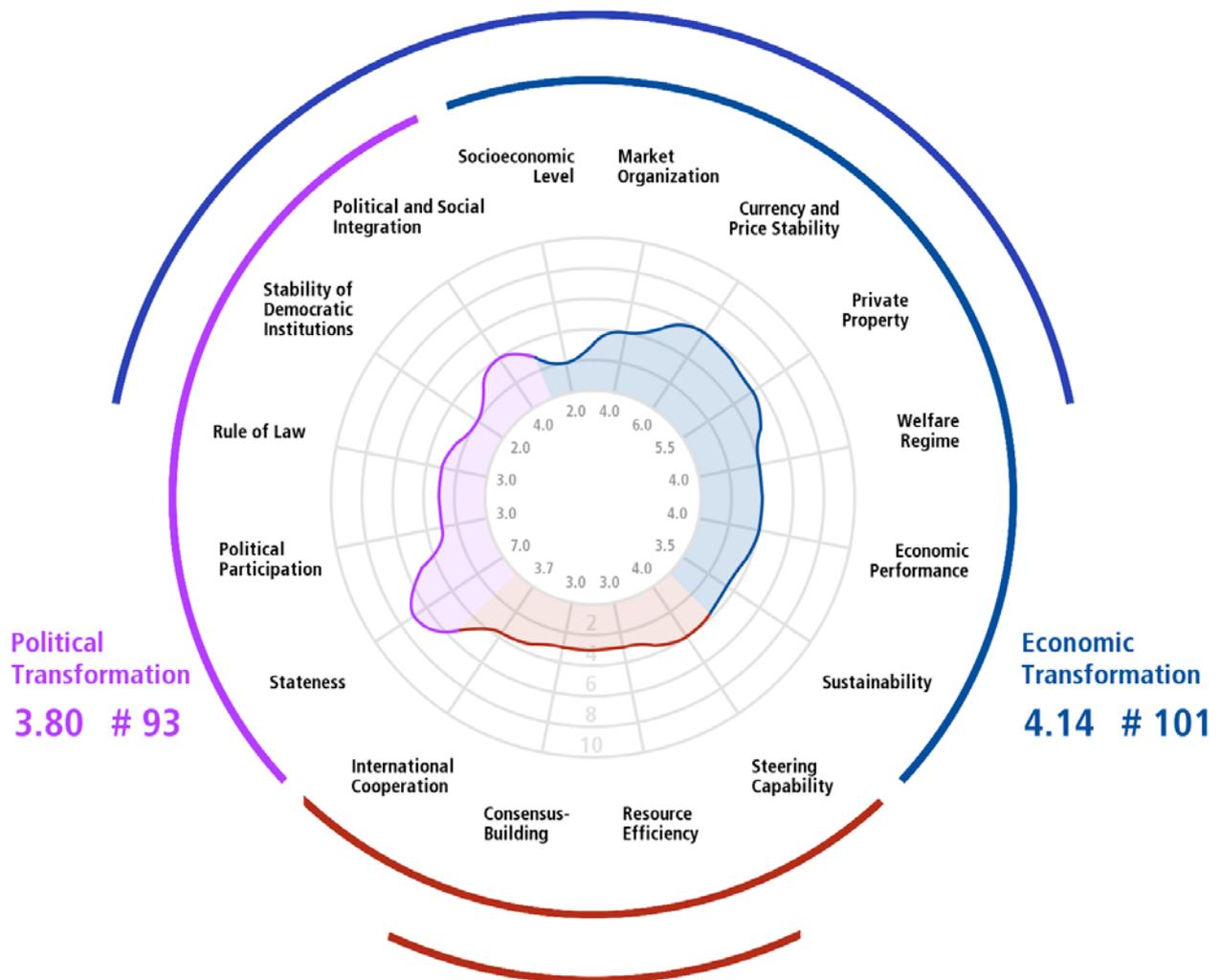


Burundi

Status Index

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on 1-10 scale out of 129



Political Transformation
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on 1-10 scale out of 129

This report is part of the Bertelsmann Stiftung's Transformation Index (BTI) 2018. It covers the period from February 1, 2015 to January 31, 2017. The BTI assesses the transformation toward democracy and a market economy as well as the quality of political management in 129 countries. More on the BTI at <http://www.bti-project.org>.

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Key Indicators

Population	M	10.5	HDI	0.404	GDP p.c., PPP \$	778
Pop. growth ¹	% p.a.	3.1	HDI rank of 188	184	Gini Index	39.2
Life expectancy	years	57.1	UN Education Index	0.437	Poverty ³	% 90.1
Urban population	%	12.4	Gender inequality ²	0.474	Aid per capita \$	35.9

Sources (as of October 2017): The World Bank, World Development Indicators 2017 | UNDP, Human Development Report 2016. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.20 a day at 2011 international prices.

Executive Summary

During the reporting period (2015-2017), Burundi has plunged into a severe political and economic crisis, provoked by President Nkurunziza's successful bid for a constitutionally prohibited third term in office. 2015 saw massive protests in the capital Bujumbura, brutal police crackdown on dissidents, a failed coup attempt and a subsequent major clean-up within the armed forces. A large part of the political opposition, civil society, independent media, dissidents from the core of the ruling CNDD-FDD (Conseil National Pour la Défense de la Démocratie–Forces pour la Défense de la Démocratie) as well as the vice-president of the Constitutional Court went into exile and around 250,000 people fled to neighboring countries. By the end of 2016 more than 1,000 people had been killed and authoritarian rule, political assassinations, forced disappearances, torture and a ban on civil society activities became the rule.

With the CNDD-FDD controlling all state institutions at all levels with an iron fist, the consociational democratic system and the little that was left of political consensus, human rights and democratic efforts ceased to exist. Diplomatic attempts by neighboring states, Western diplomats, regional organizations, the United Nations and official mediation efforts by the African Union (AU) and the East African Community (EAC) to rescue the aim of the Arusha agreement have so far failed.

As a consequence of the crisis, the U.S. and EU imposed sanctions on individuals close to Nkurunziza. The UN terminated the Burundian police units within the UN Police Mission in the Central African Republic. The EU delayed payments to the Burundian African Union Mission to Somalia (AMISOM) soldiers, all major donors withdrew or redirected their budgetary aid, development programs were closed and even partners with little or no interest in human rights issues such as China have become extremely cautious with their investment. As a consequence, Burundi plunged into a severe economic and humanitarian crisis. The government shows no willingness to alter its course and seems content to simply “sit out” the current situation, with devastating impact on the lives of the people.

Amid political fighting, the country's economic and social transformation has suffered dramatically. The government has never seriously tackled the country's structural problems. The little that had been done in the past, such as improvements in the provision of basic services (health, primary education), were almost nullified in the months after the election crisis. At the end of the reporting period, the exchange rate of the Franc Burundais has dropped significantly, foreign capital reserves have been almost entirely consumed and food prices have reached new highs. Economically and politically, Burundi's advancements of the years of peace and relative stability have been damaged and the country is on the brink of a humanitarian emergency.

History and Characteristics of Transformation

Historically, Burundi has been characterized by a deep sociopolitical cleavage between Hutu (85% of the population) and Tutsi (14% of the population), severely accentuated during colonialism. After independence in 1962, a small Tutsi elite within the Union for National Progress (UPRONA) political party seized full control of the state and military, eliminating large parts of the Hutu elite. All postcolonial regimes focused primarily on maintaining their power rather than pursuing development-oriented policies with a view to overcome the existing socioeconomic cleavages.

In 1993, an internationally driven democratization process culminated in general elections, bringing Melchior Ndadaye from the Hutu majority party Burundi Democratic Front (FRODEBU) to power. High-ranking members of the Forces Armées Burundaises (FAB) assassinated Ndadaye shortly after the elections, an event which sparked a full-fledged civil war (with an estimated 300,000 death) pitting Hutu rebel groups (primarily the CNDD-FDD and the National Forces of Liberation or FNL) against an all-Tutsi army.

The former president Pierre Buyoya (1987–1993, UPRONA) managed to regain power in a coup d'état in 1996. Splits on both sides of the Hutu-Tutsi divide occurred along regional and class lines and found their expression in different stances toward the peace process. Two radical Hutu parties excelled in the years after 1993 and soon started fighting not only the army, but also each other: the PALIPEHUTU-FNL, founded already in the 1980s in a Tanzanian refugee camp, as well as the CNDD-FDD, which emerged from FRODEBU as the armed alternative. An externally imposed peace process culminated in the Arusha Peace Agreement between UPRONA and FRODEBU (and a plethora of smaller parties) in August 2000, introducing a transitional government based on consociational power-sharing with ethnic quotas for all political institutions.

The armed conflict continued, as neither the CNDD-FDD nor the FNL were included in the peace deal. After several rounds of talks between the army and the CNDD-FDD, the Pretoria peace agreement was signed and the rebels joined the transitional institutions in 2004 largely to their advantage. By assuming control of 40% of officer positions in the army, and 35% in the police, as well as a number of ministries and seats in parliament, the CNDD-FDD became the most powerful player in Burundi besides the army and its UPRONA-allies. In most parts of the country, armed hostilities ceased immediately after the signing of the Pretoria agreement. The FNL continued its

armed struggle in the west of the country but was quickly weakened in the face of joint offensives by the army and the CNDD-FDD.

Military integration only began in 2005, creating an ethnically balanced army (Forces de Défense Nationale, FDN), removing what for decades had been the most important obstacle to peace. As early as 2007, Burundian units were deployed within the African Union peace forces in Somalia (AMISOM) and cooperation with security forces of neighboring countries in fighting rebels in the region soon began. In 2009, the first Hutu ex-rebel general was appointed army chief. The reform of the army was considered highly successful, a view that must be reassessed due to the military coup attempt in 2015.

A new constitution, based on the Arusha agreement and confirming ethnic quotas, was approved in February 2005. The first post-war elections of the same year – considered free and fair with a voter turnout of 90% – brought an outright victory to the CNDD-FDD. The ex-rebels had an extensive network over large parts of the country and were extremely popular with the neglected rural Hutu population. Not least, the electorate rewarded the CNDD-FDD for bringing the war to an end. FRODEBU lost much of its support for compromising too much with UPRONA and the latter could only count on the votes of the Tutsi minority.

The early political transformation was, however, marked by power struggles within the ruling party, leading to a decision-making paralysis within the CNDD-FDD's parliamentary group in 2007. The problem was "resolved" by the imprisonment of Nkurunziza's main rival, CNDD-FDD Chairman Hussein Radjabu, and the replacement of insubordinate parliamentarians with Nkurunziza loyalists.

The CNDD-FDD furthermore took advantage of disputes within FRODEBU and actively encouraged a party split, resulting in the creation of FRODEBU-Nyakuri, a party which would align with the CNDD-FDD in the 2010 elections.

A peace agreement with a weakened FNL was signed in 2008 and the rebel movement transformed itself into a political party in 2009. FNL leader Agathon Rwasa expected the party to become a major new force in the 2010 elections. However, the CNDD-FDD emerged as the clear winner of the communal elections with the vast support of the rural population, resulting in a 50% margin over its main opponent.

Although both international and national observers considered the elections free and fair, accusations of intimidation by the CNDD-FDD were rampant. Most opposition parties - under the leadership of the FNL and regrouped within the ADC-Ikibiri alliance - boycotted the subsequent presidential and parliamentary elections, thereby excluding themselves from the democratic process. The government and the opposition both played their role in the political polarization that followed. Being the only candidate, Nkurunziza was re-elected with 91 % of the vote. The CNDD-FDD could only establish a government in line with the consociational constitution – which requires the inclusion of more than one party - through the participation of UPRONA and FRODEBU-Nyakuri in the parliamentary contest. The absence of all other opposition parties, however, was a severe setback to the democratic transition of the country.

After the 2010 elections, the political climate became extremely hostile and attempts at dialog between the government and the opposition failed. Harassment and persecution of opposition members, particularly of the FNL, but also of human rights defenders and independent media, increased. Main opposition leaders temporarily went into exile and parts of the FNL rearmed in the Democratic Republic of Congo. Isolated attacks followed in the years after the elections, the most devastating of which caused the death of 39 people in a Gatumba bar in 2011. The government continuously denied the existence of political violence and framed the attacks as simply crime or terrorism.

A tentative dialog between the government and the opposition unfolded between late 2012 and late 2013, with many opposition leaders returning to Burundi amid a relatively calm security situation. However, from early 2014 onwards the situation worsened: the government turned increasingly authoritarian and took a number of legal and extra-legal measures to consolidate the CNDD-FDD's power. Importantly, principles of the Arusha agreement, such as the ethnic quota system and the political power-sharing between different parties at the head of the state were for the first time openly called into question. The passing of a highly contested law on the land commission, the sacking of several opposition figures within the government including the vice-president (UPRONA), the arrest of opposition politicians on flimsy grounds, several cases of severe harassment of demonstrators, opposition politicians and human rights defenders, as well as rumors around the arming of youth militias in the DRC all contributed to a climate of fear in the run-up to the 2015 elections.

It soon became obvious that president Nkurunziza did not plan to leave power as constitutionally prescribed after serving two mandates. First, he tried to change important provisions in the constitution, but the amendment fell short of being passed into law by one vote. He then called on the Constitutional Court – via a number of CNDD-FDD senators – to declare his third term bid constitutional. Under enormous pressure and forced exile of its vice-president, the court cleared the way for Nkurunziza's re-election. Arguing that in 2005 the president was elected not by popular vote but indirectly through parliament and senate, the court declared that Nkurunziza had only served one constitutionally relevant term so far.

Shortly after the court ruling, a coup attempt by parts of the army revealed fundamental splits within the FDN. These splits transcended, however, the former main cleavage of ex-FAB (Tutsi) and ex-CNDD-FDD (Hutu) officers. Rather, the coup was multi-ethnic and led by a former CNDD-FDD General, Godefroid Nyombare. The failed coup attempt served Nkurunziza with a pretext to clean up any opposition within the military. Hundreds of officers were ousted or arrested, an unknown number of military, including from Burundian troops in foreign missions (in Somalia and Central African Republic) deserted and went into hiding.

From early 2015, political fighting was accompanied by mass protests in the capital Bujumbura. The police and the secret service acted increasingly brutal and the state's security organs became infiltrated with the ruling party's own militia Imbonerakure. The failed coup attempt provoked a massive crackdown on civil society groups, raids in oppositional neighborhoods and the destruction of all independent media. New rebel groups were formed in neighboring Democratic Republic of Congo but remained largely inactive, with no large-scale attacks. However, sporadic

political violence from all sides in Bujumbura increased, with numerous killings, including the assassination of the former head of the secret service and close ally of Nkurunziza, Adolphe Nshimirimana.

Amid a climate of fear, Nkurunziza was re-elected in August 2015 and formed a government lacking any internal legitimacy. Most opposition politicians went into exile. A new opposition platform CNARED was formed in Belgium.

Politics became extremely authoritarian, arbitrary arrests, political assassinations and torture occurred almost daily. By the end of the reporting period more than 1,000 people had been killed and around 250,000 had fled the country.

All diplomatic attempts by neighboring states, Western diplomats, regional organizations and the United Nations failed and official mediation efforts by first the African Union (AU) and then the East African Community (EAC) were characterized by government walkouts and boycott by the opposition. The AU failed to find a clear stance toward the Nkurunziza government; a proposed 5,000 strong AU intervention force (MAPROBU) was not deployed, influenced by Burundi's resistance and the AU's internal struggles. A 228 strong UN police force, authorized by the UN Security Council in July, was never deployed.

Internationally, Burundi became increasingly isolated. The U.S. and EU imposed sanctions on individuals close to Nkurunziza. The UN terminated the Burundian police units within the UN Police Mission in the Central African Republic, the EU delayed payments for Burundian AMISOM soldiers over a row with the AU to find a way of bypassing the Burundi government in the distribution of salaries, all major donors withdrew or redirected their budgetary aid, many development programs were closed and even partners with little or no interest in human rights issues such as China became extremely cautious with their investment. Withdrawal from the Rome Statute further fostered Burundi's isolation but can simultaneously be seen as an attempt by Burundi to foster a different kind of alliance with those countries critical of the International Crimes Court (ICC), in particular South Africa, Kenya and other African governments. The government went into open hostilities with its neighbor Rwanda, spreading fear of a new regionalization of the crisis.

Amid political fighting, the country's economic and social transformation has suffered tremendously. The government has never seriously tackled the country's structural problems. The little that had been done in the past, such as improvements in the provision of basic services (health, primary education), were almost nullified in the months after the election crisis. At the end of the reporting period, the exchange rate of the Franc Burundais has fallen substantially, foreign capital reserves have been almost entirely consumed and food prices have reached new highs. Economically and politically, Burundi's modest advancements of the years of peace and relative stability have been significantly damaged and the country is on the brink of a humanitarian emergency.

The BTI combines text analysis and numerical assessments. The score for each question is provided below its respective title. The scale ranges from 1 (worst) to 10 (best).

Transformation Status

I. Political Transformation

1 | Stateness

In principle, the state has had, since the establishment of an integrated army and police force in 2005, a monopoly on the use of force throughout the country. However, the coup attempt of May 2015 revealed fundamental splits within the army. Thus, what was previously considered to be a successful balancing of ethnic and political affiliation within the security organs has been seriously brought into question. A major clean-up of oppositional elements within the army has not yet effectively curtailed the threat of a renewed uprising. Influential army officers with unknown numbers of foot soldiers loyal to them are in hiding, under arrest or have fled into exile.

The second largest rebel group of the civil war, the FNL, challenged the state's monopoly on the use of force until their transformation into a political party in 2009, then again after the elections of 2010 and in the following years from their bases in eastern DRC. However, in 2015 joint operations by the FDN, the Congolese army, FARDC, and the UN mission in the DRC, MONUSCO, severely reduced the FNL-rebel group's forces. It has since split into several smaller groups. New rebel groups have been formed in the wake of the 2015 crisis. Low intensity urban guerillas have become a daily threat in the capital Bujumbura and elsewhere in the West of the country.

The partially armed youth wing of the CNDD-FDD, the Imbonerakure, are a source of public violence and appear to bolster the security of the government by supporting the police and the national security service. However, it is unclear whether the government or the party is fully in control of this partisan militia.

Question
Score

Monopoly on the
use of force

6

'06 '18 10



1

The legitimacy of the nation-state is not questioned in principle. There are no calls for secession or claims of autonomy for any group. Unlike most other sub-Saharan African states, Burundi enjoys a long (pre-colonial) history of national unity, with a common national language (Kirundi) and few cultural differences within the population. The bloody struggles between the Hutu majority and the Tutsi minority have always been about controlling the state and its resources, not about belonging to the nation.

The elaborate system of power-sharing institutionalized by the Arusha Agreement - designed to initiate the process of reconciliation, democratization and peaceful development - seems to have completely collapsed through the intransigence of the dominant politicians and the incapacity, opportunism and fragmentation of the oppositional forces. Its central provisions were recently questioned by the president. Competing discourses about the past have been revived amongst the elites and the general population. These challenge the idea of national unity to some extent, at least regarding the common history.

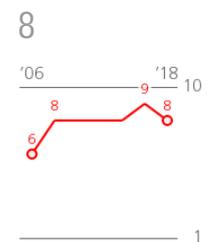
The clean-up within the army after the failed coup attempt, ethnic hate speech from government officials and rumors about attacks by Imbonerakure militias against rural Tutsi have caused widespread fear among the population and particularly the Tutsi elite. As a consequence, 250,000 citizens have fled abroad.

Burundi is a secular state and religious dogmas do not openly influence legal and political institutions. However, Christianity in various forms is very dominant and other religions (such as Islam) are effectively marginalized. From colonial times to the present, the Catholic Church has exerted a powerful influence on all levels of Burundian society. Since the civil war, Evangelical churches have mushroomed all over the country.

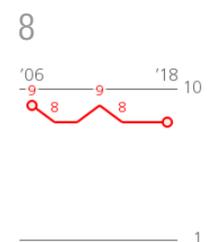
Religious dogmas have an enormous impact on social life and thereby on the success or failure of implementation of political decisions within the population. The rejection of contraception by the Catholic and born-again Christian churches effectively prevents the government from promoting family planning, which would be much needed given the link between overpopulation and poverty.

Due to the country's small size, high population density and long history of central control, public administration adequately covers the entire territory. Administrative structures are generally small and poorly funded, but have larger responsibilities than in many other African states. In 2005, the government committed to a comprehensive, externally supported decentralization process, which has yielded some results, such as the establishment of locally elected hill councils and the transfer of competencies to lower-level administration. It was hoped that decentralization would change the passive mentality toward politics that prevails in Burundi's rural population. However, decentralization is largely understood in terms of service delivery and less in terms of political emancipation of the local population. Furthermore, long

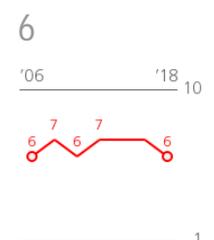
State identity



No interference of religious dogmas



Basic administration



bureaucratic procedures, politicization and a lack of competence slowed down the process.

The smallest administrative entity is the “colline” (hill). Since 2005, elected hill councils have been responsible for small-scale development activities as well as conflict mediation in their neighborhoods. Hill council members are supposed to be independent of political parties, but the rural population in most provinces form the power basis of the CNDD/FDD so that political control and indoctrination is exercised by the dominant party rather than the local administration.

Access to health services is improving but not yet sufficient. The proportion of the population with access to safe drinking water is around 76% nationwide with an enormous gap between the urban and rural populations. The figure for access to adequate sanitation is 48%.

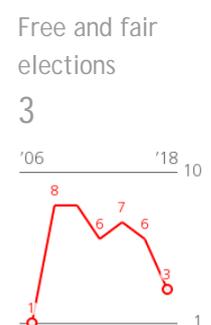
Many primary rural schools have been rebuilt or expanded thanks to foreign aid. The quality of education, however, is still very low and teachers are underpaid and underpaid. Teacher strikes and closed boarding schools, due to a lack of resources, are frequent. Since the constitutional crisis and subsequent financial withdrawal of major donors, the government has made clear its willingness to further cut education spending rather than negotiate with donors. Local jurisdiction is underpaid and highly susceptible to corruption.

The president gives much attention to the improvement of rural areas, visiting villages and rural areas frequently. These activities have clearly bolstered the president’s reputation among the rural population. However, in the ongoing political crisis since 2015, discontent is growing in rural areas too.

2 | Political Participation

Since the end of the civil war, the credibility of elections has decreased with every electoral cycle. Whereas the first post-war elections of 2005 were generally considered free and fair, the 2010 elections were highly contested. Despite some irregularities, no convincing evidence of fraud was produced, and local and international election observers alike gave a positive assessment of the overall conduct of the voting. However, the playing field was uneven, given that the ruling party made full use of state facilities and resources, and received considerably more coverage from the state-controlled media. After the CNDD-FDD was able to consolidate its majority position in most of the country in the communal electoral round, most opposition parties under the lead of the FNL boycotted the subsequent presidential and parliamentary elections.

Both the presidential and parliamentary elections were held in conformity with regulations, but as Nkurunziza did not face any opponent in the presidential elections, and only UPRONA and FRODEBU-Nyakuri took part in the parliamentary contest,



the population had no chance to engage in an open electoral contest on the national level.

The years following the elections were marked by increasing polarization. While the opposition argued that the government violated the “spirit of dialog” from the Arusha peace process, the CNDD-FDD rejected any compromise with political players who were not democratically elected. Despite tentative attempts to renew political dialog and the return from temporary exile of important opposition leaders, the political climate remained hostile in the run-up to the 2015 elections. After having already severed legal regulation of the establishment of new parties and coalition-building in past years, the government tried to exclude opposition candidates and parties from elections by means of criminal prosecution or on formal grounds.

Whereas the 2005 and 2010 elections conformed to a great extent with international standards, the 2015 elections were a complete farce. Although parliament rejected a constitutional amendment, which would have allowed Nkurunziza to run for a third term, the president still managed to cling to power, as the Constitutional Court - under enormous pressure - declared his candidature legal. Elections were held amid a political and security crisis, with 250,000 refugees and all major opposition parties outside the country. The opposition, strongly influenced by Nkurunziza’s fiercest rival Rwasana and his FNL, decided on a last-minute boycott, however their names remained on the ballot papers. After the boycott Rwasana decided to side with the CNDD-FDD in the government, being elected vice-president of the National Assembly and receiving five ministries for his parliamentary group. This move, as did the boycott of 2010, reveals a great deal of opportunism on the part of the FNL and the inconsistency and unpredictability of the opposition. Nkurunziza’s third term bid has plunged the country into a protracted internal crisis and isolated the country internationally.

Elected rulers do in principle have the authority and the instruments to govern the country effectively, but they have to be careful not to antagonize certain special interest groups too much (given the complex socioeconomic fabric of Burundian society).

Since the 2015 election crisis, Nkurunziza and his immediate entourage are effectively governing the country in an authoritarian way without any checks and balances. Democratic institutions are hollowed out and internal dissidence from within the CNDD-FDD is largely silenced as a result of major “clean-ups” of internal critics within the party and the army before, during and after the 2015 election period and coup attempt. However, the ruling elite as well as the military are far from safe from internal splits. In fact, an implosion of the ruling party as a result of power struggles in the current crisis is an immediate threat to what is left of political stability in the country.

In some cases, local CNDD-FDD politicians make decisions which reach beyond their mandate – such as arresting individuals. It is not clear whether they act purely

Effective power to govern

3

'06 '18 10



on their own behalf or at the approval of the party leadership. In many parts of the country, the CNDD-FDD youth wing Imbonerakure has become increasingly powerful and it is difficult to know who effectively controls these armed young men.

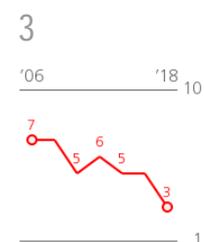
Because of the country's high financial dependency on foreign aid and the good will of its principal international partners and donors (above all the World Bank, IMF, Asian Development Bank, European Union), the government was long-term obliged to consult their international partners when taking political decisions. However, during the crisis the government has proven resistant to international pressure from donors, the UN and regional organizations. Despite the withdrawal of funds from major donors and targeted sanctions of individuals close to Nkurunziza, the president has taken a destructive direction of international isolation.

In principle, the constitution guarantees freedom of association and assembly. However, several laws and decrees on public assemblies introduced in the last few years impose far ranging restrictions. These include: a provision for government envoys in public assemblies; a provision for the dissolution of assemblies to preserve public order; a ban on the popular habit of engaging in sports in groups (such as running) in public places in the capital and a one-day limit on the duration of demonstrations. Throughout 2015 demonstrations were brutally suppressed, dozens of demonstrators were killed by police and hundreds more injured, detained and arrested without due trial. Rights to association are severely restricted. Laws make the establishment of new political parties difficult and threaten the survival of existing ones. There are lengthy registration processes for civil society organizations, and harassment and intimidation of organizations critical of the government, including the banning of ten important civil society organizations in 2016.

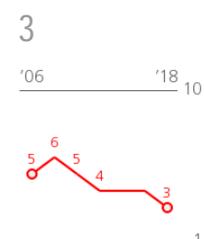
Since the 2015 crisis, freedom of expression is almost nonexistent. Already in the months before the elections, criticism of the government – such as allegations of military action in DRC or of the arming of the CNDD-FDD's youth wing – was often countered with accusations of a “threat to public security” and critical news coverage, as well as all other forms of public expression were inhibited by legal restrictions. Numerous cases of intimidation, arrest and extrajudicial killings of journalists, members of the political opposition and civil society activists are well documented by national and international NGOs.

With the brutal suppression of an army coup attempt in May 2015, all independent media were destroyed. In the months following the coup attempt and elections, most journalists and civil society activists went into exile. In September 2016 a range of well-established civil society groups and umbrella organizations were officially banned. After an effective and comprehensive crackdown on media and civil society activities there is no democratic and peaceful counterbalance to the government left in the country. Parts of the media and civil society groups have reorganized in exile using the media platform SOS Burundi and a small radio which tries to send news over the border from Rwanda.

Association /
assembly rights



Freedom of
expression



3 | Rule of Law

The separation of powers between the various state organs and a system of checks and balances exists legally but no longer in practice. Since the masquerade elections of 2015, both chambers of the legislature are dominated by the CNDD-FDD and are loyal to Nkurunziza's inner circle.

Given the crackdown on the political opposition, civil society and the media, there is no effective democratic countervailing power left in the country.

Government commissions are either ineffective (the Ombudsman's Office and the National Independent Human Rights Commission, CNIDH), contested (the National Election Commission, CENI) or not yet established (the Truth and Reconciliation Commission, CVR). State power is rarely subjected to independent decisions by the judiciary.

Until the failed coup attempt of 2015, the army remained the most important player in terms of providing checks and balances. However, despite claims by the renegade officers involved in the coup that their aim was to safeguard the constitution, it is doubtful whether the army or different factions within the army respect democratic institutions – even less so after a major clean-up within the officer corps, as part of the repression of the coup.

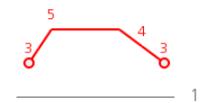
The judiciary is set up as a distinct and separate institution, theoretically able to operate independently from all other organs of the state. However, judicial appointments are made by the government (by the minister of justice, in consultation with the president), and political pressure is increasingly exerted on the judicial system.

In general, Burundi's judiciary bends to the will of the executive. Occasional independent decisions of the Supreme Court remain the exception. Overtly politically motivated court cases against opposition politicians and demonstrators signaled an increasing politicization of the courts. The ruling of the Constitutional Court that Nkurunziza's third term bid was legal – after its vice-president fled into exile – was evidence of the lack of independence of the judiciary at the highest level. Members of the lower levels of the judiciary are poorly trained and equipped, and the entire judicial system is prone to the temptations of corruption. Given the recent decision of the government to withdraw from the Rome Statute, the provision of justice to Burundian citizens has become a distant prospect.

Separation of powers

3

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Independent judiciary

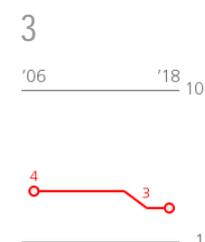
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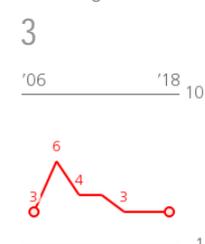
In general, a climate of absolute impunity for public officeholders prevails. Cases of apparent high-level corruption and dubious deals have become known, but have had no visible consequences for the persons implicated. Some vigilant NGOs investigated such cases and publicized them, but generally without effect. Transparency in governmental decisions and accountability are practically nonexistent. The few prosecutions of corruption that have occurred were politically motivated to remove government opponents and critics. Furthermore, offering bribes is generally considered normal by the Burundian population. Burundi has continuously ranked lowest in the East Africa Bribery Index since 2012. It became the country with the highest likelihood of bribery in 2014, and the police, land services and judiciary are the institutions most prone to petty corruption.

Prosecution of
office abuse



There is systematic infringement of civil rights associated with people's status as members of the political opposition, critical civil society and independent media, and, in particular, people associated with the anti-third term movement. Repression of these groups by legal constraint, police violence, the secret service and the youth wing of the CNDD-FDD (Imbonerakure) increased substantially around the time of the 2015 election crisis and in its immediate aftermath. Intimidation of critical voices, unlawful imprisonment without trial, "disappearances" and politically motivated extrajudicial executions (including summary executions) are extremely frequent. Apart from a half-hearted and hardly effective special commission investigating allegations of extrajudicial killings by the national police and secret service in 2012, cases of alleged extrajudicial killings have never been addressed. The Imbonerakure have become increasingly powerful and violent, and act with impunity.

Civil rights



Violence against women and girls is rampant and perpetrators rarely face persecution. Women do not enjoy the same rights as men, inheritance being the major field of discrimination.

In September 2016, the UN High Commissioner of Human Rights published a report finding abundant evidence of gross human rights violations by the government and people associated with it.

4 | Stability of Democratic Institutions

In a formal sense, all conventionally required democratic institutions exist in Burundi. This is the case for both legislative chambers, the judiciary, governmental structures at various levels and the professional public administration.

Performance of
democratic
institutions

2

However, since 2015 it is contested whether these institutions function in accordance with the constitution and other laws. Before his re-election, Nkurunziza called on the Constitutional Court to declare his candidacy constitutional. The court did so – after enormous pressure and the fleeing of its vice-president into exile. Therefore, Nkurunziza's presidency is legal in the narrow sense of the word. However, the

president enjoys no legitimacy internally or externally. The same is true for the Constitutional Court, given their obvious politicization. After the boycott by all major opposition parties of the parliamentary elections, the lower house also lacks legitimacy.

There is therefore a glaring discrepancy between the formally correct composition of the democratic institutions and the fact that these are almost totally devoid of their original purpose.

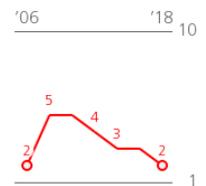
Since the various institutional levels (including the judiciary) are all controlled by the same dominant party, there is much less friction than would be the case if several competing political forces were present. At the same time, the dominance of the CNDD-FDD impedes an effective system of checks and balances.

For a long time, blame for the deficient situation concerning democratic standards could be almost equally attributed to the ruling party and the opposition. With the boycott of the 2010 elections the opposition excluded itself from the democratic contest. However, since then, and particularly before, during and after the 2015 elections, the ruling party's inner circle has become authoritarian to such an extent that democratic contest is at the moment simply not possible: both the opposition and moderate elements within the CNDD-FDD itself have been persecuted, forced into exile or otherwise made silent.

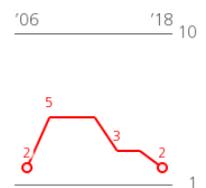
In a narrow formal sense, almost all relevant political and societal actors operate within the framework of the constitution. However, practically the presidency of Nkurunziza, the subsequent formation of his government, the parliament and all other democratic institutions lack internal and external legitimacy.

With their behavior and rhetoric before, during and after the 2015 elections, Nkurunziza and his allies made clear that they do not consider the Arusha Accords a relevant framework for their own rule. Formally, the current government bases their legitimacy on the constitution – as confirmed by the contested ruling of the Constitutional Court of 2015. However, the commitment to the constitution is no more than a means to legitimize Nkurunziza's personalized rule.

The government's stance toward the Arusha Accords is not only an expression of their current will to cling to power. The CNDD-FDD was not part of the original negotiations and has always been critical of them. The CNDD-FDD's leadership is deeply influenced by its experience as a rebel organization, leaning toward authoritative and uncompromising behavior, and it tends to be skeptical of professional politics in general (including those of CNDD-FDD politicians who joined the party after 2004). It only accepted the Arusha peace agreement and subsequent constitution because they presented the best strategy for consolidating power and legitimacy, using democratic elections and power-sharing as a means to secure the CNDD-FDD's position over time. Now that it has total control over state



Commitment to democratic institutions
2



institutions, the CNDD-FDD's commitment to democratic institutions has decreased and it now seems eager to change the framework in which it has to operate to its benefit.

At the same time, the current crisis reveals that there is a general need to reconsider the meaning of the Arusha Accords to the wider population. The ethnic quotas are criticized both by Hutu, who are unhappy with the overrepresentation of Tutsi, and by Tutsi, who argue that ethnic affiliation often outweighs merit (although in practice it is not only ethnic affiliation, but also loyalty to the ruling party). Furthermore, the power-sharing framework has clearly been unable to prevent a de facto one-party government. Fundamental underlying issues such as the gap between the (urban) rich and the (rural) poor, clientelism, corruption, oppression of dissident voices, and the concentration of power in the hands of a small and often ruthless elite, have never been addressed.

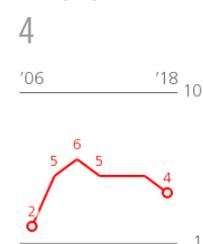
5 | Political and Social Integration

Since 2010 the highly polarized party system has been characterized by one dominant ruling party, its junior partners and a few extra-parliamentary opposition parties. In 2015 the entire extra-parliamentarian opposition was forced into exile and has regrouped as the Conseil National pour le Respect de l'Accord d'Arusha, pour la Paix et la Reconciliation au Burundi et de l'Etat de Droit (CNARED) in Belgium. Before and during the elections of 2015, the former junior partner of the CNDD-FDD in the government, UPRONA, split into different factions. UPRONA had rarely opposed CNDD-FDD decisions during their time as a coalition government. By now, the CNDD-FDD governs the country together with satellite parties and is thus confronted by no opposition - neither parliamentarian, nor extra-parliamentarian - from inside the country.

Similar to the former extra-parliamentarian coalition ADC-Ikibiri, CNARED was born out of necessity and not a shared political ideology amongst the member parties. Their common interest is to regain political strength and their goal is the resignation of Nkurunziza. They have attempted to collectively engage in an internationally mediated dialog with the government. However, so far, the government refuses to talk with CNARED as an umbrella organization.

The strongest opposition party FNL and its leader Agathon Rwaswa play an important but dubious role with regard to the regrouping of the opposition. It was Rwaswa who incited the boycott of 2010 as well as 2015, using relentless opposition backed by the possibility of a return to violence as his main strategy. In 2015 however, the ballots used in the election still featured the names of opposition candidates despite their boycott, and the FNL eventually assumed their seats and Rwaswa accepted his election

Party system



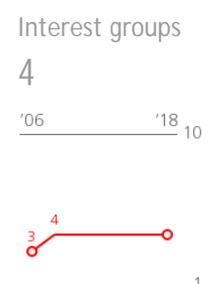
as vice-president of the National Assembly, to the great surprise of the rest of the opposition.

Due to the long history of one-party rule and the fact that the CNDD-FDD and the FNL trace their roots to rebel movements, only UPRONA and FRODEBU exhibit a strong degree of political professionalism. This is not to be mistaken for broad social rootedness. Although UPRONA has a rather stable constituency in the Tutsi community, it is largely constrained to the urban elite. Although political parties are required to comply with ethnic quotas, they are still largely seen as Hutu or Tutsi parties and voting along ethnic lines is common. All parties exhibit a high degree of clientelism and fragmentation and all opposition parties have been subject to manipulation and efforts by the government to weaken the opposition by co-optation. Since the CNDD-FDD is dominant in all state institutions its clientelistic politics are especially obvious.

Splits within the CNDD-FDD have also been frequent. In 2007 party cohesion was breached by the exclusion of parliamentarians loyal to Nkurunziza's internal rival Hussein Radjabu. In 2015, party members who publicly opposed a third term were ousted, persecuted and forced into exile. Among them were individuals in high positions such as the vice-president and the president of the National Assembly. What is striking is that internal criticism in the CNDD-FDD tended to come from those party members who did not actively fight during the civil war, but joined the party after 2005. A notable exception was the leader of the failed coup attempt, Godefroid Nyombare, who was a close ally of the president during the civil war.

Thus, Burundi's problem is not so much the proliferation of parties and the fragmentation of the party system, but the accumulation of power by one party which side-lines any opposition as well as moderate voices within its own ranks.

The scope of well-articulated interest groups and professional associations is relatively limited. However, there are an increasing number of grassroots organizations and a number of influential unions, the most important being the unions of tradespeople, teachers and journalists. Practically all interest groups are subject to the historical experience of ethnic mistrust that has permeated Burundian society. Although this tendency has begun to change in the recent past, there is a risk that it could be revived by the increasingly inflammatory ethnic rhetoric deployed by the government. Interest groups tend to be fragmented, locally based and politicized, with narrow focus and little impact. With the polarization of the entire society into those loyal to the CNDD-FDD and those affiliated with the opposition, members of interest groups have been subject to persecution and forced into exile, in a similar fashion to opposition parties or civil society groups.



In two Afrobarometer surveys in 2012 and 2015, Burundians indicated a strong and improving approval of democracy as the preferred political system. These results correspond with available qualitative assessments, the high rate of voter participation in the election of 2010, as well as the massive protests of 2015 calling for Nkurunziza to step down and conform to the constitution. Due to limited quantitative data on attitudes toward democracy before 2012, it is difficult to judge developments over extended periods of time.

Qualitative data indicates that there is a pronounced gap between the general approval of democratic norms and low trust in the democratic performance or existing democratic institutions. Trust in institutions (executive, legislative, judiciary, police, secret service) is especially low in urban centers and eroded even more after the massive repression of protests in recent years.

Trust in the army was, until recently, remarkably high in rural as well as urban areas. This was for a long time seen as a major success of post-war institutional reform. The image of a professional, disciplined and nonpartisan force first gained popularity when the army intervened to protect protesters from police violence in April and May 2015. However, with the repression of the coup attempt and a clean-up of the officer corps, it is difficult to judge how trust in the army has evolved since then.

After years of inter-communal violence, the level of trust among citizens has strongly increased since the end of the civil war, the establishment of a consociational political system and, most of all, an ethnically balanced army. However, since the crisis of 2015, the revival of inflammatory ethnic rhetoric and an increasingly brutal Imbonerakure militia, ethnic mistrust is again on the rise.

Small NGOs, churches and traditional authorities work on the reestablishment of mutual support and self-help. However, competing versions of the past still exist between Hutu and Tutsi, and comprehensive reconciliation has not yet taken place. With the massive refugee outflows of 2015, solidarity, cooperation and trust in general and cross-ethnic cooperation in particular has suffered. Twa continue to be discriminated against at all levels of society.

Mistrust is most pronounced along political lines, between individuals loyal to the CNDD-FDD and the rest of the population, but also between different parties of the opposition. A very realistic fear persists that the ruling party and its youth wing have infiltrated and therefore control all levels of society.

Given the dire economic situation of the rural population coupled with high population density, self-help is often not a choice but a necessity. The focus of the rural population remains on local issues and cooperation rarely extends beyond local boundaries. Furthermore, this cooperation often takes on the characteristics of “policing”, such as neighborhood night patrols and thus cooperation is often a sign of mistrust against a perceived “other.”

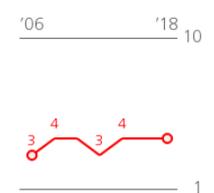
Approval of
democracy

n/a



Social capital

4



II. Economic Transformation

6 | Level of Socioeconomic Development

Burundi remains one of the least developed countries according to the 2014 Human Development Index, ranked 184th (out of 188 countries). Since 1980 the index has continuously worsened from 0.23 to 0.4. Due to insufficient data, the 2015 and 2016 Global Hunger Index could not be calculated for Burundi. In 2014 Burundi was the worst affected country in the world. In the 2010 Multidimensional Poverty Index (MPI), which takes into consideration deprivation in health, education and living standards, 81.8% of Burundians are multidimensional poor and 48.2% of the population lives in severe poverty. Poverty is relatively evenly distributed among rural Hutu, Tutsi and Twa, and it disproportionately affects women. Given the already extreme poverty and reliance on subsistence farming, the rural population remained economically untouched by the crisis of 2015 until recently. However, decreasing international aid and temporary border closures with Rwanda have by the end of the reporting period started to affect the rural poor.

Despite popular measures by the CNDD-FDD government such as free maternal health and primary education, the situation of the rural population has not changed much since the end of the war and disillusionment with the post-war government is increasing.

Burundi remains comparatively high on the Gender Equality Index (within the World Bank's Country Policy and Institutions Assessment Index, CPIA) with a stable 4.0 since 2007. However, looking at the Gender Inequality Index (GII), which measures discrimination in health, education and the labor market, Burundi's score of 2015 (0.4921) is still critical. Both indices take into consideration the percentage of women holding seats in parliament (35.5% as of December 2016). The high number of female members of parliament is due to the quota system for all political institutions. In areas not subject to quotas, gender inequality is still pervasive.

According to the HDI, only 5.3% of women over 25 have at least some secondary education versus 8.3% of men. Participation in the labor force includes 83.3% of women, versus 82% of men. Women usually work in physically demanding, low or non-paid job (such as agriculture). Apart from quota-affected positions in state institutions, women are almost absent from white-collar jobs. In the last few years, primary and secondary school enrollment among girls has increased and the government has adopted – at least on paper – a policy of promoting gender equality.

Question
Score

Socioeconomic
barriers

2

'06 '18 10



None of these indicators take into consideration deep-rooted cultural inequalities resulting from a general devaluation of women in the society, further exacerbated during the civil war, including widespread violence against women and girls and discrimination in customary law (including inheritance and ownership regulation).

Economic indicators		2013	2014	2015	2016
GDP	\$ M	2714.5	3093.6	3097.3	3007.0
GDP growth	%	4.6	4.7	-3.9	-0.6
Inflation (CPI)	%	8.0	4.4	5.6	5.5
Unemployment	%	1.6	1.6	1.6	1.6
Foreign direct investment	% of GDP	4.3	2.6	1.6	0.0
Export growth	%	3.0	5.4	-9.9	1.0
Import growth	%	8.0	5.0	-14.1	6.5
Current account balance	\$ M	-258.4	-393.2	-374.7	-
Public debt	% of GDP	36.1	35.8	46.1	48.0
External debt	\$ M	683.6	690.2	626.0	632.8
Total debt service	\$ M	32.3	29.2	26.0	61.3
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	22.1	21.0	20.7	21.5
Public education spending	% of GDP	5.4	-	-	-
Public health spending	% of GDP	4.4	4.0	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	2.2	2.0	2.1	2.2

Sources (as of October 2017): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

7 | Organization of the Market and Competition

Several structural factors impede the establishment of a market-based competitive economy. Resources are scarce. The bulk of the economy is based on the (largely informal and subsistence-focused) agricultural sector, which accounts for just over 40% of GDP but employs approximately 90% of the population, most importantly women. More market-based competition in this sphere is hardly useful, as it would not benefit the rural poor.

Competition is hampered by a politicization of the economy due to the increasing meddling of the ruling party in the economic sector and a general tendency toward clientelistic politics.

The country is characterized by high levels of economic opportunism, including corruption on all levels of administration and direct intervention in the economic sphere by politicians in order to influence economic activities in accordance with political and personal opportunities.

In the 2016 Doing Business Index Burundi ranks 155. Access to electricity and finances are the most pressing issues.

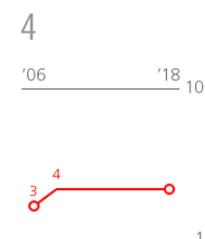
Due to the small size and the particular structural features of the national economy, there is hardly any practical scope for the effective control of existing monopolies or oligopolies. The accession (in 2007) to the wider East African Community (EAC) market may slowly have some practical bearing on this situation by confronting Burundian economic actors with competition from the more advanced EAC partner countries. Anti-monopoly policies are rarely enforced and little attention is paid to this topic.

Burundi has committed to trade liberalization policies as laid out by the Common Market for Eastern and Southern Africa (COMESA) Free Trade Agreement, which Burundi joined in 2004, and the EAC Customs Union, which it joined in 2009. Both regional organizations recently committed to bilateral trade deals with the EU in the framework of the Economic Partnership Agreements (EPAs). This could in the near future also influence trade liberalization in Burundi.

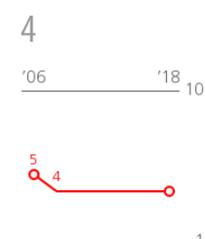
According to the Heritage Foundation's 2016 Index of Economic Freedom, Burundi's average tariff rate is 5.4% and importing goods is costly and time consuming.

Burundi does not yet fully comply with the WTO's common external tariff (CET) system. Despite some progress in harmonizing trade within COMESA and EAC, non-tariff barriers (NTBs) remain high in Burundi. Customs and administrative procedures are lengthy and partly discriminatory. Especially the complex and at times

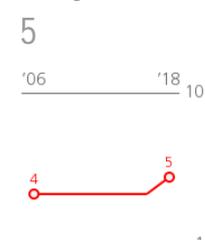
Market-based competition



Anti-monopoly policy



Liberalization of foreign trade



confusing clearance formalities and control operations at the Bujumbura port are considered an obstacle to free trade.

On the whole, the economy is only very weakly integrated into the world market, despite its heavy dependence on the import of many essential goods.

The banking system is relatively well organized and has a presence in most provincial centers, but is to a large extent concentrated in the capital city Bujumbura. In general, the small financial sector in Burundi is dominated by banks. The most important banks are foreign owned, mostly Belgian. According to the Heritage Foundation only 2% of the population own bank accounts. The majority of the rural poor do not have access to mainstream finance and rely on informal lending. However, in the last few years, micro-financing has made some progress.

The banking system is highly bureaucratic and insufficient in customer services and technology. Burundi is characterized by a narrow credit market that favors persons close to political elites.

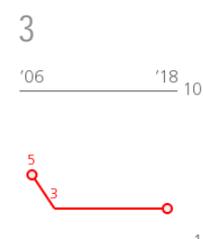
The government has only minor stakes in commercial banks, while two banks are majority-owned by the state. Nevertheless, the government manages to exert considerable influence on the appointment of managers and board members and exercise a certain level of control over the financial sector, resulting in conflicts with private shareholders. Empirical data on the efficiency of the overall weak banking sector is not available. The central bank is legally independent of the government, but during the recent political crisis it has revealed itself vulnerable to government influence. It is strongly influenced by informal oversight provided by the IMF. According to the World Bank, the share of non-performing loans out of total loans was 18.5% and the capital to assets ratio was 13.6% in 2016.

8 | Currency and Price Stability

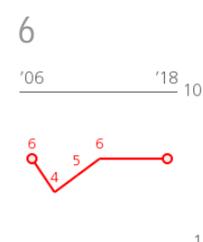
Inflation control and an appropriate exchange rate are recognized as important goals and tools of governmental economic policy. The central bank is formally independent and pressure from the government is limited by its dependency on international financial institutions. All foreign-exchange dealings have been practically liberalized, with rates determined by currency auctions under the guidance of the central bank. The official exchange rate has been held relatively stable for a number of years. However, the black market for currency exchange with its deviating rates is flourishing. With the crisis that began in 2015, foreign currency has become extremely scarce and informal exchange rates have skyrocketed.

Continuously high inflation is a major threat for the vast rural population, which lives on the breadline. Inflation was extremely high in 2008 (26%). After a brief decrease in 2009 – 2010 (on average 4.3%), inflation reached another peak in 2012 (18%) and

Banking system



Anti-inflation /
forex policy



then decreased to a moderate 4.4% in 2014. Due to the crisis of 2015 inflation increased to 5.6% with wild fluctuations month-to-month. In November 2016 year-on-year inflation reached 7.1% with 9.1% food price inflation. Inflation control is difficult, with prices for food and general agricultural products, a high proportion of the country's consumable goods, subject to the vagaries of changing weather conditions.

The government's heavy reliance on the inflow of aid resources has forced it to more or less follow conditions of financial orthodoxy set by external donor institutions. This is reflected in the second-generation Poverty Reduction Strategy Paper (PRSP) (2012). In principle, however, fiscal discipline is a low priority for the government, as opposed to more popular agendas such as the extension of basic services.

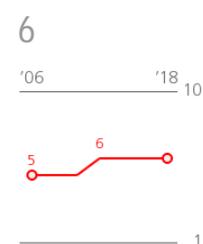
Despite the post-war integration of Burundi's security organs and a major clean-up of the army in the aftermath of the 2015 coup attempt, the government is obliged to maintain an oversized army and police force – whose engagement in UN and AU missions had hitherto much alleviated the financial burden that comes with it. The UN, however, terminated the Burundian police units within the UN Police Mission in the Central African Republic and the EU delayed payments for Burundian AMISOM soldiers over a row with the AU about how to bypass the Burundi government when paying salaries. Government consumption was at 21.9 % in 2015.

The fiscal deficit – financed by domestic borrowing – has increased due to election expenditures in 2015 and the withdrawal of aid by major donors. In its latest review of the three-year Extended Credit Facility (ECF) in March 2015, the IMF considered government performance broadly satisfactory. However, this was before the outbreak of protests and the 7th and 8th review could not be held due to the security situation. Public debt was at 42.4 % in 2015. Since the crisis of 2015, foreign currency has become scarce in Burundi and the government tries to hold back the little that is left from private customers via its influence on the central bank.

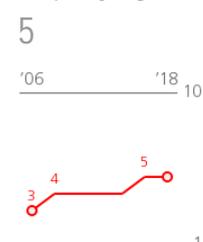
9 | Private Property

Property rights have long been formally defined by law, but their application and defense have always been precarious. According to the World Bank, registering property (land) takes only 23 days and five procedures (which is below world average), but the indicator assumes “no title disputes.” However, land property issues are almost never free of conflict in Burundi. In fact, conflict over land ownership is one of the most pressing and politicized issues today due to land scarcity, refugee return and the historic importance of land. The judiciary is prone to corruption and unable to guarantee the legality of property acquisition and dispossession. In 2013, a new highly contested law regarding the National Land Commission (CNTB) was passed. The CNTB has so far caused more conflict than it has resolved and does not adequately protect the property rights of all parties concerned. Traditional conflict

Macrostability



Property rights



resolution mechanisms have lost much credibility. Customary law deprives women of the right to property and inheritance of land. The uncertainty around land ownership and the limited access to loans are important factors in inequality and seriously hamper private investment.

The Burundian economy is largely based on an informal and subsistence-focused agricultural sector. Privatization in this sphere would be dangerous at this stage of structural difficulties.

The state remains the largest employer. With regard to public enterprises, the government is supposed to base employment policies on objective and equitable suitability criteria, as well as on the need to correct imbalances and ensure broad ethnic, regional and gender representation. It therefore argues against privatization of public enterprises. In reality, however, the public sector is almost exclusively under the control of the ruling party, and positions are doled out according to party loyalty rather than merit.

Nevertheless, some privatizations took place (including the coffee sector), though often with direct and dubious influence by the government, and in ways that were inconsistent with market principles or social requirements.

In principle, existing private companies can operate freely, however many constraints remain. Burundi still occupies one of the lowest Doing Business ranks (155).

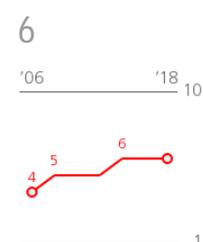
The private sector is growing but faces many constraints, such as difficult access to financing; lack of basic infrastructure, such as energy, communication and transport; and considerable bureaucratic and often direct political interference. Foreign direct investment remains almost nonexistent.

10 | Welfare Regime

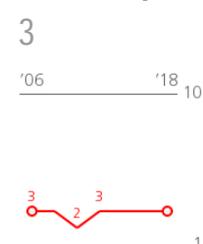
Burundi lacks public social safety nets for most of its population, excepting a small group of government and parastatal institution employees, including the top echelons of the military. Even for these individuals, resources provided are fairly minimal. Maternity care is subsidized, as is health care for children under five years of age, patients with HIV and patients with malaria. However, these services are inconsistently funded. The government's goal, set in the PRSP II, of enrolling 50% of the population in the informal sector and 40% of the rural sector in a health insurance system is financially impossible in the near future.

The long years of civil war have disturbed or even destroyed traditional social structures in many areas, but most features of traditional rural solidarity systems have survived to a considerable extent, and still provide a crucial foundation for at least a minimal social safety net for individuals within a family or village context. By far the biggest problems are faced by the many former refugees, internally displaced persons

Private enterprise



Social safety nets



and returned ex-combatants, created by the war, who have been (and to a minor extent still are) repatriated into uncertain surroundings without being able to fall back on any organized safety systems. Even the traditional village-level solidarity is being strained due to the effects of extreme overpopulation in the rural areas and worsening ecological conditions.

It will take many more years to overcome the gap in education and economic status between Hutu and Tutsi caused by a long history of ethnic discrimination. The urban Tutsi elite still benefits from their historical privilege of a higher educational level and property ownership. Within the rural population, the socioeconomic gap between Hutu and Tutsi has never been pronounced, and has further diminished.

Since the introduction of free primary education in 2005, access to basic education is distributed evenly among ethnic groups and genders. The literacy rate is quite high at 85%. Looking at higher education levels, discrimination against women is considerable with only 4:10 ratio of female-to-male enrollment in tertiary education. In terms of access to employment, ethnic and gender quotas have begun to improve access to opportunities for the hitherto marginalized groups of Hutu and women, but this is only the case where the quotas apply (i.e., in political and administrative positions). Furthermore, the government's clientelistic politics (and need for control) favors individuals loyal to the CNDD-FDD at all levels of the public sector. Thus, even in rural areas, political affiliation has become the most important factor in access to opportunity.

Despite a gender quota of at least 30% women in all political institutions, little has changed concerning the cultural exclusion of women from decision-making in the household, inequality in customary law (most importantly concerning inheritance and property rights) and the high exposure of women and girls to gender-based violence. Women account for 51.5% of the labor force, most of them working in labor-intensive jobs (e.g., in the agricultural sector). Given that women carry out the bulk of reproductive work, including childcare, firewood collection and other physically demanding tasks, their health is disproportionately at risk. Twa remain almost completely excluded from any opportunities, despite the legal mandate to integrate Twa into political institutions.

Homosexuality is legally punishable and the few courageous openly gay and lesbian Burundians face severe discrimination at all levels of society.

Equal opportunity

5

'06 '18 10



1

11 | Economic Performance

Burundi remains one of the poorest countries in the world, with 93% of the population living below the poverty line of \$2 a day (2006). With a per capita GDP based on purchasing power parity at \$736 Burundi now has the second lowest score in Africa after the Central African Republic (there is no data for Eritrea and Somalia). While GDP growth had been steadily increasing from 3.5% in 2009 to 4.7% in 2014, the crisis of 2015 and subsequent withdrawal of budget support by major donors has provoked a recession of -2.5%.

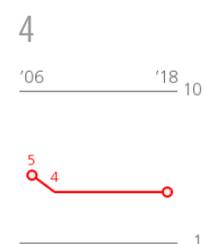
More than 90% of the population live on tiny plots of land that hardly yield enough food for subsistence. This leads to the undernourishment of large parts of the population and the requirement to import food. Given the withdrawal of foreign aid, the retention of potential foreign direct investment as well as the disturbance to economic activity caused by massive refugee outflows, the current crisis has also had a devastating effect on consumer prices, most importantly with regard to food. The regular (although temporary) closure of the border between Burundi and Rwanda has disturbed the small trade between the two countries, of which many families in the northern provinces of Burundi rely on (as they sell food in Rwanda). After a relatively low inflation of 4.4% in 2014, Burundi is now experiencing 7.1% year-on-year inflation with 9.1% food price inflation in November 2016. Despite a number of initiatives undertaken since 2005, overall macroeconomic performance has remained disappointing and even lackluster. This can be partially attributable to unfavorable climatic conditions (drought, floods) and corruption, but it has been severely aggravated by the recent political crisis.

In its latest review of the three-year ECF in March 2015, the IMF considered government performance broadly satisfactory. However, this was before the outbreak of protests and the 7th and 8th review could not be held due to the security situation. Public debt was at 42.4 % in 2015.

Given the limited possibilities for increasing the production of agrarian export goods (coffee, tea, cotton, sugar), the value of imports has continually grown faster than have export receipts, with no signs of improvement to the structural trade deficit.

The government has recently initiated some major infrastructure projects, including fiber optics, hydropower, road construction and a pilot project in nickel mining, but these plans remain ad hoc and unsustainable in the face of the current political crisis. The government relies almost completely on foreign aid from Western countries. In the face of the current diplomatic isolation the government seems to be eager to endure the situation as long as possible without making major political concessions – and it will probably manage to do this. Some donors have already found ways to avoid withdrawing aid completely by redirecting it through different channels, and a long-term donor disengagement with the country - as Zimbabwe experienced - is unlikely.

Output strength



12 | Sustainability

Given the long civil war and immediate problems (poverty, overpopulation), little attention has been paid to safeguarding the longer-term sustainability of various environmental factors. However, there is also little space for the government to tackle environmental problems.

Burundi occupies one of the lowest ranks in the Environmental Performance Index (EPI 2016: 168 out of 180 – continuing the downward trend of recent years). The most pressing problems are soil erosion due to overgrazing, monoculture (most of all, palm oil in the low lands) and the extension of agriculture into marginal lands, the decline in Lake Tanganyika's water level and deforestation for agriculture and fuel. Given the extreme land scarcity and population pressure due to high birth rates and refugee returns, measures to stop environmental degradation are urgently needed. Conflicts over land will be on the increase in coming years.

The government has so far neglected these pressing issues, despite commitments to environmental protection and sustainable resource management.

The entire education system suffered heavily during the civil war. Most rural schools were closed, and many teachers and professors were killed or exiled.

One of the popular measures of the CNDD-FDD after 2005 was to introduce free primary education for all. As a consequence, the number of pupils suddenly shot up without adequate provision of teachers, classrooms or school supplies. Teacher strikes have become frequent and, in 2014, some important boarding schools had to send their pupils back home due to a lack of food provisions for the children. Since the crisis of 2015 the president has made clear that he is willing to cut educational spending further as a result of the withdrawal of international aid.

Gross primary school enrollment is at 127% (due to older children going to school now) with near gender equality. The enrollment rate for secondary education is 37.9%, much lower than for primary education but higher than in the previous reporting period (last data available was 2012: 28%). Enrollment in tertiary education is only 4.4%, however this increased by 1.2 points since 2010. Female-to-male enrollment drops to 0.9 for secondary and 0.4 for tertiary education.

According to the World Bank the literacy rate is at 85%, the world average for adults (people aged 15 and above).

Research expenditures are very low and largely externally financed. Expensive modern R&D activities are practically nonexistent. The national university in Bujumbura is inadequately equipped and the level of teaching quality is low. Given that higher education was for a long time a symbol of Tutsi privilege, the CNDD-FDD government is generally skeptical of universities and by and large considers

Environmental
policy

4

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Education policy /
R&D

3

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university students loyalists to the former regime or political opposition, and sees them as potential troublemakers. During the crisis universities have been temporarily closed and many students arrested for participating in anti-government protests. Due to the government's neglect of higher education, politicized employment policies and an increase in petty corruption among university staff, Burundian degrees are losing credibility in other African countries.

The share of public spending on education was as high as 5.4% of GDP in 2013. However, this rather large share of GDP is somewhat misleading, as most of it is externally financed. In the Global Competitiveness Report 2015-2016, Burundi ranks 139 out of 140 under "higher education and training."

Governance

I. Level of Difficulty

The structural constraints hampering successful political and economic transformation are extremely high. They include a very low absolute level of socioeconomic development; a difficult geographical situation (landlocked, high-cost transport arteries); precarious ecological conditions; overpopulation in combination with limited land resources; severe poverty; a refugee crisis, the presence of disarmed rebels who have not been properly re-integrated; poor infrastructure; a lingering ethnic polarization with memories of a very violent recent history; a generally low level of education (mainly among Hutus and generally among the rural population); a lack of experience with market-based entrepreneurship; and a still relatively inexperienced group of political leaders (from the standpoint of technical and administrative competencies). Currently, Burundi is on the brink of a severe humanitarian and social emergency. The crisis of 2015 has destroyed many of the little advancements Burundi had made since the end of the civil war.

Traditions of civil society organization are fairly weak, and largely confined to the capital, although this situation had begun to change quite remarkably during recent years. The weakness of civil society has its roots in the dictatorships of the Tutsi military and its ethnic bias. More organized forms of civil society were beginning to emerge at the local level, and Bujumbura-based NGOs were expanding their activities into rural areas.

However, since the crisis of 2015, almost all NGOs critical of the government have been persecuted and/or forced into exile. In October 2016, a range of well-established NGOs and umbrella organizations were banned. Only NGOs largely controlled by the CNDD-FDD (called “Nyakuri,” meaning “true” in Kirundi) are still operating. Therefore, the only credible counterbalance to the increasingly authoritarian regime and a fragmented and unreliable political opposition is now largely silenced.

Growing political polarization had for a long time been felt in the realm of civil society: traditional NGOs are perceived by many Hutu and the ruling party to be loyal to the former Tutsi government, while younger but increasingly influential organizations are primarily controlled by the CNDD-FDD. Given the advantage in education and organizational capacity, long-established organizations such as Ligue

Structural
constraints

10



1

Civil society
traditions

8



1

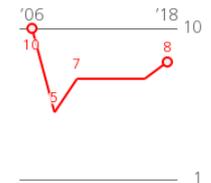
ITEKA, OLUCOME and others (most of which are organized under the umbrella of the FORSC – one of the organizations banned in 2016) are respected partners for donors. This however gives rise to the argument by the CNDD-FDD, and those NGOs loyal to it, that the international community is in cahoots with the old Tutsi elite.

Burundian society has been traditionally characterized by deep-rooted ethnic division, which subjected the majority Hutu (and the small minority Twa) to an oppressive – and at times genocidal – rule by the Tutsi elite. The relation between Hutu and Tutsi – who share a common language, culture and religion – has always had a very tangible socioeconomic dimension, thus constituting more of a class relation than anything else. The elite consists almost exclusively of urban Tutsi, while the difference in living standards between the rural Hutu and Tutsi has never been pronounced. In general, the Tutsi elite was split between the hardliners - particularly the officers - and an almost bourgeois, originally courtly elite. It was the latter which facilitated the Arusha process. The fundamental conflict has revolved around access to power and resources, including the very scarce arable land, culminating in more than a decade of bloody civil war starting in 1993.

The 2000 peace agreement and subsequent constitution very much focused on the alleviation of ethnic discrimination by introducing a complex ethnic power-sharing system. This political order, in combination with an ethnically mixed army and a regime shift to a democratically legitimate Hutu-led government has, to a large extent, led to the appeasement of the original inter-communal conflict to the point that ethnicity has ceased to be the most important conflict line. However, inflammatory rhetoric from the government and the violent behavior of the Imbonerakure militia, who are said to mainly attack Tutsi communities, currently run the risk of reviving ethnic mistrust in the rural population.

Fundamental underlying issues that can result in conflict – a huge gap between the (urban) rich and the (rural) poor, clientelism, corruption, oppression of dissident voices, and the concentration of power in the hands of a small and often ruthless elite – have never been addressed. This partly contributed to the crisis of 2015, the massive protests of frustrated urban youth and the current situation, in which an authoritarian and increasingly violent de facto one-party regime is holds all political power.

Conflict intensity
8



II. Governance Performance

14 | Steering Capability

Officially, the government is willing to focus on long-term goals regarding constitutional democracy and a socially responsible market economy as laid out in a socioeconomic program dubbed Vision Burundi 2025. Since October 2012, the second PRSP is supposed to translate the strategic pillars of Vision Burundi 2025 into projects and programs. The PRSP follows almost 100% of the guidelines of the IMF and World Bank and hardly takes Burundi's social, political and economic particularities into consideration. It is largely written in order to secure further external funding and donors' belief in its effectiveness and hardly realistic. Nevertheless, donors granted \$2.5 billion in international aid in 2012 – showing their continuing interest in staying involved in Burundi, despite concerns about serious governance deficiencies. It was only in 2015 that donors reluctantly began to cut aid; bad governance and human rights abuses could no longer be downplayed.

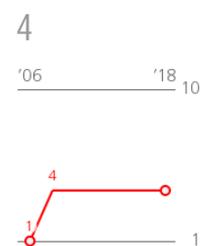
In the past, strategic priority had been given to superficial programs which inadvertently increased the popularity of the government, such as primary education and maternal and child health. With the increasing financial pressure on the government since the withdrawal of budget support by major donors in 2015, these areas have increasingly suffered. Due to the country's overwhelming dependency on external aid and the relative lack of national expertise, the role external agencies such as the International Bank for Reconstruction and Development (IBRD) and the IMF had in setting priorities was traditionally very strong. However, with the recent crisis the government has proven its capacity to "sit out" political and financial pressure and not bend to either bilateral donors or international financial institutions when it comes to governance issues. Apart from a very low level of interest in longer-term strategies that go beyond the ruling elite's immediate concerns of securing power and enriching itself, the substantial political and socioeconomic problems facing the country, combined with the pressing demands for short-term relief from the dire socioeconomic situation of the population, constrain the government's ability to pursue strategic long-term goals.

In principle, the government is willing to implement its own policies. However, a lack of resources and administrative and technical expertise, paired with high corruption and favoritism, impedes effective implementation of many policies. To a large extent, implementation is highly dependent on donors.

With regard to its political aims, the ruling party has been quite successful in conceiving of programs securing its political appeal, that is, policies regarding the

Question
Score

Prioritization



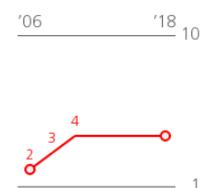
Implementation
4

provision of basic services, such as schooling or health care. However, implementation is more of a quantitative than qualitative nature, and not necessarily in compliance with objective overall developmental goals. The initial euphoria after many years of civil war has given way to widespread disillusionment concerning an improvement in the situation of the majority of the population. Whereas the IMF was broadly satisfied with Burundi's economic performance during their sixth review under the 2012-2015 Extended Credit Facility (ECF), the ECF was derailed afterwards by the deteriorating security situation. The seventh and eighth review could not take place.

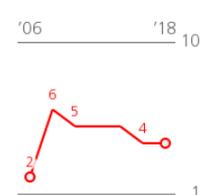
The political leadership has operated fairly flexible, and to some extent has acted in a simply opportunistic manner in its pursuit of concrete policy measures. For several years, the government seemed to learn from past experiences with respect to avoiding ethnic polarization, and had been cautious to adhere, for the most part, to the provisions of the constitution. However, this tendency has radically changed in the period under review. Almost the entire political opposition, including the former junior government partner UPRONA, as well as all moderate elements within the CNDD-FDD have left the country, been arrested, killed or otherwise silenced. The remaining part of the CNDD-FDD which now controls the entirety of the political system at least in the capital, is radical, militarized and unwilling to respect democratic institutions. The ruling party's elite has problems unlearning the military approach to politics that the CNDD-FDD embraced during its time as an armed movement. Past experience concerning the violent consequences of authoritarianism, state-sponsored violence and exclusion do not seem to impede the CNDD-FDD from resorting to similar measures. Instead, the government increasingly – and successfully – learns to deal with the international community's habitus, demands and support in order to advance the short-term interests of the ruling elite, including the consolidation of its own power.

The overcoming of ethnic polarization as a historical step is now seriously endangered. Fortunately, so far, the population has not bought into the government's increasingly inflammatory rhetoric.

There are few innovative approaches with respect to socioeconomic policies. While for years the prevailing attitude was one of pragmatism, largely aligned with requirements outlined by donors, this has now shifted to an almost self-destructive ignorance. Shortfalls in funding as a result of alienated foreign donors are hardly compensated for with internal redirection of capital. For example, missing funds in the education sector leads to the closure of schools, rather than a change in behavior of the government vis-à-vis its international partners.



Policy learning
4



15 | Resource Efficiency

In all past regimes in Burundi, the state's efficiency in utilizing financial and human resources was low, and largely determined by patronage considerations, a bloated bureaucracy and the resource hunger of oversized security organs. With a deepening corruption crisis, and the current trend to divert any available resources towards the pursuit of consolidating the ruling elite's power, the government has lost much credibility in regards to its commitment to the efficient use of assets. Efficient public procurement is riddled with political influence. Effective and independent auditing is almost nonexistent.

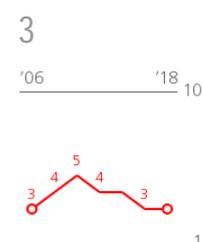
Decentralization reforms are underway; however, the CNDD-FDD is omnipresent even at lower levels of the administration and, thus far, decentralization appears to be service delivery at best and surveillance at worst, instead of political self-government and financial autonomy. However, CNDD-FDD representatives at the local level do not belong to the core of hardliners and the party does not control all local units.

Budget plans have repeatedly been too ambitious and real expenditures have often deviated a great deal from initial calculations, owing to overoptimistic growth and revenue forecasts. This is due to both nontransparent budget planning and inexperienced government personnel. State debt is increasing, to an estimated 43.4% of GDP in 2016 (up from 39.8% in 2015).

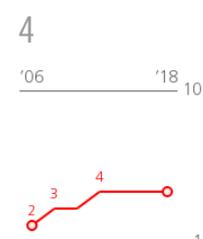
Efficient coordination of the activities of various ministries and other public bodies is very difficult, since politicians in decision-making positions tend to seek to bolster their own public profiles and pursue their own priorities without adhering to a coherent and coordinated overall government strategy. The unchallenged control the CNDD-FDD assumed after the boycotted elections of 2010 and cemented since 2015 facilitates policy coordination. However, this does not improve matters. The ruling style of the government has become overtly authoritarian, exerting authority based on patronage and corruption rather than democratic standards and efficiency. This means that official hierarchies and division of responsibilities between ministries is constantly undermined and policy coordination depends on shifting individual positions.

The possibilities for large-scale corruption are limited, given the scarceness of resources, the tight control over almost all development projects and efforts by international and bilateral aid agencies. Nevertheless, when possibilities emerge, there is an alarmingly high level of corruption at all levels, including the very top of the government. Petty corruption is especially pronounced in the police and judiciary. Isolated cases of corruption have been prosecuted. However, many of these prosecutions were politically motivated in order to remove opponents. By and large, a climate of impunity prevails.

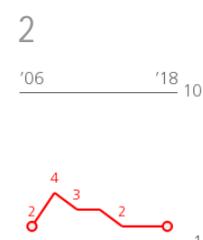
Efficient use of assets



Policy coordination



Anti-corruption policy



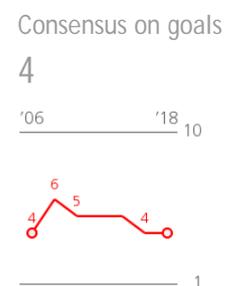
This is despite official rhetoric from the government, which has put the fight against corruption at the center of its program since the first elections in 2005. It has launched a “zero tolerance” campaign and designed a national strategy for good governance, including the creation of a series of anti-corruption agencies, such as a specialized anti-corruption police brigade and an anti-corruption court.

Anti-corruption measures have become even less credible since the ruling party gained unchallenged control over all state administration. Public procurement and employment in the public sector have become highly politicized. Furthermore, the government tries to capture the private sector, extending its control over banks, land tenure and privatization processes. Proximity to the government is generally prioritized over the criteria of competence and merit in all sectors. In fact, clientelism is essential to the CNDD-FDD’s cohesion, and anti-corruption measures are therefore almost exclusively designed to appease donors or get rid of critics and opponents.

Corruption, clientelism and the frustration this created among the urban elites as well as unemployed youth was a major factor leading to the massive protests and violence during the 2015 election crisis.

16 | Consensus-Building

Until recently, all relevant actors had agreed – albeit reluctantly – with the concept of consociational democracy as codified in the 2005 constitution, stipulating a complex ethnic (and gender) quota system in all public elected and administrative bodies and the security organs, including the overrepresentation of Tutsi which was an indispensable security guarantee to end the civil war. Since 2013 this consensus has been openly challenged. In early 2013 the president introduced a constitutional amendment which affected the core principles of the consociational model, including the ethnic quota and the system of two vice presidents, whereby the latter post traditionally went to the former ruling party UPRONA. The CNDD-FDD fell one vote short in parliament of passing the bill. However, the fundamental agreement on consociational rule has since been called into question. With President Nkurunziza’s bid for a third term, the subsequent violent suppression of protests, the forced exile of almost the entire political opposition and – most importantly – a major clean-up campaign of (especially Tutsi) officers in the army, consociationalism (apart from token Tutsi in government who are loyal to the CNDD-FDD and do not have a say in decision-making) has effectively ceased to exist. Even before this new turn, it had already become apparent that the consociational model as laid out in the 2005 constitution would not remove the possibility of a relapse into a de facto one-party state. Discourse on constitutionalism and democracy is used (by all sides) as a means to legitimize one’s own position and discredit another’s, as well as to retain or regain power.



There appears to be a somewhat vague consensus on general market economic principles among most political actors, but the state is still widely expected to take primary responsibility for promoting development and rebalancing existing inequities of wealth distribution. Given the historical socioeconomic discrimination, most political actors (Tutsi elites to a much lesser extent) agree on the fact that blunt market liberalization would thwart efforts to redress historical inequalities. The high corruption in Burundi furthermore suggests that major political actors are only interested in a liberal market economy as long as it does not interfere with their own interests.

The distinction between democratic reformers and anti-democratic veto actors is extremely blurred, as there is evidence of anti-democratic elements among all competing groups (government and opposition).

The 2015 crisis revealed that the inner circle around president Nkurunziza would not refrain from any means – legal or illegal – to cling to power, even in the face of international isolation. The opposition, for its part, did not always distance themselves from violence during protests, including attacks on Nkurunziza loyalists.

The government currently rejects any political dialog, claiming that the opposition squandered its legitimacy by disrespecting the democratic values of the Burundian state. Meanwhile, the government is continuously limiting the democratic space for opponents, by banning established civil society groups, pursuing legal persecution of dissident voices, and through police violence and torture.

The police and secret service have revealed themselves largely as stooges of the CNDD-FDD's inner circle. During the 2015 crisis, violent repression of protest, arbitrary arrests, disappearances and torture were frequent. Parts of the security organs were recruiting among the CNDD-FDD youth militia, Imbonerakure. The Imbonerakure do not appear to be controlled by any reform-oriented actor. Even voices within the CNDD-FDD that are critical of the militia have been silenced.

The coup attempt by sections of the army in 2015 paints an ambiguous picture of the FDN. On the one hand, sections of the army engaged in protecting protesters from police violence. The coup attempt that followed shortly afterwards was seen by many as an attempt to safeguard the constitution. However, it remains unclear whether those officers engaged in the coup would have ceded political power after the reestablishment of a democratic government. Since a clean-up of the officer corps in the wake of the coup the percentage of anti-democratic actors in the military is increasing.

Anti-democratic
actors

3



The consociational democratic model stipulated by the 2005 constitution is meant to overcome the deep-rooted political, social and economic cleavages that have long divided the Burundian society. The complex architecture of the new political order focuses on discrimination along ethnic lines and until recently had gradually alleviated ethnic conflict to the point that ethnicity had ceased to be the primary line of confrontation. This fragile arrangement has been essentially discarded by the current government. Since 2014/2015 cleavages along political affiliation have resulted in violent confrontation between the government, the opposition, anti-third-term protesters and the army.

Given the war fatigue amongst the general population, it is still unlikely that the cleavage will result in outright civil war. However, Burundi has by now become a repressive one-party state and political killings, forced disappearances and displacement have become the norm. Armed movements have formed in exile and hundreds of thousands of refugees can be mobilized easily.

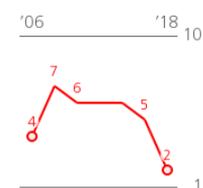
Political leadership is the main driver of cleavage exacerbation and conflict. This is especially true for the ruling party (e.g., through openly questioning the consociational model, police violence, violence by the Imbonerakure, legal restrictions on opposition parties and harassment of civil society and opposition members), but the opposition also played a role in contributing to the escalation. However, it would be misleading to speak of two monolithic blocs (ruling party and opposition). Severe hostilities between the Hutu opposition (mainly CNDD, FRODEBU and PALIPEHUTU) and the Hutu rebel movements CNDD-FDD and FNL became apparent during the civil war, and there were marked cleavages among the Tutsi Elite.

Efforts by churches and national and international civil society organizations to mediate have all been rebuffed. This is unsurprising, as the conflict is less ideological and driven more by personal power. As long as both sides try to secure their privilege, dialog will only be successful if it is aimed at accommodating elite interests.

The present political leadership seeks to suppress any critical expression made by civil society groups. The CNDD-FDD government had always regarded established civil society (most importantly human rights defenders and independent media) as Tutsi-dominated and hostile and for a long time made use of any available means (legal and illegal) to suppress it. Following this logic, the government encouraged the creation of alternative (read: loyal to the government) civil society organizations (called “nyakuri,” meaning “true” in Kirundi). Incidents of intimidation, harassment and outright persecution by security agents of the state were already on the rise before 2015. What had always been present has become an outright war against civil society since the protests against Nkurunziza’s third term in 2015. Almost all critical civil society groups (and individual human rights defenders) have been banned, persecuted

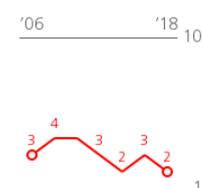
Cleavage /
conflict
management

2



Civil society
participation

2



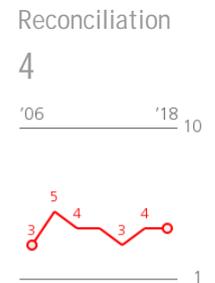
and/or forced into exile. Many of them re-organized in exile but lack the means to effectively engage in political advocacy from abroad.

There is a vague recognition of the need to deal constructively with the violent history of Burundi, but this has been largely ignored, in the interest of preserving the privilege of the politico-military elite – both on the side of the ruling party and on the side of its adversaries. In fact, the rejection of mechanisms to legally prosecute past injustices is one of the few points of consensus between the government and the opposition. Since 2015, the government has again engaged in ethnically divisive rhetoric and thereby further obstructed efforts to reconcile the Hutu and Tutsi population.

Given the fact that most political and military elites are in one way or another implicated in the commission of atrocities during the war years and earlier ethnic pogroms, they are reluctant to dig too deeply into the past. A truth and reconciliation commission (TRC) was proposed in the Arusha Peace Agreement. However, despite heavy international pressure, implementation has consistently been postponed.

A new TRC law in 2014 foresees truth finding and reconciliation, but excludes legal prosecution – amounting to a de facto amnesty. Although the majority of people interviewed in a public consultation by the technical committee which has been preparing the TRC since 2011, as well as the United Nations, opted for a mixed commission, the TRC is purely national. Furthermore, the election of 11 TRC members in December 2014 provoked widespread criticism from civil society activists, who deplore that four of the members are politically affiliated and that civil society members have not been included. In September 2016 the TRC began to collect testimonies for the period 1962 to 2008. However, given the politically oppressive and ethnically charged atmosphere in the country and the vast amount of Burundians who have fled since 2015, there is little hope that the process will be neutral and people encouraged to testify freely.

The provisions of the Arusha agreement on ethnical quotas have led to joint actions and experiences of Tutsi and Hutu in the administration, army and elsewhere. So far, the ethnically divisive rhetoric of the government has not provoked ethnic clashes, with the population appearing to resist the attempt at radicalizing the conflict along ethnical lines. Whereas the process initiated by the Arusha agreements seems to have collapsed in terms of democratization and peaceful development, concerning reconciliation it had the potential to achieve more than just an appearance of overcoming the ethnic division.



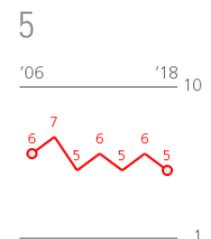
17 | International Cooperation

Given the country's structural deficiencies and the devastating effects of the long years of war, the government has no option but to rely very heavily on the support of international donors. Therefore, the state administration generally attempts to at least appear to make good use of external support, knowing that there are hardly any other sources available. Interestingly, the Burundian government has so far never pursued a pronounced "look East" form of politics. Until the crisis of 2015, the government was very effective in playing to Western donors' interests, implementing their programs in Burundi which enabled them to treat the country as a successful example of post-conflict peacebuilding. Pervasive corruption, an increasingly authoritarian style of government, as well as many cases of expected (and almost unavoidable) shortcomings in dealing with aid procedures, have not deterred international donors from granting unexpectedly high support (around \$2.5 billion in 2012). ODA assistance to Burundi amounted to \$2.9 billion between 2005 and 2015. Only reluctantly in 2015 have donors started withdrawing completely (or rededicating) aid, as authoritarian tendencies and human rights abuses could no longer be downplayed. Ever since the Burundian government appears content to simply "sit it out" and wait for the reopening of aid channels, which is a realistic prospect. With the closing of the United Nations Office in Burundi (BNUB) on 31 December 2014, the international community lost a reliable oversight mechanism over the use of international support.

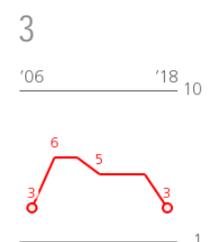
With the crisis of 2015, the government finally lost its remaining credibility vis-à-vis international partners. The period following the elections of 2015 saw the intensification of existing trends: the government continuously alienating international partners and fostering its own international isolation. The government ignored international calls for dialog with the opposition. It also engaged in open confrontation with bilateral partners, the AU, the EAC and the UN and decided to leave the ICC.

The reactions of international donors are naturally slow and cautious, and so serious threats to disengage were first made in the months after the repression of the coup attempt. All major donors withdrew or redirected their budget support and many development programs (most importantly in the security sector) were closed or at least significantly reduced. Most notably, the government's credibility with regard to security sector reform was seriously damaged. Instead of upholding democratic space, the police acted as stooges of the ruling elite during the protests of 2015. The secret service has become infamous for politically motivated assassinations, disappearances and torture. Even the integration of the army, which was hitherto seen as a success story, revealed itself to be more fragile than presumed.

Effective use of support



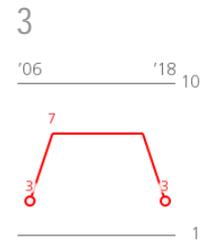
Credibility



Since the elections of 2015, the government has shown very low levels of cooperation with regional organizations. It continuously blocked mediation efforts first by the AU and then by the EAC. When the AU Commission proposed a 5,000 strong AU mission MAPROBU, the government labelled it an invasion and intervention force.

Burundi provides large numbers of peacekeepers to the African Union Mission to Somalia (AMISOM) and some military and police to other conflicts, such as Chad and the Central African Republic. The rewards to the government in terms of income and training of soldiers are important for financing the army. Therefore, the AMISOM troops have become the most important leverage for international pressure on the government. The EU, which finances the troops, has significantly cut its contribution in March 2016. Negotiations with the AU to find a way to pay the Burundian soldiers directly, as opposed to channeling the money through the Burundi government, have failed to yield results. Delays in payments to the soldiers have, however, already put the Burundi government - as well as the AU - under pressure. The suspension of Burundian participation in AMISOM is fortunately unlikely due to various factors (linked more to the AU than to the situation in Burundi).

Regional cooperation



Strategic Outlook

At the time of writing (January 2017), Burundi is in a deep political, humanitarian and security crisis. Popular protests were brutally suppressed by the police before turning violent. Violence by all sides, including arbitrary arrests, torture, disappearances and summary executions are frequent. With the failed coup attempt by sections of the army, deep splits within the armed forces have become apparent. A major clean-up of the officer corps and desertion of soldiers were the result, but the president and his leading circle clearly cannot trust the army. At least two armed rebel movements associated with former army officers have declared their fight against Nkurunziza. Even though they have not yet started concerted actions against the government, and war fatigue amongst the population is still high, the threat of organized armed resistance should not be underestimated.

Since the elections of 2015, a radicalized hard core of the ruling CNDD-FDD around president Nkurunziza has obtained full control over the entire state apparatus. Smaller opposition parties have fled into exile and have tried to re-organize but so far with little impact. The internal orientations of the strongest opposition party FNL and the ruling party of the former regime UPRONA is unknown. All independent media were closed during the brutal repression of the coup. By the end of 2015 almost all important civil society groups, including umbrella organizations, were banned or their members forced into exile.

The government embarked on a course of blunt hostility toward any dissident voice, openly attacked the achievements of the Arusha peace framework, and accepted the consequential difficulties with its major donors. The latter's withdrawal of budgetary support, and targeted sanctions against individuals close to the president have so far had little real impact on government interior policy.

The motivation for the government to defy international sanctions was not guided by the wish to become isolated, but more likely by the expectation that the international donors will eventually give in.

An EAC mediated dialog has so far failed to yield results. An intervention force proposed by the AU Commission has not materialized. An UN police force, authorized by the U.N. Security Council in 2015, has not been deployed.

International mediation and sanctions against the authoritarian government are - and will be in future - limited. The intervention of the African Union was superficial and probably made in order to avoid damaging its prestige. It was also insincere, since some autocrats of the surrounding countries have also removed barriers to re-election or are currently attempting to do so. The international significance of Burundi is too small and other conflicts in Africa too numerous to justify an engagement of the international community comparable with the Arusha process 20 years ago.

Another unpromising development is the increasing radicalization of the CNDD-FDD. Moderate elements within the party have been ousted, forced into exile, arrested or killed. Infighting within the hard core of the ruling elite around president Nkurunziza looms large.

The already weak economy has suffered dramatically during the last two years. Public and professional life in Bujumbura has at times been almost shut down. The majority rural population who survive on subsistence farming has only gradually been affected by rising food prices, an austerity budget and the temporary closure of cross-border trade with Rwanda.

In terms of economic and political transformation, the current crisis sends Burundi backwards, erasing the few achievements of the years of relative peace and stability. Given these circumstances, international donors should continue their pressure on the government. It becomes increasingly questionable, though, whether there are still moderate or simply accessible individuals in the immediate circle around the president who exert influence on political decisions. Rather than direct talks with the government itself, targeted sanctions, the direct dispersal of salaries to Burundian AMISOM soldiers without involving the Burundian government, as well as negotiations with influential regional powers all seem to be better suited strategies in the current situation.

Redirecting funds through local NGOs in the basic needs sectors is still possible, even though most politically active civil society groups have left the country or have been banned. Therefore, careful assessment is crucial, as the remaining partners are often close to the government. International aid should concentrate on the refugee crisis in neighboring countries in order to prevent another civil war. Support for civil society and the media should also be made a priority by international donors. This includes active support of independent social media projects that operate from abroad. Human rights defenders in exile in neighboring or European countries should be actively supported. Given that organizations in exile are for a large part officially banned or their members persecuted under the law in Burundi, donors should exercise caution in their assessment of when and how to offer support. They must always bear in mind the larger aim of bringing the government and the opposition together at the table and finding a political solution to the crisis when considering support to government opponents.

250,000 Burundians have taken refuge and around 100,000 are internally displaced. If the situation does not significantly improve in the coming years, another generation of frustrated refugees will be increasingly disposed to political manipulation and ultimately to the possibility of armed resistance.

Fortunately, the population in the country has so far resisted the inflammatory ethnic rhetoric deployed by the government. However, targeted killings and harassment by Imbonerakure militia, a generalized fear among Tutsi communities in rural Burundi, and a growing mistrust of Tutsi elements within the armed forces are all dangerous developments in a country that has experienced decades of ethnically mobilized violence.

But in view of the large number of refugees in the neighboring countries, the support Rwanda is allegedly providing to rebels and the deepening economic disaster, peace in the country is severely threatened. The only restraining element against a definitive breakdown of the state is the fear most Burundians have of entering into a new and bloody civil war.