transparency International Corruption Percep-

tions Index for Moldova averaged 29.65 points from 1999 until 2018, which shows that there has been a minor improvement, however, it was insignificant to change the business environment.

3.3 WESTERN SHARE IN THE SALES OF GOODS 5/6

Moldova's economic and trade activity is strongly tied to the European Union. The National Statistical Bureau of Moldova reports³⁸⁸ that in 2018, Moldova exported 68.8% to the EU, amounting to USD 1.9 billion. The value of exports to the EU increased to 16.6% compared to 2017. The rest of the exports went to CIS states (15.4%) and to other countries

(15.8%). The main exports' growth was recorded with Romania (+31.9%), Italy (+31.2%), Germany (+32.4%), Turkey (+2.1%), Switzerland (+38.9%), Ukraine (+22.6%), and Czech Republic (+43.0%).

As for imports, 49.5% came from the EU, 25.1% came from the CIS, and the remaining 25.4% came from other countries.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 3/6

According to the 2019 World Investment Report of the United Nations Conference on Trade and Development, the FDI inflow in Moldova amounted to USD 228 million in 2018, which shows an increase compared to 2017 (USD 163 million). The total stock of FDI is estimated to be USD 4 billion.³⁸⁹ Moldova tries to attract investments in such sector as agriculture and food, automotive, business process outsourcing, ICT, and clothing and footwear. However, the country is not very attractive to foreign invest-

ments due to several factors—the mass migration of the economically active population, low purchasing power, and a small market. The World Bank reports that FDI represents only 2.1% of the GDP and the external debt remains the main source of financing the current account deficit.³⁹⁰ Out of the 2018 FDI, 84.5% came from EU countries, 6% came from the CIS, and 9.5% came from other countries.³⁹¹ Remittances from Moldovan migrants remain an important source of “investment.”

4 | LANGUAGE AND CULTURAL WESTERNIZATION 9/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 2/2

The Republic of Moldova has used the Latin alphabet since independence in 1991. Although the Latin-based script Romanian language is taught in the country, there is an exception of the Russian occupied region of Transnistria where the “Moldovan”

language is taught based on the Cyrillic script. During Soviet times, the authorities decided to switch the alphabet from Latin to Cyrillic, and to rename the Romanian language to Moldovan to show that Moldovans spoke a different language.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 2/6

Unlike many countries in the region, Moldova is not assessed by the English Proficiency Index and therefore it is difficult to give a precise evaluation of the English language skills of Moldovans. Although younger people speak English better, it is not common among

the wider population. The process of learning a foreign language is shaped by migration patterns, especially of the people who are in their mid-age and elderly people. Students learn foreign languages in schools and universities, but the level is not high.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 5/7

During the week of 10-17 November 2019, the largest cinema chain in Moldova, Patria showed 11 movies—all of them produced in the West.³⁹² Sometimes Russian movies are also shown, but it is a rare event. One particular interesting development in Moldova is that most of the movies are dubbed in Russian despite the fact that for 80% of the population Romanian is the native language, while only a few movies (the most popular) are also available in Romanian.

Among the foreign TV channels in Moldova the Russian ones are the most popular. These are trans-

lated in Moldova, with some local content. Since the channels are popular in society, especially Pervyi kanal, politicians are interested in controlling the air-time of the channels to their own political benefit. Romania also broadcasts TVR channel, but its popularity is very low.

In terms of social networks, people mostly use Facebook (68%), Odnoklassniki (66%), Instagram (27%), VKontakte (14%), Twitter (4%), and LinkedIn (1%).³⁹³ There have been significant changes: just two years ago Odnoklassniki had almost twice as many users as Facebook.

5 | WESTERNIZATION OF LIFESTYLE 6.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 4/5

Moldovans are a mobile nation, mainly for reasons of seasonal or permanent work. Since the visa-free regime with EU came into effect in 2014, 60% of Moldovans travelled to the EU (2.1 million), which is an enormous amount of peo-

ple.³⁹⁴ The mobility and employment opportunities of Moldovans are also facilitated by the fact that about 1 million Moldovans hold Romanian citizenship which provides them with many privileges in the EU.³⁹⁵

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 1/3

The western chain corporations are poorly represented in Moldova. The biggest retail company, Linella, is owned by local businesspeople. Among other big retailers are the German wholesaler Metro Cash & Carry and the Ukrainian retailer Fourchette. In 2019 the German retailer Kaufland opened 2 hypermarkets in Chisinau. In terms of

clothing, most present are athletic retailers such as Nike, Adidas, and Puma. Luxury brands do not have an official representation in Moldova; however, many luxury designer brands have their production facilities in Moldova. From the restaurants and fast-food industry McDonald's, KFC, and Roberts Coffee are present.

5.3 MOBILE INTERNET COVERAGE, SMART PHONE USAGE 1.5/2

As of 2019, 84% of population were using a mobile phone,³⁹⁶ of which mobile internet accounts for 63.7% according to the State of Mobile Internet

Connectivity.³⁹⁷ The use of mobile internet will likely continue to increase since almost the entire territory of the country is now covered by 4G network.

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
3.5 /25	3 /25	5.5 /25	4 /15	2 /10

1 | POLITICAL WESTERNIZATION **3.5**/25

1.1 DEGREE OF POLITICAL FREEDOM 1/10

During the last several years, no new political parties or organizations have appeared in Tajikistan. The country's political structure is still dominated by the People's Democratic Party of Tajikistan (PDPT), which holds 51 out of 64 seats in the lower house of Tajikistan's parliament (Majlisi namoyandagon, Assembly of Representatives). There is a total of seven political parties legally registered in the country, but only one of them, the Social Democratic Party of Tajikistan (SDPT) is in opposition to the Government. However, the SDPT's main organizational units were broken down in 2005; since 2013, the party has not participated in elections and its leadership along with over 70% of members and supporters are living in exile.³⁹⁸

The Islamic Renaissance Party of Tajikistan (IRPT), which is considered the largest political opposition organization in the country, was banned and officially designated as a terrorist organization in 2015. Overall, conditions for the appearance of new political parties in Tajikistan remain extremely unfavorable.

Consequently, the 2019 rating by Freedom House categorizes Tajikistan as a non-free country with the

Freedom Rating of 6.5 (where 7 is the lowest indicator).³⁹⁹ The same rating ranks the country's civil liberties as six out of seven and political freedoms as seven out of seven.

In 2018-2019, Tajikistan was shaken by a series of terrorist acts and riots in local prisons, attributed to religious extremists. Thus, several Tajik citizens who pledged allegiance to ISIL attacked a group of foreign bicycling tourists in Danghara in July 2018, killing several persons. A riot in Khujand jail took place in November 2018, and another riot which broke out in Vahdat jail in June 2019 resulted in dozens of deaths among inmates and guards. In all these cases, ISIL assumed responsibility for organizing prison riots and terrorist acts.

There has been no improvement in freedom of speech in the country. In 2019, Reporters Without Borders, a nongovernmental human rights organization, ranked Tajikistan as 161st in its annual 2019 World Press Freedom Index. Therefore, Tajikistan went 12 spots down compared to 2018, when the country was ranked 149th among 180 countries.⁴⁰⁰

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 0.5/8

Today, there are no political parties or factions in Tajikistan's parliament which would declare in their programs a course toward rapprochement with Western democracies. Officially, the Tajik government and the ruling party adhere to the so-called multidirectional policy on the international stage. It means carrying

out a balanced foreign policy in several geopolitical directions at once, including countries of the West.⁴⁰¹

But in fact, China's influence in Tajikistan has significantly increased in recent years, first of all, in the areas of economy and security. This impacts the stance of Tajik politicians and parliamentarians, who

have become increasingly critical of the West and Russia. In particular, criticism of the Tajik government by international organizations and granting

of political asylum to Tajik opposition leaders and expats in EU states are fueling anti-Western sentiments among Tajik parliamentarians.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 2/7

No sociological surveys about public attitudes toward the West and the problems of Westernization have been held in Tajikistan in recent years. At the same time, local public opinion is largely formed under the influence of Russian mass media, which has portrayed the West as the principal instigator of “color” revolutions in post-Soviet republics. The anti-Western rhetoric of mass media also influences geopolitical preferences of the population, and

primarily among youth. Thus, when answering the question about the most preferable country for cooperation, the majority (89%) of respondents named Russia, only 26.5% the United States, and 39.9% the European Union. At the same time, only 1.8% of respondents want to have a more distanced, cooler relationship with Russia, while with regard to the EU and the US, these figures are 8.4% and 31.6%, respectively.⁴⁰²

2 | LEGAL WESTERNIZATION 3/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION: 1/6

Tajikistan does not have the practice of regularly contacting the Venice Commission and other international organizations for a legal consultation about the most important matters. The last time the Venice Commission examined a legislative act of Tajikistan was in 2014, when it provided an opinion and recommendations regarding the draft Law on the Constitutional Court of the Republic of Tajikistan.⁴⁰³

At the same time, Tajikistan is regularly criticized by the international community and human rights organizations for the incomplete fulfillment

of its commitments concerning observance of human rights and fundamental freedoms. In particular, human rights activists maintain that as a result of the passage in 2015 of the Law on the Bar and the Practice of Law, the government’s interference with judicial proceedings in the country grew. There was also strong criticism for the Law on Noncommercial Organizations and the 2019 amendments to the Law on Civil Society Associations, “which create additional administrative barriers to civil society associations.”⁴⁰⁴

2.2 INDEPENDENCE OF THE COURTS: 0.5/7

The 2019 rating by Freedom House gave Tajikistan 0 out of 4 possible points, because “the country does not have [an] independent judiciary system.” The situation worsened compared to the previous year, dropping from one point to zero.⁴⁰⁵ According to Freedom House, Tajik judges are ill-prepared, and the country is bereft with corruption.

It was noted that positive steps were taken in 2016 to ensure independence of the courts. Thus,

Constitutional amendments adopted that year abolished the Council of Justice which was responsible for the appointment of judges while being under the control of the President of Tajikistan. Therefore, the powers to appoint judges were vested in the parliament, which was intended to create the basis for their independence. But in practice, judicial appointments and oversight remain under the control of the executive branch of power.⁴⁰⁶

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS: 1/6

The Constitution and legislation of Tajikistan guarantee the fundamental rights and freedoms in Tajikistan. At the same time, the international community, human rights organizations, and public activists increasingly accuse Tajik public authorities of systematically abusing human rights. Thus, the United States Commission on International Religious Freedom recommended the U.S. Department of State in 2018 to again include Tajikistan to the list of countries “causing significant concern” due to serious violation of religious freedoms.⁴⁰⁷

In the course of a dialogue between the EU and Tajikistan held in November 2019,⁴⁰⁸ the EU representatives said that “the space for human rights in

Tajikistan is narrowing, and as a result, political opponents are imprisoned and their family members and legal defenders persecuted.”⁴⁰⁹

The death of several dozen inmates in Tajik prisons in 2018-2019 drew attention to the conditions and deficiencies of Tajikistan’s penitentiary system. There are numerous reports about the brutal torture of political prisoners, first of all, members of the banned IRPT.⁴¹⁰ As a result, the UN Committee Against Torture expressed concern in its third periodical report on Tajikistan in June 2018 about the instances of torture, and in some cases death, of prisoners in prisons and investigative detention centers.⁴¹¹

2.4 NUMBER OF ACQUITTALS 0.5/6

Tajikistan’s judicial system does not encourage verdicts of acquittal. Thus, the republic’s Supreme Court did not acquit a single indicted person in 2013.⁴¹² In 2015, courts in Tajikistan acquitted 12 persons who stood trial, which was 4 acquittals less than the year before. In 2016, Tajikistan’s courts entered 13 ac-

quittal verdicts.⁴¹³ Tajik mass media noted that many judges did not enter a single verdict of acquittal during many years of their judicial practice.⁴¹⁴ According to current practice, out of many thousands of cases heard by courts every year, in only a few cases has a person proved his or her innocence.⁴¹⁵

3 | ECONOMIC WESTERNIZATION 5.5/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 2.5/7

Tajikistan has been a member of the WTO since 2010; cooperation between the EU and Tajikistan is regulated through the Partnership and Cooperation Agreement (PCA) signed in October 2004 and enacted on 1 January 2010.⁴¹⁶

In 2018, Tajikistan also applied to Brussels for accession to the European Union’s Generalized System of Preferences. The membership in this system would allow Tajikistan to export more than 6.4 thousand products to European Union markets under the zero-customs duty regime.

However, in order to be granted a membership in the European Union’s Generalized System of Preferences, Tajikistan must implement 27 conventions and protocols concerning human rights, environmental protection, occupational safety, and efficient governance.⁴¹⁷ In this regard, the actual prospects of the country’s joining this system look doubtful; and many independent experts believe that the government of Tajikistan is not ready to sign this package of commitments.⁴¹⁸

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 0.5/6

In 2019, the World Bank’s Doing Business-2020 rating included Tajikistan in the top 20 reformist countries in terms of doing business. According to

the report’s authors, it became easier to do business in Tajikistan thanks to improved access to bank loans and to social protections provided when reg-

istering a company.⁴¹⁹ As a result, Tajikistan climbed up 20 spots in the general Doing Business 2020 rating, presently occupying the 106th position among 190 countries of the world; whereas last year, Tajikistan only ranked 126. At the same time, Tajikistan still has one of the lowest rankings among post-Soviet states in this index.⁴²⁰

In addition, most other international expert organizations are critical about the degree of economic freedom in the country. Thus, in 2018 Tajikistan was ranked 122nd among 180 countries in the Global Index of Economic Freedom by US-based Heritage Foundation.⁴²¹ Compared to the previous year, the country's

score went down by 2.7 points due to a sharp decline in financial wellbeing, freedom of business, and freedom of trade.⁴²² In 2019, the Paying Taxes 2019 survey included Tajikistan to the top nine countries with the heaviest tax burden. The aggregate tax rate in the country is 67.3%, indicating the share of taxes and duties on company profits.⁴²³

Indeed, conditions for private (and especially small) businesses are steadily deteriorating. As a result, 30,281 Tajik entrepreneurs left the small business sector in 2017, and in the first half of 2019, close to 260 thousand individual entrepreneurs closed their business in the country.⁴²⁴

3.3 WESTERN SHARE IN THE SALES OF GOODS 0.5/6

In 2019, Russia and China remained the country's main trade partners, whereas the share of trade with Western countries was minimal. Thus, Tajikistan's key trade partner in the first half of 2019 was Russia with a total trade turnover of \$470 million,

followed by Kazakhstan (\$416 million), China (\$316 million) and Uzbekistan (\$128 million). Tajikistan's main partners in export of goods (mostly aluminum and cotton) include Turkey, Switzerland, Uzbekistan, Kazakhstan, and Afghanistan.⁴²⁵

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY 2/6

In 2018, Tajikistan brought in USD 645 million in investments, including USD 326 million in FDI.⁴²⁶

The biggest investor is China, while the share of Western FDIs, especially private ones, remains small. Thus, out of the total amount of USD 350.3 million in investments received in the first half of 2018, China invested almost

USD 200 million in the country's economy, Russia USD 20.4 million and Turkey USD 17 million. Government investment projects are financed mostly by the Asian Development Bank (ADB), World Bank, China, European Bank for Reconstruction and Development, and the Islamic Development Bank.⁴²⁷

4 | LANGUAGE AND CULTURAL WESTERNIZATION 4/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 0.5/2

The Latin alphabet was used in the Tajik language for only a few years, from 1936 to 1939, and afterwards was replaced with the Cyrillic script. During the last two years, a discussion has intensified on social media about the possible reversal of the official language back to the Perso-Arabic script, which was used before Soviet power was established in the country. At the

same time, the discourse concerning the return to the Persian alphabet is attracting an increasingly political character, being favored by a significant part of the Tajik opposition based in foreign countries today. The alphabet-related discussion has also been distinguished by a growing confrontation between the secular and religious parts of contemporary Tajik society.⁴²⁸

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 0.5/6

Knowledge of Russian is traditionally widespread in Tajikistan. Even though the bulk of the Russian-speaking population left the country in the early 1990s, the majority of population is still oriented toward learning the Russian language, first of all, thanks to a high level of economic migration to Russia. Today, about 68% of Tajikistan's population claim that they are fluent in Russian. According to another survey, 69% of respondents named Russian as the desired language of education for their chil-

dren, along with Tajik and English.⁴²⁹ However, the percentage of people who know English and other Western languages remains low.

At the same time, there is a growing interest in the country in learning English and German, especially among the urban population and intelligentsia who regard proficiency in these languages as one of the factors promoting their professional career. Today, many (including public) institutions prefer to hire candidates who have knowledge of foreign languages.⁴³⁰

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATRES AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES, AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 3/6

Presently, the overwhelming majority of films shown in Tajikistan's movie theaters are Western made. Thus, all 10 films shown in Dushanbe's Kayhon movie theater in late November 2019 were produced in Hollywood.⁴³¹ The bulk of programs aired on Tajik TV channels are Russian serials and Hollywood blockbusters. European films are rarely found in Tajikistan's movie theaters or on television.

Presently, because of the government's attempts to restrict the media in the country, the majority of the Tajik audience and public discourse has migrated to the Internet and social media. In 2019, there was almost 700 thousand persons in Tajikistan who simultaneously used various social media. The majority of them are the users of Russian social media VKontakte (vk.com), Odnoklassniki.ru (700 thousand active users), Instagram (360,000), and Face-

book (210,000).⁴³² In response, the Tajik government takes resolute yet unsuccessful steps to establish control over the Tajik segment of the Internet. Since 2016, yielding to government pressure, local mobile operators began to raise, one after another, the cost of outgoing calls and then cut Internet traffic. In March 2019, the Antimonopoly Service of Tajikistan signed a decree on telecommunications tariffs, ordering the mobile Internet access fee to be raised 1.5 times, from approximately 30-35 somoni (USD 3.7) to 63 somoni (USD 6.7). However, this action by the government has caused such a serious surge in public protests that the government had to back off. As a result, sometime later, Tajikistan's President Emomali Rahmon had to personally intervene and overrule the governmental decree which forcibly raised prices.⁴³³

5 | WESTERNIZATION OF LIFESTYLE 2/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES: 1/5

Until now, there has been no credible statistical data about the number of Tajik citizens traveling abroad, and especially, to the West. Even statisti-

cal data regarding the scale of economic migration remains a subject of dispute among politicians and experts alike. Thus, during a press briefing

held in April 2019 after the meeting between Vladimir Putin and Emomali Rahmon, the heads of both states voiced contradictory statistics. In particular, the Tajik President said that there are 480 thousand Tajik citizens working in Russia, while Vladimir Putin mentioned 1.2 million economic migrants from Tajikistan in his speech.⁴³⁴ Most experts believe that the reasons for these discrepancies have largely political motives: in particular, the Tajik government understates the magnitude of economic migration in order to understate the degree of the national economy's dependence on money remittances from abroad.⁴³⁵ In turn, when assessing economic migration from Tajikistan, Russian authorities also include dual citizens to the category of economic migrants.

In the meantime, in 2018 Tajikistan has for the first time become Russia's biggest migration donor, replacing Ukraine. By that time, every fourth legal immigrant was coming to Russia from Tajikistan.⁴³⁶

Those traveling to European countries and the United States come from a more educated part of the country's population, first of all, students and intelligentsia. At the same time, there has been an increasing number of Tajik citizens participating in the US Government's Diversity Visa Program. Thus, 122,178 Tajik citizens applied for participation in this program in 2018.⁴³⁷ Recent years saw a steady trend toward an increasing number of that particular category of emigrants. While the number of students studying in Belarusian universities in 2015 was approximately 300, their number almost doubled in 2017.⁴³⁸

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 0.5/3

In the opinion of international experts, Tajikistan is not very interesting for foreign companies due to possible logistical problems with raw materials and the low purchasing capacity of the population.⁴³⁹ Nevertheless, there has been a slow yet steady growth in the number of Western franchise companies operating in the country in 2010-2016. Southern Fried Chicken, Burger King,

MEXX, Auchan, and Coca-Cola came to the country during this period.⁴⁴⁰ Among Russian companies, the Shokoladnitsa franchise which was also sold to Tajikistan in 2016 is worth noting.⁴⁴¹ In the subsequent years, however, this process has significantly slowed down due to economic recession and the resulting decline in the standard of living of the country's population.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 0.5/2

Before 2018, the country saw a general increase in the number of Internet and mobile phone users. Thus, the number of Internet users in Tajikistan went up from 1,622,924 in 2016⁴⁴² to 3,013,256 in December 2018. As of December 2017, the number of Facebook users also increased, reaching 170 thousand.

During the same period, the number of mobile phone users in the country has also increased from 9.4 million in December 2016 to 9.9 million in December 2017.⁴⁴³

But in 2018-2019, Tajik authorities carried out a consistent policy of making Internet access and mobile communication services more expensive and strengthening government control over the country's telecommunications sector. In particular, the government introduced a strict limitation on the number of SIM cards a user could have. As a result, by October 2019 the number of Internet users in the country declined to 2.9 million, while the number of mobile phone users went down to 6.1 million; of that number, only 4.4 million users were considered active subscribers.⁴⁴⁴

Turkmenistan

15/100

SCORE, POINTS/OUT OF

Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
3/25	3/25	4/25	3.5/15	1.5/10

1 | POLITICAL WESTERNIZATION 3/25

1.1 DEGREE OF POLITICAL FREEDOM 0.5/10.

The 2016 Constitution of Turkmenistan^{445,446} strengthened the super-presidential system of government and the law “On the Halk Maslahaty”⁴⁴⁷ (People’s Council) subordinated the powers of all branches of the executive, legislative, and judiciary to the President personally and, indirectly, subordinated those of all public institutions. In the absence of a logical and effective state ideology, the constitution is fulfilled by the personality cult of the President of Turkmenistan Gurbanguly Berdimuhamedow.

The official spectrum of political life in Turkmenistan is represented by three parties. The Democratic Party, established in 1991, inherited the structure of the Communist Party and has continued to represent the interests of the administrative bureaucracy and consisted of its representatives. The Party of Industrialists and Entrepreneurs was formed on the foundations of the quasi-public association the, Union of Industrialists and Entrepreneurs of Turkmenistan and represents business interests. The third party is the so-called Agrarian Party and represents the interests of agrarians.

All these parties were created on the initiative and under the control of the authorities. In fact, they are parties of the “trade union” type, representing the interests of the three largest social groups—the state bureaucracy, business, and agrarians. These

parties have no genuine political freedom and initiative. Control over all them, as well as over other aspects of social and political life, is concentrated in the Presidential Administration. Also, the special services tightly control and suppress political initiatives. Abroad, a whole series of “parties in exile” has been created, which generally have several founders and are not registered at the place of establishment. These groups have no significant influence on political life in Turkmenistan.

A good example of regression in the process of Westernization is the preparation of a successor to the post of President of Turkmenistan, which is represented by the current president’s son, Serdar Berdimuhamedow. Over the years, Serdar was elected to the parliament (Majlis) of Turkmenistan, while simultaneously holding the post of Deputy Minister of Foreign Affairs; such a combination of posts was prohibited by the law on the status of the deputy of the Majlis, but this rule was specifically removed from the law for Serdar Berdimuhamedow. Serdar was then appointed Head of the Central Akhal region of Turkmenistan.⁴⁴⁸ To allow for the formal observance of the rule of law, a law⁴⁴⁹ was passed to abolish the law⁴⁵⁰ which banned service in government bodies for close relatives. Thus, the foundation was laid for the hereditary transfer of power.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 1/8

There are no pro-Western parties in the country. Not a single political party has its own foreign policy agenda except for “supporting the foreign policy

pursued by the President of Turkmenistan.” Neither the parties nor the parliament (Mejlis) as a whole, have their own websites or newspapers.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 1.5/7

All media are controlled by the state, and other public life is controlled by special services. Everything that can be regarded as a manifestation of disloyalty or deviates from the concept of “traditionality” is severely suppressed. Students who have just returned from studying abroad play a certain role, but special services tightly control this social stratum, often at the place of study. All demonstrative manifestations of belonging to Western (and Muslim) mass culture—tattoos, hipster hairstyles and

beards, particular clothing styles—are susceptible to prosecution by the police. All public discussions on the Internet are also monitored for loyalty and “unwanted” and seditious ones are suppressed.

Recent sociological polls on the territory of modern Turkmenistan, the results of which are credible, were carried out during the period of Perestroika in the USSR (1980s). The authorities not only discourage, but also directly suppress any attempt to measure public sentiment.

2 | LEGAL WESTERNIZATION 3/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 1/6

Turkmenistan is not a member of the Council of Europe; therefore, the jurisdiction of the Venice Commission does not apply to it. However, in 2016, after the draft Constitution of Turkmenistan appeared in the public domain, the ODIHR at the OSCE proactively conducted an analysis of the main provisions of the draft Constitution stemming from Turkmenistan’s membership in the OSCE.⁴⁵¹ The number of critical comments in this document was significant, which meant that the draft Constitution was inconsistent with OSCE membership obligations.

On September 26, 2019 at a meeting of the People’s Council, President Berdimuhamedow announced the need for constitutional reform, in particular, reform of the parliament.⁴⁵² A constitutional commission has been established.⁴⁵³ It is worth noting that the latest version of the constitution was adopted in 2016, and the constitutional law “On the Halk Maslahaty” (People’s Council) was adopted in 2018. The reasons and details of the upcoming reform are not known, except for the timing of its implementation—September 2020

2.2 INDEPENDENCE OF THE COURTS 0.5/7

Members of the judiciary are directly appointed by the President of Turkmenistan. Moreover, the chairman of the Supreme Court of Turkmenistan

is a member of the Halk Maslahaty, and is directly subordinate to the President.⁴⁵⁴ According to the latest report by Freedom House (2018), the judicial

system in the country is not independent—the judicial branch has the lowest mark, which indicates significant problems in the field of justice in Turk-

menistan.⁴⁵⁵ The President of the country uses the courts to eliminate any real or imaginary check on his power.

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 1/6

Turkmenistan is a signatory to most UN human rights conventions and the Constitution of Turkmenistan⁴⁵⁶ has a separate chapter on guarantees of human rights and freedoms. The constitutional law “On the Permanent Neutrality of Turkmenistan”⁴⁵⁷ contains rules that determine the primacy of international law and the recognition of decisions of UN bodies, and is also based on the declaration “On International Obligations of Neutral Turkmenistan in the Field of Human Rights,” which is the reference norm of this law.

Nevertheless, at the level of practical implementation of legislation and international law, the authorities in Turkmenistan sabotage their work. In particular, Turkmenistan denies visits by a number of special rapporteurs of various UN mechanisms (e.g. for torture, enforced disappearances). The OSCE (ODIHR) either refuses to observe elections or sends short-term missions.

A number of laws of Turkmenistan directly violate the norms of international law or contain rules to sabotage them. The Criminal Code of Turkmenistan⁴⁵⁸ criminalizes “sodomy,” the law governing the Internet⁴⁵⁹ contains prohibitive norms, the law “On Migration”⁴⁶⁰ contains a norm that allows a selective, punitive, and repressive ban on leaving the country.

The law “On the Ombudsman”⁴⁶¹ adopted in 2016 did not lead to the full-fledged work of the national human rights institution, which remains limited to the consideration of property, gender, and administrative issues.⁴⁶² The Report of the Ombudsman completely ignores the problems of those missing (disappeared) in prisons of Turkmenistan,⁴⁶³ the rights of prisoners, torture; disproportionately little attention is paid to the ban on leaving the country,⁴⁶⁴ domestic violence, and the prosecution of LGBT people.

2.4 NUMBER OF ACQUITTALS 0.5/6

There is no practice of acquittals in Turkmenistan. There are isolated precedents for terminating

criminal cases at the investigation stage, but corruption plays a role in this outcome.

3 | ECONOMIC WESTERNIZATION 4/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 0.5/7

Turkmenistan is not a member of the EU or the WTO. For many years, the European Parliament has blocked the ratification of the Partnership and Cooperation Agreement between the European Union

and Turkmenistan due to the violation of human rights in Turkmenistan.

Following the call of the President of the European Commission to the leadership of Turkmenistan

to join the WTO⁴⁶⁵ in 2013 a government commission was established,⁴⁶⁶ negotiations on joining the WTO⁴⁶⁷ were announced, and a specialized seminar was held on this topic.⁴⁶⁸ However, in 2016⁴⁶⁹ and 2019,⁴⁷⁰ at meetings with functionaries Turkmen diplomats were not talking about joining, but about “cooperation with the WTO” in the framework of “developing international trade partnership.” At the same time, it was stated that “By the decree of President Gurbanguly Berdimuhamedow on July 15, 2019, the composition of the government commission to study issues related to Turkmenistan’s membership in the World Trade Organization was

approved.”⁴⁷¹ Nothing is known about any specific actions to join the WTO.

Cooperation on security issues between Turkmenistan and the United States has been on the decline in recent years. Until about 2010, a “NATO logistics center” was in operation at the Ashgabat airport to receive and dispatch goods in the interests of the NATO grouping in Afghanistan, but currently this center has been liquidated. The United States allocates funds under various programs to protect the border with Afghanistan and Iran (video surveillance, staff training), but this funding has been greatly reduced or completely stopped.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 0.5/6

The authorities in Turkmenistan exercise strict and tight control over the activities of all business structures—from large industrial manufacturers to private entrepreneurs. The Union of Industrialists and Entrepreneurs of Turkmenistan (SPPT)⁴⁷² was established for this purpose by a separate law.⁴⁷³ This Union is the largest and has a near monopoly on subsidies and loans from the government and state banks of Turkmenistan.⁴⁷⁴ It also has the exclusive right to represent the interests of the Turkmen business abroad^{475,476} and at home when representatives of foreign business, and foreign and international financial institutions visit Turkmenistan.⁴⁷⁷

All other state institutions that are supposed to play a regulatory and stimulating role (e.g. the State Exchange, the Chamber of Commerce and Industry) instead perform a decorative function, to create the appearance of a “market” and “competitive” economy. Accordingly, the legal field of business is burdened by administrative regulation by the state. The President’s closest associates,⁴⁷⁸ especially his closest relatives,⁴⁷⁹ put substantial pressure on business.

Independent assessments of the business climate in Turkmenistan do not exist. The World Bank’s Ease of Doing Business report does not include Turkmenistan in its analysis.

3.3 WESTERN SHARE IN THE SALES OF GOODS 1/6

Estimating the share of Western exports and imports to/from Turkmenistan is extremely difficult due to the absolute opacity of the Turkmen economy and statistics.⁴⁸⁰ Only certain amounts of contracts are known, for example, deliveries of American or German agricultural machinery, equipment for the extraction and processing of hydrocarbons, and the textile industry.

Data from the International Monetary Fund show a systematic drop in investments: “Foreign investments in 2015 amounted to 8.6% of GDP, in 2016 - 5.4%, in 2017 - 4%, in 2018 - 3.7%. In 2019, investments are projected to fall to 3.3% of GDP.”⁴⁸¹ A decrease in foreign investment is also noted in the materials of the World Bank.⁴⁸²

Western countries (USA)⁴⁸³ and individual western companies (70 companies)⁴⁸⁴ have imposed a complete ban on the import of cotton from Turkmenistan and its products due to the use of forced and child labor. This ban significantly undermined the exports of Turkmenistan as a whole—cotton, along with hydrocarbons were a significant share in exports. Along with the European Parliament blocking the Partnership and Cooperation Agreement, the “cotton embargo” is the second sanction measure in relation to Turkmenistan’s economic cooperation with Western countries.

Due to the geographical remoteness, the large proportion of gas in Turkmen exports, the relatively small size of the Turkmen economy, the presence of an embargo on the purchase of Turkmen cotton, there is a significant imbalance in the economic interaction between the United States and Turkmenistan. With insignificant exports to the United States, Turkmenistan imports high-tech products from the United States—Boeing⁴⁸⁵ aircraft, which are the backbone of the national fleet, agricultural equipment is supplied by John Deere,⁴⁸⁶ and Case

and General Electric supplies gas turbines and electronic equipment. Case and General Electric have representative offices in Turkmenistan.⁴⁸⁷ Until 2017, Coca-Cola was a major investor and almost held a monopoly in the core market.

According to unofficial data, more than 90% of the total turnover falls on the countries of Asia, including China, the countries of Central Asia, the United Arab Emirates (offshore), Pakistan, India, Singapore, South Korea, and Japan. The information was announced in the report of the World Bank representative at the “Oil and Gas of Turkmenistan”-2019 conference in October of this year, but it is not available in open sources.

According to the CIA World Factbook,⁴⁸⁸ Turkmenistan primarily exports gas, crude oil, petroleum products, textiles, and cotton fabric. In 2017, exports primarily went to China (83.7%) and Turkey (5.1%). Imports are more diversified—in 2017, Turkey accounted for 24.4%; Algeria, 14.4%; Germany, 9.8%; China, 8.9%; Russia, 8%; and the United States, 6.6%. The largest share in total imports is machinery and equipment, chemicals, and food.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY’S ECONOMY 2/6

The assessment of Western investments (and investments in general) in the Turkmen economy is difficult primarily because of the ambiguous definition of “investments” by the Turkmen authorities. The largest and genuine western investor in Turkmenistan is the Italian hydrocarbon company ENI, operating in the west of Turkmenistan and in the Caspian Sea since 2008. According to third-party sources, ENI’s total investment in Turkmenistan amounted to about USD 2 billion. It is impossible to name the exact amount, since all work is carried out under the Production Sharing Agreement (PSA), the details of which are confidential, and the declared ones do not always reflect the real

picture. Independent estimates show that FDI represented 4.87% of GDP⁴⁸⁹ in 2018. At the same time, the World Bank predicts that FDI flows will decline⁴⁹⁰ in 2019-2020.

Coca-Cola, another major investor in Turkmenistan, is experiencing serious problems due to corruption and administrative pressure.⁴⁹¹

There are no reliable data in the public domain on the level and nature of Western investment in the economy of Turkmenistan. The sporadically published figures are clearly biased in nature, confined to the visits of the President of Turkmenistan to other countries, or to coincide with any holidays or signing of contracts, and do not inspire confidence.

4 | LANGUAGE AND CULTURAL WESTERNIZATION 3.5/15

4.1 USE OF THE LATIN ALPHABET IN THE LOCAL LANGUAGE 2/2

Turkmenistan completely switched to the use of Latin script. This transition was a tribute to the rapid rapprochement with Turkey (indirect westernization). The priority was to minimize Russian influence on the internal political and public life in Turk-

menistan. The transition to the Latin script is not perceived as a Western heritage by the population. However, this factor has become one of the most important in motivating mass labor migration to Turkey and Northern Cyprus.⁴⁹²

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 0.5/6

Citizens of Turkmenistan do not speak Western languages well. One reason is due to the barriers that exist for communicating with foreigners. Very few citizens have the opportunity to travel abroad and just a few representatives of the West visit Turkmenistan. Therefore, there is no special need to learn English, French, or German. However, there are many initiatives for cooperation between Turkmenistan and Western countries in the cultural and lingu-

istic fields. In 2018, the government of Turkmenistan signed an agreement with two departments from the University of Cambridge to improve the teaching and learning of English in Turkmen schools⁴⁹³. In addition, many initiatives for learning English come from the US Embassy.⁴⁹⁴ In particular, there is a program for high school students called “FLEX” which will allow individuals to live with American families and study in American schools.⁴⁹⁵

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION’S MOVIE THEATRES AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER, ETC.) 1/7

Film distribution in Turkmenistan is extremely limited due to a number of reasons. The existing repertoire consists of 90-95% Western-made films. However, the vast majority of films are dubbed in Russian. The repertoire is designed as part of adventure and entertainment content. All films containing scenes of excessive violence, nudity, smoking, alcohol (with rare exceptions) are not allowed to be broadcasted. Restrictive measures are determined and dictated through self-censorship of the distributor. All premieres and new films are shown in a single multiplex in Ashgabat (in other cities there are none)—the cinema of the Berkara⁴⁹⁶ Shopping Center—where 2-3 films, mainly of Western production but dubbed in Russian, are shown after the premiere for 2-3 weeks.

National television is dominated by local series. Feature films have not been produced for a long time due to the personnel and censorship crisis. There are virtually no Western films on official national TV, with the exception of cartoons for children (dubbed in Turkmen or Russian).

Facebook, Instagram, Twitter, as well as other social networks and message apps in Turkmenistan are blocked and inaccessible to a wide audience. Attempts to use a VPN to access them are detected, VPN services are blocked one by one, and VPN users and commercial debuggers are identified and punished. The use of VPNs and other mechanisms of crypto-access to the Internet is prohibited by law.⁴⁹⁷

5 | WESTERNIZATION OF LIFESTYLE 1.5/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 0.5/5

Due to the low standard of living (and income), weak foreign economic relations of the Turkmen small and medium-sized businesses, tourist and business trips to the West are insignificant. Students primarily go to study in Turkey, Belarus, Russia, and Kazakhstan. There are no objective data on the number of students studying abroad, since official statistics take into account only students leaving for studies under intergovernmental agreements on training, but do not take into account initiative trips, which are several times

higher than state quotas for studying abroad. It is widely known there are numerous restrictions on students leaving to study abroad.⁴⁹⁸ According to human rights organizations, the number of Turkmen citizens included on “blacklists,” prohibiting them from leaving the country, is more than 30 thousand people.⁴⁹⁹

Moreover, the authorities of Turkmenistan suppress any attempts of Westernization in the country’s universities, including expelling Western teachers and interfering in the learning process⁵⁰⁰.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 0.5/3

Western fast food networks are missing in Turkmenistan. A small company that owns a KFC franchise has been operating for less than a year with only one point of sale. The Starbucks

coffee shop closed after being revealed as fictitious (it had nothing in common with the famous brand).⁵⁰¹ Other brands, mainly clothing, are present as dealers and resellers.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USING 0.5/2

Mobile Internet coverage provides Internet access in almost all settlements and on key roads between them.⁵⁰² However, the high cost of mobile

Internet⁵⁰³ and the censorship of social networks and most sources of information negates its wide coverage.

SCORE, POINTS/OUT OF	Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
		17/25	11.5/25	14.5/25	8.5/15

1 | POLITICAL WESTERNIZATION 17/25

1.1 DEGREE OF POLITICAL FREEDOM 7/10

In 2019, the country’s political life was especially eventful. Ukraine went through a two-round presidential election and a snap parliamentary election. International observers positively evaluated both these elections, noting that certain deficiencies had, in the end, no effect on the competitive nature of this process, which was accompanied by “respect for fundamental freedoms.”⁵⁰⁴ The peaceful transition of power, which has not always been the case in this country, is also worth noting: Petro Poroshenko admitted defeat and congratulated the President-elect, Volodymyr

Zelensky. Ukraine enjoys a high degree of freedom of speech compared to the majority of post-Soviet states, but there is still significant room for improvement. According to the World Press Freedom Index, Ukraine ranked 102nd in 2019.⁵⁰⁵ Before the Revolution of Dignity in 2013, the country’s ranking was more than 20 spots lower. The environment for formation of political parties in Ukraine remained favorable. Moreover, Servant of the People party, a political newcomer, managed to win the absolute majority of seats in the Ukrainian parliament (252 out of 450).

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 6/8

The majority of Ukrainian parties in the parliament favor the country’s European integration. The only exception is the Opposition Platform – For Life (which holds 44 seats out of the total number of 424 MPs). Therefore, it is fair to say that the percentage of pro-Western politicians in the parliament may reach 90%. However, public criticism of the President and his party in the parliament is often heard. The biggest drawback is that

he seldom mentions the country’s integration with the EU and NATO. Pro-presidential politicians explain that the new leadership is more inclined toward a pragmatic approach rather than making groundless statements. The fact that key government offices are held by people who advocate Ukraine’s full integration with the EU and NATO can serve as an indirect indication of the country’s adherence to a Western trajectory.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 4/7

Over 57% of Ukrainians support Ukraine’s accession to the European Union, and over 44% of the country’s population support membership in NATO.⁵⁰⁶ The greatest number of supporters of EU and NATO

integration live in the country’s western region, while the opponents are based mostly in the east and south. The popularity of European integration has always been high in Ukraine, and support for the Euro-Atlan-

tic direction significantly increased after 2014, when Russia annexed Crimea and launched an operation aimed at separating the country's southeastern areas. Discussions concerning possible concessions on the part of Ukraine to restore a peaceful relationship with

Russia increased in 2019. A sociological survey indicated that 54.4% of Ukrainians do not support abandonment of Ukraine's possible membership in NATO and stipulation of the country's non-aligned status in the Constitution.⁵⁰⁷

2 | **LEGAL WESTERNIZATION 11.5/25**

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF THE VENICE COMMISSION 5/6

Ukraine regularly seeks assistance from the Venice Commission when it needs an independent legal examination of the most important matters. Sometimes, recommendations from the Venice Commission performed an arbitration function to resolve disputes between states. Thus, in December 2017 Ukraine received the Venice Commission's recommendations concerning the education law. Hungary and a number of other countries believed that this legislative act violates the right of ethnic minorities to receive secondary education in their native language. In the fall of 2019, the Venice Commission also analyzed various aspects concerning im-

plementation of the law on the Ukrainian language as the official language. In addition, the Monitoring Committee of the Parliamentary Assembly of the Council of Europe asked for the Venice Commission's opinion regarding amendments to Ukraine's legislative framework regulating the Supreme Court and judicial bodies. Ukraine's ruling political party, Servant of the People, also promised to request an analysis of constitutional amendments by the Venice Commission. In general, Ukraine has a responsible attitude toward recommendations of the Venice Commission, making the relevant changes in its legislation.

2.2 INDEPENDENCE OF THE COURTS 2/7

According to the World Justice Project 2019 Rule of Law Index, Ukraine is ranked 77th among 126 countries of the world. The country is in the group of states with medium adherence to the rule of law. Ukraine scored 0.5 points out of 1, where "1" means the strongest adherence to the rule of law.⁵⁰⁸ The country still has a low ranking in terms of judi-

cial independence in the Index of Public Integrity: 101st in the 2017 rating (a year earlier, the country held the same position). All efforts aimed to reform the judicial branch of power after the 2014 revolution were in vain. Ukrainians are highly distrustful of prosecution authorities (62%) and courts (66%). Only 14-15% of Ukrainians trust them.⁵⁰⁹

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS 3.5/6

Ukrainian law guarantees fundamental rights of Ukrainian citizens, and the country is a signatory party to fundamental international documents envisaging

protection of human rights. At the same time, human rights organizations stress that assaults on journalists, public activists, and representatives of ethnic minori-

ties often go unpunished. The U.S. Department of State noted in its Ukraine Human Rights Report: “The government generally failed to take adequate steps to prosecute or punish most officials who committed abuses, resulting in a climate of impunity.”⁵¹⁰ Less than half of Ukrainians have ever tried to defend their rights, which may indicate the lack of trust in public institutions responsible for protecting human rights. Fifty-five percent of Ukrainians whose rights were violated said that they did not even try to defend themselves. In the south, this figure reaches 80% of respondents.⁵¹¹

Russia continues to occupy Crimea and provides military support to militants in the east of Ukraine,

which has resulted in the death of over three thousand civilians. In November 2018, martial law was imposed for 30 days in 10 regions of Ukraine after Russia captured 24 Ukrainian sailors near Crimea. Martial law allowed for restrictions on freedom of speech and assembly, but no such measures were actually taken.

International organizations analyzing the observance of human rights in Ukraine place Ukraine into the group of countries with a substantial amount of human rights and freedoms, even though problems exist there. Ukraine usually receives an “above average” score.⁵¹²

2.4 NUMBER OF ACQUITTALS 1/6

In Ukraine, 73.7 thousand persons were sentenced, 140 were acquitted, and cases against 22.4 thousand persons were closed in 2018. In 2017, 76.8 thousand persons were sentenced, 311 were acquitted, and cases against 19.7 thousand persons were closed.⁵¹³ Similar figures were

reported for 2016: 76.2 thousand persons were convicted and 314 persons were acquitted. The situation remains the same year after year: the percentage of acquittals is extremely low. For a long time, this indicator has been below 1% in Ukraine.⁵¹⁴

3 | ECONOMIC WESTERNIZATION 14.5/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION 4.5/7

Ukraine has been a member of the World Trade Organization since 2008. Official Kyiv has also set a strategic goal of joining the European Union, but leaders in the capitals of EU member states are not ready to give Ukraine even the prospect of membership. At this point, Ukraine and the EU work together under the Association Agreement which entered into full force in September 2017. EU representatives prefer to talk about “rapprochement,” not about “integration” with Ukraine. Ukraine is an

important member of the EU’s Eastern Partnership initiative, which also includes five other countries in this region. Ukraine did not want the EU to employ a “package,” one-size-fits-all type policy with regard to the six countries but instead wanted a differentiated policy that recognized the readiness of a particular state to move to a higher degree of cooperation. The EU emphasizes its adherence to the principle of “differentiation” with regard to its Eastern partners, particularly Ukraine.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS 3.5/6

Ukraine has climbed up seven places in the Doing Business-2020 rating published annually by the World Bank and is currently ranked 64th among 190 countries.⁵¹⁵ The country was able to improve its score in 6 out of 10 indicators. Ukraine achieved the most significant progress in the “Protection of minority shareholders” category (+27 points) thanks to the disclosure of information regarding ultimate beneficial owners, and in the “Procurement of construction permits” category (+10 points).

According to a survey by the American Chamber of Commerce concerning the business climate in Ukraine, 41% of investors working in that country had to deal

with corruption in Ukraine during the past year, and a further 48% gave a negative answer to this question.⁵¹⁶ It is important that in a similar survey held in 2018, 91% of respondents said that they had to deal with corruption when doing business. Even though this survey is not representative or methodologically sound, it still demonstrates a certain positive shift in investor sentiments.

Serious discussions about land reform in Ukraine also began under the new president, and a relevant draft law was passed in first reading in November 2019. However, this document was criticized, particularly in the West, because if this version is adopted, it would not permit foreigners to buy land in Ukraine.

3.3 WESTERN SHARE IN THE SALES OF GOODS 3.5/6

The European Union continues to improve its position as the biggest trade partner of Ukraine. During the first 9 months of 2019, the turnover of trade with the EU went up by 5% (USD 33.8 billion), amounting to 42% of Ukraine’s turnover of trade with other countries.⁵¹⁷ Trade with countries from the CIS holds a 17.3% share (USD 13.9 billion).

In 2018, Ukraine’s total turnover of trade with other countries exceeded USD 104 billion, with the EU’s share almost USD 44.5 billion (43%) and the CIS’s USD 18 billion (17.3%). Ukraine’s trade turnover with the United States was over USD 4 billion in 2018 (or

4% of the total trade turnover). Despite the de-facto state of war between Ukraine and Russia, the trade relationship between the two countries did not cease as the turnover of trade amounted to USD 11.7 billion (over 11% of the total trade turnover). Trade between Ukraine and China was approximately the same level: slightly more than 9% of the total turnover. During three quarters of 2019, China surged ahead of Russia in terms of trade turnover, which reached USD 9.2 billion (versus Russia’s USD 7.9 billion during the same period).⁵¹⁸ Therefore, Ukraine’s trade with Western countries prevailed over other regions of the world.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY’S ECONOMY 3/6

In 2018, foreign direct investments in the Ukrainian economy amounted to USD 32.3 billion. Almost half of investments (USD 14 billion) had a European origin. The biggest investors in Ukraine’s economy were Cyprus (USD 8.9 billion), the Netherlands (USD 7.1 billion), United Kingdom (USD 1.95 billion), Germany (USD 1.7 billion) and Switzerland (USD 1.5 billion). Very often, “foreign”

investors were, in fact, Ukrainian businesspeople, especially when it comes to Cypriot and Dutch investments. Russia is no longer among the top five investors, even though in the last Westernization Index it ranked third in this indicator. However, it is still among the 10 largest investors in the Ukrainian economy with USD 1 billion. American investments amounted to half a billion dollars.

4 | LANGUAGE AND CULTURAL WESTERNIZATION 8.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE 1/2

In Ukraine, the subject of switching to the Latin alphabet is discussed from time to time, but these discussions are very marginalized. The new rules of Ukrainian orthography came into force in 2019. Reformist philologists described the introduction of new orthography as the “language de-Sovietization” process.⁵¹⁹ In recent years, the movement advocating Ukrainization of the spelling of Ukrainian city names in other languages also gained momentum. Thus, the country welcomed the change of the spelling of the Ukrainian capital’s name

from “Kiev” to “Kyiv” at airports across the world. Leading foreign mass media have also switched to the transliteration of Ukrainian cities according to Ukrainian, not Russian, spelling and pronouncing (for instance, the British Broadcasting Corporation made this decision in 2019). However, initiatives like these are being implemented not so much under the flag of Westernization but rather as the process of getting rid of the Soviet totalitarian past. It is also trendy in Ukraine to Latinize company and brand names.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 2/6

According to the EF English Proficiency Index which measures the level of proficiency in English in a particular country, Ukraine’s rankings worsened in 2019.⁵²⁰ Presently, it is ranked 49th among 100 countries and belongs to the group of countries with low proficiency in English. In 2018, Ukraine belonged to the group of countries whose citizens have moderate proficiency in English.⁵²¹ In the meantime, public initiatives aimed to popularize the study of English are gaining momentum in Ukraine. Thus, the GoCamp program, a new format of language camps which engage foreign volunteers, was launched in 2016. As of 2019, over a thousand foreign volunteers from 72 countries took part in this initiative; the project featured the participation of 1700 schools.⁵²² A survey by Kantar TNS Online Track showed that besides the native language, 70% of Ukrainians

claim they know English, 24% know Polish, 10% German, 5% French, and 3% for each of Italian and Spanish (regardless of the degree of proficiency).⁵²³ At the same time, 35% of Ukrainians claim they have sufficient knowledge of English to hold a conversation; and 44% believe they are proficient enough to communicate online. Since 2018, the government has been implementing an obligatory American International Foundations of Medicine (IFOM)⁵²⁴ test at all medical colleges and universities. This innovation became a professional challenge for over 90 thousand Ukrainian medical students. To evaluate the quality of knowledge of Ukrainian medical students, the Health Ministry held an experimental American test among 4,906 medical interns in 2017. Only 3% of Ukrainian interns were able to pass the test, i.e. score more than 70.5 points on a 100-point scale.⁵²⁵

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION’S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 5.5/7

Ukrainian movie theaters are dominated by foreign—first of all, American—produced films. Out of the 20 highest-grossing films shown in Ukraini-

an movie theaters during the first three quarters of 2019, only one film was produced in Ukraine; the rest were made in the West (the top twenty high-

est-grossing films earned 64.5% of the total box office).⁵²⁶ Eighteen films produced in Ukraine or coproduced with other countries premiered during the same period, but the total audience of Ukrainian films fell far behind the similar indicator for Western-made films. Thus, the most watched Ukrainian film received half a million viewers, whereas the least successful from the top 20 Western-made films had an audience of almost 1.5 million Ukrainians. The only exception is one Ukrainian-produced film, *I, You, He, She*, in which Volodymyr Zelensky was co-director and cast in the main role (the film premiered in late 2018, before the start of the presidential election campaign which he won). This film became 10th in the rating of the highest-grossing films. Still, Ukrainian films demonstrate substantial achievements: the aggregate box office earnings of Ukrainian-produced films released in 2018 exceed-

ed \$7 million, which is a record-high figure for the Ukrainian film industry.⁵²⁷

TV channels indicate a growing preference for Ukrainian film producers. Some Ukrainian TV serials are enjoying success beyond the domestic market. Thus, the Ukrainian melodrama *Kriposna* broke the viewing record in Poland.⁵²⁸ Netflix, an American streaming service, bought the right to show the Ukrainian TV serial *Servant of the People* starring Volodymyr Zelensky.⁵²⁹

In terms of reach, the leading social media is Facebook, followed by VKontakte, and Instagram. In January 2019, the Facebook audience was 55%, VKontakte 28%, Instagram 31%, and Twitter 10%. The reach of the Russian social media Odnoklassniki is 18%.⁵³⁰ Western social media experienced a substantial increase in popularity versus their Russian counterparts.

5 | WESTERNIZATION OF LIFESTYLE 7/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 3.5/5

A growing number of Ukrainians have the opportunity to travel to European Union member states after Ukraine was granted a visa-free regime. Moreover, low-cost carriers are actively entering the Ukrainian market. Sixty-three new low-cost airline-operated flights connecting Ukraine with, in particular, tourist destinations in Europe and the rest of the world were launched in 2019.⁵³¹ According to data from the State Border Guard Service, the number of Ukrainians who visited Europe as of early June 2019, after two years of the visa-free regime with the EU, increased 4.2 times and reached 2.35 million.⁵³² The largest number of Ukrainians (over 1 million persons) crossed the border with Poland. Tour operators report that most Ukrainians still prefer more affordable resorts in Egypt and Turkey (up to 90% of the total tourist flow from Ukraine).

In July 2019, the top five most popular destinations among Ukrainians were: Turkey, Egypt, Spain, Greece, and Bulgaria.⁵³³ However, it is worth noting that tourists who prefer to travel to European countries can organize their trip themselves, without assistance from travel agencies, which affects the count of tourists.

Many Ukrainian citizens also travel to other countries to work there. A study by the State Statistics Service for 2015-2017 shows that 1.3 million Ukrainians were working abroad. In its 2018 report the Institute of Demography estimated the total number of Ukrainians working abroad to be between 1.5 and 5 million.⁵³⁴ The largest number of Ukrainian citizens working abroad are in Poland (about one and a half million according to various estimates), followed by Russia.

In addition, more young Ukrainians take advantage of education programs and choose to study in European Union states. An analysis by the New Europe Center shows that during 2014-2018, more than 10 thousand Ukrainians were

studying at EU universities under the Erasmus+ program alone⁵³⁵ (during ten years preceding the Revolution of Dignity, slightly more than 300 students went to study in the EU under a similar program).

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES 2/3

Ukraine is becoming a more attractive country for large foreign brands. Thus, over 45 international retail chains (in particular, H&M, Under Armour, Zara Home and others) came to the Ukrainian market after 2017.⁵³⁶ IKEA also announced entry into the Ukrainian market. Ukrainians have received access to three technological services: Apple Pay, Google Pay, and Xoom. New airline companies are entering the Ukrainian market, in particular, Ryanair, the largest European low-cost carrier. International hotel chains, such as Aloft and Mercure, also went operational in Ukraine. The volume of retail trade is steadily growing, increasing by 7.2% in February

2019.⁵³⁷ This trend attracts more and more large retailer companies: thus, French-based Auchan Group, one of the largest retail chains in the world which came to the Ukrainian market in 2008, decided to expand its network by building retail complexes in Kyiv, Kharkiv, Zhytomyr, Dnipro, and Chernivtsi. Decathlon, a French retailer of athletic apparel, opened stores in Kyiv and is going to open its outlets in Odesa and Lviv.⁵³⁸ Ukraine has also welcomed convenient services initially launched in Western countries, such as Uber taxi service (since 2016) and Glovo, an on-demand courier service delivering various goods (since October 2018).

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE 1.5/2

Twenty-six million Ukrainians are Internet users, which is more than 60% of the country's total population.⁵³⁹ This indicator is continuously growing in Ukraine: two years earlier, the number of users was almost 5 million less. The majority of Internet users are Ukrainians aged between 25 and 44 years. Sixty-six percent of Internet users use smartphones to access the internet; 40% use laptops at home; 36%

use home desktop computers; and 5% use desktop computers at work.⁵⁴⁰

According to the most recent Newzoo's Global Mobile Market Report for 2018, Ukraine is ranked 21st in the world in terms of the number of smartphone users. A total of 21.3 million Ukrainians (almost half of the country's population) have a smartphone. This indicator has doubled compared to the previous rating.⁵⁴¹

SCORE, POINTS/OUT OF	Political Westernization	Legal Westernization	Economic Westernization	Language and Cultural Westernization	Westernization of Lifestyle
		7/25	6/25	10/25	6.5/15

1 | POLITICAL WESTERNIZATION 7/25

1.1 DEGREE OF POLITICAL FREEDOM, 3/10

One of the main political events of 2019 was the parliamentary elections of December 22. These elections did not change the political life of the country, because, as with the previous President, Islam Karimov, all five parties elected to the Legislative Chamber of the Oliy Majlis (the name of the parliament in Uzbek)⁵⁴² are loyal to and controlled by the authorities.

Non-independent elections are based, first of all, on the fact that not a single real opposition party was allowed to participate in the elections, which leaves voters with no real choice.⁵⁴³ There are no signs that the Uzbek authorities are ready to register parties that are created out of the initiative of citizens.

In the field of the media, the situation has somewhat improved under the new President Mirziyoyev. Local journalists felt relatively more freedom in their professional activities. More critical material has appeared in the local press. Ordinary citizens also began to speak more freely on social networks. If in 2018 there was a practice of restricting access to some social networks, especially Facebook and YouTube, then in early 2019 restrictions on these two networks were lifted.⁵⁴⁴

At the same time, in the second half of the year there were again signs of attempts by the authorities to restrict freedom of speech. Thus, the authorities placed legal responsibility on the authors of posts on social networks, especially if the authors are from the media, and for the authors to comment on their posts. Now, authors of posts should remove not only comments that are against the law (for example, inciting ethnic or religious hatred), but also be responsible for the reliability of comments in which certain facts are reported.⁵⁴⁵

In early November 2019, the Tugri.uz news site, which was created in July of this year, was suddenly closed without prior warning or explanation but gained popularity due to critical materials at the time of closing.⁵⁴⁶

On September 22, blogger Nafosat Ollashukurova was detained for being involved in a street protest in the Khorezm region, beaten in a police car, and then forcibly placed in a psychiatric unit,⁵⁴⁷ which was perceived by observers as a return to the practice of punitive psychiatry.

1.2 PRO-WESTERN PARTIES IN THE PARLIAMENT 2/8

For the Uzbek public, as well as the corps of parliamentarians, issues related to EU integration are unfamiliar, are not of great inter-

est, and are not the subject of discussion in the public field. Also, the public and parliamentary parties are not interested in issues of

joining NATO. In practical terms, for Uzbekistan this issue is not worth it. On the issue of NATO, a significant part of the population is influenced by the Russian media, especially television, and adopts anti-American sentiment from them. However, among parliamentary parties, attitudes toward NATO are not

discussed at all, since they are not the subject of their interest.

At the same time, there are almost no opponents to trade with Western countries. Almost all western products in the Uzbek market are welcome. There are no special differences between parliamentary parties and public sentiments on this matter.

1.3 PUBLIC OPINION OF WESTERN CIVILIZATION 2/7

The attitude towards Western countries in Uzbek society remains twofold. Most of the population understands that the West is superior to all the former Soviet republics, including Russia, in technology, level and quality of life. Many dream of going to Europe or North America and settling there. Consumer demand is for goods from the West over all other countries. At the same time, under the influence of Russian media, and in terms of politics, part of the population directs their sympathies to

the Russian Federation. This is especially noticeable among the Russian-speaking population. Meanwhile, liberal-minded intellectuals and professionals are pro-Western, and perceive the Kremlin's foreign and domestic policies negatively.

On this issue, the population has been divided into two camps, supporters of joining this union and those who understand that joining it will mean a step towards losing the country's political independence. There are no survey data that could be trusted on this issue.

2 | LEGAL WESTERNIZATION 6/25

2.1 COMPLIANCE OF THE CONSTITUTION WITH THE REQUIREMENTS OF WITH THE VENICE COMMISSION, 1/6

Although Uzbekistan is not a member of the Venice Commission, some cooperation between the two parties has taken place over the last 2-3 years. In September 2018, a delegation of the commission visited Uzbekistan, and in October issued an opinion on the draft Electoral Code, which was prepared by the Uzbek government for approval,⁵⁴⁸ and a number of the commission's recommendations were agreed between the parties. In June 2019, the new version of the Electoral Code was approved by Parliament.⁵⁴⁹

Although some recommendations were introduced into the Electoral Code, other important recommendations of the Venice Commission were not taken into account, especially the recommendation on the registration of independent candidates. This suggests that the Uzbek authorities still refuse to guarantee equal rights to all political groups in the country to participate in the election process. Voters are still being asked to choose between party candidates who are loyal to, and controlled by, political leadership.

2.2 INDEPENDENCE OF THE COURTS, 1/7

The justice system does not meet international standards, being neither independent, nor free from

systematic corruption, nor sufficiently professional. According to the results of the World Justice Project

(WJP) Rule of Law Index for 2019, Uzbekistan improved its position slightly, moving from 96th place to 94th.⁵⁵⁰ According to the WJP report, the situation in the country remains extremely unfavorable in terms of restricting the arbitrariness of the authorities (118th position out of 126 countries), openness and transparency (119th position), corruption of the

authorities (95th position), and respect for the fundamental rights of citizens (109th position), that is, by the key criteria of the rule of law.

In principle, the government accepts the services of international organizations in promoting justice reform. However, it is too early to talk about practical results on creating an independent judicial system.

2.3 LEGISLATION IN THE AREA OF HUMAN RIGHTS, 2/6

In 2019, there was little progress in legislative initiatives in the field of human rights. Freedom of association and assembly remains limited. The restrictions on registration of non-governmental organizations, adopted in 2005, are still maintained, and there is no noticeable increase in officially registered non-governmental organizations created on the initiative of citizens in the country.

Although substantial progress has been made over the past two years in terms of limiting the practice of forced labor in the cotton sector, the government has

not taken steps to reform this sector, first of all, by abolishing the compulsory state order system, the so called quotas on cotton delivery, which has been the institutional driver of forced labor practice.

In 2019, efforts by the authorities to demolish housing for new construction were widespread. This was largely motivated by a corrupt conspiracy between local authorities and construction companies. Attempts to demolish houses and evict residents to other areas with poorer social infrastructure, without adequate compensation were, in most cases, against the law.

2.4 NUMBER OF ACQUITTALS, 2/6

Under the previous president, Islam Karimov, the courts passed mostly convictions. Thus, in 2012-2016 in Uzbekistan, only seven people were acquitted in courts.⁵⁵¹ With the appearance of Shavkat Mirziyoyev in 2016, the situation, in terms of statistics on convictions, began to change for the better. According to the Ministry of Justice, in 2017, 262 people were acquitted in Uzbekistan, and in 2018, 867 people.⁵⁵² The percentage of acquittals is now within 1.8%, which is

still much lower than in more advanced countries in terms of rule of law indicators.⁵⁵³

Decriminalization of a number of articles of the Criminal Code, as well as the prohibition for judges to return cases for further investigation, contributed to the growth of acquittals. Previously, judges who doubted the validity of the indictment preferred not to conflict with prosecutors, but to return cases back for further investigation.

3 | ECONOMIC WESTERNIZATION 10/25

3.1 EU AND WTO MEMBERSHIP OR ASSOCIATION, 2/7

In June 2019, the Council of the European Union approved a new strategy on relations with the countries of Central Asia,⁵⁵⁴ aimed at ex-

panding partnership with this region. Uzbekistan has also recently activated its diplomacy with the European Union and its members. At the same

time, there were signs that the government of Uzbekistan was considering the country's accession to the Eurasian Economic Union, which caused a mixed reaction in society. A number of local experts made a statement that it would be in the country's interest to join the WTO. A similar signal came from Washington with a call to expedite accession to the WTO,⁵⁵⁵ which forced

the government of Uzbekistan to declare that it is actively working on this issue and held negotiations with the WTO.⁵⁵⁶ However, it is not yet clear when these negotiations will end. Since July 2019, Uzbekistan began again to increase customs duties on imports "in the interests of the domestic producer." Joining the WTO will force the government to lower these tariffs.

3.2 EASE AND TRANSPARENCY OF DOING BUSINESS, 3.5/6

Uzbekistan has been improving its Doing Business rating recently, having risen from 79th place to 69th compared to last year.⁵⁵⁷ Uzbekistan has one of the best positions in terms of speed of registration and starting a business (8th place), and one of the worst in cross-border trade (152nd position). Uzbekistan made a step forward towards the establishment of transparency standards with the admission of Moody's experts to report on economic statistics and assign the country a long-term credit rating of "B1," in February 2019, thus completing the country's first assessment with the Big Three rating agencies on the state of its econ-

omy (previously, in December 2018, Fitch and S&P gave their estimates).⁵⁵⁸

A great threat to local businesses and international investors is corruption of state bodies. In terms of the corruption perception index, Uzbekistan holds one of the lowest ranks in the world, taking the 158th place⁵⁵⁹ at the end of 2018, even worsening its position slightly compared to 2016 (156th position) and 2017 (157th position). In May 2019, the government adopted a two-year anti-corruption reform program, but there is no information yet on what progress has been made since its implementation.

3.3 WESTERN SHARE IN THE SALES OF GOODS, 2/6

Uzbekistan is gradually increasing foreign trade turnover. According to official figures, in January-August 2019, it amounted to USD 28.4 billion, an increase of USD 7.9 billion compared to the same period last year.⁵⁶⁰

The largest volume of foreign trade turnover among the countries of the world was recorded with China (18.4%), the Russian Federation (14.5%), Kazakhstan (8.1%), the Republic of Korea (6.5%), Turkey (5.7%), Germany (2.3%), and Kyrgyzstan (2.0%).⁵⁶¹ So far, trade turnover with the EU countries remains small.

Of the EU member states, only Germany entered the top 10 countries with the largest trade turnover with Uzbekistan. Latvia is in 11th place. Uzbekistan has the potential to supply cotton textiles to European countries, but two things impede this: Uzbek cotton is produced using forced labor, which reduces the interest of Western companies in importing cotton; the flow of foreign investment in the textile industry of Uzbekistan is also small due to the uncertainty on the part of foreign investors that their business would be sufficiently protected in this country.

3.4 WESTERN INVESTMENTS INTO THE COUNTRY'S ECONOMY, 2.5/6

According to United Nations Conference on Trade and Development, the volume of FDI in the country remains small, although there is a tendency to increase its inflow. At the end of 2018, the volume of FDI amounted to USD 412 million, an increase from USD 98 million in 2017.⁵⁶² The increase in FDI inflows is due primarily to the liberalization of the foreign exchange policy in 2017. Now companies do not need, as in the past, to resort to the services of the black market and various shadow schemes to

purchase and repatriate their profits into hard currency. At the same time, per capita FDI amounted to USD 12.7 in 2018, while in neighboring Kazakhstan it was USD 210. Even Tajikistan, a less affluent country and in a less advantageous geographical location, is ahead of Uzbekistan in FDI per capita (USD 35.6 in 2018). The share of FDI from EU countries is negligible. Among the countries from which investments mainly come, China, the Russian Federation, Turkey, and South Korea, dominated in 2019.

4 | LANGUAGE AND CULTURAL WESTERNIZATION 6.5/15

4.1 USE OF THE LATIN ALPHABET IN THE NATIVE LANGUAGE, 2/2

Although Uzbekistan switched to the Latin alphabet in 1993, this did not contribute at all to the country's cultural integration towards the West. On the contrary, the young generation that began to receive education after 1993 (with respect only to Uzbek-language schools) turned out to be cut off from literature in the Uzbek language that was published during the Soviet period. The book market of Uzbek printed materials was also divided into two sectors—literature published in Latin alphabet (mainly chil-

dren's fiction and textbooks) and books aimed at an adult reader (fiction and non-fiction). In May 2019, a new version of the Latin alphabet⁵⁶³ was adopted, which canceled some letters and introduced new ones. This by no means contributed to the development of the publishing business and improved access of the young generation to world culture, since the number of translations of world literature and specialty books into the Uzbek language in the Latin alphabet is negligible in the present period.

4.2 PROPORTION OF THE POPULATION PROFICIENT IN THE MOST COMMON LANGUAGES OF THE WEST (ENGLISH, FRENCH, GERMAN, SPANISH) 1.5/6

In terms of knowledge of the English language, Uzbekistan is at the very bottom of the corresponding international rating, being in 95th place out of 100.⁵⁶⁴ Higher education institutions continue to operate in the country, in which English is taught better than in other educational institutions. These are the University of World Languages, a branch of Westminster University, the Univer-

sity of World Economy and Diplomacy, branches of the Inha University of Korea and the Singapore Institute for Management Development, and the Turin Polytechnic University. The number of such educational institutions will grow, and the government supports this trend.

The use of the English language is increasing, but slowly. Growth is visible mainly among students

who go to study at Western universities or study at local branches of foreign universities, as well as employees of international organizations and companies. Branches of the British Council, Goethe In-

stitute, and the Hugo Center in Tashkent contribute to the study of English, German, and French languages, in which courses for the relevant languages have been created.

4.3 SHARE OF WESTERN PRODUCTS IN THE NATION'S MOVIE THEATERS AND ON TV CHANNELS, SHARE OF WESTERN INTERNET SITES AND SOCIAL MEDIA (FACEBOOK, INSTAGRAM, TWITTER) 3/7

Western television channels are hard to access and not very popular in Uzbekistan, primarily due to poor knowledge of foreign languages among the majority of the population. However, Western film distribution is dominant. The audience is aware of what new films are released in the West, especially in Hollywood and especially in the genre of blockbusters. Mostly American films are listed in the movie section on the local site Afisha.uz. The December 2019 program includes Jumanji: A New Level, The Six Outlaws, Star Wars: Skywalker, and Sunrise.⁵⁶⁵

In recent years, social networking applications have become very popular in the country, especially Telegram, YouTube, and Facebook (67%, 25%, and 19% according to the latest survey in 2019).⁵⁶⁶ Previously, Russian applications dominated in this area, but over the past two or three years they began to be replaced by Western ones. Since mid-2018, authorities have blocked access to Facebook and YouTube, but at the beginning of 2019, they were unblocked. However, while fearing reprisals, some Facebook users still use anonymous accounts using fake names and do not reveal their real name.

5 | WESTERNIZATION OF LIFESTYLE 3/10

5.1 PERCENTAGE OF THE POPULATION WHO HAVE VISITED WESTERN COUNTRIES 1/5

Due to low living standards and low incomes, citizens of Uzbekistan, unlike, say, Russians or residents of Kazakhstan, rarely have the opportunity to travel to Western countries for leisure or for business purposes. Basically, in terms of foreign travel destinations, Russia, Turkey, Thailand, and some neighboring countries dominate.

A huge number of Uzbek citizens travel to the Russian Federation every year as labor migrants. For some of them, this has the effect of socio-cultural integration with Russian society. After the Russian Federation, Turkey, Kazakhstan, and South Korea are popular destinations for labor migration. The number of labor migrants in Europe is still very small due to the visa barrier.

Under Karimov, since 1997, the Umid program has been in operation for sending Uzbek students

to study in Western countries, but it lasted only one year. In 2003, this program was transformed into the Foundation of the President of the Republic of Uzbekistan, Istedod, to organize advanced training, internships and training scholarships abroad, but with much less funding. In 2018, this was again transformed into the El-Yurt Umidi Foundation ("Hope of the Nation") for training specialists abroad and encouraging dialogue with compatriots, also with little funding so far.⁵⁶⁷

Currently, Uzbek students study in Western universities mainly at their own expense or with the support of international donors who offer a very limited number of places under grants and mainly under master's programs.

5.2 PRESENCE OF WESTERN FRANCHISE COMPANIES, 0.5/3

So far, local brands and the corresponding cuisine dominate in the restaurant business of Uzbekistan. But in recent years, the presence of restaurants offering a menu of foreign dishes has grown rapidly. However, the number of franchise networks is growing slowly. Here, mainly Russian franchises dominate. The Russian site *franshiza.ru* counted only 74 franchises across all sectors of the economy,⁵⁶⁸ and Western fast food brands such as Subway, Starbucks, McDonald's, Dunkin', Pizza Hut, Burger King are almost absent on this list. Only in June this year, the Wendy's⁵⁶⁹

restaurant opened. Until September 2017, an obstacle to opening branches of these franchises was a highly centralized foreign exchange policy, which impeded the export of hard currency profits from the country, as well as numerous restrictions on private business activities. The situation in this regard has improved, but so far not so that global franchises rush to Uzbekistan. Although food in fast foods is cheap in the West, not every Uzbek citizen can afford it with their low incomes. This is another barrier discouraging the arrival of franchises in the country.

5.3 MOBILE INTERNET COVERAGE, SMARTPHONE USAGE, 1.5/2

Over the past few years, until the beginning of 2019, the situation in the field of telecommunication services was extremely unsatisfactory—Internet speed was slow, and the cost of traffic was high. This was due in part because of a corruption scandal in the mobile telecommunications sector in 2012, the result of which was that one of the mobile operators, the Russian company MTS, left the country. As a result, the competitive environment in the sector was severely undermined. In 2018, Uzbekistan was in 110th place in the world in terms of Internet speed.⁵⁷⁰ Only by May 2019 did the situation improve. The average speed of wired Internet increased from 11.8 Mbit/s in 2018 to 18.92 Mbit/s in July 2019.⁵⁷¹

Much work is being done to improve access to broadband. Prices for international traffic are significantly reduced.⁵⁷² International traffic in the country is limited due to the fact that Uzbekistan does not have direct access to the sea (there are only two such countries in the world—another country is Luxembourg). Therefore, the state is heavily

dependent on landlines for international communications—with the increase in the number of users, traffic becomes slower.

This problem (increasing the speed of international traffic, and accordingly, improving access to broadband Internet) is now being solved by the World Bank together with the government of Uzbekistan within the framework of the Digital CASA program.⁵⁷³ The current government also intends to attract private investment in order to deploy 277,000 km of fiber-optic infrastructure by 2021.⁵⁷⁴

However, to date, the situation in the field of mobile Internet has not improved significantly compared to 2018. Uzbekistan's world ranking in terms of mobile Internet speed dropped to 136th place.⁵⁷⁵

As of April 2019, there were more than 22 million mobile subscribers in the country, i.e. 67% of the total population, including 16 million mobile Internet users. In 2019, mobile operators have planned more than three thousand new base stations in all regions of the republic.⁵⁷⁶

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WESTERNIZATION

Westernization is a process whereby societies adopt Western standards for cultural norms and codes of conduct, such as individual freedom, liberal democratic governance, respect for human rights and fundamental freedoms, rule of law, secularism, and protection of private property in areas such as industry, technology, law, politics, economics, and lifestyle.

In the last few centuries, Westernization has served as a catalytic influence in the acceleration of global growth in equatable ways as with modernization.

Rather than reflective of a single society's values, however, Westernization is more than a unidirectional influence of one country over another. Over time, the process of Westernization can produce a two-sided exchange. As a country becomes more Western, it, in turn, can also produce reciprocal influence on countries in which Western ideas originated.