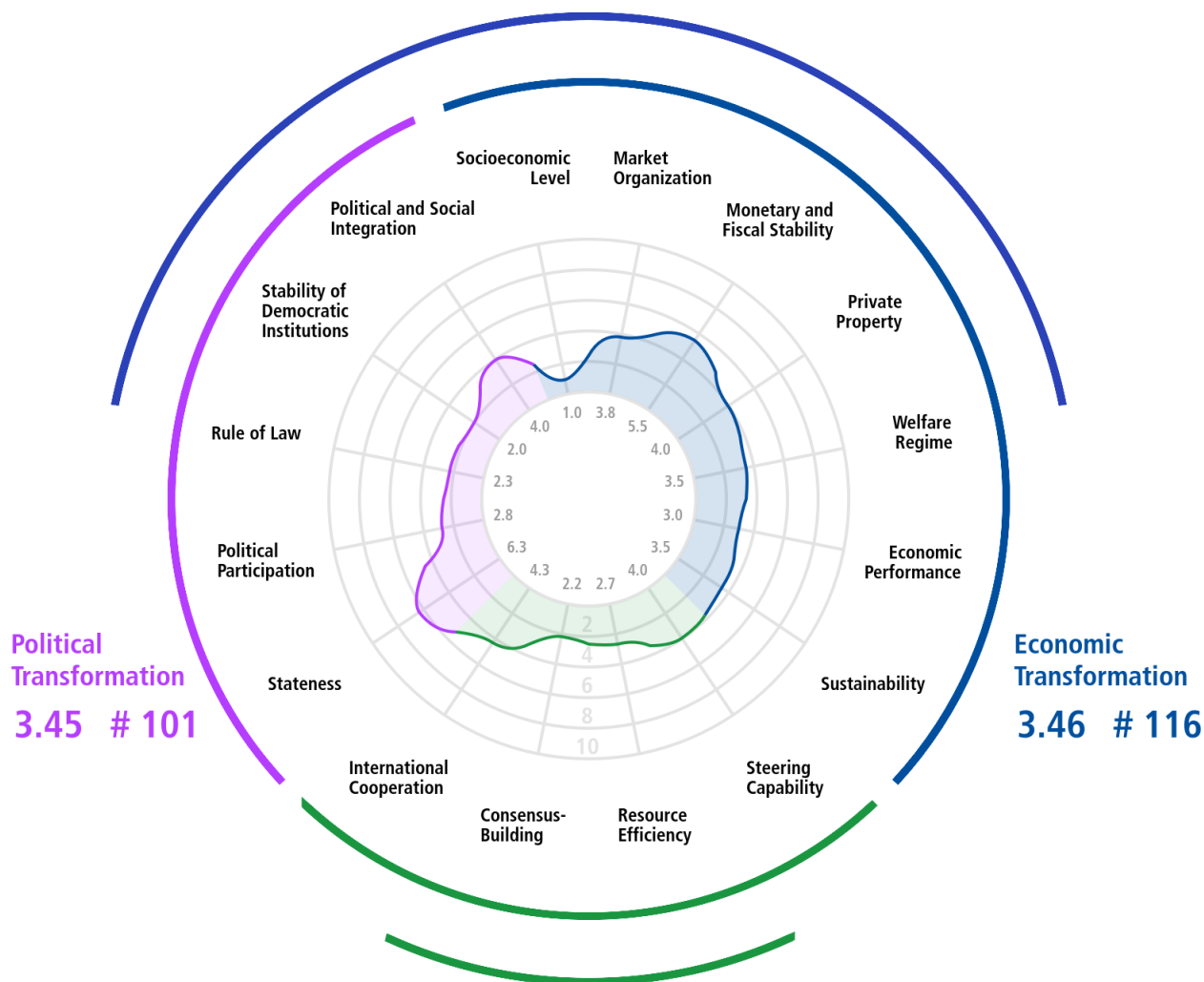


Burundi

Status Index

3.46 # 114

on 1-10 scale out of 137



Political Transformation
3.45 # 101

Economic Transformation
3.46 # 116

Governance Index

3.21 # 112

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2026**. It covers the period from February 1, 2023 to January 31, 2025. The BTI assesses the transformation toward democracy and a market economy as well as the quality of governance in 137 countries. More on the BTI at <https://www.bti-project.org>.

Please cite as follows: Bertelsmann Stiftung, BTI 2026 Country Report – Burundi. Gütersloh: Bertelsmann Stiftung, 2026.

This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

Contact

Bertelsmann Stiftung
Carl-Bertelsmann-Strasse 256
33111 Gütersloh
Germany

Sabine Donner

Phone +49 5241 81 81501
sabine.donner@bertelsmann-stiftung.de

Hauke Hartmann

Phone +49 5241 81 81389
hauke.hartmann@bertelsmann-stiftung.de

Sebastian Plate

Phone +49 5241 81 81263
sebastian.plate@bertelsmann-stiftung.de

Sabine Steinkamp

Phone +49 5241 81 81507
sabine.steinkamp@bertelsmann-stiftung.de

Key Indicators

Population	M	14.0	HDI	0.439	GDP p.c., PPP \$	950
Pop. growth ¹	% p.a.	2.6	HDI rank of 193	187	Gini Index	37.5
Life expectancy	years	63.7	UN Education Index	0.389	Poverty ³	% 86.2
Urban population	%	15.2	Gender inequality ²	0.501	Aid per capita \$	45.4

Sources (as of December 2025): The World Bank, World Development Indicators | UNDP, Human Development Report 2025. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.65 a day at 2017 international prices.

Executive Summary

During the period from 2023 to 2025, Burundi remained relatively stable despite its economic and political struggles. These years saw power become increasingly concentrated in the hands of the president and the governing party. From an economic perspective, the government made efforts to improve the economy while maintaining control over several sectors and state-owned enterprises (SOEs).

Politically, Burundi is experiencing rising tensions because of the government's repressive actions against the opposition, media and civil society leaders. Extreme abuses, including threats, intimidation, killings, illegal abductions and imprisonment, occur with impunity and are perpetrated by the National Intelligence Service (SNR) and actors close to the government (youth groups). These actions are likely to continue in the context of the 2025 elections, with the aim of dissuading opposition figures from carrying out their work in preparation for those elections.

Respect for human rights and freedoms remains limited. Despite the president's pardon of journalist Floriane Irangabiye in August 2024, the regime maintains an extremely harsh stance toward civil society and media leaders who criticize the government.

In 2023, the economy grew by 2.7%, signaling a positive trend. However, rising inflation (with a rate of more than 35%) and high levels of external debt (amounting to more than 80% of GDP) indicate that the economy continues to struggle in the aftermath of the COVID-19 pandemic and due to the effects of the war in Ukraine.

Efforts have been made to improve relations with foreign donors. The United States lifted its sanctions on Burundi in 2021, and the United Kingdom did so in 2024. Aid from major donors is increasing in scope, although this is heightening Burundi's dependence on aid. Key donors include the European Union, the United States, Germany, the Netherlands, Belgium, Japan and France. The closure of USAID may negatively affect the stability of Burundi's budget.

The security situation in Burundi remains volatile, with incursions by rebel groups and killings near the border with the Democratic Republic of the Congo. During the review period, Burundi closed its border with Rwanda to protect against potential interference.

History and Characteristics of Transformation

Historians argue that all ethnic groups in Burundi immigrated to the territory about 2,000 years ago and that occupational specialization led to social diversification. Thus, the ethnic categories “Hutu” and “Tutsi” in fact refer to socioeconomic groups, such as crop farmers and cattle raisers. The majority of the population is Hutu (85%). There are two minorities – the Tutsi, who make up 14% of the population, and the Twa, who make up 1%.

Colonizers, particularly the Belgians, exploited divisions between these groups by declaring the Tutsi to be superior to others. The country gained independence in 1962 under the Union for National Progress (UPRONA). This party represented a small Tutsi elite that soon began to centralize political power. The monarchy was abolished in 1966. Opposition Hutu elites faced repression, leading to the 1972 genocide.

Democratization began in the 1990s. The 1993 elections were won by Melchior Ndadaye of the Hutu-dominated Burundi Democratic Front (FRODEBU). The assassination of Ndadaye by members of the Forces Armées Burundaises (FAB) marked the beginning of a political crisis that culminated in civil war between Hutu rebels and the Tutsi-dominated military. During the course of this conflict, former President Pierre Buyoya (1987 – 1993, UPRONA) regained power in a coup d'état in 1996.

The war ended in 2000 with the Arusha Peace Agreement between UPRONA and FRODEBU. A power-sharing agreement introduced a transitional government with an ethnic quota system. Further talks between the army and the CNDD-FDD led to an agreement under which the rebels joined transitional institutions in 2004, 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 postwar elections of 2005 – considered free and fair with a 90% voter turnout – brought an outright victory to the CNDD-FDD, the ex-rebel group with strong support among the neglected rural Hutu population, making Pierre Nkurunziza president. Nkurunziza was re-elected in 2010 in elections that excluded the opposition, and his government became increasingly authoritarian.

Key opposition leaders temporarily went into exile, and parts of the National Forces of Liberation (FNL) rearmed in the Democratic Republic of the Congo. By 2014, the CNDD-FDD's determination to retain power and seek a third term for Nkurunziza overrode fidelity to the constitution's term limits. General elections on May 20, 2020, led to a peaceful transfer of power after 15 years. A new president, Évariste Ndayishimiye, and a new National Assembly were respectively elected to seven- and five-year terms.

Ndayishimiye's early speeches did not articulate a clear political agenda. There has been a shift in tone on the issues of political inclusion, international isolation and press freedom, but the implementation of his stated ideas remains unclear. In practice, Ndayishimiye and the CNDD-FDD have continued to centralize power and control the economy, showing little respect for civil rights and freedoms.

Regional security dynamics have led to an active war in the Democratic Republic of the Congo and to strained relations between Burundi, on the one hand, and Rwanda and Uganda, on the other, culminating in Burundi closing its border with Rwanda.

Burundi has followed a problematic trajectory since its colonization. Endemic violence, the centralization of power, power struggles, economic collapse and limited international exposure make this beautiful, densely populated country one of the most challenging political and economic environments today.

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

While Burundi broadly has the capacity to maintain a monopoly on the use of force across its territory, it remains constrained by the activities of guerrilla and youth groups that often act with impunity. Late 2023 to early 2024 saw guerrilla incursions along the border with the Democratic Republic of the Congo (DRC), leading to several deaths. Relations with the neighboring DRC and Rwanda are becoming increasingly difficult, with Burundi closing its border with Rwanda in January 2024.

As in the past, Burundi's borders remain porous, with armed groups continuing to cross into Burundi from neighboring states, especially from the DRC. These groups have even launched isolated attacks within Burundi.

While significant levels of discrimination persist against the Twa ethnic group and women, the vast majority of the population accepts the nation-state as legitimate. Individuals have the right to acquire citizenship without discrimination under Burundi's citizenship laws, except in the case of children born to Burundian mothers married to foreign men.

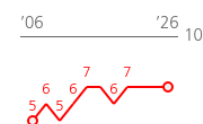
Burundi has a long history as a political entity. While struggles among political parties over access to power and resources continue, the country's legitimacy as a nation-state has always been unquestioned. National unity – reinforced by the use of Kirundi as a common language and recognition of a shared past over hundreds of years of monarchy – has allowed Burundi to cultivate shared traditions and a collective sense of national identity.

Refugees' willingness to return to Burundi also indicates the trust Burundian citizens place in the nation-state. Although some Burundians left before the 2020 elections, the UNHCR reported in 2024 that more than 220,000 Burundian refugees had returned since 2017. In 2024 alone, more than 20,000 refugees returned to Burundi, most of them from Tanzania. Additionally, the UNHCR reported that as of December 31, 2024, more than 318,000 Burundian refugees were living in Tanzania, Rwanda, Uganda and the Democratic Republic of the Congo. Tanzania is reported to be hosting the most Burundian refugees (more than 140,000).

Question
Score

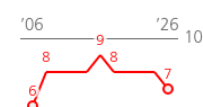
Monopoly on the
use of force

7



State identity

7



The Burundian state is secular under the provisions of its constitution. The law protects religious freedom and prohibits religious discrimination. 62% of the population is Roman Catholic, while 21.6% is Protestant, 2.3% Seventh-day Adventist, 2.5% Muslim and 3.7% belong to indigenous religious groups. An estimated 6.1% have no religious affiliation. Religious groups appear to coexist and interact, with few reports of tensions or conflict. However, several aspects of life have been increasingly influenced by religious dogma under the current president's leadership. For example, the LGBTQ+ community has long been a subject of discrimination. The president said in 2024 that homosexuals should be "stoned" in Burundi.

The Burundian constitution prohibits political parties from promoting religious violence or hate and guarantees religious freedom. However, in 2024, the country's legislation concerning religious groups was amended to require their registration with the Ministry of Interior.

Past examples illustrate how religious dogma informally interferes with the legal order and political institutions. President Évariste Ndayishimiye is described as a fervent Catholic and is known to use religious rhetoric in his speeches. The 2024 Freedom of Thought Report finds that religious norms and dogma significantly affect Burundi and directly limit the constitutional freedoms of expression, assembly and thought, among others. Religious constraints in practice affect most aspects of social life, with the most negative impact on the LGBTQ+ community, women, and unmarried couples and their children.

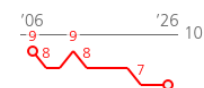
The Burundian state provides basic public services fairly evenly across the country, but they remain inadequate because of inefficiency, limited capacity and resources and corruption. These limitations are exacerbated by unclear dynamics between the state and traditional authorities (the *bashingantahe*).

With respect to fiscal and economic functions, several policies are beginning to yield positive results in the area of tax collection, with the partial goal of demonstrating the state's credibility to international institutions and donor states. The lifting of sanctions by the European Union in 2022 and the United States in 2021 attest to international actors' growing trust in the government of Burundi, as well as to the state's potential to enhance the capacity of administrative structures further in the short run.

Today, Burundi's administrative structures remain limited and inadequately funded. For centuries, the country has had a distinct system of local administration, with the lowest-level local administrative positions held by the *chef de quartier* in urban areas and the *chef de colline* in rural areas. The Office Burundais des Recettes (OBR) has increased its tax-collection capacity, yet faces challenges.

No interference of religious dogmas

7



1

Basic administration

4



1

The proportion of individuals using the internet increased to 11.3% in 2024 (up from 5% in 2017, according to DataReportal). The effects of COVID-19 increased the number of people living under harsh conditions, and access to services continued to deteriorate. In 2024, an Mpox epidemic affected Burundi. The population has limited access to health services. The gross enrollment rate for primary education has risen sharply in recent years and remains high. However, the quality of education remains very low, and teachers are ill-equipped and underpaid.

More than 40% of Burundi's population is chronically food insecure (World Food Programme), a condition attributed to the significant incidence of extreme poverty, along with poor access to clean water and health care – due in turn to an extreme shortage of qualified health care providers. Infectious diseases, particularly malaria, pose a persistent challenge. The World Bank (2023) estimates that 12% of the population has access to electricity. This share has not changed substantially in recent years. The share of the population with access to sanitation services has also stagnated. Frequent natural disasters, insecurity and the resulting displacements exacerbate humanitarian crises and complicate government efforts to improve infrastructure and agricultural productivity. About 62.4% of the population has access to a basic water source and 45.7% has access to basic sanitation (World Bank, 2022).

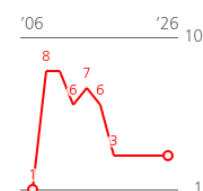
2 | Political Participation

General elections were held on May 20, 2020, and resulted in the first peaceful transfer of power after 15 years. A new president and National Assembly were elected, with respective terms of seven and five years. In April 2024, the parliament passed a new electoral code. The code makes it more difficult for candidates to run for office. Exiled opposition parties were barred from participating in the 2020 elections, and acts of violence and intimidation were carried out by the ruling party's Imbonerakure youth wing and security forces, according to churches, civil society groups and opposition parties. Citizens had almost no access to independent media leading up to the elections. International observers were either banned or informed by the electoral commission nine days before the vote that they would need to quarantine for 14 days upon arrival, effectively preventing their participation. The Catholic Bishop's Conference and the civil society coalition Consortium pour le monitoring des violations des droits de l'homme pendant la période électorale (COSOME) reported irregularities, including double voting, and raised concerns about the integrity of the electoral process.

The elections were the first to occur under the provisions of the 2018 constitution, which dismantled the ethnic quota system in place since the end of the country's civil war. They were also notable for producing a peaceful transfer of power from one president to another, although this occurred within the confines of the same ruling party. Following the elections, seats were distributed according to the results, and a complaint by opposition candidate Agathon Rwaswa was quickly dismissed by the constitutional court. Ndayishimiye's election as president drew mixed reactions, as

Free and fair elections

3



he had previously managed the Imbonerakure, which has been responsible for most acts of intimidation in the country. However, he had also been described as one of the more open and modest politicians within CNDD-FDD. The elections gave CNDD-FDD an overwhelming majority in the National Assembly (86 out of 123 seats) and Senate (33 out of 39). Notably, 38% of the National Assembly's seats and 45% of the Senate's seats were allocated to women, in accordance with a recently introduced quota.

Parliamentary elections were next scheduled for June 5, 2025. In December 2024, the elections body excluded the opposition coalition's candidates from the following year's June legislative elections, removing the prospect of a fair vote.

Democratically elected representatives have limited power to govern. The structure of political parties and their ties to society indicate that parties serve largely as mechanisms of state capture rather than ensuring democratic governance. Furthermore, the continued rivalry between elected officials and traditional leaders suggests that these officials have limited power over a large share of the citizenry – a notion supported by low voter turnout rates.

The revised 2018 constitution provides for a prime minister instead of two vice presidents. This means the prime minister and the president can be from the same ethnic group and political party, and it reduces the vice president's role as the president's assistant (Art. 93). This overrides the Arusha Peace Treaty's formula for power-sharing between different ethnic groups and political parties. The mode of cooperation between the president and the prime minister is laid out in more detail in Presidential Decree No. 100/007, dated June 28, 2020, under which the president appoints the prime minister, who in turn coordinates the government that implements the president's policies.

Soon after the 2020 elections, experts observed growing competition between the president and the prime minister. This led to a change of prime minister in 2022. The prime minister appointed in 2022 is a former general. The military's influence in national politics exacerbates the situation, with the ruling party now led by a group of generals. Party factions are aligning with one of the two leaders, and since 2020 former military personnel have been appointed to key ministry positions.

The freedoms of association and assembly are significantly restricted. Several cases of government authorities interfering with the activities of independent civic and political groups have been reported. Various human rights organizations have condemned abuses committed by the Burundian government against civil society organizations and opposition parties. International forums responsible for assessing human rights compliance have found that the government shows little to no willingness to cooperate with ongoing investigations. Human rights organizations operate in a climate of fear because of potential reprisals. Restrictive laws on foreign non-governmental organizations and the press have put considerable control in the government's hands, raising doubts about the independence of such organizations.

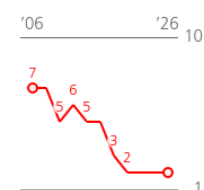
Effective power to govern

3



Association / assembly rights

2



Courts are not free to defend freedom of assembly and association; on the contrary, arbitrary rulings are used to limit such freedoms. By and large, any statements that contradict the official propaganda of the government and the CNDD-FDD – which contend that peace and security prevail in Burundi – have been systematically described as attempts to destabilize the country. Opponents face attacks by the authorities and ruling party members. In June 2023, all activities of the opposition National Congress for Freedom (CNL) party were suspended by the interior minister; members of the CNL are exposed to particular danger. Members of the Imbonerakure – the ruling party’s youth wing – have killed, arbitrarily arrested and attacked dozens of CNL members and destroyed local party offices throughout the country.

In July 2024, the report of the special rapporteur on the situation of human rights in Burundi was issued, documenting shortcomings in the state’s respect for human rights, including the freedoms of association and assembly. The report shows how organizations that do not support the government are restricted in their activities.

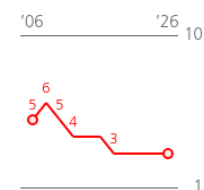
Article 31 of Burundi’s constitution guarantees the freedom of expression. In practice, however, these freedoms are curtailed. State institutions, along with the ruling party and its associated factions, continue to use practices that systematically oppress journalists and the media, as they have for years, thereby limiting or eliminating the freedom of expression. These practices continued in 2024, as indicated by the report of the special rapporteur on the situation of human rights in Burundi.

During the pre-election period, messages of hatred and hostility directed at political opponents of the CNDD-FDD party circulated on social networks, sometimes with an ethnic dimension. The authorities did not condemn or rebuke these messages. Such practices are likely to increase as parliamentary elections approach in 2025.

Journalists continue to face intimidation and threats, and some have had to obtain permission from local authorities to travel within the country. In December 2022, four journalists from Iwacu, an independent press group, were released after spending almost a year in prison. They had been arrested for “undermining the security of the state” by reporting on a clash between Burundian soldiers and an armed group. The press is still under surveillance by the National Communication Council. In October 2019, the council issued its Code of Conduct for the Media and Journalists in the 2020 Election Period, which required the media to collaborate and prohibited reporting results other than those officially announced by the Independent National Electoral Commission. It also prohibited the use of opinion polls as a source of information. Although the newly elected president has expressed a desire for media outlets to reopen in Burundi, the extent to which he is willing to relax restrictions on their work remains to be seen.

Freedom of expression

3



In August 2024, the government released journalist Floriane Irangabiye from prison. She had been arrested and convicted of “undermining the integrity of the national territory,” and had been held in prison since 2022. Sandra Muhoza – detained since April 2024 – was sentenced to 21 months in prison for “undermining territorial integrity” and “ethnic aversion.”

3 | Rule of Law

There is a de jure separation of powers, but it is not respected in practice. The executive and certain political leaders wield significant amounts of arbitrary power, which directly affects the legislature and the judiciary. De facto, there are no checks and balances. Even the creation of citizen-driven accountability mechanisms is impossible because courts, security forces and other actors are used to silence such initiatives. In 2024, the governing party further strengthened its control over state institutions and limited the separation of powers.

There is very little left of the separation of powers – whether horizontally, between the branches of government or between the government and external counterbalancing actors, or vertically, between the central and local governments.

Backed by allies in the ruling party, the new president can set policy unilaterally, leaving the government to implement it. He can appoint ministers without regard to the balance of representation of different parties and ethnic groups, and can quickly dismiss legal initiatives pursued by parliament.

The new constitution significantly curtails the legislative branch’s powers, even though recent elections have granted the ruling party an overwhelming majority in both chambers. The judiciary remains the only independent branch of government. However, in matters related to Burundi’s primary sources of division – access to land and resources – the judiciary has been bypassed by the establishment of the Special Court on Land and Other Assets (Court Spéciale des Terres et Autres Biens), which is directly under the president’s authority. The electoral commission has not demonstrated independence in addressing voting irregularities. The Truth and Reconciliation Commission has focused solely on earlier decades in Burundi, avoiding any examination of atrocities committed by the current ruling party.

Civil society, the media and opposition parties have suffered from repressive measures and acts of intimidation for years, leaving them weak and often prone to self-censorship.

Separation of powers

2

'06 '26 10



1

The judiciary is somewhat differentiated, but it remains heavily influenced and at times controlled by leading politicians. The entire system has limited reach and is complemented by customary rules. Traditional authorities (the *bashingantahe*) hold juridical competencies in some contexts. The case of Tony Germain Nkina and his recent release is a step in the right direction; however, it remains to be seen how the judiciary will handle other cases related to freedom of assembly and speech.

Burundi's judiciary has faced long-standing criticism for its overall weakness. Despite being constitutionally independent, it is hampered by structural and financial constraints, as well as frequent breaches of judicial procedure and state interference. These factors have created a climate of mistrust among the population, preventing citizens from fully enjoying their rights.

In a few exceptional cases, victims of serious human rights violations have attempted to take legal action against perpetrators. However, they rarely receive fair trials, and offenders are punished in only a small number of cases. According to reports, the National Intelligence Service (SNR) frequently interferes in court proceedings and in the operations of the police and prisons related to the prosecution and release of prisoners. Impunity remains pervasive in Burundi.

Institutions such as the Special Court on Land and Other Assets (Court Spéciale des Terres et Autres Biens), established in 2014 and placed directly under the president, also contribute to the perception of a weakened and marginalized judiciary. Several laws adopted in 2019 and 2020 have intensified government intervention.

Given political leaders' extensive control over juridical institutions, officeholders who abuse their positions are not held accountable. Numerous accounts indicate that lawbreaking by officeholders is embedded in the workings of society, with little regard for legal norms. Moreover, illegal acts by youth groups associated with the governing party seldom result in prosecution.

The misuse of public office for private gain persists with impunity in Burundi. Incidents of corruption involving illicit cash transfers to European bank accounts have been documented by the World Bank, and the United Nations has identified specific cases in which public funds were abused for private purposes. However, these revelations did not lead to prosecutions.

Evidence also indicates that senior government and party officials hold real estate and other assets in foreign countries that appear disproportionate to their compensation. Burundian elected officials do not consistently declare their assets to the Supreme Court, as prescribed by the constitution.

Some senior officeholders have been accused of crimes against humanity and are subject to targeted sanctions imposed by jurisdictions in Europe and the United States. Burundi withdrew from the Rome Statute in 2017.

Independent judiciary

3

'06 _____ '26 10



Prosecution of office abuse

2

'06 _____ '26 10



Burundi's constitution provides an extensive list of rights for Burundian citizens. However, these rights are systematically violated, with no effective means of redress. Even fundamental rights – life, liberty and physical integrity – are violated, as international human rights organizations and institutions have reported numerous disappearances, torture and killings.

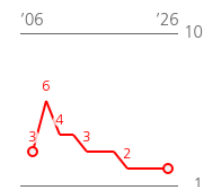
In September 2020, the final report of the U.N. Human Rights Council Commission of Inquiry on Burundi documented serious human rights violations that occurred in 2019 and during the 2020 presidential, legislative and local elections. These violations included summary executions, arbitrary detentions and arrests. The African Union Human Rights Observer Mission was not able to continue its work after 2018. On March 5, 2019, Burundi forced the U.N. Human Rights Office to close after 23 years in the country. Burundi had already withdrawn from the Rome Statute in 2017.

Organizations based outside the country have documented an alarming number of arbitrary arrests, cases of torture and extrajudicial killings. Discrimination against women in Burundi persists in law and practice. Under customary law, women are typically unable to inherit property, and, according to the citizenship code, a Burundian woman married to a foreign national cannot pass her citizenship to her husband or children. LGBTQ+ people face prosecution and stigmatization, and same-sex relations are criminalized.

However, Burundi has made progress on women's rights by ratifying regional and international instruments that protect women's rights, such as the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), and adopting a quota of at least 30% representation for women in parliament. The latter led to significant representation for women following the 2020 elections – as of the close of the review period, 38% of National Assembly members and 45% of Senate members were women. In August 2024, the president of Burundi pardoned Floriane Irangabiye, a journalist who had received a 10-year sentence in 2023 for undermining Burundi's national integrity. This was one of the few positive steps toward protecting the rights of journalists.

Civil rights

2



4 | Stability of Democratic Institutions

Democratic institutions exist on paper and are maintained to the extent necessary for the international community to continue relations with Burundi. State institutions have been taken over by political groups and private interests, leaving no room for democratic processes. In addition, citizens often turn to customary law and traditional authorities, which sometimes seem to provide them with better outcomes than is possible with state institutions.

Burundi's democratic institutions perform poorly because they have been captured by the ruling party, intimidated by both formal and informal security services, and undermined by structural reforms aimed at enabling the governing party to consolidate power and eliminate dissent. Because the electoral process lacks integrity, there are no effective mechanisms for citizens to hold officials accountable for abuse or underperformance.

Civil society and the independent media are weak and operate in an atmosphere of fear and repression.

Formal state institutions are accepted only if they provide access to power and resources for specific individuals and political groups. Political parties serve as mechanisms to capture the state, enabling relevant individuals and groups in power to secure official positions and access state budgets.

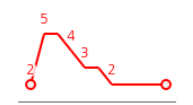
Burundi's democratic institutions are constitutionally and practically ill-equipped to regulate public affairs in the interest of all. The Nkurunziza regime tightened its grip on opposing forces, and the 2020 elections were criticized as neither free nor fair. Under President Ndayishimiye, institutions have already been described as "militarized" – that is, key posts in ministries and other institutions have been given to former generals and other military personnel. The new president has reduced the number of ministries to 15 and has shown genuine commitment to advancing his country's economic development. However, the humanitarian situation remains problematic; human rights violations continue, and any alternative opinions on political matters are repressed.

Religious forces primarily exercise their veto power indirectly by informing foreign donors about the challenges they encounter under the regime. However, the Catholic Bishops' Conference publicly spoke out against the manner in which the 2020 elections were conducted. Civil society, opposition parties and the media have been prevented from speaking up through the use of intimidation, suspension from office or even expulsion from the country. Very few potential critics are still in the country and working, and those who remain have little veto power.

Performance of democratic institutions

2

'06 '26 10



Commitment to democratic institutions

2

'06 '26 10



Nevertheless, rebel groups remain, and new ones are emerging, some of which are associated with political parties. If Ndayishimiye's government strengthens relations with neighboring Rwanda and the DRC, it might be able to keep security threats in check.

5 | Political and Social Integration

The Burundian party system is dominated by the current governing party, the CNDD-FDD. Although opposition parties exist, some operate from abroad in the diaspora.

The CNDD-FDD enjoys considerable support among a large share of the electorate.

At the same time, the party exerts significant pressure on opposition parties, often restricting their rights. Suspected members of the ruling party CNDD-FDD's youth wing, Imbonerakure, continued to coerce citizens into providing financial contributions for CNDD-FDD's 2025 election campaign, and have been blamed for continued acts of violence against opposition members.

All parties in Burundi claim to align themselves along cleavages between the educated elites and the working class, although some also claim, in part, to speak on behalf of specific regions or religions.

The system is highly clientelistic, as personal networks, rather than party programs, tend to determine citizens' party choices. The 2000 Arusha Peace Treaty prohibited members of the security forces from belonging to political parties and required that parties be organized in a "spirit of national unity." Parties were to be elected through proportional lists, with the goal of guaranteeing a high degree of representation.

The ruling CNDD-FDD self-identifies as a national movement that transcends ethnic lines. In 2020, the CNDD-FDD, dominant in all areas of political life and backed by the military, won 70% of the vote in legislative elections. It continued to pursue the militarization of government administration.

A new party, National Congress for Liberty (CNL), won 23% of the vote in the 2020 elections. However, it is still too early to determine whether the CNL will be a "real" opposition party or whether it will instead be marginalized like most of the 36 other opposition parties – a process known in Burundi as nyakurization. The former royalist party UPRONA received 2% of the vote, and the other political representative of a rebel group, FRODEBU, received less than 1% of the vote.

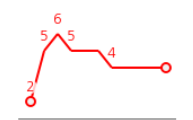
In June 2023, the interior minister suspended the activities of the CNL for alleged irregularities in its last two congresses.

Polarization is defined primarily along partisan rather than ethnic lines.

Party system

4

'06 '26 10



The range of interest groups reflecting social interests is limited, and only a few actors dominate political life. Polarization and conflict persist, with serious consequences for interest groups not aligned with the government party.

On the one hand, religious interest groups, primarily the Catholic Church, are well positioned and retain a degree of representation and influence. On the other hand, civil society, independent media and opposition parties are constrained in multiple ways. A recent opening toward greater press freedom may lead to broader representation of interests in the future.

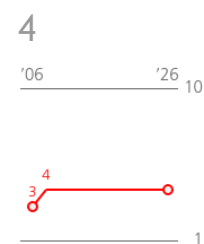
Trade unions such as the Confédération des Syndicats au Burundi (COSYBU) and the Confédération Syndicale du Burundi (CSB) only have about 53,000 members in total. Professional associations such as L'association des employeurs au Burundi and Intercafé have even fewer members. The number of NGOs, grassroots organizations, trade associations and journalists' unions was on the rise prior to 2015. However, ongoing state interference in internal matters, such as repeated mandatory re-registrations, the need to submit financial status statements, requirements to present plans demonstrating support for the National Development Agenda and continued intimidation, has led many organizations to close or go into exile.

The country's NGO crisis, which emerged at the end of 2018, peaked when the National Security Council suspended 130 NGOs. A total of 93 groups had their operational status restored in 2019. In addition, NGOs were required to involve provincial governors in staff recruitment. In December 2019, approximately 7,000 associations were registered in Burundi. However, this number does not take into account the country's numerous informally organized grassroots organizations. In June 2019, the well-known human rights organization Parole et actions pour le réveil des consciences et l'évolution des mentalités (PARCEM) was suspended by the government.

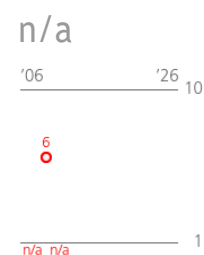
Some local civil society organizations – especially those that can rely on financial support and solidarity from abroad – have courageously continued to operate despite pressure. With reduced financial support and capacity, infrequent media coverage and a decline in advocacy activities, these groups' influence has diminished considerably.

Valid statements about the public approval of democratic norms and procedures can be made to only a very limited degree. The best-known measure of such issues on the African continent, Afrobarometer, conducted its latest survey in Burundi in 2014. At that time, a large majority of respondents (86%) said they approved of democracy as the best form of governance and rejected other systems, including one-party rule. Qualitative research indicates a general approval of democratic norms and principles and aims to better understand how Burundi's violent past has prevented the country from embracing democracy. However, even if people would in theory like their rights protected, the media to be free and elections to be peaceful, they have little trust in democratic institutions – a fact often connected with phenomena such as corruption.

Interest groups



Approval of democracy



Given the country's restrictions on the freedoms of assembly and speech, the number of self-organized groups is limited, as are other forms of organization. At the same time, the presence of customary norms and traditional authorities indicates a reliance on social structures that exist outside the realm of the modern state.

The ruling party and the security forces permeate every corner of society. The party has organized development programs and agricultural cooperatives, but it has also coordinated spying on ordinary citizens and engaged in arbitrary arrests and intimidation. Trust among Burundian citizens, painstakingly rebuilt by many civic initiatives after the civil war, has been seriously affected by these developments.

Burundian society features a variety of informal self-organized associations, including self-help initiatives, savings groups, joint small-scale businesses, and sports and cultural associations. Depending on the voluntary nature of participation and the quality of organization, these entities can in some cases foster genuine solidarity and support. Many donors use the self-help group system, recognizing it as an empowerment tool, particularly when these groups are exclusively for women.

Some religious institutions have fostered social cohesion through acts of charity and courage, for instance, by offering space to discuss contentious subjects peacefully and through their international connections and support. People tend to trust others within their own church. The World Happiness Ranking, which measures indicators such as social trust and support, ranks Burundi at 140th place, near the bottom of the global list. However, it ranked above some peaceful countries, such as Malawi and Botswana.

Social capital

4

'06 '26 10



1

II. Economic Transformation

6 | Level of Socioeconomic Development

Poverty rates have remained high in recent years, with 75.1% of residents affected by multidimensional poverty in 2023. An additional 15.8% of residents are classified as vulnerable to multidimensional poverty, while 65.1% live below the income poverty line (UNDP Multidimensional Poverty Index 2023). In 2020, Burundi's Gini coefficient was 37.5. A large portion of the population is expected to remain in poverty in the coming years.

Burundi was ranked at 187th place out of 189 countries on the 2022 Human Development Index (HDI), with its HDI score increasing by 0.01 to 0.42 compared with 2021 (HDI). About 80% of Burundi's income comes from agriculture (World Bank), and the majority of the population lives at the subsistence level. By the end of 2024, approximately 1.9 million people in Burundi were forecast to face acute food

Question

Score

Socioeconomic
barriers

1

'06 '26 10



1

insecurity (World Food Programme), up from 1.4 million in 2022. The rate of chronic malnutrition among children aged between six and 58 months is 52.8%, the highest in the world in 2024 (World Food Programme).

Burundi has experienced a strained economic situation in recent years, due in part to low levels of foreign assistance compared with 2016 levels (World Bank). This has resulted in fiscal and balance-of-payments difficulties. To offset the loss of international resources, the government has made significant efforts to mobilize domestic resources, with some positive results in the area of tax collection. However, these efforts have not been enough to meet ever-increasing social demands driven by a very high population growth rate. Although the United States lifted its sanctions on Burundi in 2021, the mobilization of international funding has not yet reached 2016 levels. The United Kingdom lifted its sanctions on Burundi in 2024, which may affect future aid levels (Global Sanctions). The European Union extended its sanctions on Burundi through 2025 (European Council).

More than 80% of the population is employed in the agricultural sector. All three ethnic groups in Burundi are affected by poverty. Gender inequality is a significant barrier to socioeconomic development. Burundi's score on the Gender Inequality Index published on February 23, 2024, was 0.499, ranking the country 128th globally.

The humanitarian situation remains difficult, with more than 86,000 internally displaced people and more than 91,000 refugees. The leading causes of internal displacement are conflict and natural disasters (UNHCR).

Economic indicators		2021	2022	2023	2024
GDP	\$ M	2775.8	3338.7	2629.4	2162.4
GDP growth	%	3.1	1.8	2.7	3.5
Inflation (CPI)	%	8.4	18.8	26.9	20.2
Unemployment	%	1.1	0.9	0.9	0.9
Foreign direct investment	% of GDP	0.8	0.8	1.3	1.5
Export growth	%	3.4	5.8	7.8	-
Import growth	%	3.2	7.0	7.0	-
Current account balance	\$ M	-393.9	-622.0	-625.6	-
Public debt	% of GDP	66.5	68.5	58.1	52.0
External debt	\$ M	976.0	955.0	1042.8	-
Total debt service	\$ M	29.8	33.4	44.4	-

Economic indicators		2021	2022	2023	2024
Net lending/borrowing	% of GDP	-0.7	-	-	-
Tax revenue	% of GDP	15.6	-	-	-
Government consumption	% of GDP	30.8	31.0	30.7	-
Public education spending	% of GDP	4.9	-	-	-
Public health spending	% of GDP	2.2	1.6	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	2.0	2.6	3.7	-

Sources (as of December 2025): 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

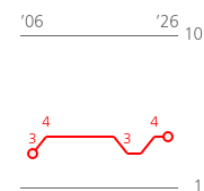
Despite increased efforts by the current government, Burundi remains relatively closed to global trade. Participation in regional and continental trade arrangements is contributing to a greater openness to trade.

Burundi's institutional framework is advancing thanks to several reforms passed by the government in recent years – new investment legislation in 2021, a new mining code in 2023, fiscal consolidation measures in 2023, a national industrialization policy and strategy, and a national strategy for African Continental Free Trade Area (AfCFTA) implementation in 2023. However, market institutions overall remain weak and affected by corruption and a lack of capacity (2024 Investment Climate Statement, U.S. Department of State). Furthermore, weak infrastructure, political instability, comparatively weak international connectedness and the country's landlocked status constitute non-fiscal entry barriers. The high trade deficit and narrow export base represent significant exit barriers.

Burundi updated its investment legislation in 2021 (UNCTAD). The new legislation establishes fiscal benefits primarily for the first five years of operation (or up to 10 years for certain sectors). The corporate tax rate is 30% after the first five years of operation. The government may co-finance foreign direct investment (FDI) projects, mostly in kind. During the review period, Burundi established the Burundi Development Agency (ADB), replacing the Investment Promotion Authority (API). The agency supports both local and foreign investors (U.S. Department of State).

Market organization

4



Burundi has signed the WTO's Investment Facilitation for Development Agreement and is a member of the International Center for Settlement of Investment Disputes (ICSID) Convention (1969). Commercial legislation allows local courts to enforce foreign court judgments. Burundi has bilateral investment treaties with a number of countries including Belgium, Luxembourg, Germany, Kenya, Mauritius, the Netherlands and the U.K. (U.S. Department of State).

Current regulations do not generally discriminate between foreign and domestic businesses, and set no limits on foreign ownership except in the mining sector (a 16% stake of project share capital is reserved for the government, increasing by 5% with each renewal). Restrictions on foreign investment apply to ammunition, weaponry and military companies. Land acquisition and lease regulations do not differentiate between foreign and local investors (however, reciprocity with the investor's country is required). Some SOEs benefit from an unfair advantage as they hold both regulator and competitor roles (U.S. Department of State).

Burundi's small market size and lack of diversification are linked to its dependence on the agriculture and mining sectors. The country is a member of the East African Community (EAC) and the Common Market for Eastern and Southern Africa (COMESA), and it has ratified the African Free Trade Area Agreement, which will require changes to its legal system. Competition legislation has been in place since 2010, but has not been implemented. A draft document establishing a Competition Commission was sent to the president in 2017; however, as of the end of the review period, it had not yet been approved (Browmans, 2024). On the Global Innovation Index 2024, Burundi was ranked 127th worldwide, marking one of the largest gains in the ranking.

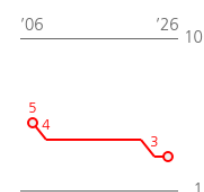
According to World Bank data, Burundi's trade openness was rated with a score of 29.59 out of 100 in 2023, with an average of 30.80 for the period from 1960 to 2023.

Burundi mainly exports agricultural products, such as coffee and tea, and mining products, notably gold and other minerals found in the country's northern region. The decline in exports observed since 2015 persisted throughout the 2020s, with a boost in performance seen in 2022. However, the overall quantity of goods exported remains relatively low. The value of the country's imported goods has also fluctuated.

These trends are linked to the overall international contraction in trade and to developments in world market prices. Both the COVID-19 pandemic and the Russian war in Ukraine have negatively affected trade. The government has been pursuing its National Development Plan in accordance with Agenda 2030, with support provided by U.N. agencies, the World Bank and the African Development Bank as well as other multilateral and bilateral sources. Recently, the government has continued its efforts to improve trade policies and establish special economic zones (U.S. Department of State).

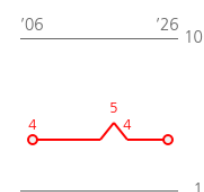
Competition policy

3



Liberalization of foreign trade

4



Burundi's trade balance remains in deficit, largely because of its dependence on imported manufactured goods. The government added trade liberalization policies to its agenda in 2004 and 2009, when the country joined COMESA and EAC, respectively. However, it has not yet implemented measures to reduce non-tariff barriers or streamline customs processes. In 2021, Burundi ratified the African Continental Free Trade Area agreement. As of 2023, the average applied most-favored-nation tariff rate was 14.0%.

The Burundian banking sector is small and faces a shortage of stable, long-term resources as well as weak supervision and regulation, including excessive government involvement in governance. Further challenges include high interest rates, inflation, and a lack of sufficient foreign exchange and collateral. At the same time, the World Bank has described the country's financial sector as "resilient," as its core has survived crises and proved highly profitable. The sector consists of 15 commercial banks, with seven playing a dominant role. The sector includes a handful of formal non-bank financial institutions, mainly development banks; a growing microfinance network (55 microfinance institutions); 16 insurance companies; three payment institutions; and three social security institutions (U.S. Department of State).

In 2020 and 2022, Burundi's government launched two banks – one for youth and another for women.

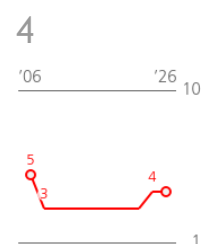
The degree of direct state ownership in the banking sector is low overall; however, the government is the main stakeholder in two banks and interferes with banking policies by nominating representatives to their boards of directors. The three traditional commercial banks – Banque Commerciale du Burundi (Bancobu), Bujumbura Banque de Crédit (BCB) and Interbank Burundi (IBB) – together control 75% of the country's total credits, assets, deposits and savings.

The central bank, Banque de la République du Burundi, has pursued a policy aimed at stability and austerity with regard to domestic credit. It has set the minimum level of foreign-exchange reserves at 3% of total monthly unpaid deposits (2022). Total reserves amount to about one month of imports. According to the World Bank, the most recent available data indicate that the banking system's capital-to-assets ratio was 11.5% in 2018. The ratio of non-performing loans to total gross loans decreased from 14.19% in 2017 to 4.1% in 2021 (IMF) and showed an upward trend at the beginning of 2024 (Banque de la République du Burundi).

Burundi established the Burundi Stock Exchange in January 2024. However, it was not yet operational as of the close of the review period (U.S. Department of State).

The insurance and pension sectors are underdeveloped, impeding resource mobilization and the country's transformation toward maturity.

Banking system



8 | Monetary and fiscal stability

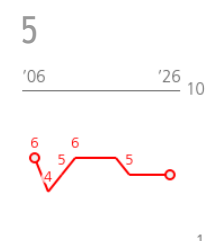
Burundi's central bank serves as the country's monetary authority. Throughout the review period, the local economy faced challenges stemming from a foreign-exchange deficit, leading to limited private investment and a decline in production. The central bank had previously pursued a strategy of foreign-exchange liberalization, with rates set through currency auctions overseen by the central bank. However, the African Development Bank reports that the central bank recently implemented significant reforms to its exchange-rate policy, which may alleviate pressure on the country's foreign reserves. In 2020, the central bank suspended the licenses of foreign-exchange traders accused of violating regulations by trading beyond the 18% margin allowed for official exchange rates. The exchange bureaus were permitted to reopen in late 2022. Special measures were also adopted to soften the impact of the Russian war in Ukraine. In 2023, the government focused on adjustment measures and fiscal consolidation. It tightened monetary policy and adopted limited reforms of the banking sector with the goal of supporting macroeconomic stability (U.S. Department of State).

The real effective exchange-rate index in 2023 was 135.71 (based on a 2010 value of 100, according to the World Bank), up from 134.30 in 2022.

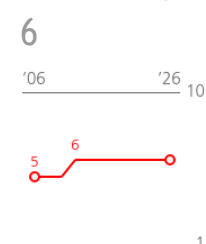
With a small export base (coffee and tea) and an agricultural sector highly vulnerable to weather shocks, Burundi's current account is in deficit. The current account deficit amounted to 14.9% of GDP in 2022 (IMF estimate) and 16.6% in 2023 (World Bank), driven by high oil prices and sluggish exports. It is expected to improve to 15.9% in 2024. The central bank has identified vulnerabilities in the export sector and the high budget deficit as the primary risks to financial stability.

Burundi's gross public debt increased to 72.7% of GDP in 2023, but decreased to 70.6% in 2024 (World Bank), up from approximately 50% of GDP in 2018 (AfDB). In July 2020, the IMF Executive Board approved debt relief under the Catastrophe Containment and Relief Trust, providing \$7.63 million in relief in the subsequent three months and potentially up to \$24.97 million in the following 21 months. The IMF debt relief will support the allocation of resources to public sector health needs and other emergency spending programs while helping to alleviate the balance-of-payments shock associated with the COVID-19 pandemic. Burundi also participates in the World Bank's Debt Service Suspension Initiative, resulting in savings of \$4.5 million, and it has benefited from a \$5 million grant from the International Development Association. Overall spending in the state's fiscal year 2022/23 budget will increase relative to 2021/22, rising to BIF 2.39 trillion (approximately \$1.18 billion), a 39.6% increase from the previous fiscal year (UNICEF). The fiscal deficit stood at 5.3% in 2023, up from 4.5% in 2021 (AfDB).

Monetary stability



Fiscal stability



During the review period, the government implemented an ambitious tax-collection plan along with a strategy for targeted investment in the economy. It also reduced the number of ministries from 21 to 15 and outlined six priority areas in line with the National Development Plan and the Agenda 2030 document. State revenues are rising; however, systemic corruption, tax evasion and illicit cash transfers have been identified as the key risks to the public budget.

The government has struggled to balance improvements in fiscal regulations and practices with the ongoing need to compensate its clientelistic networks for security and allegiance.

The exchange rate is calculated from the weighted average rate of commercial banks' currency sales and purchases on the previous day (Banque de la Republique du Burundi). The Burundian franc is not pegged to any anchor currency.

The inflation rate has changed rapidly, rising to more than 35% in 2024, up from -0.7% in 2019. The IMF noted a 2023 inflation rate of 27.1% and estimated an average inflation rate of 25% in 2024. (World Bank) Historically, the inflation rate in Burundi has fluctuated between -5.88% in 2018 and 37.38% in 1996. With more than 80% of the population living below the income poverty line, and with wages having been frozen for several years, 31 trade unions have been urging the government since the beginning of 2020 to adjust wages to keep up with inflation.

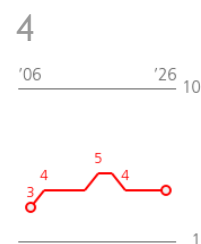
9 | Private Property

Family property (Itongo) in Burundi is passed down from generation to generation. The 1986 Land Code (revised in 2011) and customary law together form the foundation of the legal framework that governs land rights. Several contentious attempts to reform the code in recent years have demonstrated the highly politicized nature of land tenure issues in the country, particularly given the increasing population.

Property law, land laws and related regulations are routinely abused, and families are accustomed to going to court every 20 years to defend their rights to their plots. Beyond the conflicts generated by returnees, disputes with neighbors, family members and other locals are also common. An estimated 90% of legal cases in Burundi are land-related (Rick de Satgé and Luis Baquero, Land Portal Foundation, 2025).

In 2014, the government passed a regulation that prohibits opponents in land conflicts from filing appeals of decisions made by the National Commission of Lands and Property (CNTB). Instead, the Special Court on Land and Other Goods (Court Spécial des Terres et Autres Biens, CSTB) – whose members are appointed by the president – was established as a last resort for plaintiffs. Both institutions are thus

Property rights



involved when citizens are seeking to obtain or retain a land certificate or land title. The law on the CSTB was revised in 2019 to make the court accountable to the Supreme Court. This revision also requires its members to have specific qualifications, expands the court by adding a second chamber, involves magistrates and the Senate in selecting its members, and limits its authority.

With World Bank support, the government has implemented a system to issue land certificates. In 2024, several pilot projects aimed at consolidating the capacity of local land registration offices were underway.

Recognizing women as landowners has presented significant challenges within Burundian society. Through the end of 2022, the majority of land certificates included the names of both spouses. Despite this, women's right to land is severely restricted.

The CNTB's mandate was not renewed in April 2022, and the legal and institutional framework for managing land and land conflicts remains inadequate and inefficient.

In 2024, civil society organizations that addressed the U.N. special rapporteur for Burundi indicated that there had been cases in which the National Intelligence Service (SNR) had threatened people seeking compensation for expropriated land. Furthermore, women and children often lose access to their land and homes in cases of separation or divorce. The Heritage Foundation's property rights index measures the degree to which a country's laws protect private property rights and the extent to which its government enforces those laws. Burundi is ranked 38th out of 52 within Africa on this index.

The private sector remains under the ruling party's control. In theory, the ruling party oversees the country's economic development and is responsible for keeping it on the right course.

The government's efforts to improve the business climate are reflected in Burundi's score of 56 points in the April 2024 business confidence survey. However, the country's score on the Heritage Foundation's Index of Economic Freedom fell to 28 points in 2024, indicating systemic challenges for the business sector.

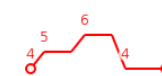
The legal framework governing the activities of private businesses is in place, but its application has shortcomings.

Despite this legal framework and the presence of associated institutions – for example, specialized commercial and labor courts, a Burundi Federal Chamber of Commerce and Industry (Chambre Fédérale de Commerce et d'Industrie du Burundi, CFCB), laws to protect patents and trademarks, and national strategies to foster the private sector – the private sector remains weak, undiversified and fragmented. Its development is hampered primarily by a lack of access to electricity and credit, security issues, and high levels of corruption. At present, the sector is made up of about 3,000 formally registered companies, 80% of which are based in Bujumbura.

Private enterprise

4

'06 _____ '26 10



1

In 2014, Burundi additionally had approximately 249,000 informal companies, largely characterized by self-employment. The country is predominantly rural, with only 13.7% of the population living in cities (2019: 13.4%), making it among the least urbanized countries in the world. As a result, the private sector is associated mainly with processing agricultural products and mining.

The sector is neither diversified nor internationally competitive. A joint assessment by UNDP, the African Development Bank (AfDB), the World Bank and UNICEF of the socioeconomic impact of the 2020 global pandemic on Burundi's economy recommended emergency measures for the private sector. The focus has been on providing credit and bolstering the sector as a whole. The World Bank's International Finance Corporation reiterated similar recommendations in 2022.

10 | Welfare Regime

Contributory social security programs in Burundi were previously employment-based social insurance systems, financed by employers and employees and managed by the state through institutions including the Commission Nationale de Protection Sociale and the Institut Nationale de Sécurité Sociale, and through insurance programs such as Mutuelle de la Fonction Publique.

The Burundian social support system includes old-age pensions, disability pensions and survivor pensions. Additionally, benefits are available for medical needs, including coverage for dependents, sickness (including HIV/AIDS, malaria, leprosy and tuberculosis) and maternity. Moreover, informal and customary social support networks also exist and depend on community generosity and social initiatives such as savings and credit clubs.

A more inclusive social protection law was adopted in May 2020 to subsidize not only maternity care and care for children under age 5, but also social welfare programs for the ultra-poor and people with disabilities. In 2020, the president also reiterated that social protection policy was a policy priority for his administration. However, financing these programs will be a challenge despite the positive trend in the country's relations with Development Assistance Committee donors.

Humanitarian organizations regularly provide material support and cash transfers to vulnerable groups, yet these programs remain heavily underfunded. A shortage of qualified medical personnel also impedes access to health care. The Human Development Index score for women in Burundi remains significantly lower than that for men (UNICEF, January 2023). In December 2021, the World Bank (IDA) approved \$150 million in financing for Burundi's social sector.

Approximately 6% of Burundi's budget for the 2023/24 fiscal year was allocated to social protection interventions, down from 9% in the previous year. Since 2022, the Merankabandi Program (a cash-transfer program for the most vulnerable populations) has been extended nationwide, covering 145,000 households. A new social protection policy and related strategy are being developed (UNICEF).

Social safety nets

3

'06 '26 10



The country has made significant progress with regard to women’s representation in electoral decision-making positions since 2010. Burundi’s constitution provides for a 30% quota for women in government, and in the 2020 elections, 38% of newly elected National Assembly members and 45% of new senators were women. Burundi has ratified international and regional instruments that protect women’s rights, including the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), the International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights. It also adopted a National Gender Policy (2012 – 2025), which led to the establishment of an investment bank for women in 2020.

Despite these improvements, women still face numerous challenges. Based on 2022 data, the literacy rate for women still trails the rate for men by about 13 percentage points. Although access to education is broad – 96% of all children go to school – the ratio of women to men declines sharply at the tertiary education level. Women accounted for 50.8% of the labor force in 2023, a slight decrease from 51.7% in 2021.

The Twa ethnic group has long suffered from social and economic exclusion, but the Arusha Peace Agreement’s guarantee of representation in the National Assembly continues to be respected.

LGBTQ+ citizens continue to face discrimination. As of 2022, legal provisions criminalize LGBTQ+ individuals and sexual activity between same-sex partners. In 2024, the president spoke against the LGBTQ+ population.

The majority of the population is under 18, which has considerable effects on society as a whole. UNICEF regards access to arable land as a potential trigger for violence with a significant impact on social needs.

11 | Economic Performance

The Burundian economy is primarily agricultural and remains susceptible to shocks, government intervention, and environmental and social pressures. Consequently, it lacks the capacity to generate substantial long-term growth. The country’s economic growth rate declined after the 2015 political and security crisis but has gradually begun to rebound. The economy expanded by 2.7% in 2023.

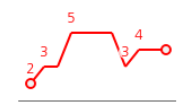
Burundi is still considered one of the least developed countries in the world, with more than 70% of its population living below the poverty line in 2024. The country also experiences relatively high levels of inequality, and economic growth has slowed in recent years because of the COVID-19 pandemic and the war in Ukraine initiated by Russia.

During the review period, a significant share of the population experienced hunger, and the share living under conditions of food insecurity remained high in 2024. Burundi’s current account showed a deficit exceeding 15% of GDP in 2024. The

Equal opportunity

4

'06 '26 10



Output strength

3

'06 '26 10



central bank has identified vulnerabilities in the export sector and the high budget deficit as the primary risks to financial stability, and the government continues to take measures to address these vulnerabilities.

The economic growth rate rose from 1.61% in 2018 to 3.1% in 2021, but slowed to 2.7% in 2024, according to World Bank data. Weak economic growth relative to population growth results in low per capita income, estimated at about \$199 in 2023, according to the World Bank, a decrease from \$259 in 2022.

The country's gross debt rose to more than 80% of GDP in 2024, up from about 50% in 2018. The IMF granted some debt relief in 2020 to help stabilize the country. The inflation rate has fluctuated, ranging from -0.7% in 2019 to 26.9% in 2023.

In June 2019, the official exchange rate was BIF 1,842.4 francs to USD 1, and by 2023 it had depreciated to BIF 2,903. While the official unemployment rate was around 0.93% in 2023, the informal sector remains substantial.

In 2024, DAC financial assistance from some donors continued to grow, with most support coming from the European Union, the United States, Germany and France.

12 | Sustainability

With one of the highest population densities on the continent (about 400 people per square kilometer) and more than 80% of the population dependent on agriculture, Burundi relies heavily on functioning ecosystems. As a mountainous country with a tropical climate, it also depends on efficient land-management practices. However, the ambitious land reform provided for in the Arusha Agreement was only superficial and did not meet expectations. Property law, as well as land and environmental laws and regulations, has been sidetracked for political purposes. There is little coordination among the reforms that have been implemented, and traditional conflict resolution mechanisms are disappearing. As long as the population continues to grow and income-generating activities in cities do not offer a viable alternative, worsening land degradation, erosion, loss of soil fertility and deforestation will pose an increasing threat to livelihoods.

Climate change is already generating more frequent extreme weather events, including heavy rainfall and prolonged dry seasons in the north and the basin between the Democratic Republic of the Congo (DRC) and Burundi. Water levels in the lakes are dropping. This is likely to worsen soil erosion, landslides and land loss, while also leading to desertification and increasing the risk of hunger.

The government has drafted several adaptation and prevention plans, including the National Profile on Climate Change, the Planned Contributions at National Level and the National Adaptation Plan. Top-priority measures to be implemented under the technical guidance of the Institut Géographique du Burundi include improved

Environmental
policy

4

'06 '26 10

3 4 3 4

1

electricity generation using hydropower and biogas, adaptation of transportation infrastructure, extensive reforestation, raising public awareness of climate change issues, more efficient use of rainwater, and adapted – that is, more sustainable and organic – farming methods. Efforts have been made to improve early-warning climate forecasts and protect buffer zones and floodplains around important lakes.

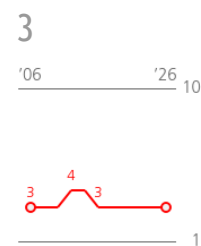
Burundi was commended in 2020 for its efforts to improve the quality of education and boost its overall school enrollment rate to 96%. On average, the government allocates about 17% of its national budget to education, and literacy rates surpass the African average both for women and men. In 2023/24, the share of the national budget allocated to the ministry in charge of education was 12.7%, compared with 14.8% in 2022/23 and 20.6% in 2021/22, although in absolute terms the allocation has increased (UNICEF Educ. Budget Analysis 2023/24). Stress factors, including climate change, violence and other threats, significantly affect access to education. Vulnerable groups, such as returning refugees and internally displaced people, are among those most affected. Notably, there has been a sharp decline in attendance at the secondary school level (50% attendance) and an even greater decline at the tertiary level.

There is strong demand for high-quality education, and pressure on educational institutions has increased as the young population has grown. In addition to the seven state universities, the country is home to 46 private institutes and universities. In 2020, the University of Burundi received 70,000 applications but admitted only 4,000 students. The educational system is politicized – university students can be disciplined by having their state scholarships withheld, a circumstance which results in frequent student strikes.

A UNDP study estimated that 30% of children in Burundi engage in child labor and were at high risk of dropping out of school indefinitely because of the global pandemic.

Burundi ranked in the lower echelons of the 2022 U.N. Education Index, with a score of 0.39 on a scale from 0 to 1. In 2022, the overall literacy rate was 75.54%, up from 68% in 2017. The country allocated a sum amounting to 4.9% of GDP to public expenditure on education in 2023/24, while its R&D expenditure amounted to 0.21% of GDP in 2018.

Education policy /
R&D



Governance

I. Level of Difficulty

Burundi continues to face multiple structural constraints in 2024 that reinforce one another, making government intervention highly challenging. The combination of geographic (landlocked) and demographic (densely populated) factors tends to generate land conflicts, which are considered the fundamental cause of Burundi's ongoing violence. Additionally, Burundi lies between the DRC and Rwanda, which have experienced crises for decades. This, in turn, exacerbates conflict in Burundi.

Demographic statistics indicate that Burundi is a very young country. In 2024, 44% of the population was 15 or younger (UNFPA), and the population has grown at about 3% per year, including 2.74% that year. Consequently, education systems and the economy face continuous challenges in providing adequate nutrition, health care and education to all young people.

One key government task has been to overcome the sociopolitical divides related to inequality and clientelism. About 50% of Burundi's national budget had been financed by foreign donors before most bilateral aid was suspended after the 2015 crisis. The 2015 crisis significantly set back the limited progress Burundi had made since the end of the civil war, and recovery remained slow in 2024. Moreover, climate change is severely affecting the country and is expected to further worsen the already dire situation for land and the environment.

Socioeconomic effects are expected to exert greater influence than the health situation. GDP was expected to grow by 2.5% in 2024.

Civil society activities formerly derived their legitimacy from Decree No. 1/11 of 1992 and the 2005 constitution, which guarantees freedom of association and expression.

Burundi's formal civil society emerged in the form of cooperatives in the 1950s, when it was often difficult to distinguish between political parties and civil society organizations. There is also a distinction between formally organized groups, which often align with Western or international NGOs, and more informal local organizations. While local, informal associations have a long-standing history, they have become more structured and visible since the end of the civil war. Most formal NGOs are based in Bujumbura. In 2006, estimates suggested that 2,000 formal NGOs (known as ASBL, or associations sans but lucratives) were registered with the

Structural
constraints

10



1

Civil society
traditions

9



1

Ministry of the Interior, while an additional 5,000 community-based organizations (referred to as groupements) operated in rural areas without official registration. This – combined with a reliance on foreign aid and a lack of coordination among formally registered NGOs – contributes to the sector’s vulnerability.

After the 2010 elections, government repression of civil society and international organizations increased steadily, peaking during the violent, contentious 2015 elections. In 2018, passage of the NGO law required foreign NGOs operating in Burundi to implement ethnic quotas in their staff recruitment. The law resulted in an NGO crisis in 2018/19, during which all 130 foreign NGOs were temporarily suspended.

The primary factor eroding the equality of opportunity is the autocratic regime, as affiliation with the ruling party provides access to jobs and other opportunities. Consequently, many individuals working in independent media, civil society or opposition parties have fled the country and now live in exile. This level of repression has significantly undermined social trust, forcing citizens to navigate an atmosphere of fear and contend with limited access to information.

Burundian cleavages exist between rural and urban society and among elites with access to resources and clientelistic followers.

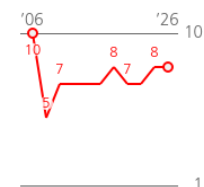
The Peace Agreement resulted in an era of power-sharing, but after 2015, the ruling party established an autocratic one-party system. Despite fears of escalating violence around the 2020 elections, violence during the reporting period did not reach the levels seen around the 2015 election. Cross-border incursions by armed groups were not serious enough to spark wider conflict.

The COVID-19 pandemic may have played a key role in the 2020 conflict because it is suspected – though not proven – that then-President Pierre Nkurunziza died of COVID-19.

The situation worsened in 2024 because of the continued escalation of the conflict in the Democratic Republic of the Congo (DRC), which partly involves the Burundian army and rebel groups, and because of rising tensions between Uganda and Rwanda. Violence and hate speech by the Imbonerakure persisted in 2024, in violation of legal provisions. As the military youth wing of CNDD-FDD party, the Imbonerakure performs tasks usually reserved for the police and army, such as patrolling around houses at night. Observers report that the National Intelligence Service (SNR) has continued to use torture and issue threats.

Conflict intensity

8



1

II. Governance Performance

14 | Steering Capability

Since the 2020 elections, the Burundian government has continued to implement programs focused on socioeconomic development and humanitarian stabilization. In 2024, the government continued to successfully persuade international donors such as the United States and the European Union to provide international support. In 2024, the United Kingdom lifted its sanctions on Burundi.

The guiding policy document was the Vision 2025 plan, implemented as part of the country's National Development Plan (NDP), Burundi (Plan national de développement du Burundi, 2018 – 2027). In 2020, President Ndayishimiye prioritized his government's planned interventions in line with Agenda 2030 and the NDP, and took the long-overdue step of seeking to rebuild partnerships with European donors.

In theory, there is consensus among major Burundian and foreign stakeholders that energy and agriculture should be the top investment priorities, as they are critical drivers of growth and transformation. During the review period, the government took steps to improve Burundi's economic performance. Measures to create jobs for young people are seen as a key way to alleviate poverty. While the priorities align with existing assessments, and some budgetary adjustments show that the state is investing in the prioritized areas, key measures needed to achieve change remain unimplemented.

The World Bank's International Development Association (IDA) has committed \$713.45 million to Burundi through 14 country projects.

Burundi has endured a difficult economic situation in recent years. Fiscal, exchange-rate and balance-of-payments challenges have emerged. To offset this loss, the government has drawn heavily on domestic resources while also engaging new donors such as China, India and Saudi Arabia. Nonetheless, these efforts have proved insufficient to meet escalating social demands.

By making education free in 2005, Burundi achieved significant progress in educational quality and equal access, with the net primary-level enrollment rate reaching 103% in 2022 without significant variation by region, gender or socioeconomic status.

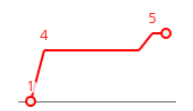
While the current government appears to pursue some strategic priorities diligently, overall government effectiveness remains low because of weak institutions. The government primarily faces internal management constraints, exacerbated by the

Question
Score

Prioritization

5

'06 _____ '26 10



centralization and the militarization of the government sector. Government operations in Burundi are marked by high levels of corruption, resulting in a constant drain of resources from their intended purposes. This also undermines efficient cooperation with the private sector and other external partners.

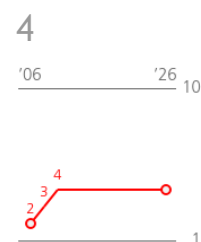
The government's ambitious NDP aims to transform the country's economy, pushing it to a post-agrarian state by 2027. However, fully achieving this goal would require a drastic revision of fundamental governance and intraparty structures and mechanisms to prevent the constant drain of resources that renders most political projects ineffective today. Given the current political constellation, this outcome appears unlikely, despite isolated actions by the new president, Ndayishimiye, such as restoring relationships with European donors and beginning to hold violent offenders accountable for their actions.

In recent years, the government has at times been highly effective – for example, it significantly enhanced access to education, increased women's political representation, and successfully conducted mass vaccination and mass testing campaigns for Ebola and COVID-19. However, at the macro level, the government would need to completely change the rules of the game, which cannot be expected under the current one-party regime. The constitutional changes of 2018, persistent acts of violence, an ongoing culture of impunity, the staffing of public positions with military officers after the 2020 elections, aggressive actions by the SNR and ongoing illicit cash transfers all suggest that the government might not yet be prioritizing the implementation of its own policies.

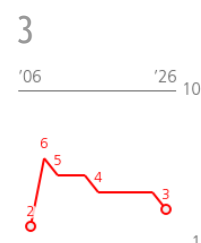
Equipped with extensive powers, the president appears interested in pursuing constructive policies. However, as the former interior minister and a general during the civil war, he is likely to represent continuity with the past. It is unrealistic to expect existing structures to produce different results. The style of speeches by both the former president and the new president – for instance, the use of moralistic pleas, religious rhetoric and blame games – also points toward an alternative analysis of the problem and an assumed logic of change. Joint efforts between foreign donors and the government, intended to strengthen technical aspects of policy implementation, sometimes lack coordination and lag behind schedule. The 2025 elections will increase pressure to focus on short-term political gains and on controlling society instead of pursuing long-term strategies and strategic priorities.

While the country's overall sociopolitical development before 2015 had raised hopes for change within the war-weary population, the events that followed President Nkurunziza's announcement that he would run for a third term set off another cascade of violence and led to the establishment of an autocratic regime. The Burundian government has shifted strategies regarding its neighbor Rwanda, the role of women in parliament, the assessment of the danger posed by COVID-19, and the state's position toward foreign donors. Efforts to protect the population from the virus and mitigate negative socioeconomic effects included cooperation with UNICEF and a Burundian private company.

Implementation



Policy learning



In February 2019, the facilitator of the Inter-Burundi Dialogue, Benjamin Mkapa, presented his final report to the summit of heads of state of the East African Community. The Office of the U.N. High Commissioner in Burundi was forced to close at the insistence of the government. The Human Rights Council's Commission of Inquiry on Burundi was not given access to the country despite repeated requests. Burundi also changed its U.N. envoy several times. Jamal Benomar, who served as the U.N. envoy for two years until the Burundi government demanded his resignation, was replaced by Michel Kafando, who, in turn, was forced to resign by the end of 2019. Election observers were unable to enter the country because information about a COVID-19 quarantine regulation was provided late.

Former President Buyoya served as the African Union (AU) special envoy for Mali and the Sahel but resigned at the end of 2020. He learned he had been convicted in absentia by the AU of killing President Melchior Ndadaye, whose death sparked the civil war. The 2020 deaths of former presidents Buyoya and Nkurunziza and of former mediator Benjamin Mkapa have made it even more challenging to uncover the truth about the past.

In this context, the government's working styles have been marked by rigidity, a lack of innovation and little willingness to learn.

15 | Resource Efficiency

Burundi loosened its austerity measures during the review period, increasing its public indebtedness to more than 80% of GDP. Following complaints in late 2024 by two labor union confederations, further allocations were made for public servants' bonuses, which had been frozen since 2015. The government is prioritizing investments and continuing to pay civil servants' salaries.

The central government heavily influences the recruitment of personnel in local and provincial administrations; this could perpetuate corrupt practices, even though some progress toward decentralization has been made.

Burundi's growth rate is relatively low, and the country is struggling with rising inflation. The inflation rate rose from -0.7% in 2019 to 36.5% in December 2024. It can be assumed that these factors will affect the state's efficiency in using financial and human resources.

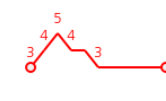
In 2021, the official average exchange rate was BIF 2,042.00 to USD 1, indicating further depreciation. The rate reached BIF 2,940.36 to USD 1 in December 2024. Public debt increased to over 80% of GDP in 2024.

Following decisions by the United States to lift sanctions in 2021/22 and by the U.K. to follow suit in 2024, the volume of bilateral aid is increasing.

Efficient use of assets

3

'06 '26 10



1

Although the annual fiscal report indicated that the 2019/20 budget was almost fully spent, Burundi's Ministry of Finance reported that spending on development projects with external partners fell short of planned levels, with only about 50% of allocated funds spent. The 2020/21 budget plan looked good on paper, with the bulk of financial resources earmarked for local development, education, social protection and promotion of the economy; however, critics assert that 90% of the budget is in fact spent on the government's operating costs.

The fiscal deficit remains high, reaching 5.3% of GDP in 2023. Decentralization processes underway in cooperation with the World Bank have led to measures to strengthen municipalities' tax-collection capacity and accountability to citizens, among other factors.

In 2020, local elections were held, and a new law governing the functioning of municipalities was adopted. The law governs the operation of district councils and systems for planning and overseeing local budgets. Among its provisions, the law emphasizes maintaining ethnic and gender quotas. However, the transfer of resources and competencies from the national to the local level appears limited, and municipalities continue to serve as monitoring agencies for the central government.

Burundi has a centralized political system under the continued control of a single political party and the country's president. Political and administrative decisions are typically made at the level of ministers and permanent secretaries, with minimal delegation to lower levels of the administration. Provisions of the 2018 constitution helped consolidate power within the ruling party and the central government. The ruling CNDD-FDD party secured a decisive majority in both chambers of parliament in the 2020 elections. Hiring at the national and provincial levels has aligned with party preferences, resulting in the militarization of the administration.

Interministerial bodies capable of coordinating initiatives across ministries are often absent. According to the National Development Plan (NDP), political stakeholders are expected to allocate funds to priority investment areas outlined in the plan. In practice, the goals set often fail to align with coherent policies or are implemented inconsistently. A number of crucial measures remain unaddressed, and the government's complete control over institutions, along with its frequent meddling in minor public affairs, suggests the absence of a shared strategy embraced by all stakeholders.

The Special Court on Land and Other Assets, established in 2014 and placed directly under the president's authority, underwent revisions in 2019 and 2020. However, there is no indication that an inclusive and transparent discussion is underway regarding a future vision for demographic change or sustainable farming.

Policy
coordination

4

'06 '26 10



Reports continue to indicate that the National Intelligence Service (SNR) regularly intervenes in court cases and with the police and prisons, and that journalists and opposition politicians have sometimes disappeared. Intraparty democracy remains weak, in part because of regionalism and factionalism, reinforcing the impression that the ruling party is not engaged in substantial initiatives based on real consensus.

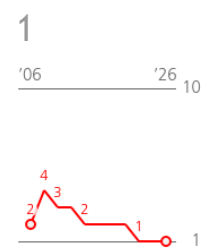
Apart from its alarming human rights record and ongoing violence against its citizens, the government's main challenge is corruption. Corruption at all levels of government and the private sector diverts resources from their intended purposes. It also hampers efforts to establish effective cooperation with private sector entities and other external partners. In 2024, Burundi was ranked 165th out of 180 countries on Transparency International's Corruption Perceptions Index, with 17 points, down three points and three places from 2023.

The government has developed the National Strategy on Good Governance and Anti-Corruption to promote transparency and accountability and to foster high-performing institutions. The strategy underwent revision through the end of 2018 and was mentioned in the president's year-end speech. However, the ministry leading the process was later reorganized, and a new minister was appointed. In 2020, the state institutions responsible for fighting corruption were dissolved. These institutions were weak from the start, and their dissolution has sent discouraging signals to both the public and external partners. The current president has reorganized Burundian anti-corruption bodies since taking office, abolishing an anti-corruption court and an anti-corruption brigade and placing their functions within existing offices. Isolated media reports about individuals arrested for corruption give the impression of a double standard. Overall, most citizens regard attempts to hold the powerful accountable for their corrupt practices as dangerous.

The World Bank and other organizations have documented instances of corruption tied to illicit cash transfers to European bank accounts, as well as multiple cases of conflicts of interest that authorities have ignored. Evidence indicates that government and party officials in high-ranking positions hold real estate and other assets in foreign countries that appear to exceed their official earnings. Certain senior officeholders face allegations of crimes against humanity. The total lack of accountability for those responsible for such crimes has likely worsened the situation.

A 2024 Transparency International Report documents the different types of corruption that are pervasive in Burundi, including high-level corruption, large-scale capture of public resources, abuse of office, trading in influence, balance of payment leaks, trade misinvoicing, misappropriation of foreign currency reserves, the capture of public lands and natural resources, organized criminal activities and arms trafficking.

Anti-corruption
policy



While Burundian leaders have never officially rejected the principles of democracy or of a free-market economy, the country has moved further and further from enacting them, at least as applied and interpreted by national and international stakeholders. Inclusive dialogue with opposing actors is no longer sought, as shown by the failed African Union and U.N. diplomatic missions that encouraged political dialogue with opposition parties. The government and related actors (SNR, youth groups) act with impunity, carrying out forced disappearances, killings and arbitrary detention. The state's persecution of civil society figures, opposition party members and independent media representatives; its interference with the judiciary; and its adoption of a constitutional reform that eliminates checks and balances and undermines the Arusha Peace Agreement provide reasons to believe it has little interest in consultation as a tool to strengthen decision-making processes.

Burundian policies suggest a general acceptance of the need for economic transformation, and the government actively seeks support for such policies from donors. However, the slow implementation of projects with external partners suggests that even in this area, the consensus on political goals and their implementation seems rather fragile.

In 2020, Burundi ratified the free-trade zone between the Southern African Development Community (SADC), COMESA and the East African Community (EAC). It also ratified a treaty providing for an Economic Community of Central African States (Communauté Économique des États de l'Afrique Centrale) and the treaty establishing the African Free Trade Area.

Burundi has found new partners in India, Saudi Arabia and China, with whom it has worked to develop its infrastructure and to whom it has shown loyalty. The government of Burundi officially consults with the country's unions regarding civil servants' salaries; however, there is little evidence of cooperation with the Chamber of Commerce (Chambre de Commerce et d'Industrie du Burundi) or the Employers' Association. The government has taken several steps to indicate its openness to building a market economy. This demonstrates that it understands the importance of economic development and stability, but it is not ready to renounce tight control over key sectors of the economy and SOEs.

Reformers and stakeholders with an interest in undermining democracy are found across the political spectrum in Burundi. The use of violence by both the opposition and the government's youth militia illustrates this, but the decisive actor in this regard will be the military. The governing party and the military are the key stakeholders to observe. Given the degree to which the president controls the party and the growing participation of officials with military backgrounds in government, the military might be the only force left able to exert a veto regarding the ruling party's dominance. Some rebel groups have persisted, and new ones have emerged – in some cases associated with political parties. Under the country's current conditions, the ruling party will determine whether its elites seek to reverse some of the autocratic regime's oppressive measures and shift to consensual decision-making structures, or

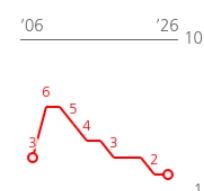
Consensus on goals

2



Anti-democratic actors

2



alternatively whether the party will continue to undermine democratic rules and systems. The president also plays an important role, given the power consolidated in his hands after the 2018 constitutional changes. Despite presidential rhetoric seeming to favor more openness, concrete actions on democratization have not followed. The year 2024 brought further consolidation of power in the hands of the governing party and the president. Given the close links between the president and the military, it is unlikely that democracy will prevail in the near future.

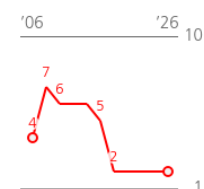
The government's refusal to recognize the legitimacy of opposing viewpoints, to appreciate the contribution of civil society and to respect the views of independent media hindered its ability to foster unity or expand its coalition. The current inability of both domestic and foreign forces in the country to resolve the primary divisions can be traced to the CNDD-FDD's 2015 statement, which declared, "Certain Arusha provisions are ineffectual and not applicable in addressing the present crisis... these provisions were deemed null and void under the Global Cease-fire Agreement." The party was referring specifically to the cease-fire agreements mediated by South Africa in 2003, when the CNDD-FDD was still a rebel group.

After 2015, the ruling party established an autocratic one-party system that enabled the clientelistic redistribution of resources, which at times was officially labeled "affirmative action" by the government and "systemic corruption" by critics. The May 2018 referendum gave top government posts to military personnel and disabled checks and balances among different ethnic groups. Critics fear this will upset the delicate balance among communities that have preserved the peace since the end of the country's civil war. Both former President Nkurunziza and recently elected President Ndayishimiye have sought to rewrite the narrative around these cleavages, blaming external interventions and systemic dynamics within the international system that always favor beneficiaries other than Burundians. However, the large share of the national budget devoted to community development, social services and economic development can be understood as an attempt to unite the population behind the government. Despite rhetoric meant to indicate openness, the ruling party and the president make every effort to tighten control and limit the plurality of perspectives and political options. Such a strategy cannot bridge cleavages; rather, it exacerbates them and raises the likelihood of instability.

Until 2014/15, officially registered civil society organizations were consulted by the government on laws and policies. However, an increasingly repressive atmosphere reached its lowest point in 2015 when President Nkurunziza announced his bid for a third term in office, prompting civil society to protest. "Soft" strategies, such as a requirement for reregistration, have commonly been used to control civil society. Even before 2015, the state had employed more severe tactics including prosecutions, blocking bank accounts, intimidation, suspending groups' ability to operate, incarceration and even torture. The government continues to use these methods to this day. It has also attempted to divide the sector by accusing certain organizations

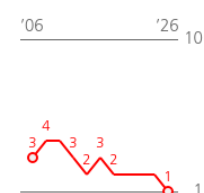
Cleavage /
conflict
management

2



Public
consultation

1



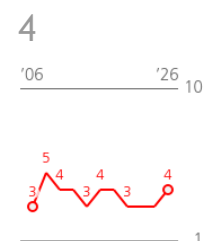
of being inauthentic while identifying others as close collaborators, known as nyakuri. The government is open to engaging with churches, trade unions and business associations. In 2019, all 130 international NGOs operating in the country were suspended and instructed to reregister in a manner that disclosed the ethnic composition of their employee base. Many organizations simply closed down rather than complying. PARCEM, one of the few remaining human rights organizations, was suspended after being accused of tarnishing the country's image and that of its leaders. In 2024, with the tightening of the government party's grip on power, consultations with civil society (aside from churches, trade unions and business associations) were not even considered.

As the government has shown little interest in engaging in peace talks with the exiled opposition, the African Union, the United Nations and the East African Community (EAC) have all sought to mediate. However, persistent friction among members of these groups has rendered mediation ineffective and prolonged the conflict. Of particular concern is the escalating tension between Uganda, the chair of the Burundi Peace Talks, and Rwanda, the EAC chair. In February 2019, mediator Benjamin Mkapa presented a report to the EAC Summit that called for a review of Burundi's new constitution, with the goal of keeping the Arusha provisions intact. The summit adopted the report but to little effect, as the EAC does not have the power to overrule a member state's constitution. A fresh peace process should include a broader group of African and international actors and build on Mkapa's experience. Surviving members of the Mandela and Nyerere mediation teams, as well as representatives from all components of Burundi's political and social environment, should also be consulted.

The government has further extended the mandate of Burundi's Truth and Reconciliation Commission. The commission has achieved impressive results – with over 70,000 witness reports and the identification of more than 4,000 mass graves – which have allowed more than 20,000 families to mourn their loved ones. Additionally, a decision has been made to extend the time frame for prosecuting crimes committed during colonial times. However, given the country's overall climate of repression and intimidation, there are doubts about whether the commission, which has been accused of bias, can effectively contribute to healing trauma. This is especially true when it comes to ensuring the crimes will not be repeated, a fundamental aspect of transitional justice.

The mandate of the Special Court on Land Conflicts has been extended, and its operations have been slightly modified, ostensibly to help resolve land conflicts but in practice narrowing reconciliation to the issue of land redistribution and possibly politicizing the process. Government efforts to accommodate refugees from 2015 within the country are supposedly flawed, as former members of civil society and opposition parties apparently face discrimination. The limited number of refugees who have returned further suggests that the government's priorities do not include

Reconciliation



reconciliation. President Ndayishimiye has demonstrated greater openness than his predecessor in this regard. He has released some journalists from prison and has even received praise from the United Nations for imposing isolated punishments for acts of violence committed by the Imbonerakure. The treatment of women has also been ambiguous. While substantial progress has been made with regard to promoting women's rights and political representation, women continue to face discrimination in land inheritance and have been disproportionately affected by recent political crises.

During the review period, the governing party showed no interest in addressing historical injustices beyond those that serve its own power-capture strategies.

17 | International Cooperation

The country engages in international cooperation in several key areas, including providing development aid, developing international standards such as international law, contributing troops to peacekeeping missions and ratifying treaties.

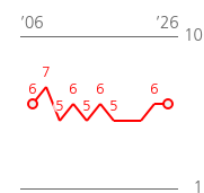
Before the 2015 political crisis, at least 50% of Burundi's national budget was financed by foreign donors, but most bilateral aid was suspended after the crisis. However, Burundi retained some international donors and found new sources of direct budgetary support from China, Saudi Arabia and India, allowing it to pursue some infrastructure projects. The guiding policy document for coordinating foreign aid was Burundi's Vision 2025 plan, which has been implemented through the National Development Plan (NDP). The NDP was also aligned with the longer-range Agenda 2030 document, and it covers the period through 2027.

In recent years (2021 – 2024), Burundi managed to persuade countries such as the United States and United Kingdom to lift sanctions. However, the European Union continues to maintain some of its sanctions. Aid levels are beginning to increase, with the European Union, the United States, France and Germany among the DAC donors offering the largest contributions.

Government initiatives and foreign aid have primarily focused on socioeconomic development and humanitarian stabilization. According to project status reports from Burundi's Ministry of Finance and the World Bank, implementation of development projects with external partners has been slow. In 2020, President Ndayishimiye prioritized the issues of good governance, education, agriculture and youth development in his government's interventions. Several multimillion-dollar projects in partnership with international financial institutions (IFIs) are currently supporting economic development. Debt relief provided by the IMF and World Bank aims to enhance Burundi's resilience, especially given the economic impact of the COVID-19 pandemic and Russia's war in Ukraine.

Effective use of support

6



The stalemate between Burundi and Western political entities and international institutions intensified further through the end of 2024.

Burundi withdrew from the Rome Statute in 2017. Its refusal to cooperate with U.N. institutions and representatives or with EAC mediation and election observers was in line with alarming reports of continued grave human rights violations in the country. These violations peaked around the 2020 elections, continued at a slower pace during the review period and are likely to increase with elections planned for 2025.

In 2020, Burundi ratified the free-trade zone among the Southern African Development Community (SADC), Common Market for Eastern and Southern Africa (COMESA) and East African Community (EAC), as well as a treaty providing for an Economic Community of Central African States (Communauté Économique des États de l'Afrique Centrale). Burundi is among the top 10 troop contributors to the U.N. peacekeeping mission in the Central African Republic, MINUSCA, and has also deployed troops to the African Union mission in Somalia (AMISOM) for years. Burundi's contingent consists of 5,432 troops, the second-largest in AMISOM. At the end of December 2024, the government confirmed that Burundian soldiers would not be part of the new AU mission in Somalia – where Burundian troops have deployed since 2007 – that begins in January 2025.

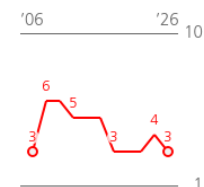
Although the United States and U.K. respectively lifted sanctions on Burundi in 2021 and 2024, Burundi's government must still demonstrate its credibility on the international stage.

In 2020, Burundi ratified the free-trade zone among the Southern African Development Community (SADC), the Common Market for Eastern and Southern Africa (COMESA) and the East African Community (EAC). It also ratified a treaty establishing the Economic Community of Central African States, known as the Communauté Économique des États de l'Afrique Centrale. Burundi has ratified the treaty establishing the African Continental Free Trade Area.

In 2019, tensions with Rwanda escalated, raising significant concerns about the stability of the already fragile Great Lakes region. In January 2024, Burundi's government decided to close its border with Rwanda, accusing Kigali of supporting the RED-Tabara rebels. In addition, the border with the Democratic Republic of the Congo (DRC) remained a concern, despite cooperation between the Burundian and Congolese governments in combating rebel groups hiding in eastern Congo. This remains a sensitive issue for other regional powers engaged in eastern Congo, such as Rwanda and Uganda. Recent rebel attacks have resulted in casualties in Burundi, prompting a strong government response as attacks escalated sharply toward the end of 2024.

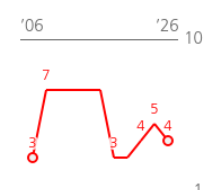
Credibility

3



Regional cooperation

4



When the threat emerged of Ebola spreading from the DRC to Burundi, the government successfully vaccinated more than 60% of the population in 2019. Although some initial resettlements have occurred, a significant number of Burundian refugees remain in neighboring countries.

While prior visits to the region and the bilateral engagement pursued by President Ndayishimiye demonstrate a growing willingness to advance regional cooperation, rising insecurity in the region is affecting Burundi's ability to build relations with its neighbors.

Strategic Outlook

With elections planned for 2025, Burundi, donor countries and relevant regional organizations should take steps to reduce the risk of violence escalating. Opposition parties, independent media and civil society organizations participating in elections or monitoring and reporting on elections should prepare thoroughly and identify protection strategies.

Burundi is a dictatorship that mimics certain democratic institutions. Advances toward democracy will depend primarily on strengthening the connection between citizens and state institutions.

Burundi is Africa's second-most densely populated country. It depends largely on subsistence agriculture and is likely to lose more land because of climate change.

To date, Burundi's economic growth has been closely tied to commodity prices, particularly those of gold and coffee. Burundi should promptly assess its position in the trade partnerships it has joined in order to identify avenues by which to expand trade and attract investment. A stronger focus on supporting entrepreneurial initiatives will be essential to growing Burundi's economy.

Burundi's niche could include marketing its excellent coffee, known for its high quality, and leveraging its well-educated, entrepreneurial youth. Thus, if the government and foreign donors focus on promoting policies that strengthen access to and the quality of education – including secondary schools and universities – as well as vocational education and entrepreneurship, that focus could provide a competitive advantage within a common African market.

International institutions and forums, such as the United Nations, the African Union and the East African Community, should prioritize addressing the interconnected dynamics of conflict in the Great Lakes region, given the region's demonstrated susceptibility to climate change. Furthermore, given increased volatility in the DRC and the engagement of several countries from the region, regional organizations should seek to prevent escalation of the war in the region.