

Reconstruction in Yemen

From Rebuilding to Reshaping the State and Economy

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Executive Summary

This paper addresses reconstruction in Yemen as a multi-dimensional national trajectory, not limited to rebuilding what war has destroyed, but extending to restoring state functions, reactivating the economy, and repairing trust and the social contract. It proceeds from the reality that Yemen faces an exceptional context characterized by the overlap of conflict effects with extended economic and institutional collapse, and division in decision-making centers, alongside the expansion of war economy and patronage networks, which makes any narrow approach to reconstruction based on decision-making centers, disconnected construction projects, or uncontrolled financing commitments-vulnerable to waste, capture, and reproducing the dysfunction of the pre-2014 era.

The paper presents a comprehensive approach and a sequenced framework for reconstruction linking four interconnected phases: humanitarian response, early recovery, reconstruction, then long-term development and investment. It emphasizes that Yemen cannot afford to wait for the “ideal next day,” and that with ongoing conflict, it remains essential to protect remaining capacities and reduce future reconstruction costs, while distinguishing between what can be implemented in the context of war and what should be conditioned on political, security, and institutional thresholds.

At the analytical level, the paper diagnoses a set of governing risks that could undermine any reconstruction trajectory if not addressed from the outset. Most notably: institutional fragmentation and multiple decision-making centers; the risk of war economy capture of reconstruction projects; weak governance and implementation capacity; absence of reliable data and needs prioritization; poor phase sequencing; erosion of the investment environment; and geographic and social justice sensitivity.

In light of this, the paper proposes that the most realistic model for managing reconstruction in Yemen is a “hybrid” model based on clear national leadership that controls vision, standards, and financing coordination, alongside decentralized execution within a unified governance framework involving local-level participation and implementation partners under clear governance and accountability mechanisms. It also emphasizes engaging the private sector and utilizing multiple financing tools (grants, concessional financing, blended finance) under a single national umbrella, while avoiding parallel channels that may accelerate spending but fragment impact and weaken the state.

The paper concludes with a package of policy recommendations directed at decision-makers including: adopting a national definition based on clear phase sequencing: humanitarian response, early recovery, reconstruction, then long-term development and investment; establishing a reference national vision for reconstruction; establishing a high national authority for reconstruction with coordinating and strategic functions (not direct implementation), overseeing priorities, standards, financing coordination, and managing relationships with partners within a unified national framework; not launching major projects or pledge conferences until achieving a minimum level of institutional readiness and unified national data on damages and needs that enables objective planning and limits politicization. It also recommends holding a joint national preparatory meeting before any international reconstruction conference to unify concepts, arrange roles, and narrow realistic priorities, which transforms subsequent conferences from general pledge platforms into realistic implementation stations.

In this context, the Development Champions Forum (DCF) affirms its role as a Yemeni platform for policy dialogue that contributes to building national consensus on reconstruction, its financing, and governance, and pushing the transition from discussion to impact through policy dialogues and organized advocacy supporting Yemeni ownership of the reconstruction trajectory.

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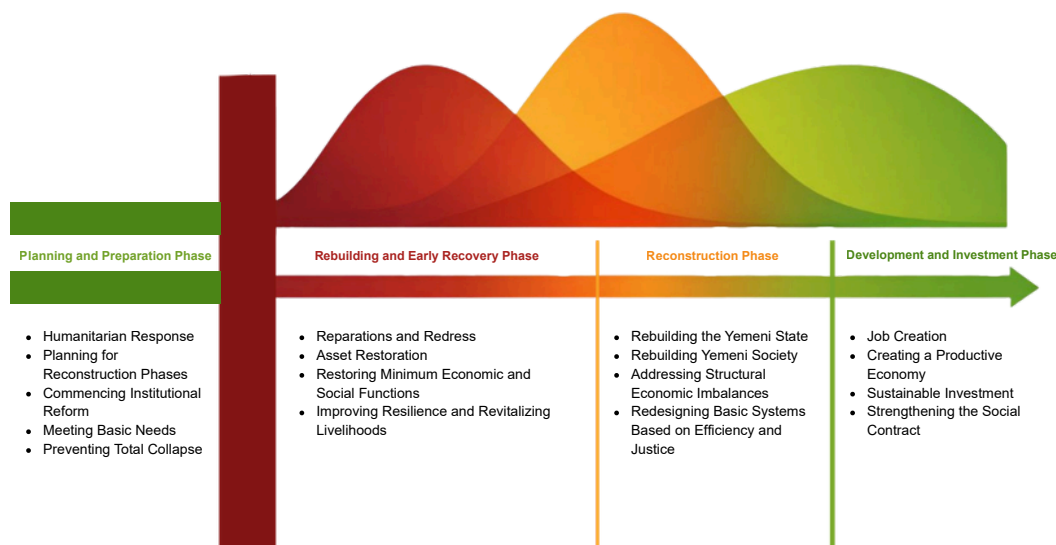
Introduction

Reconstruction in Yemen unfolds in an exceptional context shaped by the overlap of armed conflict, prolonged economic collapse, and institutional erosion, making it one of the most complex reconstruction cases in the region. The challenge is not limited to the scale of physical destruction caused by years of war; it also extends to state breakdown, multiple centers of power and decision-making, the disruption of the relationship between politics and the economy, and declining public capacity for planning, implementation, and oversight. In this setting, reconstruction becomes a critical test of Yemen's ability to restore state functions, reorder development priorities, and chart a realistic path from a crisis economy toward a more stable and inclusive model.

Over more than a decade, core infrastructure - roads, ports, electricity, water, health, and education - has suffered extensive damage, while public institutions have experienced unprecedented erosion in their ability to provide services. Institutional fragmentation has appeared in the duplication of monetary and financial authorities, multiple taxation and spending systems, and broken decision chains. This has created space for war-economy and patronage networks to expand at the expense of productive activity and sustainable employment, while deepening social and geographic disparities.

By contrast, the international response has so far remained fragmented: a large humanitarian system focused on emergency response, limited early-recovery programs with mixed results, bilateral and regional initiatives, and scattered local efforts by local authorities, civil society, and the private sector. Although these interventions have been essential in relieving suffering and preserving minimum levels of survival, they continue to operate without a comprehensive Yemeni framework that reorders priorities, defines roles, and prevents reconstruction from becoming a set of parallel tracks or a tool of influence and patronage for conflict networks and warlords.

This paper proceeds from the premise that reconstruction in Yemen is not a purely technical process to be postponed until the end of conflict. Rather, it is a national, multi-dimensional trajectory that intersects humanitarian, service, economic, institutional, and political dimensions. Accordingly, the paper proposes a comprehensive and sequenced approach that treats reconstruction as a transition beginning with protecting human dignity and restoring minimum economic and social functions, then rehabilitating infrastructure and services on stronger foundations, and ultimately rebuilding state institutions and legitimacy to support a gradual shift from a crisis economy to a growth and investment economy led by an effective state and a productive private sector.



Chapter One

Reconstruction in Yemen - The Comprehensive Approach and Conceptual Scope

Defining "reconstruction" is the essential starting point for any serious discussion of Yemen's future after years of conflict. Reducing reconstruction to rebuilding destroyed physical assets does not reflect the nature of the Yemeni crisis or respond to its structural challenges. It also risks reproducing the same patterns of fragility that predated the war and contributed to its outbreak.

This paper therefore adopts a comprehensive approach to reconstruction that establishes a coordinating framework, maps relationships among stakeholders, distinguishes between levels of intervention, and links reconstruction to institutional reform, economic transformation, and rebuilding trust and the social contract.

Definition of Reconstruction

This paper defines reconstruction in Yemen as a multi-dimensional national transition process that links physical rebuilding, economic recovery, institution-building, and repair of the social contract. This definition provides the foundation for the following chapters, which examine structural challenges, institutional options, financing mechanisms, and governance in a realistic and implementable way.

Distinguishing Between Overlapping Concepts: Rebuilding, Recovery, and Comprehensive Reconstruction

Although the terms rebuilding, recovery, and reconstruction are often used interchangeably, they refer to different processes with distinct objectives, tools, and time horizons. These distinctions matter because they affect priority sequencing, policy design, and how success is measured.

Rebuilding refers to restoring damaged or destroyed physical assets, whether public infrastructure or private property. It is a necessary step, but its impact remains limited if it is carried out in isolation from reforming the systems that operate, own, and sustain those assets.

Recovery goes beyond physical rebuilding to include restoring minimum economic and social functions, improving resilience, and revitalizing livelihoods, especially in phases that precede or accompany the end of conflict. Recovery focuses on reducing future losses and preserving remaining human and institutional capacity, preventing further decline into poverty and systemic breakdown.

By contrast, this paper uses comprehensive reconstruction to describe a broader and longer-term process of rebuilding the state, society, and economy together. It aims not only to repair what was destroyed, but also to address structural imbalances that accumulated before the war and deepened during it, and to redesign core systems on more efficient, equitable, and sustainable foundations.

Integrated Dimensions of Reconstruction According to the Comprehensive Approach

The comprehensive approach to reconstruction assumes that as a multi-dimensional process, it cannot be reduced to a single sector, ministry, authority, or separate financing program. In the Yemeni context, experience has proven that dealing with each dimension in isolation from others leads to partial, short-lived results. Therefore, this paper sees reconstruction as necessarily designed and executed as an integrated package comprising four interconnected dimensions.

The first dimension is infrastructure and basic services. The challenge here is not limited to rehabilitating damaged assets, but extends to restoring the system's capacity to deliver regular, fair, and sustainable services. Rehabilitating a facility without ensuring operational financing and maintenance leads to temporary results or rebuilding an asset without core problem treatment. Thus, service reconstruction becomes a test of state capacity to manage public assets, not merely implementing construction projects.

The second dimension relates to economy and employment. Reconstruction cannot be considered successful if limited to capital spending without reviving economic activity or creating sustainable employment opportunities. This dimension requires linking reconstruction with stimulating productive economy, supporting local value chains, enabling small and medium enterprises, and reactivating sectors that constrain private sector activity, including access to financing and energy, regulatory environment stability. Reconstruction that does not reflect on livelihoods and employment opportunities risks losing its social legitimacy.

The third dimension is institutions and governance, the most sensitive and impactful dimension in the Yemeni context. Reconstruction cannot succeed under institutions incapable of planning, implementation, and oversight. This dimension includes rebuilding public finance systems, enhancing public investment management, developing contracting and procurement frameworks, strengthening oversight bodies, and enabling local authorities within a disciplined national framework. Without institutional governance, reconstruction turns into unsustainable spending flows, increasing corruption and capture risks, and undermining trust in the state rather than repairing it.

The fourth dimension relates to social contract and trust, a dimension often neglected in traditional reconstruction approaches despite its critical importance for stability. Reconstruction, at its core, is not merely a material process, but a political and social process that redefines the relationship between state and citizens. This includes addressing displacement, property, and reparations issues, ensuring fair geographic and social resource distribution, and involving local communities in priority-setting. Reconstruction perceived as unjust or unfair may transform into a factor of tension and conflict rather than a driver of stability.

Why Reconstruction Cannot Be Separated from Institutional Reform

The Yemeni experience, like that of other conflict-affected countries, confirms that separating reconstruction from institutional reform is a reliable way to reproduce fragility. Building infrastructure without reforming taxation and public expenditure systems means there will be no sustainable funding for operations and maintenance. Expanding investment without transparent contracting and procurement rules opens the door to capture by war-economy networks. Likewise, empowering implementers without a clear national framework weakens national ownership and undermines state legitimacy rather than strengthening it.

Chapter Two

Structural Challenges and Governing Risks for Reconstruction in Yemen

(What Could Cause Reconstruction to Fail Even If Funding Is Available?) Reconstruction in Yemen faces a complex environment that exceeds the usual technical and financial challenges in countries emerging from conflicts. The long conflict has not only left material destruction, but has reshaped economic structure, power nature, incentive patterns, and produced a system of interests that feeds on fragility and division. In this context, reconstruction cannot be viewed as a neutral or technical process, but as a high-risk trajectory governed by interlinked political, institutional, and economic considerations.

This chapter aims to identify the most prominent structural challenges and risks that could undermine any reconstruction trajectory in Yemen if not considered from the earliest design and implementation phases.

First

Institutional Fragmentation and Multiple Decision-Making Centers

Institutional fragmentation is among the most dangerous challenges facing reconstruction in Yemen. With parallel authorities, multiple decision-making centers, and dual legal and financial frameworks, an unstable environment for planning, implementation, and accountability is created. In such a context, basic questions—who decides? who implements? who monitors?—become contentious, with no clear rules.

This fragmentation not only hinders project implementation, but also weakens the credibility of any national reconstruction framework before international partners, pushing some donors to bypass state institutions, which deepens the vicious cycle between state weakness and eroding national ownership.

Second

War Economy and Risk of Reconstruction Capture

Years of conflict have produced an economy based on patronage, supply chain control, irregular levies, and monopolistic concessions. One of the most dangerous risks is that reconstruction itself becomes an extension of this economy, through capture by influential networks of project contracts, supply monopolization, or directing investments toward areas or sectors serving narrow interests.

In the absence of strict rules for transparency and competition, resource injection may strengthen these networks instead of dismantling them, which undermines reconstruction's developmental impact and increases inequality and social tension levels, transforming reconstruction from a stabilization tool into a source of new conflict.

Third Weak Governance and State Implementation Capacity

Yemeni state institutions suffer from deep erosion in administrative and technical capacity, as well as oversight capacity, resulting from years of fragmentation, loss of skilled personnel, and resource weakness. This weakness appears clearly in vital areas for reconstruction management, including public investment management, tendering and contracting procedures, monitoring and evaluation, and asset and maintenance management.

Under these constraints, large complex projects carry high risks, whether from delay, implementation stoppage, quality weakness, or deviation from objectives. Likewise, weakness of oversight and accountability systems increases corruption and misuse probability, weakening citizen and donor trust alike.

Fourth Absence of Reliable Data and Needs Politicization in Planning Phase

Any sound reconstruction process depends on accurate data about damage scale, needs, and actual distribution of affected populations geographically and socially. However, the Yemeni reality is characterized by data fragmentation, source multiplicity, methodology variation, and in some cases politicization.

In this context, "needs" transform from an objective topic into political negotiation material, which complicates prioritization, delays execution, and weakens legitimacy of decisions made. Also, the absence of a unified, reliable national database limits state capacity to negotiate with donors on clear bases, making reconstruction vulnerable to fragmentation and disconnected initiatives.

Fifth Risks of Poor Phase Sequencing

Comparative experiences show that poor phase sequencing is one of the common causes of reconstruction operation failures.

In the Yemeni case, this risk appears in two opposing directions: whether by rushing to launch major projects without a minimum level of institutional and governance stability, or, conversely, confining interventions to short-term responses without building a clear transitional path toward comprehensive reconstruction. Both directions carry high risks: the first deepens waste and corruption, and the second entrenches emergency economy and delays real recovery.

Sixth

Weak Investment Environment and Erosion of Private Sector Trust

Despite the vital role played by the Yemeni private sector in maintaining goods and services flow during war years, it operates in a highly unstable environment, characterized by security and legal instability, multiple fees and levies, treatment discrimination, and absence of effective protection for investments.

Under these circumstances, expecting active private sector contribution to reconstruction without addressing these imbalances becomes unrealistic. Similarly, the continued exit of Yemeni capital abroad represents a double loss: depriving the local economy of investment, and weakening the national partnership base in reconstruction.

Seventh

Geographic and Social Justice as a Latent Risk

Justice in reconstruction project distribution is one of the most sensitive files. Geographic or social disparity in benefiting from reconstruction, whether real or perceived, may fuel marginalization feelings, undermine trust in the state, and reproduce conflict dynamics.

These risks increase in the absence of declared criteria for priority-setting, weak local community participation in planning, and failure to address return, property, and reparations issues in a systematic and transparent manner.

Chapter Three

Institutional Options and Reconstruction Management Models in Yemen

Institutional questions about financing volume or priority ordering in reconstruction trajectory are equally important. Comparative experiences in countries emerging from conflicts clearly indicate that absence of a clear institutional framework, or burdening unsuitable structures with roles exceeding their capacity, often leads to effort fragmentation, decision erosion, and trust erosion, even in cases where financial resources are available. In the Yemeni context, these problems multiply due to financial resource weakness and the existing institutional weakness, multiplicity of actors, and sovereignty and national ownership file sensitivity.

This paper's approach assumes that the core question is not "which institutional model is theoretically best," but rather "which model can actually work in the current Yemeni context, and evolves as political and institutional conditions improve." From this premise, institutional options are not presented as static alternatives, but as a range of arrangements that vary in their degree of centralization, relationship nature with international partners, and level of delegation to local levels. One of the proposed options is establishing a centralized national authority for reconstruction management, assuming strategic planning, financing coordination, and project portfolio management at the national level. This option allows vision unification, reducing duplication, and providing a clear contact point for international partners. However, its effectiveness in the Yemeni context remains conditional on this authority's capacity to avoid excessive centralization, and its possession of minimum technical and administrative competence qualifying it to perform its role without transforming into a bottleneck or new conflict arena.

Conversely, some international actors prefer a model where implementation is left to international organizations and financial institutions, with state role limited to general oversight or formal ratification. Although this arrangement may achieve relative speed in implementation, and limits short-term operational risks, previous experiences in similar contexts show it weakens national ownership, and establishes parallel structures that drain local capacities instead of building them, and undermines citizen trust in the state and its capacity to manage public affairs in the medium term. The broad decentralization option, based on transferring planning and implementation responsibilities to local authorities, relies on the logic of proximity to actual needs and enhancing community participation. However, applying this model without a disciplined national framework carries high risks in the Yemeni context, given the large variation in capacities between governorates, differing security and political contexts, and weak oversight and accountability systems at the local level. Rather than strengthening justice and response, this option may lead to more fragmentation and inconsistency in standards.

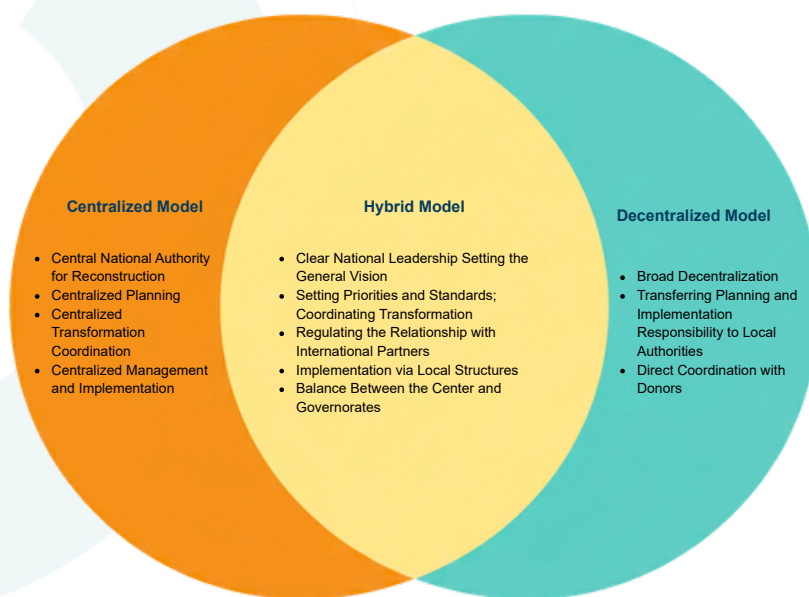
In light of these considerations, the hybrid approach emerges as the most realistic option for managing reconstruction in Yemen. This approach is based on clear national leadership with oversight of overall vision, priority and standard setting, financing coordination, and relationships with partners, versus decentralized disciplined execution involving local authorities and specialized implementation units, within a unified national framework for governance and accountability. This formula does not seek to combine centralization and decentralization as contradictory values, but rather to distribute roles in proportion to capacities and risks at each level.

This model gains additional importance when coupled with smart portfolio management for reconstruction projects. It is neither realistic nor safe to subject all projects to a single management pattern. Strategic large-scale projects, such as ports or power stations, require direct national oversight and strict standards, while service and medium-sized projects can be implemented through local structures or implementation partnerships, conditioned on their commitment to national standards. This differentiation allows matching project size with risk level and available capacities, and reduces failure or capture opportunities.

This framework also redefines the relationship between Yemeni state and international partners in a more balanced manner. The state, according to this approach, is not required to implement every project itself, but rather is required to be the political and regulatory reference and the framework encompassing all interventions. This means transitioning from the logic of "bypassing the state to accelerate execution" to the logic of "building state capacity through execution," which is a fundamental transformation to ensure sustainability and prevent reconstruction from becoming a parallel track for the state instead of a lever for rebuilding it.

This reading concludes that successful reconstruction in Yemen is not linked to choosing an ideal model on paper, but to designing a flexible and adaptable framework, balancing between national leadership and operational realism, and limiting structural risks diagnosed in the previous chapter. This understanding paves the way for transition, in the next chapter, to discussing private sector role, financing options, and governance and transparency requirements, as complementary elements indispensable for the success of any institutional arrangement for managing reconstruction.

Coordination Framework for Reconstruction



Chapter Four

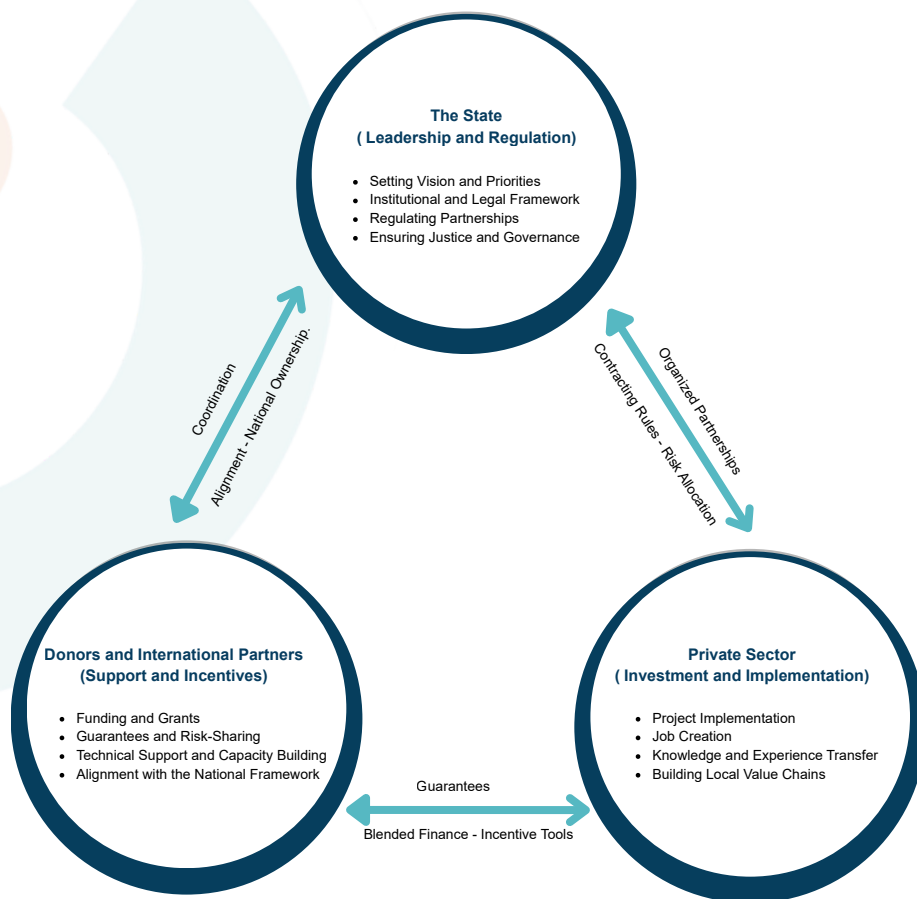
Private Sector Role and Reconstruction Financing Options

Private Sector Role

A sustainable reconstruction path in Yemen cannot be achieved without an active and organized private sector role, nor without a financing model that moves beyond short-term funding flows toward stable economic rules. At its core, reconstruction is not only a public spending process; it is also a process of economic reactivation, job creation, and investment mobilization - functions the state, especially in a fragile and divided context, cannot carry out alone.

Reconstruction Financing Options

On the financing front, reconstruction in Yemen faces a dual dilemma: the scale of needs far exceeds the state's short- and medium-term self-financing capacity, while excessive dependence on grants and external assistance - without a disciplined national framework - creates fragmentation and undermines sustainability. A multi-instrument financing approach is therefore required, organized within a single national framework.



Chapter Five

Governance and Transparency as a Critical Condition for Reconstruction Success

Governance is the decisive factor that determines whether reconstruction becomes a path to rebuilding the state and stabilizing the country, or a new cycle of patronage and fragility. Comparative experience in conflict-affected countries shows that weak control over decision-making and resource management rules leads not only to financing waste, but often to the reproduction of influence networks and erosion of trust in the state, even when reconstruction projects produce quick visible results.

Final Chapter

Conclusions and Recommendations Directed at Decision-Makers

First General Conclusions

- Reconstruction in Yemen is a multi-phase national trajectory beginning with humanitarian response and early recovery, extending to rebuilding state and economy, and cannot be reduced to infrastructure projects or short-term financing flows.
- Reconstruction success is conditional on the existence of a reference national vision that controls priorities, and connects relief, recovery, reconstruction, development, and investment.
- Absence of governance, weak coordination, and multiple financing channels represent real risks that may transform reconstruction into a new patronage economy instead of being a lever for stability and trust rebuilding.
- The most realistic model for managing reconstruction in Yemen is the hybrid model of disciplined decentralized national leadership and organized partnership with the private sector within unified national standards.
- Attracting serious investments or mobilizing sustainable financing without gradual institutional reforms that rebuild trust and reduce risks is not possible.

Second Policy Recommendations by Decision-Maker Categories

1- Recommendations Directed at Political Leadership and Central Government

- Adopting an official national definition for reconstruction based on clear phase sequencing: humanitarian response, early recovery, reconstruction, then long-term development and investment.
- Adopting a national vision for reconstruction and development as a single reference for all partners, linking reconstruction with economic priorities and institutional reform, and setting geographic and social justice principles.
- Establishing a high national authority for reconstruction with coordinating and strategic functions (not direct implementation), overseeing priorities, standards, financing coordination, and managing relationships with partners within a unified national framework.
- Not launching major projects or pledge conferences until achieving a minimum level of institutional readiness and unified national data on damages and needs that enables objective planning and limits politicization.
- Holding a joint national preparatory meeting before any international reconstruction conference, with DCF preparation efforts in partnership with official entities, including the government, Economic Team, and relevant local authorities and private sector and international partners, aiming to unify basic reconstruction concepts, and agreeing on financing and governance principles, defining roles, and narrowing realistic priorities, which transforms subsequent conferences from general pledge platforms into realistic implementation stations.
- Aligning reconstruction with a gradual economic and financial reform program including improving public finance management, unifying policies as much as possible, and strengthening operation and maintenance capacity and service sustainability.

2- Recommendations Directed at Local Authorities

- Enabling local authorities to implement service and developmental reconstruction projects within unified national standards ensuring consistency, quality, and sustainability.
- Granting governorates flexible and controlled authorities to set their priorities according to actual needs, with strengthening local planning tools and linking them to the national framework.
- Linking any financial or implementation delegation to transparent and clear accountability mechanisms, and strengthening community participation in priority-setting and implementation monitoring.
- Involving local private sector in implementation, services, and supply chains in ways that support employment opportunities and increase community ownership of the reconstruction trajectory.

3- Recommendations Directed at International Partners and Donors

- Committing to working within a single national framework for reconstruction and avoiding creating parallel funds or channels that accelerate spending but fragment impact and weaken the state.
- Supporting reconstruction as a state-building process not merely project financing, with investment in institutional capacity and governance and data systems.
- Adopting a graduated financing mix (grants, concessional financing, guarantees, blended finance) within unified governance, balancing urgent needs and long-term sustainability
- Supporting establishment of a unified national data system that includes damages, needs, projects, and financing, in ways that strengthen objective planning and limit priority politicization.

4- Recommendations Directed at Local and Regional Private Sector

- Engaging with reconstruction as a long-term investment opportunity linked to stability, not as short-term contracts.
- Committing to transparency and fair competition
- Engaging in organized partnerships with the state in infrastructure, services, and energy sectors, according to clear contracting rules and balanced risk distribution.
- Investing in building local value chains, expanding national workforce employment, and transferring knowledge and expertise in ways that maximize economic and social impact.
- Supporting development of carefully designed PPP models to avoid their transformation into patronage channels, and ensuring oversight and accountability.

5- Recommendations Directed at Oversight and Accountability Bodies

- Activating oversight from the beginning of the reconstruction cycle by adopting operational oversight that follows planning, contracting, execution, and maintenance, not only ex post review.

6- Cross-cutting Recommendations

- Integrating governance and transparency into reconstruction design from the outset, and treating them as preventive tools rather than formal procedures.

This paper affirms that reconstruction in Yemen is not a test of financing capacity, but a test of state capacity to lead a comprehensive national trajectory that rebuilds trust, stimulates productive economy, and prevents reproducing conflict causes. Transforming reconstruction into a historic opportunity requires a clear vision, a realistic institutional framework, strict governance, and balanced partnership between state, society, private sector, and international partners, ensuring transition from commitments to implementation, and from spending to sustainable impact.

Conclusion

The Role of Development Champions Forum (DCF) in the Reconstruction Trajectory

The Development Champions Forum (DCF) plays a supportive role in Yemen's reconstruction trajectory as an independent Yemeni platform for policy dialogue. It brings together decision-makers, experts, the private sector, local authorities, and international partners around a shared understanding of reconstruction challenges and realistic options. In a context marked by multiple actors and competing approaches, the Forum provides a space for Yemeni consensus-building that helps align concepts and build common ground on reconstruction priorities, financing, and governance.

For more information and previous publications: <https://DCFYemen.org>



About the Author

Remal Advisory for Studies & Consultations is an independent research and consulting firm specializing in policy and strategic analysis and in delivering evidence-based solutions to complex challenges in emerging markets and development contexts. Remal relies on multidisciplinary expertise and rigorous analytical methodologies to provide actionable insights that link policy to practice. The firm works with governments, international organizations, and private-sector stakeholders on key issues in governance, economics, and sustainable development. For more information, please visit www.remaladvisory.com

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