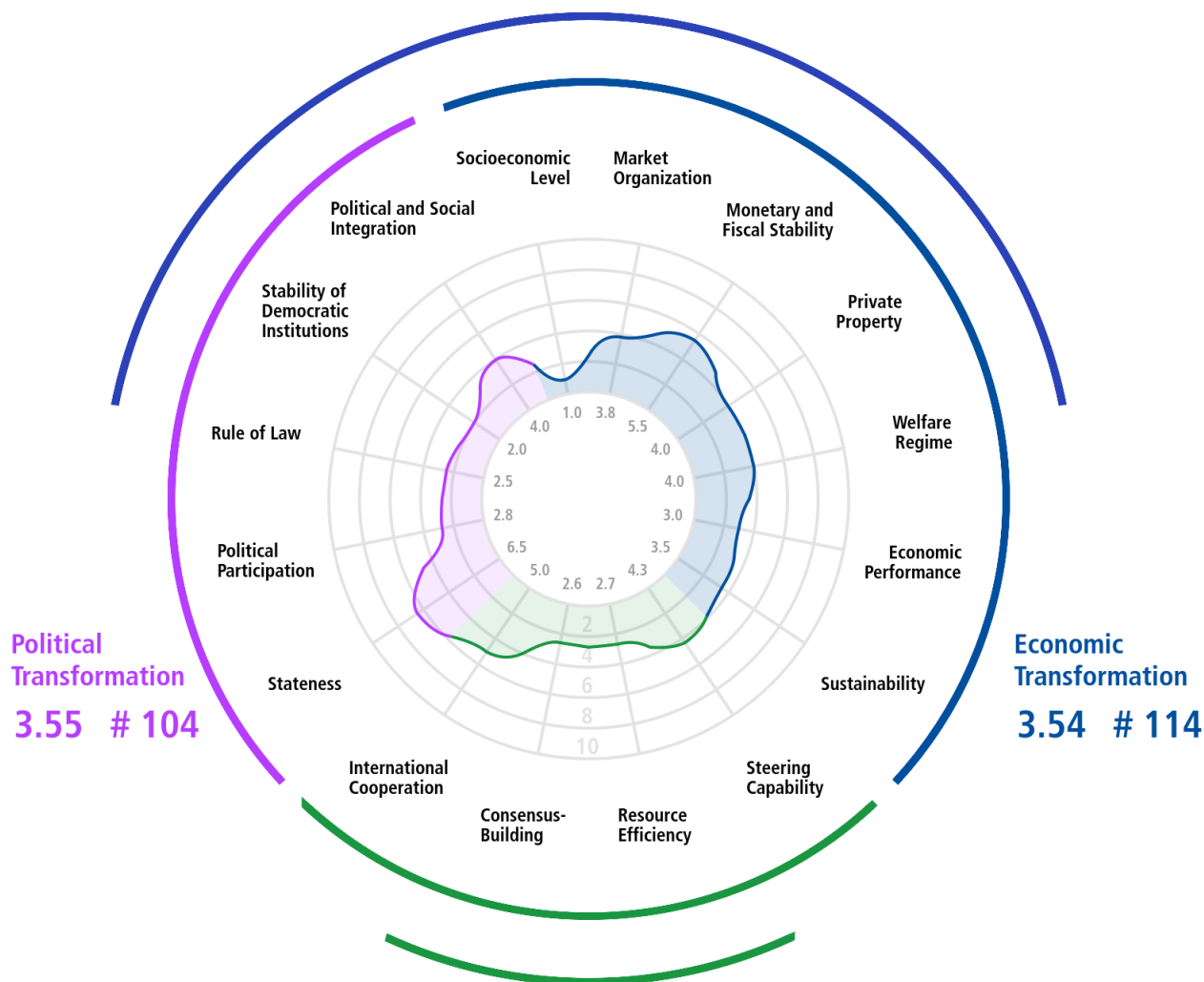


Burundi

Status Index

3.54 # 114

on 1-10 scale out of 137



Governance Index

3.54 # 109

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2024**. It covers the period from February 1, 2021 to January 31, 2023. 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>.

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Key Indicators

Population	M	12.9	HDI	0.426	GDP p.c., PPP \$	836
Pop. growth ¹	% p.a.	2.7	HDI rank of 189	187	Gini Index	38.6
Life expectancy	years	61.7	UN Education Index	0.402	Poverty ³	% 86.7
Urban population	%	14.4	Gender inequality ²	0.505	Aid per capita \$	47.0

Sources (as of December 2023): The World Bank, World Development Indicators | UNDP, Human Development Report 2021-22. 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

The period from 2021 to 2023 enabled Burundi's president and government to consolidate their power. Considerable political power is concentrated in the hands of a single party led by military generals; decisions are implemented through bargaining with followers, and efforts to integrate opposing forces can succeed to a degree. The fact that clientelism is the working principle intensifies the underlying conflict over scarce resources. Corruption remains a primary resource drain and continues to be systemic.

The above illustrates how political power concentrated in the party and military is detaching itself from the citizenry, creating a system that appears to be stable but functions against citizens, not for and with the citizens. The main issue to address in the future is enhancing respect for citizen rights and the constitutional power of citizens.

Burundi has successfully improved its relations with the United States and the European Commission, resulting in the removal of sanctions. Additionally, the president of Burundi is actively pursuing regional integration and rapprochement, an effort that is showing promising potential.

New legislation and regulations have been developed, holding out the prospect of reforms in areas such as fiscal rules and tax collection, banking, the business ecosystem, health and the return of refugees. Economic development will have a chance to advance if the president and his government manage to thoroughly implement the reforms they have announced.

The past two years in Burundi have also witnessed a deepening of cleavages, with minimal progress on the issues that jeopardize the country's sustainability and stability. Burundi consistently falls short with regard to respecting the human rights and fundamental freedoms of its citizens. The system depends on practices like intimidation, unlawful incarcerations, torture and arbitrary killings as a means of consolidating power, suppressing opposition or simply acting with impunity. Specific vulnerable groups, including the LGBT community, require increased respect and protection.

History and Characteristics of Transformation

Historians argue that all ethnic groups immigrated to the territory around 2,000 years ago and that professional specialization led to social diversification. Thus, the ethnic categories “Hutu” and “Tutsi” in fact relate to socioeconomic groups such as crop farmers and cattle raisers. The majority of the population belongs to the Hutu (85% of the population). There are two minorities – the Tutsi, comprising 14% of the population, and the Twa, comprising 1% of the population. Colonizers, particularly the Belgians, began to exploit divisions between these groups by declaring the Tutsi to be superior to the others. After independence in 1962, a small Tutsi elite within the Union for National Progress (UPRONA) political party seized full control of the state and military, abolishing the monarchy in 1966 and eliminating substantial parts of the Hutu elite in the 1972 genocide.

In 1993, an internationally backed democratization process culminated in general elections, bringing Melchior Ndadaye from the Hutu majority party Burundi Democratic Front (FRODEBU) to power. High-ranking members of the Forces Armées Burundaises (FAB) assassinated Ndadaye shortly after the election, an event that sparked a full-fledged civil war (with an estimated 300,000 death toll) that lasted until 2005, pitting Hutu rebel groups (primarily the CNDD-FDD and the National Forces of Liberation of FNL) against a Tutsi-dominated army. In the midst of the conflict, former President Pierre Buyoya (1987 – 1993, UPRONA) regained power in a coup d'état in 1996. An externally imposed peace process culminated in the Arusha Peace Agreement between UPRONA and FRODEBU (and a plethora of smaller parties) in August 2000, introducing a transitional government based on power-sharing with ethnic quotas for all political institutions. More 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. A new constitution, based on the Arusha agreement and confirming ethnic quotas, was approved in February 2005.

The first postwar elections of the same year – considered free and fair with a voter turnout of 90% – brought an outright victory to the CNDD-FDD, the ex-rebel group with strong support among the neglected rural Hutu population, and Pierre Nkurunziza became president. Nkurunziza was re-elected in 2010 in elections that did not include the opposition, and his government became increasingly authoritarian. Key opposition leaders temporarily went into exile, and parts of the 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 were held on May 20, 2020 and led to a peaceful transfer of power after 15 years. A new president and a new National Assembly were elected, respectively, for mandates of seven and five years.

The recently elected president's early speeches did not yet illuminate a clear political agenda. There has been a shift in tone in the areas of political inclusion, international isolation and press freedom, but the substance remains unclear.

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

The state's capacity to ensure a monopoly on the use of force throughout its territory remains limited by the activity of guerrillas and youth groups, which often act with impunity. There has been an improvement in relations with the neighboring Democratic Republic of the Congo (DRC) and Rwanda, which may lead to fewer security challenges in the future.

As in the past, Burundi's borders remain porous, with armed groups continuing to cross into Burundi from neighboring Rwanda, Tanzania and especially the DRC. These groups even launched isolated attacks within Burundi. The situation was worsened by tensions between Rwanda and Burundi, which peaked at the end of 2019. However, since 2020, ongoing rapprochement has resulted in joint efforts to secure the borders.

The United Nations Security Council's decision to remove Burundi from its agenda in December 2020 was based on an assessment that the situation in the country was largely stable.

While significant levels of discrimination exist against the Twa ethnic group and women, the vast majority of the population accepts the nation-state as legitimate. Individuals enjoy the right to acquire citizenship without discrimination, based on the citizenship laws of Burundi.

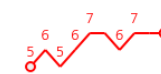
Despite struggles between political parties over access to power and resources, Burundi's legitimacy as a nation-state has always remained unquestioned due to its long history as a political entity. National unity, reinforced by the use of Kirundi as a common language and recognition of a shared past during approximately 500 years of monarchy, has allowed Burundi to cultivate shared traditions and a collective sense of national identity.

Question
Score

Monopoly on the
use of force

7

'06 '24 10



1

State identity

8

'06 '24 10



1

The willingness to return to Burundi among refugees is also indicative of the trust Burundian citizens hold in the nation-state. While some Burundians decided to leave Burundi prior to the 2020 elections, the UNHCR reported in 2023 that more than 200,000 Burundian refugees had chosen to return home since 2017. Additionally, the UNHCR reported in 2021 that more than 300,000 Burundian refugees were living in Tanzania, Rwanda, Uganda and the Democratic Republic of the Congo. Tanzania is reported to host the majority of the Burundian refugees.

The Burundian state is largely secular; however, several aspects of life are significantly influenced by religious dogmas. For example, the LGBTQ+ community has long been subject of discrimination.

The Burundian constitution establishes a secular state, prohibits political parties from preaching religious violence or hate, and guarantees religious freedom. In the past and during crises, many Burundians have turned to forms of mysticism and individual sects, all of which the government has forbidden.

Some examples from the past are relevant in illustrating how religious dogmas informally interfere with the legal order and political institutions. In 2018, the ruling party officially declared President Nkurunziza to be the “eternal supreme guide,” and he and his supporters publicly implied that God had selected him to lead Burundi. By 2020, as the COVID-19 pandemic spread worldwide, Nkurunziza maintained that God had protected the country, stating that social distancing was unnecessary for Burundi citizens and ordering World Health Organization officials to leave the country.

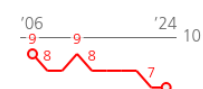
While the Catholic Bishops’ Conference of Burundi criticized repressive measures taken against the opposition, civil society and ordinary citizens prior to the 2020 elections, the new president, Évariste Ndayishimiye, who is Catholic, is known to use religious rhetoric in his speeches.

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

Regarding fiscal and economic services, several policies are appreciated and commencing to provide positive results in terms of tax collection, attempting to demonstrate trustworthiness in relations with international institutions and donor states. The lifting of sanctions by the European Union in 2022 and the United States in 2021 attests to international actors’ growing trust in the government of Burundi, as well as the potential to further enhance the capacity of administrative structures over the short run.

No interference of religious dogmas

7



1

Basic administration

4



1

Today, Burundi's administrative structures remain limited and are inadequately funded. For centuries, the country has had a distinct local administration system, 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 witnessed a growth in its tax collection capacity, yet it faces various challenges.

The proportion of individuals using the internet has increased to 14.6% in 2022 (from 5.5% in 2017, according to DataReportal). The effects of COVID-19 increased the number of people who were living under harsh conditions, and access to services continued to deteriorate. The population does not have good access to health services. The gross enrollment rate for primary education has risen sharply and remains at high levels. However, the quality of education remains very low, and teachers are both ill-equipped and underpaid.

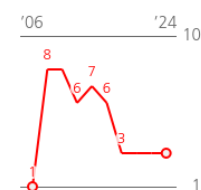
Over half of the population of Burundi is chronically food insecure, a fact largely attributed to poor access to health care – due in turn to an extreme shortage of qualified health care providers – and clean water, along with extreme poverty. Infectious diseases, particularly malaria, pose a persistent challenge. The World Bank estimates that less than 12% of the population has access to electricity. This share has not changed substantially in recent times. The share of the population with access to sanitation services has also stagnated. Frequent natural disasters, as well as insecurity and the resulting displacements, exacerbate humanitarian crises and complicate government efforts to improve infrastructure and agricultural productivity. About 62.2% of the population has access to a basic water source, and 45.7% have access to electricity.

2 | Political Participation

General elections were held on May 20, 2020, and resulted in a peaceful transfer of power after 15 years. A new president and National Assembly were elected for respective mandates of seven and five years. During the pre-electoral period, observers noted irregularities concerning the rights to life, liberty and security and the freedom of expression, including limitations on seeking, receiving and imparting information. Exiled opposition parties were barred from participating in the elections, and acts of violence and intimidation were reportedly carried out by the ruling party's Imbonerakure youth wing and security forces, as reported by churches, civil society groups and opposition parties. Citizens had nearly no access to independent media leading up to the election. International observers were either completely banned or informed by the electoral commission nine days prior to 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 such as double voting and raised concerns about the integrity of the electoral process.

Free and fair elections

3



The elections were the first to occur under the provisions of the 2018 constitution, which dismantled the ethnic quota system that had been in place since the end of the civil war. These elections were also notable for marking a peaceful transfer of power from one president to another, although within the confines of the same ruling party. Furthermore, when outgoing President Nkurunziza, who was expected to retain a great deal of power behind the scenes, suddenly died following the election, the resulting period of uncertainty did not degenerate into violence. In such cases, the constitution mandates that the president of the National Assembly step in for an interim period. However, the constitutional court allowed the new president to be inaugurated early, in June.

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 was met with mixed reactions, as he had previously been in charge of managing the Imbonerakure, which has been responsible for most of the acts of intimidation in the country. However, he had also been described as one of the more open and modest politicians within the CNDD-FDD party. The elections provided the CNDD-FDD with an overwhelming majority in the National Assembly (86 out of 123 seats) and Senate (33 out of 39), but this success must be viewed within the context of frustrated opposition parties and a militarized administration. On a positive note, 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.

Burundi was among the first countries in the region to establish a 14-day quarantine for individuals traveling outside the country, as well as to close its airport and set up hand-washing facilities in public. However, the team from the World Health Organization (WHO) that was working on COVID-19 was expelled before the elections due to their criticism of the party rallies that occurred. The outgoing president downplayed the virus's danger. No international election observers were present in the country due to the mandatory 14-day quarantine. In-person elections were conducted with few precautionary measures, although gathering near polling stations was prohibited. The incoming president, Ndayishimiye, changed the course set by his predecessor and declared COVID-19 to be the greatest enemy of the Burundian people.

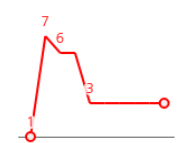
Democratically elected political representatives have limited power to govern. The structure of political parties and their connection to society indicate that parties are used largely as mechanisms for state capture rather than for ensuring democratic government. Furthermore, the continued rivalry between elected officials and traditional leaders suggests that elected officials have limited power over a large part of the citizenry – a notion supported by low voter participation rates in elections.

The revised constitution of 2018 provides for a prime minister instead of two vice presidents. This implies that the prime minister and the president can be of the same ethnic group and political party and it reduces the role of the vice president as the president's assistant (Art. 93). This overrides the Arusha Peace Treaty's formula for

Effective power to govern

3

'06 '24 10



power-sharing between different ethnic groups and political parties. The mode of cooperation between the president and prime minister is laid out in more detail in presidential decree No. 100/007 of June 28, 2020, whereby the president appoints the prime minister, who then coordinates the government that implements the president's policies.

Soon after the 2020 elections, experts began to observe increasing competition between the president and the prime minister. This development could potentially interfere with effective governance, as the resignation of the prime minister would lead to the resignation of the entire government. The military's influence in the country's politics exacerbates this situation, with the ruling party being led by a group of generals. Party factions are aligning themselves with one of the two leadership figures, and since 2020, former military personnel have been appointed to key ministry positions. The creation of the prime minister's position might pose a genuine threat to the ruling party's unity, shifting the locus of the power struggle to within the party itself.

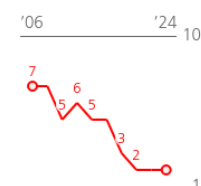
The freedoms of association and assembly continue to be significantly restricted. Multiple cases of government authorities interfering to limit the activity of independent civic and political groups have been reported. Although the new administration elected in 2020 is rhetorically attempting to address previous government abuses, there is currently no credible evidence that these efforts are being implemented. 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 are finding little to no willingness on the part of the government to cooperate in ongoing investigations. Human rights organizations operate in an atmosphere of fear due to potential reprisals. The existence of restrictive laws on foreign non-governmental organizations and press laws has put considerable control in the hands of the government, raising doubts about the independence of these organizations.

Courts are not free in defending the freedom of assembly and association; on the contrary, arbitrary rulings are used to limit such freedoms. The infamous case of Tony Germain Nkina, a lawyer who was convicted for having been associated with civil society several years before, led to multiple trials, including at the Burundian Supreme Court, and to his imprisonment for more than two years until his recent release.

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. Members of the National Congress for Freedom (CNL) are exposed to particular danger. Members of the Imbonerakure – the ruling party's youth wing – have killed, arbitrarily arrested

Association /
assembly rights

2



and attacked dozens of CNL members, and have destroyed local party offices throughout the country. Some CNL meetings in the run-up to the elections were disrupted or encountered obstacles.

The global pandemic led the government to close land borders and the airport. Numerous election rallies were organized across the country by all the competing political parties – with no coronavirus-related restrictions on assembly.

Freedom of expression continues to be curtailed by the government of Burundi. Although the president has made encouraging statements regarding attempts to restore some degree of freedom for the media, there have been no concrete steps taken to demonstrate this willingness in practice. State institutions, along with the political party in power and its associated factions, continue to employ various practices that systematically oppress journalists and media, as they have done for years, thereby limiting or eliminating the freedom of expression.

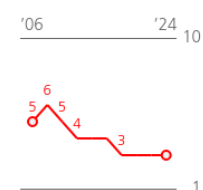
During the pre-election period, messages of hatred and hostility were circulated on social networks, sometimes with an ethnic dimension, directed toward political opponents of the CNDD-FDD party. These messages were not condemned or rebuked by the authorities. Journalists continue to face intimidation and threats, and some have had to obtain permission from local authorities to travel within the country. In December 2022, four journalists from the Iwacu 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 obliged the media to collaborate, and prohibited the reporting of 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.

The Burundian government reacted promptly to the global COVID-19 pandemic, resulting in a limited number of reported infections. However, the government’s information management caused confusion among the population. Initially, outgoing President Nkurunziza downplayed the danger of the pandemic, but incoming President Ndayishimiye subsequently presented it as a pressing threat.

Art. 32 of the constitution of Burundi guarantees freedom of assembly and association, as well as the freedom “to form associations or organizations in accordance with the law.” While these freedoms are explicitly stated in the constitution, they are in practice curtailed by the main political actors, the political party in power and state institutions.

Freedom of
expression

3



3 | Rule of Law

There is a de jure separation of powers; however, it is not respected in practice. The executive, along with certain political leaders, enjoys a significant level of arbitrary power, which directly impacts the legislative power and the judiciary. De facto, there are no checks and balances in place. Even the creation of citizen accountability mechanisms is impossible, as courts, security forces and other actors are used to silence such initiatives.

Multiparty democracy and modes of ethnic representation, which are historically linked to checks and balances in Burundi, were promoted by the Arusha Peace Treaty and enshrined in the constitution. However, the 2018 constitution abolished ethnic balances and led to a concentration of power in the hands of the head of state. The mediation process between the ruling party and the opposition, led by the East African Community (EAC), aimed to protect some of these power-sharing provisions. Unfortunately, in 2019, it became evident that the government would simply ignore the EAC recommendations, resulting in a halt to the mediation process.

There is very little left to 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 his allies in the ruling party, the new president can establish policy on his own and leave the government to implement it. He can appoint ministers without taking the representation of different parties and ethnic groups into account and can also quickly dismiss legal initiatives pursued by parliament.

The new constitution significantly curtails the legislative branch's powers, while recent elections have granted the ruling party an overwhelming majority in both chambers. Under the terms of the constitution, the judiciary remains the sole branch with independence. However, on issues having to do with Burundi's primary sources of division – access to land and resources – the judiciary has been bypassed through the establishment of a 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 past 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

3

'06 '24 10



1

The judiciary is somewhat differentiated. However, it continues to be heavily influenced and, at times, controlled by the leading politicians. The entire system is limited in its reach and is complemented by customary rules and traditional authorities (the *bashingantahe*) that hold juridical competencies in some contexts. The case of Tony Germain Nkina and his recent release represents a good 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. Local NGOs and international actors, including the U.N. Human Rights Council's Commission of Inquiry for Burundi, repeatedly criticized the judiciary during the reporting period for its corrupt practices, lack of independence and limited capacities. Despite being constitutionally independent, the judiciary is hampered by structural and financial constraints, as well as frequent breaches of judicial procedures and interference by the state. These factors have created a climate of mistrust among the population, preventing citizens from fully enjoying their rights.

In a few exceptional instances, victims of serious human rights violations have attempted to bring legal action against the perpetrators. However, they have rarely been afforded a fair trial, and punishment has been enacted against offenders in only a small number of cases. According to reports, the National Intelligence Service frequently interferes in court proceedings, as well as in the operations of the police and prisons, when it comes to the prosecution and release of prisoners. Impunity remains pervasive in Burundi.

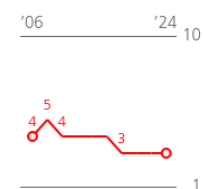
Institutions such as the Special Court on Land and Other Assets (Court Spéciale des Terres et Autres Biens), which was established in 2014 and placed directly under the president, also contribute to the perception of a weakened and marginalized judiciary. Several laws adopted in 2019 and 2020 have intensified government intervention. For instance, in May 2019, a law was enacted that requires foreign NGOs to establish recruitment committees involving provincial governors in the decision-making process for staff selection.

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

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

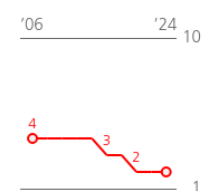
Independent judiciary

3



Prosecution of office abuse

2



There is also evidence that senior government and party officials have real estate holdings and other assets in foreign countries that appear to be disproportionate to their remuneration. Elected Burundians do not systematically declare their assets to the Supreme Court, as prescribed by the constitution.

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

Burundi's constitution provides an extensive list of rights for Burundian citizens. However, these rights are systematically violated without any effective means of redress. Even fundamental rights such as the rights to life, liberty and physical integrity are infringed upon, with international human rights organizations and institutions reporting numerous accounts of 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 had occurred in 2019 and during the 2020 presidential, legislative and local elections. These violations included summary executions, arbitrary detentions and arrests. Similar conclusions were reached by reports from Human Rights Watch and Amnesty International. The African Union Human Rights Observer mission was not able to continue its work past 2018.

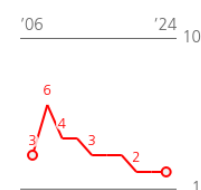
On March 5, 2019, Burundi forced the U.N. Human Rights Office in Burundi to close after 23 years. U.N. Special Envoy for Burundi Michel Kafando resigned in October 2019. Burundi had already withdrawn from the Rome Statute in 2017.

However, Burundi has made progress on the issue of women's rights, ratifying regional and international instruments that protect women's rights in general, such as the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), and by adopting a quota of at least 30% representation for women in parliament. The latter led to significant representation for women following the 2020 elections – 38% of the National Assembly's members and 45% of the Senate's members are now women. According to a 2017 report by Burundi's National Statistical Office, 52% of women in rural areas had been victims of domestic violence, along with 36% in urban areas.

The global pandemic led the government to close the country's land borders and the airport. Muslims were unable to make their pilgrimage to Mecca but were permitted to celebrate Eid al-Adha (Feast of Sacrifice) during the pandemic. Consequently, the freedom of movement was somewhat restricted.

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 its 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, who sometimes seem to provide better outcomes for them than do state institutions.

Burundi's democratic institutions do not perform well, as they have been captured by the ruling party, intimidated by both formal and informal security services, and undermined by structural reforms aimed at consolidating power and eliminating dissent. Due to the lack of integrity in the electoral process, there are no effective mechanisms for citizens to hold officials accountable for abuse or underperformance.

Civil society and the independent media are weak and function within an atmosphere of fear and repression.

Formal state institutions are accepted only to the extent that they provide a means of accessing power and resources for specific individuals and political groups. Political parties serve as mechanisms for capturing the state, enabling relevant individuals and groups in power to secure official positions and gain access to state budgets.

Burundi's democratic institutions are constitutionally and practically ill-equipped to regulate public affairs in the interest of all. While the Nkurunziza regime tightened its grip on any opposing forces and elections in 2020 were criticized as not free or fair, the institutions under President Ndayishimiye have already been described as "militarized," as 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.

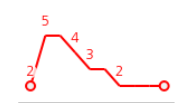
Religious forces mainly use their veto power indirectly by informing foreign donors about the challenges they encounter under the regime. However, the Catholic Bishop's Conference publicly spoke out against the manner in which elections were conducted in 2020. Civil society, opposition parties and the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

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

Performance of democratic institutions

2

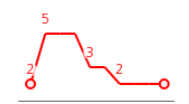
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Commitment to democratic institutions

2

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5 | Political and Social Integration

The Burundian party system has been dominated by the current governing party, the CNDD-FDD, since 2005. The party has produced the current president and holds a strong majority in both houses of parliament. Although opposition parties do exist, some are operating from abroad in the diaspora.

The dominance of the CNDD-FDD generates stability, although internal struggles do take place. The party benefits from considerable support from a significant portion of the electorate.

At the same time, the CNDD-FDD exerts significant pressure on the opposition parties, often restricting their rights.

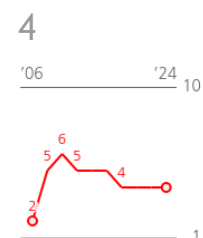
All parties in Burundi claim to align themselves along cleavages between the educated elites and the working class, although some also partially claim to speak on behalf of specific regions or religions.

The system is highly clientelistic, as personal networks rather than party programs tend to determine citizens' choice of party. The Arusha Peace Treaty of 2000 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 Arusha Agreement included the adoption of a power-sharing model – security for the minority, democracy for the majority – between political parties.

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

The new party Congrès National pour la Liberté won 23% of the votes in the 2020 elections. However, it is still too early to determine whether the Congrès National 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. Polarization is now primarily defined along partisan rather than ethnic lines.

Party system



The range of interest groups reflecting social interests is rather limited, and there are a limited number of players that dominate political life. Polarization and conflict are ongoing, with serious consequences for interest groups that are not aligned with the government party. The consolidation of power within the ruling party indicates that this trend is likely to continue.

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

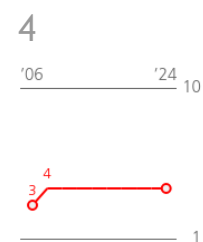
The Catholic Church is overwhelmingly the most influential interest group in Burundi, given its membership of more than 7 million followers, which accounts for approximately 65% of the total population. Moreover, its international affiliation with the Catholic Church allows it to leverage connections to disseminate information from the country to Europe and the United States.

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

The country's NGO crisis, which emerged at the end of 2018, peaked when 130 NGOs were suspended by the National Security Council. A total of 93 were readmitted in 2019. Furthermore, 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 the numerous informally organized grassroots organizations into account. 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 able to rely on financial support and solidarity from abroad – have courageously continued to operate despite the pressure. With reduced financial support and capacity, infrequent coverage by the media, and a decline in advocacy activities, these groups' influence has diminished considerably.

Interest groups



Valid statements about the public approval of democratic norms and procedures can be made to only a very limited degree. The most well-known measure for this on the African continent, the Afrobarometer, conducted its latest survey on Burundi in 2014. At that time, the large majority of respondents (86%) approved of democracy as the best form of governance and rejected other types of 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 fully embracing democracy. However, even if people would, in theory, like their rights to be protected, the media to be free and elections to be peaceful, they have little trust in democratic institutions – a fact that is often connected with phenomena such as corruption.

Given the limitations on the freedoms of assembly and speech, the number of self-organized groups and other forms of organization is restricted. 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.

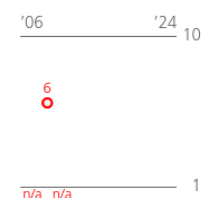
The ruling party and the security forces permeate every corner of society. The party has organized development programs and agriculture cooperatives, but it has also coordinated spying on ordinary citizens while engaging in arbitrary arrests and measures of intimidation. Trust among Burundian citizens,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

Burundian society is characterized by a variety of informal self-organized associations, encompassing self-help initiatives, savings groups, joint small-scale businesses, and sports and cultural associations. These entities, depending on the voluntary nature of participation and the degree of organizational quality, have the potential to foster genuine solidarity and support. In fact, many donors utilize the self-help group system, recognizing it as an empowerment tool, particularly when these groups are exclusively for women.

Some religious institutions have been able to foster social cohesion through acts of charity and courage, for instance by offering space to discuss contentious subjects in a peaceful way 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 country list. However, it did rank above some peaceful countries, such as Malawi and Botswana.

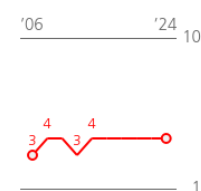
Approval of
democracy

n/a



Social capital

4



II. Economic Transformation

6 | Level of Socioeconomic Development

Poverty levels have remained high in recent years, with a total of 75.1% of residents living in poverty in 2017. Although the Gini coefficient has not been recently calculated, inequality is likely to intensify as Burundi becomes more stable, with a large portion of the population expected to remain in poverty in the coming years.

Burundi was ranked 187th out of 189 countries in the 2021 Human Development Index (HDI). Eighty percent of Burundi's income comes from agriculture, with the majority of the population living at the subsistence level. By the end of 2022, approximately 1.4 million people in Burundi were forecast to be facing acute food insecurity. This can be attributed to several factors, including the upcoming dry season, the socioeconomic impact of COVID-19 and cholera, and an increase in the number of vulnerable groups such as refugees, displaced persons, youth and women.

Burundi has experienced a tense economic situation in recent years due to the decline in foreign aid since 2015, which has resulted in fiscal and balance-of-payments difficulties. In order to offset the loss of international resources, the government has made significant efforts to mobilize domestic resources. However, these efforts have not been enough to meet the ever-increasing social demand driven by a very high population growth rate. The United States lifted sanctions on Burundi in 2021, and the European Union followed suit in 2022, which is expected to facilitate the mobilization of international funding.

More than 80% of the population is employed in the agriculture 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 in 2021 was 505.

The coronavirus pandemic has had repercussions within Burundi's economy, which is facing a double shock on both the supply and demand sides. All productive sectors, including agriculture – an important pillar of the Burundian economy – have been affected. Overall, poverty and inequality remain structurally and extensively prevalent.

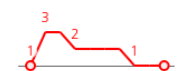
The humanitarian situation has been exacerbated by the combined effects of climate change (natural hazards, drought, hazardous rainfall), an outbreak of the Rift Valley fever, the return of refugees and supply shortages. By the end of 2022, the United Nations estimated that a total of 1.8 million Burundians were in need of humanitarian assistance.

Question
Score

Socioeconomic
barriers

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Economic indicators		2019	2020	2021	2022
GDP	\$ M	2576.5	2649.7	2775.8	3073.4
GDP growth	%	1.8	0.3	3.1	1.8
Inflation (CPI)	%	-0.7	7.3	8.4	18.8
Unemployment	%	0.9	1.0	1.1	1.0
Foreign direct investment	% of GDP	0.0	0.3	0.4	0.4
Export growth	%	-0.5	-14.9	3.4	5.8
Import growth	%	17.1	3.4	3.2	7.0
Current account balance	\$ M	-	-	-	-
Public debt	% of GDP	60.0	66.0	66.6	68.4
External debt	\$ M	622.2	657.1	966.4	-
Total debt service	\$ M	40.0	36.7	29.7	-
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	27.2	31.3	30.8	31.0
Public education spending	% of GDP	5.3	5.3	4.9	-
Public health spending	% of GDP	2.4	2.4	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	2.8	2.2	2.0	2.8

Sources (as of December 2023): 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

The new government of Burundi has made significant efforts to improve the institutional framework for business. Although the rules for market participants are improving, it is still to be seen how they will be implemented. Therefore, at the moment, the institutional framework remains rather weak.

Burundi's economy contracted by 1% in 2020 and then rebounded by over 1% in 2021. The African Development Bank (AfDB) estimates a 3.5% annual growth rate for 2022. In 2021, the trade deficit reached 25.7% of GDP, while the current account deficit stood at 15.4% of GDP (AfDB), both impacted by the COVID-19 pandemic. Agricultural production plays a significant role in the economy, contributing 28.7% of GDP (World Bank) and representing a substantial portion of the country's exports. It also employs approximately 86.21% of Burundi's population (International Labor Organization, ILO). According to the ILO, 89% of all nonagricultural employment is in the informal sector.

The country is facing significant challenges, including a severe shortage of foreign currency, rising government debt levels and an austerity policy. However, the government has set a goal of transforming Burundi's economy by 2027, with a focus on industrial production. The domestic financial base for public funding of the private sector is fragile; the new government has consequently managed to regain the support of European donors. In 2019, the public budget deficit was estimated at 5.1%, while the overall public debt reached 71.9% of the GDP for that year, according to the AfDB.

Inflation rates remain relatively high, reaching 8.3% in 2021 and 7.5% in 2020. Contradictory assessments exist regarding the government's performance in terms of tax collection and expenditure efficiency. While government efforts are apparent, there is a need for further improvement. However, abundant evidence supports the existence of systemic corruption and tax evasion. Additionally, the autocratic regime consistently interferes in almost all sectors and aspects of public and private life.

Business activities are hampered by a lack of access to electricity and finance, as well as customs-clearing issues and road infrastructure. Starting a business in Burundi takes five days and costs 12.3% of the average Burundian income.

Burundi has implemented measures such as reducing the cost of registering a business and increasing the transparency of construction permits. The country has also introduced preventive measures related to insolvency. Foreign investments are not limited under Burundian legislation. Additionally, foreigners can purchase land if their country of origin grants similar rights to Burundian citizens.

With support from the Chinese government, a 15-megawatt hydroelectric power plant was inaugurated in Rumonge, located in the south of the country, in 2022.

Market
organization

4

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Burundi joined the African Continental Free Trade Area in 2018. This initiative launched on January 1, 2021 and was ratified on June 17, 2021.

The informal sector remains significant, although improvement is expected due to recent changes in fiscal regulations.

Burundi's small market size and lack of diversification are connected to its dependence on agriculture and mining. The country has become a member of the East African Community (EAC) and the Common Market for Eastern and Southern Africa (COMESA) and has also ratified the African Free Trade Area Agreement, which requires adjustments to its legal system. In 2022, the Burundian government started developing its competition policy. In the Global Innovation Index 2019, Burundi was ranked near the bottom, at 130th out of 132 countries, in the market sophistication category.

Burundi mainly exports agricultural products such as coffee and tea, as well as mining products, notably gold and other minerals found in the northern region of the country. The decline in exports observed since late 2018 persisted throughout 2020, but turned around in the third quarter of 2020 and has continued on a positive trajectory in 2021. However, the overall quantity of goods exported remains relatively low. The value of imported goods has also experienced fluctuations.

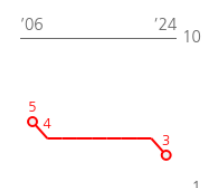
These trends are linked to the international contraction of trade in general and to world market price developments. Both the COVID-19 pandemic and the Russian war in Ukraine have had a negative impact on trade. The government has been pursuing its National Development Plan in accordance with the Agenda 2030, with support provided by U.N. agencies, the World Bank and the African Development Bank, as well as bilateral support from China, Russia and France since 2019.

Burundi's trade balance remains negative, a fact largely attributable to its dependence on imported manufactured goods. The government has included trade liberalization policies on its agenda since 2004 and 2009, when the country joined COMESA and EAC, respectively. However, it has not yet implemented measures to reduce non-tariff barriers and streamline customs processes. In 2021, Burundi ratified the African Continental Free Trade Area agreement. As of 2021, the average most-favored nation tariff applied stood at 12.8%.

The Burundian banking sector is small and characterized by a severe shortage of stable long-term resources, an inefficient allocation of resources, weak supervision and regulation, and constrained access. At the same time, the sector has also been described by the World Bank as "resilient," as the core of the financial sector has been able to survive crises and has even proven highly profitable. The sector consists of 14 commercial banks (IFM), with seven playing a dominant role. The sector includes a handful of formal nonbank financial institutions, mainly development banks and a growing microfinance network. In 2020 and 2022, the government of Burundi launched two banks – one dedicated to youth and another dedicated to women.

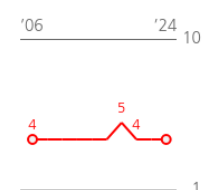
Competition policy

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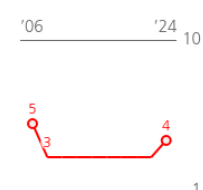
Liberalization of foreign trade

4



Banking system

4



There is a low ratio of state ownership in the banking sector overall; however, the government is the main stakeholder in two of the banks and interferes with banking policies by nominating representatives on their board of directors. The three traditional commercial banks – the 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 of stability and austerity regarding domestic credit. Currently, it has set the minimum value of foreign exchange reserves at 3% of all monthly unpaid deposits (2022). Reserves totaling about one month of imports are available in total. According to the World Bank, the most recent available data indicate that the capital-to-assets ratio of the banking system was 12.2 in 2017. The ratio of non-performing loans to total gross loans decreased from 14.19% in 2017 to 4.1% in 2021 (IMF). The COVID-19 crisis has caused an increase in inflation rates and public deficits. This, combined with a lack of foreign aid due to sanctions, has led to a foreign exchange crisis.

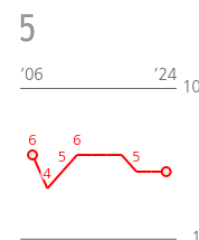
The insurance and pension sectors are underdeveloped, which impedes resource mobilization and the transformation toward maturity.

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 due to the country’s foreign exchange deficit, leading to a decline in production caused by liquidity issues stemming from a lack of foreign exchange. The central bank had previously pursued a strategy of liberalization regarding foreign exchange, with rates determined through currency auctions guided by the central bank. However, the African Development Bank reports that the central bank has recently implemented significant reforms to its exchange rate policy, which may alleviate pressure on the country’s foreign reserves. In 2020, the central bank took action to suspend the licenses of foreign exchange traders accused of violating regulations by engaging in trading beyond the 18% margin allowed for official exchange rates. The exchange bureaus were permitted to reopen in late 2022. Additionally, special measures were adopted to soften the impact of the Russian war in Ukraine. The real effective exchange rate index for 2022 was recorded at 116.7 (based on a 2010 value of 100, according to the World Bank).

With a small export base (coffee and tea) and an agricultural sector highly vulnerable to weather shocks, Burundi’s current account is in deficit (14.9% in 2022, est., IMF). The central bank has identified vulnerabilities in the export sector and the high budget deficit as the primary risks to financial stability.

Monetary stability



Burundi's gross debt increased to 71.9% of GDP in 2021, 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 relief of \$7.63 million over the following three months and potentially up to \$24.97 million over the subsequent 21 months. IMF debt relief will assist in allocating 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 has benefited from a \$5 million grant from the International Development Association. The state's fiscal year 2022/2023 budget will entail an increase relative to 2021/2022, 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 4.5% in 2021 (AfDB).

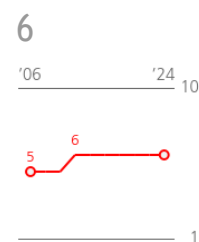
The new government has implemented an ambitious tax collection plan along with a strategy for targeted investment in the economy. It has also decreased the number of ministries from 21 to 15 and outlined six priority areas in line with the National Development Plan and the Agenda 2030 document. However, state revenues have been inconsistent in recent years and are projected to decrease. Furthermore, systemic corruption, tax evasion and illicit cash transfers have been identified as the primary sources of leakage in the public budget.

European donors' suspension of bilateral assistance to Burundi posed a significant issue, as these sources had previously funded at least 50% of the country's national budget. Consequently, the government sought alternative donors and aimed to independently finance its public expenditures. Nonetheless, achieving these goals has become more challenging due to the government's ongoing need to compensate its clientelistic networks for security and allegiance. In 2021, both the United States and the European Union lifted sanctions on Burundi.

The exchange rate is calculated based on the weighted average rate of the sales and purchases of currencies made by commercial banks on the previous day (BRB). The Burundian franc is not pegged to any anchor currency.

The inflation rate has undergone rapid change, ranging from -0.7% in 2019 to 8.3% in 2021. Historically, the inflation rate in Burundi has fluctuated between -5.88% in 2018 and 37.38% in 1996. With over 87% 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.

Fiscal stability



9 | Private Property

Family property (Itongo) in Burundi is passed down from generation to generation. The 1986 Land Code and customary law together constitute the foundation of the legal framework that governs land rights. Several contentious attempts to reform the code in the last 12 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 right to their plots. The Arusha Peace Agreement of 2000 aimed to help bring an end to these negative dynamics by requiring the formation of a sub-commission that “must always remain aware of the fact that the objective is not only restoration of their property to returnees, but also reconciliation between the groups as well as peace in the country.” In 2014, the government passed a new regulation that prohibits opponents in land conflicts from filing appeals to decisions made by the National Commission of Lands and Property (CNTB). Instead, a 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 involved in the efforts to obtain and 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 that its members possess specific qualifications, expands the court by adding a second chamber, involves magistrates and the Senate in the selection of its members, and limits its authority.

With the support of the World Bank, the government has put in place a system for issuing land certificates. Women can be recognized as landowners, which is a major challenge within Burundian society. Up through the end of 2022, the majority of land certificates issued have included the names of both spouses. The CNTB’s mandate was not renewed in April 2022.

The private sector is important for the economy; however, it is fully under the control of the ruling party. Theoretically, the ruling party oversees the economic development of the country and is responsible for keeping economic development on the right course. The legal framework for its operation is in place, but there are shortcomings in its application.

Despite this legal framework and the presence of associated institutions – for example, there are 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, it comprises about 3,000 formally registered companies, 80% of which are based in Bujumbura.

Property rights

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Private enterprise

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In 2014, there were approximately 249,000 informal companies in Burundi, primarily characterized by self-employment. It is predominantly a rural country, with only 13.7% of the population residing in cities (2019: 13.4%), making it one of the least urbanized countries worldwide. As a result, the private sector is primarily associated with agricultural product processing and mining.

The sector is neither diversified nor internationally competitive. A joint assessment by the UNDP, AfDB, World Bank and UNICEF of the socioeconomic impact of the global pandemic of 2020 on Burundi's economy contained recommendations for emergency measures directed toward the private sector. The focus has mainly been on providing credit and bolstering the sector as a whole. Privatization in this sphere would be risky, considering the current structural challenges.

10 | Welfare Regime

Contributory social security programs in Burundi used to be employment-based social insurance systems financed by the employer and the employee, 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 pension, disability pension and survivor pension. Additionally, there are benefits available for medical causes, including coverage for dependents, sickness and maternity. Moreover, informal and customary social support networks are also present, which depend on community generosity and social initiatives such as savings and credit clubs.

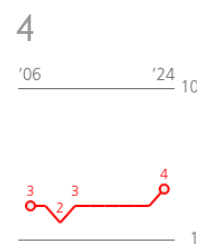
A more inclusive social protection law was adopted in May 2020, aiming to subsidize not only maternity care and care for children under five years of age, but also social welfare programs for the ultra-poor and disabled people. The newly elected president also reiterated in 2020 that social protection policy was one of his priorities. However, financing these programs will be a challenge, despite the positive trend in relations with Development Assistance Committee donors.

Humanitarian organizations regularly provide material support and cash transfers to vulnerable groups, but even their programs remain heavily underfunded. A shortage of qualified medical personnel in the country also impedes access to health care. The Human Development Index score for women in Burundi is still significantly lower than that for men (UNICEF, January 2023).

The government implemented several COVID-19 emergency measures, including reductions in the prices for water and soap, and prepared a National Preparation and Response Plan with a price tag of \$28.5 million for the expected socioeconomic effects of the global crisis.

In December 2021, the World Bank (IDA) approved \$150 million in financing for Burundi's social sector.

Social safety nets



The country has made significant progress in the representation of women in electoral decision-making positions since 2010. Burundi's constitution provides for a quota of 30% women in the government, and in the elections of 2020, 38% of the newly elected National Assembly members and 45% of the 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 data from 2017, the literacy rate for women still trails that for men by approximately 15 percentage points. Although access to education is inclusive – 96% of all children go to school – the share of women strongly decreases in the tertiary education sector. Women accounted for 51.5% of the labor force in 2021, a slight decrease from 51.9% in 2019.

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

LGBTQ+ citizens continue to face discrimination. Legal provisions put into force as of 2022 criminalize LGBTQ+ individuals and sexual activity among same-sex partners.

The majority of the population is under the age of 18, a fact that has considerable effects on society as a whole. Gaining access to arable land is regarded by UNICEF as a potential trigger for violence, while youth unemployment is by far the most worrying issue.

11 | Economic Performance

The Burundian economy is primarily based on agriculture and remains susceptible to shocks and environmental as well as social pressures. Consequently, it lacks the capacity to generate substantial long-term growth. Economic growth rates declined after the 2015 political and security crisis but have gradually started to rebound. The African Development Bank estimates that the economy will expand by 3.5% in 2022.

Burundi is still described as one of the least developed countries on Earth, with 71.8% of its population living below the poverty line. The country also experiences relatively high levels of inequality, and growth is slowing across the economy due to the COVID-19 pandemic and the war in Ukraine initiated by Russia.

Equal opportunity

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Output strength

3

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During the review period, a significant portion of the population experienced hunger, and food insecurity increased in 2022. Burundi's current account showed a deficit of more than 15% in 2021. The 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 respective vulnerabilities. The fiscal deficit is continuing to grow in the face of global challenges.

The economic growth rate increased from 1.6% in 2018 to 1.8% in 2021, according to the International Monetary Fund (IMF). The economy is slowly recovering from this crisis, but the weakness of economic growth in relation to population growth results in a low per capita income, which was estimated at about \$221.5 in 2021, according to the World Bank. Additionally, Russia's war against Ukraine is also affecting Burundi's economic prospects.

The country's gross debt rose to 66.56% of GDP in 2021, up from roughly 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 8.3% in 2021, and continued to increase in 2022. In June 2019, the official exchange rate was 1,842.4 francs to the dollar, subsequently depreciating to an average of 2,042 francs in 2022. While the official unemployment rate has remained around 1.4%, youth unemployment is considered to be rampant. Burundi's per capita income was estimated by the World Bank at \$221.5 in 2021, a decrease from \$260 in 2019.

Much-needed change may be on its way, as President Ndayishimiye has made some commitments that have been described as gestures aimed at rebuilding relations with foreign donors. This in turn brings hopes of renewed and increased direct aid. The success of the head of state will also depend on his standing in the ruling party and interparty processes in general. With support from China, the country is working to improve the public's access to electricity, thus alleviating one of the main barriers to private sector development.

Considering the pressures exerted by the country's changing demography, it will be critical to promote youth entrepreneurship and vocational education alongside large-scale infrastructure development projects.

12 | Sustainability

With one of the highest population densities on the continent (about 400 people per square kilometer) and 90% 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 has not met expectations. Property law, as well as land and environmental laws and regulations, have been abused for political purposes. There is little coordination between reforms, and traditional conflict resolution mechanisms are disappearing. As long as the population continues to grow and income generation activities in cities do not offer a viable alternative, the worsening issues of land degradation, erosion, loss of soil fertility and deforestation will increasingly threaten livelihoods in this predominantly rural country.

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

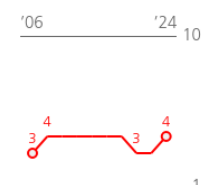
The government has drafted several adaptation and prevention plans, including the National Profile on Climate Change, the Planned Contributions at National Level, and the National Adaptation Plan. Top-priority measures to be implemented under the technical guidance of the Institut Géographique du Burundi include improved electricity generation using hydropower and biogas, adaptation of transportation infrastructures, extensive reforestation, sensitization of the population to climate change issues, a 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 to protect buffer zones and floodplains around important lakes.

Burundi was commended in 2020 for its efforts to increase the quality of education and boost school enrollment levels to 96%. On average, the government allocates about 20% of its national budget to education, and literacy rates surpass the African average for both women and men. 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 impacted. 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 a strong demand for high-quality education, and as the young population has expanded, pressure on educational institutions has increased. 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 was able to admit

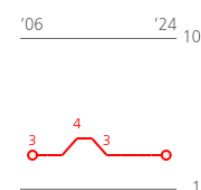
Environmental
policy

4



Education policy /
R&D

3



just 4,000 students. The educational system is politicized – university students can be disciplined by withholding their state scholarships, resulting in frequent student strikes.

A UNDP study estimates that 30% of Burundi's children perform child labor and are at high risk of dropping out of school indefinitely due to the global pandemic.

Burundi ranks among the lower echelons of the U.N. Education Index 2021, scoring 0.402 on a scale from 0 to 1. In 2017, the literacy rate stood at 68.4%. Additionally, the country allocated 5% of its GDP for public expenditure on education in 2021, while its R&D expenditure amounted to 0.2% of GDP in 2018.

Governance

I. Level of Difficulty

Burundi faces multiple structural constraints that mutually reinforce one another, thereby keeping it in a disadvantaged position and making governmental intervention a highly challenging task. The combination of geographic (landlocked) and demographic (densely populated) factors tends to generate land conflicts, which are considered the fundamental cause behind Burundi's ongoing violent conflict. Additionally, Burundi is located between two nations, the DRC and Rwanda, that have experienced crises for decades. This, in turn, further exacerbates the conflict in Burundi.

Demographic statistics indicate that Burundi is a very young country. In 2020, 55.0% of the population (6,766,520 people) was 19 or younger, and the population has shown a steady growth rate of about 3.07% per year. Consequently, educational 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 connected to questions of inequality and clientelism. Approximately 50% of Burundi's national budget was financed by foreign donors before most bilateral aid was suspended following the 2015 crisis. The crisis in 2015 significantly set back the limited progress Burundi had achieved since the end of the civil war. Moreover, climate change is having a severe impact on the country and is expected to further worsen the already dire situation concerning land and the environment.

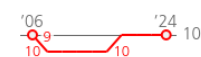
Burundi was only mildly affected by the global COVID-19 pandemic, with 109 active cases in January 2021 and just two reported fatalities. The socioeconomic effects are anticipated to exert a greater influence than the health situation. Real GDP was projected to contract by 4.5% in 2021, with positive economic growth of 4.6% expected in 2023.

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

Burundi's formal civil society emerged as cooperatives in the 1950s, when it was often challenging to distinguish between political parties and civil society organizations. Additionally, a distinction exists between formally organized groups, which often align with Western or international NGOs, and more informally organized local organizations. While local, informal associations have a long-

Structural
constraints

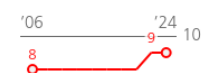
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Civil society
traditions

9



1

standing history, they have become more structured and visible since the end of the civil war. The majority of 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 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 the reliance on foreign aid and the lack of coordination among formally registered NGOs, contributes to their vulnerability.

Following the 2010 elections, acts of repression by the government directed toward civil society and international organizations increased consistently, reaching a peak during the violent and contentious elections of 2015. In 2018, the passing of the NGO law required foreign NGOs operating in Burundi to implement ethnic quotas in their staff recruitment. This law resulted in an NGO crisis between 2018 and 2019, during which all 130 foreign NGOs were temporarily suspended. The public justification for this program was its presentation as an affirmative action initiative aimed at promoting Hutu employment. However, Burundi experts believe that it also functioned as a means of further restricting the available deliberative space and exerting a chilling effect on all civil society organizations. The primary factor contributing to the erosion of equal opportunity is the autocratic regime, as affiliation with the ruling party provides access to jobs and other opportunities. Consequently, a considerable number of individuals employed in independent media or civil society, or by opposition parties, have fled the country and now reside in exile. This level of repression has significantly undermined social trust, as citizens are forced to navigate an atmosphere of fear and contend with limited access to information.

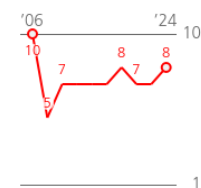
Burundian cleavages exist between rural and urban society, as well as between different elites with access to resources and clientelistic followers.

The Peace Agreement resulted in an era of power-sharing, but after 2015, the ruling party established an autocratic one-party system. The referendum in May 2018 allowed changes to the distribution of top government posts according to ethnicity. Critics fear this will upset the delicate balance between communities that has preserved peace since the end of the civil war. Despite fears about escalating violence around the 2020 elections, violence did not flare up to the levels seen around the 2015 election during the reporting period, and cross-border incursions from armed groups were not sufficiently serious to spark more widespread conflict.

COVID-19 may have played a vital role in the conflict in 2020, as it is suspected – though not proven – that then-President Pierre Nkurunziza died from a COVID-19 infection. This obviously led to altered constellations within the ruling party and for incoming President Ndayishimiye.

The situation has worsened due to escalated levels of conflict in the Democratic Republic of the Congo (DRC), partially involving the Burundian army and rebel groups, as well as increased tensions between Uganda and Rwanda in this regard. Violence and hate speeches by the Imbonerakure have persisted, thereby violating

Conflict intensity
8



legal provisions. As the military youth wing of CNDD-FDD, the Imbonerakure performs tasks that are normally reserved for the police and army, such as patrolling around houses at night. Observers report that the secret service has continued to apply torture in several cases (OHCHR).

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. Over the past two years, the government has successfully persuaded international donors such as the United States and the European Union to lift sanctions and provide international support.

The guiding policy document was the Vision 2025 plan, put into action as a 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-due 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 highest-priority areas of investment, as they are critical drivers for growth and transformation. Moreover, measures creating jobs for youth are seen as a key means of alleviating poverty. However, the goals set are somewhat ambitious and do not follow a coherent philosophy. While the priorities are in line with existing assessments and some budgetary adjustments show that the state invests in the prioritized areas, some key measures for achieving change remain unimplemented. Multimillion-dollar projects are underway to support these initiatives, and debt relief efforts by the IMF and World Bank aim to enhance Burundi's resilience, especially regarding the economic impact of the COVID-19 pandemic and Russia's war in Ukraine.

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

Burundi has endured a difficult economic situation over the past five years, especially given the decrease in foreign aid since 2015. Both fiscal and balance-of-payments challenges have ensued. To offset this loss, the government has extensively accessed domestic resources, while also engaging with new donors like China, India and Saudi Arabia. Nonetheless, these efforts have proved unable to meet the constantly escalating social demands.

Question
Score

Prioritization

5

'06 _____ '24 10



By making education free of charge in 2005, Burundi achieved significant progress in terms of quality and equal access to education, with a net enrollment rate in primary education reaching 115.1% in 2021, without significant variation based on region, gender or socioeconomic status.

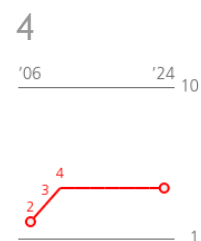
While the current government appears to be pursuing some of its strategic priorities diligently, overall government effectiveness has nevertheless been low, a fact attributed to the weakness of institutions. The government mainly faces internal management constraints, exacerbated by the militarization of the government sector. This sector is characterized by high levels of corruption, resulting in a constant drain of resources that are not used for their intended purpose. This situation also undermines the efficiency of cooperation with the private sector and other external partners.

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

During the past two years, the government has shown that it can be very effective at times – for example, it significantly enhanced access to education and women's political representation and successfully conducted mass vaccination and mass testing campaigns for Ebola and COVID-19. But 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 and ongoing illicit cash transfers all suggest that the government might not yet be prioritizing the implementation of its own policies.

The new president, equipped with extensive powers, seems to be speaking in a softer tone than his predecessor. However, as the former minister for the interior and a general during the civil war, he is likely to represent continuity with the past. It is unrealistic to expect the existing structures to lead to changed results. The style of speeches by both the former and 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 proper coordination and are lagging behind schedule. Burundi was planning to implement a national census in 2022, including estimates of agricultural potential as well as demographic data.

Implementation



While the country's overall sociopolitical development before 2015 raised hopes of change among the war-weary population, the events following President Nkurunziza's announcement that he would run for a third term set off another cascade of violence and resulted in the establishment of an autocratic regime. By January 2020, the Burundian Truth and Reconciliation Commission, established in 2014, had uncovered 4,000 mass graves in the country. The body's mandate was extended by another four years in 2018 and was adapted to include crimes committed by colonialists in Burundi. The Burundian government has shifted strategies regarding its neighboring country Rwanda, the role of women in parliament, the assessment of the danger of COVID-19, and the state's position toward foreign donors. Efforts made to protect the population from the virus and mitigate negative socioeconomic effects included cooperation with UNICEF and with a Burundian private company.

Step by step, Burundi has distanced itself from what it regards as international interference. 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 United Nations High Commissioner in Burundi was forced to close down 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 had also been shifting its own U.N. envoys – Jamal Benomar, who served as the U.N. envoy for two years before 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 due to the late provision of information about a COVID-19 quarantine regulation.

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

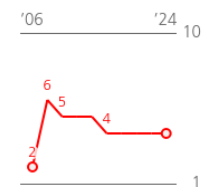
Against this background, the government's working styles have been marked by rigidity, a lack of innovation and little willingness to learn.

15 | Resource Efficiency

Burundi maintained its policy of austerity during the review period, prioritizing expenses and continuing to pay salaries to its civil servants without making adjustments for inflation, as it has done for the past five years. To fund the elections in 2020, the government deducted amounts from civil servants' salaries through the end of 2019. Since the central government heavily influences the recruitment of local and provincial administration personnel, this situation could facilitate the perpetuation of corrupt practices, even though some progress toward decentralization has been made.

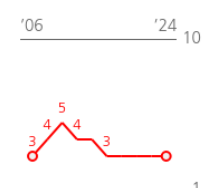
Policy learning

4



Efficient use of assets

3



Burundi's growth rate is low, and the country is struggling with fluctuating inflation rates. The inflation rate veered from 15% in 2018 to -0.7% in 2019, and further to 8.31% in 2021. Given these circumstances, it can be assumed that these factors will impact state efficiency in utilizing financial and human resources.

In 2021, the official average exchange rate was BIF 2,042.00 to the dollar, indicating further depreciation. Public debt increased to over 70% of GDP in 2022.

At least 50% of Burundi's national budget was financed by foreign donors before most bilateral aid was suspended following the 2015 crisis. Despite the suspension of most bilateral aid, Burundi managed to maintain support from some international donors and secure new sources for direct budgetary assistance, allowing it to continue its pursuit of infrastructure projects. Furthermore, following decisions by the United States and the European Union to lift sanctions in 2021/2022, the level of bilateral aid is expected to increase.

However, while the annual fiscal report indicated that the 2019/2020 budget was mostly fully spent, Burundi's Ministry of Finance reported that expenses for development projects with external partners fell short of planned levels, with only about 50% of allocated funds actually spent. The budget plan for 2020/2021 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 actually spent on the government's operating costs.

The fiscal deficit remains high, reaching 4.1% of GDP. Decentralization processes underway in cooperation with the World Bank have led to measures aimed at strengthening municipalities' tax collection capacities and accountability toward citizens, among other factors.

In 2020, local elections were held, and a new law on the functioning of local municipalities was adopted. The law governs the operation of district councils and the systems for planning and overseeing budgets at the local level. Among various provisions, the law also emphasizes the importance of maintaining ethnic and gender quotas. However, the transfer of resources and competences from the national to local level appears to be limited, and a separate law focused on this aspect is still being developed.

Despite the introduction of decentralized governance structures, municipalities continue to serve as monitoring agencies working on behalf of the central government. The fact that the main association for local government officials, Associations des Élus Locaux (ABELO), seems to have stopped work since 2017 (at least no updated information is available) also indicates that the country is not realizing the full potential of devolution with regard to producing a more efficient use of resources.

Political and administrative decisions in Burundi are typically made centrally at the level of ministers and permanent secretaries, with minimal delegation to lower levels of the administration. The provisions of the new constitution of 2018 played a role in consolidating power within the ruling party and the central government. Additionally, the ruling CNDD-FDD party secured a decisive majority in both chambers of parliament in the 2020 elections, and the hiring of personnel at the national and provincial levels has aligned with party preferences, resulting in a militarization of the administration.

Interministerial bodies able to coordinate initiatives between different ministries are often lacking. According to the NDP, political stakeholders are expected to allocate funds to prioritized areas of investment as outlined in the NDP. However, in reality, the goals that are set often fail to align with coherent policies or are implemented inconsistently. Several 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 taking place concerning a future vision for demographic change or sustainable farming.

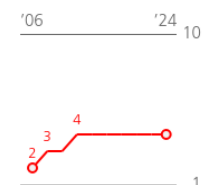
Reports continue to indicate that the National Intelligence Service regularly intervenes in court cases and with police and prisons, and that journalists and opposition politicians are sometimes disappeared. Intraparty democracy is still weak, partly due to the effect of regionalism, thereby reinforcing 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 the government and private sector means that there is a constant drain of resources that are not used for their intended purpose. This also hampers the establishment of effective cooperation with private sector entities and other external partnerships. In 2022, Burundi was ranked at 171st place out of 180 countries in Transparency International's Corruption Perception Index, dropping two positions from 2021.

The government has developed the National Strategy on Good Governance and Anti-Corruption, with the goal of promoting transparency and accountability and fostering high-performing institutions. The strategy underwent revision until the end of 2018 and was even mentioned in the president's year-end speech. However, the ministry heading the process was subsequently transformed, and a new minister was appointed. In 2020, the state institutions responsible for fighting corruption were dissolved. These institutions were weak from the beginning, and their dissolution has sent discouraging signals to both the public and external partners. 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.

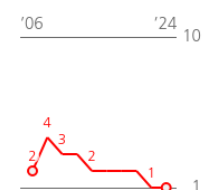
Policy coordination

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Anti-corruption policy

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The World Bank and other organizations have documented instances of corruption associated with illicit cash transfers to European bank accounts, as well as multiple cases of conflicts of interest that authorities have ignored. There is evidence indicating that government and party officials in high-ranking positions possess real estate holdings and other assets in foreign countries that appear to exceed what they officially earn. Certain senior officeholders face allegations of crimes against humanity. The total lack of accountability afforded to those responsible for such crimes has likely contributed to a worsening of the situation.

16 | Consensus-Building

While Burundian leaders have never officially rejected the principles of democracy and a free market economy, the country has moved further and further away from enacting them, at least as interpreted and applied by national and international stakeholders. Inclusive dialogue with opposing actors is no longer desired, as shown by the failed African Union and U.N. diplomatic missions that encouraged political dialogue with opposition parties. The government's persecution of civil society figures, opposition party members and 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 reason to believe that 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 gives the impression that even here, the consensus regarding political goals and aspects of their realization seems rather fragile.

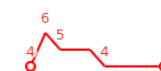
In 2020, Burundi ratified the free trade zone between the Southern African Development Community (SADC), COMESA, and the East African Community (EAC). It has also ratified a treaty providing for an economic community of central African states (Communauté Économique des États de l'Afrique Centrale) and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

Burundi has successfully found new partners in India, Saudi Arabia and China, with whom it has worked to build up its infrastructure and to whom it shows loyalty. The government of Burundi officially consults with the country's unions regarding civil servants' salaries; however, there is little evident cooperation with the Chamber of Commerce (Chambre de Commerce et d'Industrie du Burundi) or the Employers' Association.

Consensus on goals

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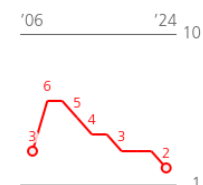
Reformers and stakeholders with an interest in undermining democracy can be found on all sides of the political spectrum in Burundi. The use of violence by both the opposition and the government youth militia illustrates this, but the decisive actor in this regard will be the military. The governing party and the military are the key stakeholders to observe. Given the degree to which the president controls the party, 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 come into existence, in some cases associated with political parties. Under today's conditions, it is the ruling party itself that will determine whether its elites will seek to reverse some of the autocratic regime's oppressive measures and shift instead to consensual decision-making structures, or alternately, whether the party will continue to undermine democratic rules and systems. Thus, eyes in the future should be on intraparty processes and the military. However, 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 has hindered its ability to foster unity or expand its coalition. The current inability of both domestic and foreign forces in the country to find resolutions for the primary divisions can be traced back to the CNDD-FDD's statement in 2015, 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 specifically referring 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 allowed for clientelistic redistribution of resources, at times officially labeled as "affirmative action" by the government and as "systemic corruption" by critics. The May 2018 referendum gave top government posts to military personnel and disabled checks and balances between different ethnic groups. Critics fear this will upset the delicate balance between communities that has 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.

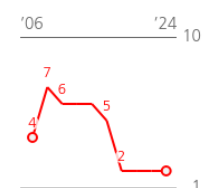
Anti-democratic actors

2



Cleavage / conflict management

2



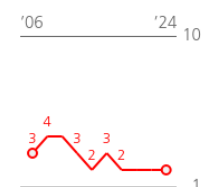
Up to 2014/2015, officially registered civil society organizations were consulted by the government regarding laws and policies. However, an increasingly repressive atmosphere reached its lowest point in 2015 when President Nkurunziza announced his bid for a third term in office, prompting civil society to protest against this action. “Soft” strategies such as a requirement for reregistration have been commonly used to control civil society. However, even before 2015, the state had employed more severe tactics, including prosecutions, the blocking of bank accounts, intimidation, suspension of groups’ ability to operate, incarceration and even torture. The government continues to utilize these methods to this day. It has also attempted to divide the sector by accusing certain organizations of being inauthentic, while identifying others as close collaborators, known as nyakuri. 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.

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 have all sought to mediate. However, persistent frictions among the members of these groups have rendered the 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 calling for a review of Burundi’s new constitution, with the aim of keeping the Arusha provisions intact. The summit adopted the report, but to little end, as the EAC does not have the power to overrule a member state’s constitution. A fresh peace process should bring on board a wider group of African and international actors and build on Mkapa’s experience. Surviving members of the Mandela and Nyerere mediation teams and representatives from all components of Burundi’s political and social environment should also be consulted.

The government has extended the mandate of Burundi’s Truth and Reconciliation Commission by an additional four years. The commission has achieved impressive results – over 70,000 witness reports and the identification of more than 4,000 mass graves – allowing over 20,000 families to finally mourn their loved ones. Additionally, it has decided to prolong the timeframe for prosecuting crimes committed during colonial times. However, given the country’s overall climate of repression and intimidation, there are doubts as to whether the commission, which has been accused of bias, can effectively contribute to healing trauma. This is especially true in terms of ensuring that the crimes will not be repeated, a fundamental aspect of transitional justice.

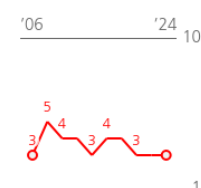
Public consultation

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Reconciliation

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The mandate of the Special Court on Land Conflicts has also been extended and its operations slightly modified, ostensibly to contribute to the resolution of land conflicts but actually narrowing reconciliation to include only land redistribution and possibly even 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 experience discrimination. The limited number of refugees who have returned further suggests that the government's priorities do not include reconciliation. President Ndayishimiye, who was recently elected, 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 in promoting women's rights and their political representation, they continue to face discrimination in terms of land inheritance and have been disproportionately affected by recent political crises.

17 | International Cooperation

The country engages in international cooperation in several key areas, including development aid, the development of international standards such as international law, the contribution of troops to peacekeeping missions and the ratification of treaties.

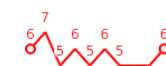
Prior to the 2015 political crisis, at least 50% of Burundi's national budget was financed by foreign donors, but most such bilateral aid was suspended following the crisis. However, Burundi was able to retain some international donors and find new sources for direct budgetary support in China, Saudi Arabia and India, thus 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.

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. Only about 50% of planned budgets have been spent, and projects have fallen behind schedule. In 2020, President Ndayishimiye prioritized issues such as good governance, education, agriculture and youth development for his government's interventions. He also sought to rebuild partnerships with European donors, an effort that had been long overdue. Currently, there are multimillion-dollar projects underway to support economic development initiatives. Debt relief provided by the IMF and World Bank aims to enhance Burundi's resilience, especially given the economic impact of the COVID-19

Effective use of support

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pandemic and Russia's war in Ukraine. The World Bank's current portfolio in Burundi consists of 14 country projects and three regional projects, totaling \$713.45 million. France has begun providing bilateral support to Burundi despite the European Union's decision not to do so. Furthermore, the European Union lifted sanctions on Burundi in 2022.

The stalemate between Burundi and an assortment of Western political players and international institutions intensified during the reporting period until, at the end of 2020, the new government and some donors began to reapproach one another. 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 about continued grave human rights violations in the country, which peaked around the 2020 elections. In 2020, Burundi ratified the free trade zone between SADC, COMESA and 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 contributors of troops 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 a number of years. The mandate of this latter mission was recently prolonged.

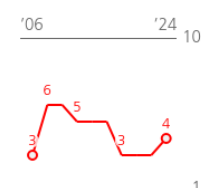
During the coronavirus crisis, Burundi's credibility was affected by President Nkurunziza's expressed indifference toward the virus, although some limited protective measures were put in place. President Ndayishimiye reversed Nkurunziza's course, referring to COVID-19 as the country's "worst enemy" and implementing rapid mass testing. However, he still declined vaccines from the COVAX initiative, resulting in a mixed message regarding credibility.

Although the United States and the European Union lifted their sanctions on Burundi in 2021 and 2022, the government of Burundi still has to demonstrate its credibility on the international stage.

In 2020, Burundi ratified the free trade zone between the Southern African Development Community (SADC), the Common Market for Eastern and Southern Africa (COMESA), and the East African Community (EAC). Additionally, it ratified a treaty establishing the economic community of Central African states, known as the Communauté Économique des États de l'Afrique Centrale. Burundi has also ratified the treaty on 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. However, in 2020, President Ndayishimiye and President Paul Kagame of Rwanda restored relations and agreed to collaborate on border security issues. 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. When the threat of Ebola spreading from the DRC to Burundi emerged, the government

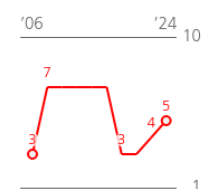
Credibility

4



Regional cooperation

5



successfully vaccinated over 60% of the population in 2019. Although some initial resettlements have occurred, a significant number of Burundian refugees still remain in neighboring countries.

Recent visits to the region and the bilateral engagement pursued by President Ndayishimiye demonstrate a growing willingness to engage in regional cooperation.

Strategic Outlook

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

Burundi's economic growth has hitherto been closely linked to commodity prices, particularly those of gold and coffee. Burundi should promptly analyze its position within the EAC common market and the African free trade zone to identify niche areas in which it could provide skills and products that are presently lacking in these markets.

Burundi's niche area could include marketing its excellent coffee, known for its high quality, as well as 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 in secondary schools and universities – as well as vocational education and entrepreneurship, this could provide a competitive advantage within a common African market.

Burundi should also adopt economic and industrial policies that allow it to gradually enter the common market while protecting specific sectors of its economy, so as to avoid being placed at a disadvantage in comparison to larger economies such as Kenya, Nigeria and South Africa. In East Africa, there is substantial competition for highly educated labor, and Kenya, Uganda and Rwanda are presently better positioned to supply well-educated young professionals.

International institutions and forums such as the United Nations, the African Union and the East African Community should prioritize efforts to address the interconnected dynamics of conflict in the Great Lakes Region, particularly given the region's demonstrated susceptibility to climate change. Climate resilience has the potential to serve as a fresh avenue for conflict-sensitive interventions that adopt a regional rather than national scope.

The most important dimension for Burundi is the connection between citizens and state institutions. Without having the citizens on board, the prospects for ensuring peace in the medium term remain uncertain.