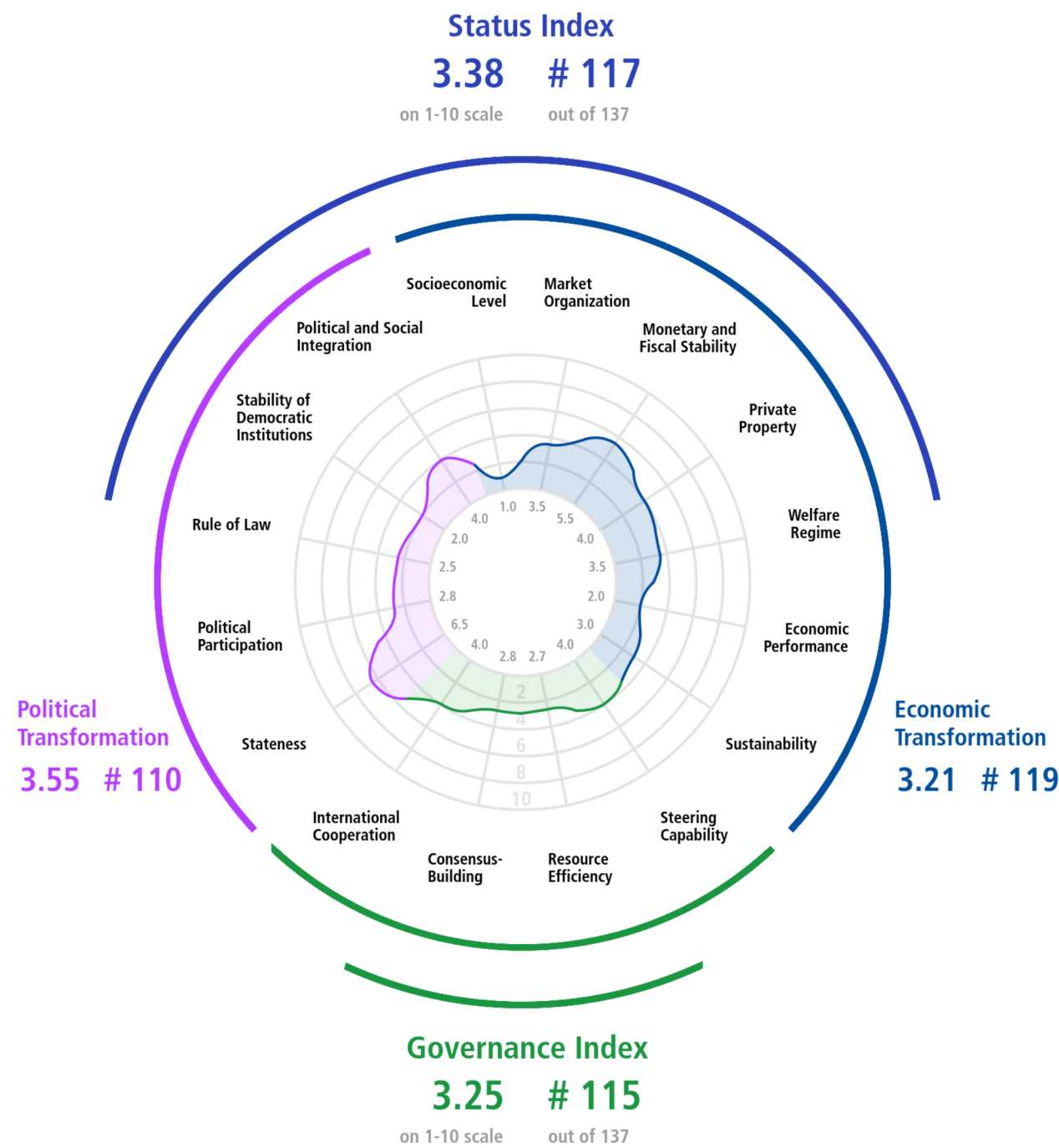


Flygtningenævnets baggrundsmateriale

Bilagsnr.:	377
Land:	Burundi
Kilde:	Bertelsmann Stiftung
Titel:	BTI 2022 Country Report Burundi
Udgivet:	23. februar 2022
Optaget på baggrundsmaterialet:	17. juni 2022

Burundi



This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2022**. It covers the period from February 1, 2019 to January 31, 2021. The BTI assesses the transformation toward democracy and a market economy as well as the quality of governance in 137 countries. More on the BTI at <https://www.bti-project.org>.

Please cite as follows: Bertelsmann Stiftung, BTI 2022 Country Report — Burundi. Gütersloh: Bertelsmann Stiftung, 2022.

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Key Indicators

Population	M	11.9	HDI	0.433	GDP p.c., PPP \$	771
Pop. growth ¹	% p.a.	3.1	HDI rank of 189	185	Gini Index	38.6
Life expectancy	years	61.6	UN Education Index	0.417	Poverty ³	% 89.6
Urban population	%	13.7	Gender inequality ²	0.504	Aid per capita \$	51.1

Sources (as of December 2021): The World Bank, World Development Indicators 2021 | UNDP, Human Development Report 2020. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.20 a day at 2011 international prices.

Executive Summary

While Burundi continues to struggle with poverty, insecurity and poor governance, the 2020 election resulted in a change of leadership that has delivered mixed results. On the one hand, Burundi has benefited from a more moderate political tone coming from the top level of government, as well as from improved relations with some neighboring countries. However, some anti-democratic tendencies have deepened.

The run-up to the vote in 2020 revealed ongoing severe limits on civil and political freedoms and highlighted the persistent fragility of the state. Despite an agreement regarding refugee returns in 2019, unresolved tensions and pre-electoral violence deterred most refugees from coming back to Burundi. Harassment, intimidation, violence and widespread impunity before and after elections resulted in a weakening of the remaining opposition parties, as well as the media and civil society. The elections occurred without the presence of international observers, and the outcome was never in doubt; the CNDD-FDD won the majority of seats both at the national and local levels, Évariste Ndayishimiye took over as president, with Alain Guillaume Bunyoni, who remains under targeted sanctions from the United States and the EU for his role in human rights violations in 2015, as prime minister.

The army and ruling party remain deeply intertwined in Burundi, though social control is also achieved through the use of irregular “youth league” militia forces. Meanwhile, the security situation especially around Burundi’s borders remains fragile, with the RED-TABARA rebel group launching a number of cross-border attacks. However, the recently elected government has improved relations with Rwanda and Democratic Republic of Congo, and aims to cooperate with the neighboring governments in order to better secure the borders.

During the reporting period, Burundi began taking minor steps away from international isolation – a condition that perhaps reached its nadir in 2019 when the government forced the U.N. Human Rights office in the country to close – and toward reengagement with international institutions and the donor community. The country has made progress on the issue of women’s political representation, and early in 2021, President Ndayishimiye launched a campaign aimed at normalizing relations between media outlets and the state, although the terms of this opening remain unclear.

Burundi still ranks among the world’s least developed countries (it was ranked at 185th place out of 189 countries on the Human Development Index (HDI) in 2019), and over 70% of its population lives below the poverty line, although its education sector continues to be a bright spot in terms of both access and outcomes. The ongoing foreign-exchange crisis continued through 2020, public debt levels rose and the country continues to grapple with energy provision issues, even though some large-scale infrastructure projects will in the future expand access to electricity. While gold prices are expected to rise, the COVID-19 pandemic is expected to slow down growth globally; therefore, the economy’s tentative positive growth trend will probably not continue. Agreements to support fiscally constrained countries in the context of the COVID-19 pandemic and global economic slowdown resulted in IMF debt relief for Burundi and new World Bank support. Burundi has not yet ratified the African Continental Free Trade Area agreement.

Access to high-quality education is available to Burundians equally, with no difference regarding gender, regional or socioeconomic background. The enrollment rate is 96%. Access to water had been improved so as to serve a large majority of the population. The country suffered from extraordinarily high prevalence rates of malaria and cholera in 2019. It also experienced cases of COVID-19 in 2020, though the number of cases reported was lower than caseloads elsewhere. In response, the government closed the airport and national borders, but also denied the danger of the virus throughout the first half of 2020. After the sudden and unexpected death of former President Pierre Nkurunziza – supposedly of a heart attack, others say due to a coronavirus infection – and after the new president had been sworn in, the politics toward COVID-19 changed. Burundi has also accepted debt relief from the IMF and a socioeconomic stabilization program led by the World Bank and the UNDP, among others. This will ease the stress on its economy generated by the negative growth trend expected globally.

History and Characteristics of Transformation

Historically, Burundi has been characterized by professional and social diversification into several groups that used to cooperate with each other, guided by the royal family and certain checks and balances between the groups. Historians of African history argue that all ethnic groups immigrated 2000 years ago and that professional specialization led to social diversification. Thus, the ethnic categories “Hutu” and “Tutsi” 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: Tutsi (14% of the population) and Twa (1% of the population). Colonizers, especially 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 large 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, 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 post-war elections of the same year – considered free and fair with a voter turnout of 90% – brought an outright victory to the CNDD-FDD, the ex-rebel group with strong support among the neglected rural Hutu population, and Pierre Nkurunziza became president.

Nkurunziza was reelected 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 and the political power-sharing provisions enshrined in the Arusha agreement. Under enormous pressure and the forced exile of its vice president, the court cleared the way for Nkurunziza's re-election.

Shortly after the court ruling, a coup attempt by parts of the army revealed fundamental splits within the National Defense Force (Force de défense nationale, FDN) that transcended the former main cleavage of ex-FAB (Tutsi) and ex-CNDD-FDD (Hutu) officers. It provided Nkurunziza with a pretext to attack any opposition, including members of the military, civil society, the political opposition and the independent media. New rebel groups were formed in the neighboring Democratic Republic of the Congo but remained largely inactive, and most of the political opposition went into exile. All diplomatic attempts by neighboring states, Western diplomats, regional organizations and the United Nations failed and official mediation efforts by first the African Union (AU) and then the East African Community (EAC) were characterized by government walkouts and boycotted by the opposition. The AU failed to confront the Nkurunziza government, ultimately declining to deploy a proposed intervention force in the face of resistance from Bujumbura. Similarly, a police force authorized by the U.N. Security Council, was never deployed. In 2018, in an atmosphere of oppression and state-sponsored violence, a constitutional referendum that would have enabled Nkurunziza to remain president through 2034 succeeded.

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

Political intolerance and violence in the run-up to presidential and parliamentary elections in May 2020 remained largely controlled and did not reach the level of turmoil seen in 2015. Targeted state violence against the opposition and civil society, including the arrest of members of the political opposition and assassinations of members of the military alleged to support rebel groups, minimized the scope for anti-government protests. The ruling party's youth wing in some cases operates as an irregular militia and enjoys impunity.

As in the past, Burundi's borders remained porous, with armed groups continuing to cross into Burundi from neighboring Rwanda, Tanzania and especially the Democratic Republic of the Congo (DRC). This included groups that launched isolated attacks in Burundi. The situation was exacerbated by tensions between Rwanda and Burundi, which reached a peak at the end of 2019. However, rapprochement in 2020 led to joint efforts in securing borders.

The U.N. 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.

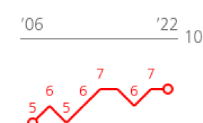
Despite struggles between different political parties over access to power and resources, Burundi's legitimacy as a nation-state has always remained unquestioned. National unity reinforced by the use of Kirundi as a common language and by recognition of a common past during roughly 500 years of monarchy has enabled Burundi to develop common traditions and a sense of national identity.

Despite some refugee return efforts, a significant number of Burundian refugees have chosen to stay in the neighboring countries to which they fled in 2015, and more Burundians decided to leave Burundi prior to elections in 2020. The UNHCR reported that at the end of 2020, there were approximately 314,523 Burundian

Question Score

Monopoly on the
use of force

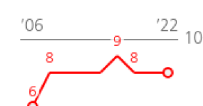
7



1

State identity

8



1

refugees in Tanzania, Rwanda, Uganda and the Democratic Republic of Congo, only about 11,400 fewer than at the end of 2019.

As of the time of writing, there was no sign that proposed legislation that would discriminate against women in terms of their ability to pass their nationality to their children, allowing for this only where the father is unknown or stateless, had advanced.

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 have been forbidden by the government.

In 2018, the ruling party formally deemed President Nkurunziza the “eternal supreme guide,” and he and his supporters publicly suggested that he had been chosen by God to lead Burundi. By 2020, as the COVID-19 pandemic spread globally, Nkurunziza insisted that God had spared the country, claiming that social distancing was unnecessary for Burundi citizens and expelling World Health Organization officials from the country.

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

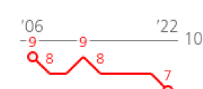
Burundi’s administrative structures continue to be small and poorly funded. The country has for centuries been characterized by a differentiated local administration, with the lowest local administrative posts being those of the chef de quartier in urban areas and the chef de colline in rural areas. The government’s efforts to deliver services and collect taxes throughout the country have met with mixed success, though challenges increased in 2019 and 2020. This has been possible due to a modernization of the formal tax collection system. The country’s tax office, the Office Burundais des Recettes (OBR), reported increased yields in 2019.

The proportion of individuals using the internet has slightly increased to 9.9% in 2020 (from 5.5% in 2017). 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. 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. Frequent natural

No interference of religious dogmas

7



1

Basic administration

4



1

disasters, as well as insecurity and resulting displacement, exacerbate humanitarian crises and complicate government efforts to improve infrastructure and agricultural productivity.

2 | Political Participation

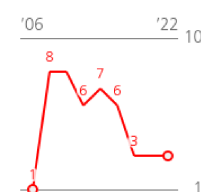
The year 2020, an election year, was a milestone in Burundi, and the elections were neither free nor fair. During the pre-electoral period, irregularities were observed with regard to the rights of life, liberty, security and freedom of expression, including the practices of seeking, receiving and imparting information. Exiled opposition parties were not allowed to take part in the elections and acts of violence and intimidation by the ruling party's Imbonerakure youth wing and by security forces were reported by churches, civil society groups and opposition parties. Citizens had virtually no access to independent media in the pre-election period. International observers were either banned outright or told by the electoral commission nine days before the vote that they would have to quarantine for 14 days upon arrival, effectively making it impossible for them to participate. The Catholic Bishop's Conference and the "Consortium pour le monitoring des violations des droits de l'homme pendant la période électorale" (COSOME) civil society coalition reported irregularities such as double voting and questioned the integrity of the exercise.

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. It was also notable in marking a peaceful transfer of power from one president to another, although within the confines of the same ruling party. Moreover, 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 a case, the constitution mandates that the president of the National Assembly step in for an interim period. Instead, the Constitutional Court allowed the new president to be inaugurated early, in June.

Following the elections, seats were distributed according to results, and a complaint by opposition candidate Agathon Rwasa was quickly dismissed by the Constitutional Court. Ndayishimiye's election was received 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. The elections provided the CNDD-FDD with an overwhelming majority in the National Assembly (86/123 seats) and Senate (33/39), but the success must be seen in a fragile 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 given to women, following the terms of a recently introduced quota.

Free and fair elections

3



Burundi was among the first countries in the region to establish a 14-day quarantine for those traveling outside the country, as well as to close its airport and establish hand-washing facilities in public. However, the WHO team working on COVID-19 was expelled prior to the elections for criticizing the party rallies that took place. The outgoing president downplayed the danger of the virus. No international election observers were in the country due to the 14-day mandatory quarantine. Elections took place in person, and few precautionary measures were taken, although gathering near polling stations was prohibited. The incoming president, Ndayishimiye, reversed his predecessor's course and declared COVID-19 to be Burundians' greatest enemy.

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 reduces the role of the vice president as president's assistant (Art. 93), overriding the Arusha Peace Treaty's formula for power-sharing between different ethnic groups and political parties. The mode of cooperation between the president and prime minister is laid out more in detail in presidential decree No. 100/007 of June 28, 2020, whereby the prime minister is appointed by the president and coordinates the government that implements the president's policies.

Soon after the elections in 2020, experts began to observe increasing competition between the president and the prime minister. This could ultimately interfere with effective governance, as when the prime minister resigns, this leads to a resignation of the government as a whole. The tendency toward a militarization of the country's politics also plays into this; the ruling party is led by a group of generals, party factions are gathering around the two leadership figures, and beginning in 2020, key ministry posts have been filled with former military personnel. The introduction of the prime minister's post might pose a real threat to the ruling party's cohesion, transferring the interparty power struggle to an intra-party level.

Ndayishimiye's success in convincing European donors to believe he is truly interested in and capable of governing in a more moderate and open political style than his predecessor could also indirectly influence the playing field. However, China, which is financing major infrastructure projects in the areas of energy and transportation, will likely be able to attenuate western donors' persuasive power to a certain degree through its mere presence as an alternative financier.

Effective power to govern

3



During the reporting period, the freedom of assembly was severely restricted in Burundi. 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.

Civil society organizations were suspended during the review period. By March 2019, at least 93 foreign NGOs had been registered following a three-month suspension. It is not clear whether the other organizations were denied registration for refusing or failing to specify the ethnicities of their local staff members.

Opposition members and perceived government opponents continued to face attacks by the authorities and ruling party members. Members of the National Congress for Freedom (CNL) faced particular danger. Members of the Imbonerakure, the ruling party's youth wing, killed, arbitrarily arrested and attacked dozens of CNL members, and destroyed local party offices throughout the country. Harassment of and violence perpetrated against opposition party members was prevalent before, and supposedly continued after the 2020 elections, even though Imbonerakure members have been punished for their crimes in isolated cases. Some CNL meetings in the run-up to the elections were disrupted or encountered obstacles.

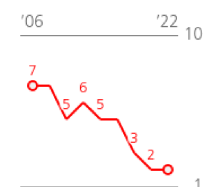
The global pandemic led the government to close land borders and the airport. Land borders were reopened on August 1, while all other borders and entry points remained closed. The airport reopened in November 2020. Numerous election rallies were organized across the country by all the competing political parties, and there were no coronavirus-related restrictions on assembly.

Burundi's ruling party continued systematically oppress journalists and media, as it has for several years.

During the pre-election period, messages of hatred and hostility toward political opponents of the CNDD-FDD party, sometimes with an ethnic dimension, circulated on social networks without eliciting the authorities' condemnation or rebuke. Journalists have been intimidated and threatened, and some have been forced to seek permission to travel within the country from local authorities. Four Iwacu independent press group journalists were released in December 2020 after almost a year in prison. They had been arrested for "undermining the security of the state" for covering reports of a clash between Burundian soldiers and an armed group. The press continued to be monitored by the National Communication Council. In October 2019, the council released the Code of Conduct for the Media and Journalists in the 2020 Election Period, which obliged the media to work in synergy and prohibited the reporting of results other than those officially announced by the Independent National Electoral Commission or the use of opinion polls as a source of information. While the newly elected president has made statements suggesting he would like to see media houses reopen in Burundi, the degree to which he is willing to loosen restrictions on their work remains to be seen.

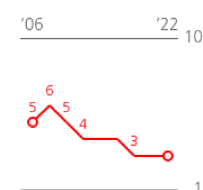
Association / assembly rights

2



Freedom of expression

3



The Burundian government reacted quickly to the global COVID-19 pandemic, and by the end of the reporting period, the country had not seen a high number of reported infections. However, the government's information management led to confusion among the population, as the danger of the pandemic was first downplayed by outgoing President Nkurunziza, then presented as a pressing threat by the new President Ndayishimiye.

3 | Rule of Law

Multiparty democracy and ethnic representation historically linked to checks and balances in Burundi were promoted by the Arusha Peace Treaty and enshrined in the constitution. However, the constitution of 2018 abolished ethnic balances and contributed to concentrating power in the hands of the head of state. The EAC-led mediation process between the ruling party and the opposition, which aimed to protect some of these power-sharing provisions, was halted in 2019 when it became clear that the government would simply ignore the EAC recommendations.

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

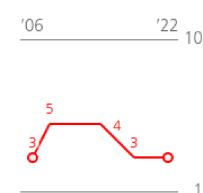
Backed by his allies in the ruling party, the new president can establish policy on his own, and leave the government to implement it. He can appoint ministers without taking the representation of different parties and ethnic groups into account and can also quickly dismiss legal initiatives pursued by parliament. The new constitution deprives the legislative branch of some of its major powers, while the most recent elections provided the ruling party with an overwhelming majority in both chambers. The judiciary is the only branch left that remains independent under the terms of the constitution. However, in regard to one of the roots of Burundi's major 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), placed directly under the president. The electoral commission did not exercise independence with regard to the review of voting irregularities. The Truth and Reconciliation Commission has avoided addressing atrocities committed by the current ruling party, keeping its focus on previous decades in Burundi.

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.

No state of emergency was declared in Burundi due to COVID-19. While the government imposed quarantine measures on international travelers, it took very few other steps aimed at controlling the transmission of COVID-19.

Separation of powers

3



Burundi's judiciary has been characterized by a general weakness for years. During the reporting period, it was repeatedly criticized by local NGOs and international actors such as the U.N. Human Rights Council's Commission of Inquiry for Burundi for its corrupt practices and a lack of independence and capacities, even though it is independent under the terms of the constitution. In fact, structural and financial conditions, regular violations of judicial procedures, and state threats and interference prevent targets from enjoying their rights and have led to a general mistrust in the judiciary on the part of the population. In some rare cases, victims of grave human rights violations have tried to sue the offenders; however, they have hardly ever had an impartial trial, and in even fewer cases has any punishment been enacted upon offenders. Reports indicate that the National Intelligence Service has regularly intervened in court cases and with police and prisons regarding the prosecution and release of prisoners. In Burundi, impunity continues to be widespread.

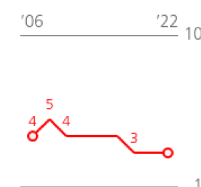
Institutions such as the Special Court on Land and Other Assets (Court Spéciale des Terres et Autres Biens), which was established in 2014 and placed directly under the president, also give credence to the impression of a weak and disempowered judiciary. Several laws adopted in 2019 and 2020 strengthened government interference. For example, in May 2019, a law was promulgated mandating that foreign NGOs set up recruitment committees that have to involve provincial governors in staff-selection decisions.

Misuse of public office for private gain persists with impunity in Burundi. Incidents of corruption linked with illicit cash transfers to European bank accounts were 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. There is also evidence that senior government and party officials have real estate holdings and real assets in foreign countries that seem to be out of proportion with their remuneration. Elected Burundians do not systematically declare their assets to the Supreme Court as prescribed by the constitution. Some senior office holders stand accused of crimes against humanity and are in fact subject to targeted sanctions by jurisdictions in Europe and the United States. Burundi withdrew from the Rome Statute in 2017.

Arts. 21 through 61 of the constitution contain an elaborate catalog of human rights. The document states general principles and values based on democracy, peace and human rights in arts. 13 to 20, and refers to international conventions ratified on the topic. In practice, numerous serious human rights violations continued to occur from 2019 to 2020, even if the new government under President Ndayishimiye received some praise for initial steps taken to punish crimes by the Imbonerakure and its release of some journalists from prison. 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 from 2019 and around the 2020 presidential, legislative and local elections, including summary executions, arbitrary

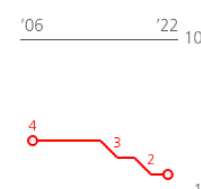
Independent judiciary

3



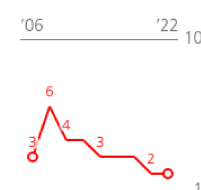
Prosecution of office abuse

2



Civil rights

2



detentions and arrests. Reports in 2019 from Human Rights Watch and Amnesty International came to similar conclusions. The AU 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 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 land borders and the airport. Land borders were reopened on August 1, while all other borders and entry points remained closed. The airport was reopened in November 2020. Muslims were not able to make their pilgrimage to Mecca but were allowed to celebrate Eid al-Adha (Feast of Sacrifice) in July 2020. Thus, the freedom of movement has been and still is somewhat restricted.

4 | Stability of Democratic Institutions

Burundi's democratic institutions are underperforming, having been co-opted by the ruling party, intimidated by formal and informal security services, and undermined by structural reforms aimed at consolidating power and eliminating dissent. Neither the judiciary nor the legislature enjoys independence and given 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 extremely weak and operate in an environment of fear and repression. The government continues to implement its National Development Agenda, and despite high levels of poverty has succeeded in ensuring access to education (96% have access to education) and drinking water (72%). The fate of the National Strategy on Good Governance and Anti-Corruption, which sought to enhance transparency and accountability and foster effective institutions, remains uncertain due to questions of political will and changes at the ministry charged with driving the strategy forward.

Performance of democratic institutions

2

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Burundi's democratic institutions are constitutionally and in reality 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 and fair, the new 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, informing foreign donors about the challenges they encounter under the regime. However, the Catholic Bishop's Conference did speak out publicly against the manner in which elections were conducted in 2020. Civil society, opposition parties and the media have been barred from speaking up through intimidation, suspension from offices or even expulsion from the country. Very few are still in the country and working, and have hardly any veto powers.

Nevertheless, rebel groups seem to persist, and new ones seem to be coming into existence, some associated with political parties. If Ndayishimiye's government further enhances its relationship with neighboring Rwanda and DRC, it might be able to keep security threats in check. But in order for democratic institutions to fully function, and to appease regime adversaries including the population that continues to suffer from harassment and exploitation by Imbonerakure, the ruling party's youth wing, real change in terms of economic and social improvement is necessary. The COVID-19 pandemic led to restrictions on movement due to the closure of land borders and the airport – which were respectively reopened in August and November 2020.

5 | Political and Social Integration

Following the assassination of the first democratically elected president, Melchior Ndadaye, in 1993 and the subsequent 12 years of civil war, former rebel groups transformed into political parties, with the CNDD-FDD being elected by a large majority of voters. All parties in Burundi claim to be aligned along cleavages between the educated elites and the working class, though some also partly claim to speak on behalf of regions or religions. The system is highly clientelistic, as personal networks more 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.

Commitment to democratic institutions

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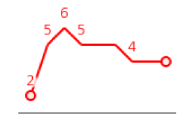
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Party system

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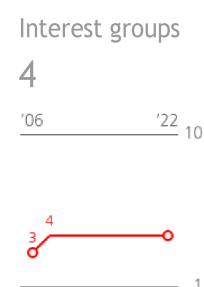
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The ruling CNDD-FDD self-identifies as a national movement that transcends ethnic lines. In 2020, the CNDD-FDD, now dominating all areas of political life and backed by the military, won 70% of votes in the legislative elections. It continued to pursue a militarization of the government administration. The new party Congrès National pour la Liberté won 23% of all votes in the 2020 elections. However, it is yet too early to tell 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. Former royalist party UPRONA received 2% of the vote, and the other political representative of a rebel group, FRODEBU, less than 1%. Polarization is now largely defined along partisan rather than ethnic, lines.

The Catholic Church is by far the most influential group in Burundi, based both on its more than seven million church members, constituting about 65% of the total population, and its ties with the Catholic Church internationally, which can be used to channel information out of the country into 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, while professional associations such as L’association des employeurs au Burundi and Intercafé have even less. The total number of NGOs, grassroots organizations, trade associations and journalists’ unions were on the rise before 2015, but ongoing state interference in internal matters such as repeated mandatory re-registrations, financial status statements and requirements to present plans indicating how the given organization supports the National Development Agenda, paired with continued intimidation, have forced many organizations to close or go into exile.

The country’s NGO crisis, which emerged at the end of 2018 and persisted at least until March 2019, 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 recruiting processes. In December 2019, approximately 7,000 associations were registered in Burundi; however, this number does not take into account the numerous informally organized grassroots organization. In June 2019, the well-known human rights organization PARCEM (Parole et actions pour le réveil des consciences et l’évolution des mentalités) was suspended by the government. Some local civil society organizations, especially those able to rely on financial support and solidarity from abroad, have courageously remained operating despite the pressure. Due to increased competition between the organizations for funds, cooperation is mainly technical, taking the form of information exchange, or linked to specific tasks such as elections. With reduced financial support and capacity, infrequent coverage by the media, and a decline in advocacy activities, these groups’ influence has considerably diminished.



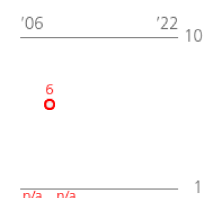
Valid statements about the public approval of democratic norms and procedures can be made to only a very limited degree. The most well-known measure for this on the African continent, the Afrobarometer, conducted its latest survey on Burundi in 2014. At that time, the large majority of respondents approved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

With the events of 2015, the ruling party and the security forces have begun to permeate every corner of society. The party has organized development programs and agriculture cooperatives, but has also coordinated spying on ordinary citizens, while engaging in arbitrary arrests and measures of intimidation. Trust among Burundian citizens, which had been painstakingly rebuilt by the many civic initiatives after the civil war, has been heavily affected by these developments. Furthermore, the ongoing poverty contributes to a competition for scarce resources among ordinary citizens. Burundian society is characterized by a multitude of informal self-organized associations ranging from self-help initiatives, savings groups and joint small-scale businesses to sports and cultural associations. Depending on the degree to which participation is truly voluntary and the quality of group organization, such entities can create real solidarity and support. In fact, many donors use the system of self-help groups, as it has been regarded as a tool for empowerment, especially if these groups are only for women.

Some religious institutions have been able to foster social cohesion through acts of charity and courage, by offering space for discussing contentious subjects in a peaceful way and through their international connections and support. People tend to trust those from their own church. Burundi has been ranked at 140th place, at the bottom of the country list, in the World Happiness Ranking, which measures indicators such as social trust and support; however, it did rank above some peaceful countries such as Malawi and Botswana. It is difficult to estimate how COVID-19 has affected the situation in the country, as Burundi has as of the time of writing seen low numbers of infections. As mass testing was rapidly rolled out in late 2020, it can be assumed that the pandemic did not negatively impact existing levels of social trust.

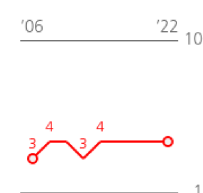
Approval of democracy

n/a



Social capital

4



II. Economic Transformation

6 | Level of Socioeconomic Development

Burundi's Gini coefficient in 2020 is at 0.68, indicating a rather wide disparity between the income of the wealthiest and the poorest. Poverty levels have been high throughout the past years, with a total of 73% of residents living in poverty in 2020. Burundi was ranked at 185th place out of 189 countries in the 2019 Human Development Index (HDI). Fully 80% of Burundi's income stems from agriculture, the largest part of which is at a subsistence level. The UNHCR estimated that by December 2020, 15% of the Burundian population would be facing conditions of acute food insecurity. This was explained by the coming dry season; the socioeconomic impact of COVID-19 and cholera; and the fact that the number of people belonging to vulnerable groups such as refugees, displaced persons, youth or women increased in 2019 and 2020. Burundi has experienced a unique economic situation over the last five years, due in particular to the decline in foreign aid since 2015, which generated both fiscal and balance-of-payments difficulties. To compensate for this loss, the government has mobilized domestic resources to a large extent, but this has not been sufficient to meet the continuously rising social demand driven by a very high population growth rate. Economic growth increased from 1.6% in 2018 to 1.8% (World Bank) in 2019. Economic growth in 2021 is expected to average 3.1% year-over-year (United Nations). 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 \$260 in 2019. A total of 80% of the population is employed within the agriculture sector. Gender inequality is a significant barrier to socioeconomic development; Burundi's score on the Gender Inequality Index is .504.

The coronavirus pandemic will have repercussions within Burundi's economy, which is facing a double shock of supply and demand. All productive sectors are expected to contract, including agriculture, an important pillar of the Burundian economy.

Question
Score

Socioeconomic
barriers

1

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Economic indicators		2017	2018	2019	2020
GDP	\$ M	3172.3	3036.9	3012.3	3258.2
GDP growth	%	0.5	1.6	1.8	0.3
Inflation (CPI)	%	16.1	-2.8	-0.7	7.3
Unemployment	%	1.5	1.5	1.4	0.8
Foreign direct investment	% of GDP	0.0	0.0	0.0	-
Export growth	%	56.7	-10.1	-1.2	-10.2
Import growth	%	24.7	-28.4	12.1	9.0
Current account balance	\$ M	-373.4	-362.6	-	-
Public debt	% of GDP	46.9	53.0	60.3	67.0
External debt	\$ M	606.8	585.0	593.9	626.0
Total debt service	\$ M	27.1	30.0	39.7	36.1
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	25.1	26.2	27.6	31.2
Public education spending	% of GDP	4.8	5.1	-	-
Public health spending	% of GDP	1.9	1.9	-	-
R&D expenditure	% of GDP	-	0.2	-	-
Military expenditure	% of GDP	1.9	1.9	2.5	2.0

Sources (as of December 2021): 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

Burundi's economy is based mainly on agricultural production, which accounts for 40% of its GDP and accounts for almost all of the country's exports, while employing about 90% of the country's population. According to the International Labor Organization (ILO), 89% of all non-agricultural employment is informal. The country is grappling with a severe lack of foreign currency, rising government debt and an austerity policy; however, the government is pursuing a goal of transforming Burundi's economy by 2027 to refocus it on industrial production. As the domestic financial base for public funding of the private sector is fragile, the new government is seeking to win back European donors. The public budget deficit was estimated at 5.1% in 2019, and while overall public debt amounted to 58.6% of that year's GDP.

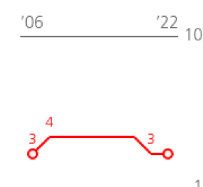
Inflation rates have fluctuated rapidly. There are contradictory assessments of how well the government performs in terms of tax collection and expenditure efficiency. However, there is ample evidence of systemic corruption and tax evasion, and the autocratic regime interferes constantly in basically all sectors and realms of public and private life. During the reporting period, the government officially raised "voluntary contributions" to finance elections, but in reality, local officials have routinely forced businesses to pay forced contributions and improvised taxes to the ruling party.

In the World Bank's Ease of Doing Business 2020 index, Burundi's rating stands at 166th out of 190 countries. This is attributed to 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, involves four procedures and costs 12.3% of the average Burundian income. According to the U.N. Food and Agriculture Organization (FAO), a majority of the Burundian population experienced a hunger crisis in 2019, partly due to unfavorable weather conditions. Burundi has implemented measures such as reducing the cost of registering a business and increasing the transparency of construction permits and has introduced some preventive measures with regard to insolvency. With support from the Chinese government, a hydroelectric power plant is being built in Rumonge, in the south of the country. Burundi joined the African Continental Free Trade Area in 2018; this launched on January 1, 2021, although the agreement had yet to be ratified at the time of writing.

Burundi's small market size and lack of diversification are linked to its reliance on agriculture and mining. Burundi has joined the East African Community (EAC) and the Common Market for Eastern and Southern Africa (COMESA), and has signed the African Free Trade Area Agreement, necessitating adaptations to its legal system. However, a Competition Act providing for an independent authority, passed in 2010, has not yet been implemented. The Global Innovation Index 2019 places Burundi at the very bottom of 129 countries in the category of market sophistication.

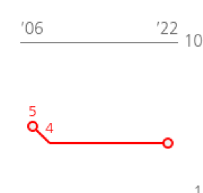
Market organization

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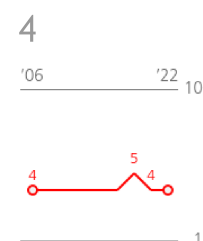
Competition policy

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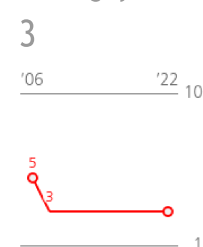
Burundi's exports are primarily agricultural products, mainly coffee and tea, as well as mining products, predominantly gold and other minerals that have been discovered in the north of the country. The downward trend in exports since the end of 2018 continued throughout 2019, reversing only in the third trimester of 2020. However, the absolute volume of goods remained low. The value of imported goods has also been diminishing since 2016. These trends are linked to the international contraction of trade generally and to world-market price developments. As gold prices are expected to rise, the current account deficit will probably decline in 2021. The government has pursued its National Development Plan in accordance with the Agenda 2030 plan, with support provided by U.N. agencies, the World Bank and the African Development Bank, as well as bilateral support from China, Russia and, since 2019, France. Burundi's trade balance continues to be negative due to its reliance on imported manufactured goods. Trade liberalization policies have been on the government's agenda since 2004 and 2009 (respectively when the country acceded to COMESA and EAC). However, it has yet to take measures to reduce non-tariff barriers and facilitate customs processes. The country has signed but not ratified the African Continental Free Trade Area agreement. The average most-favored-nation tariff applied as of 2018 was 12.8%.

Liberalization of foreign trade



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 is dominated by seven commercial banks and includes a handful of formal non-bank financial institutions, mainly development banks and a growing microfinance network. The insurance and pension sectors are underdeveloped, which is an impediment to resource mobilization and a transformation toward maturity. There is a low degree of state ownership in the banking sector; 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 concerning domestic credit. It has currently set the minimum value of foreign-exchange reserves to 3% of all monthly unpaid deposits. In total, reserves totaling about one month of imports are available. The most recent data available indicates that the banking systems capital-to-assets ratio was 12.2 in 2017, according to the World Bank. In the same year, the ratio of non-performing loans to total gross loans was 14.19%. The COVID-19 crisis has pushed up inflation rates and public deficits, which, combined with a lack of foreign aid due to sanctions, led to a foreign-exchange crisis.

Banking system



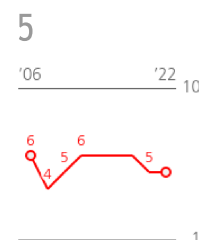
8 | Monetary and fiscal stability

Burundi's monetary authority is its central bank. During the review period, the country's foreign-exchange deficit continued to take a toll on the local economy, which saw a drop in production due to liquidity issues connected with the lack of foreign-exchange. The central bank had been pursuing a liberalization strategy in regard to foreign exchange, with rates determined by currency auctions guided by the central bank. However, according to the African Development Bank, it has recently initiated significant exchange rate policy reforms that could relieve pressure on the country's foreign reserves. In 2020, the bank took action to suspend licenses of foreign-exchange traders accused of undermining official exchange rates by trading outside the 18% margin allowed by regulations. The real effective exchange rate index in 2019 was 114.1 (2010 = 100). With a small export base (coffee and tea) and an agricultural sector highly vulnerable to weather shocks, Burundi's current account is in deficit (10% in 2019). The central bank has identified vulnerability in the export sector and the high budget deficit as the main risks to financial stability.

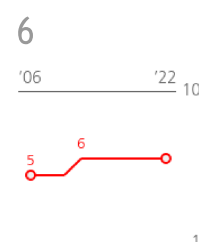
Burundi's gross debt rose to 65% of GDP in 2020, up from roughly 50% of GDP in 2018. In July 2020, the IMF Executive Board approved debt relief under the Catastrophe Containment and Relief Trust, providing for relief totaling \$7.63 million over the subsequent three months, and potentially up to \$24.97 million over the subsequent 21 months. IMF debt relief will help free up resources for public sector health needs and other emergency spending, while helping to mitigate the balance-of-payments shock associated with the COVID-19 pandemic. Burundi also participates in the World Bank's Debt Service Suspension Initiative, saving \$4.5 million, and has benefited from a \$5 million grant from the International Development Association. The state's annual budget for the fiscal year 2020 – 2021 will be increased compared to that of 2019 – 2020. It will rise from BIF 1.33 trillion (about \$704.24 million) to BIF 1.42 trillion (about \$751.16 million), an increase of 6.66%. The fiscal deficit (4.2% in 2019) could increase further in 2020 (to an estimated 4.9% of GDP) and 2021 (to an estimated 5.2% of GDP). The new government has established an ambitious tax collection plan as well as a strategy for targeted investment into the economy. It has also reduced the number of ministries from 21 to 15 and presented six priority areas for the government in line with the National Development Plan and the Agenda 2030. However, in reality, state revenues have fluctuated in recent years, and are expected to decrease, while systemic corruption, tax evasion and illicit cash transfers have been identified as the public budget's main leakages.

European donors' suspension of bilateral assistance to Burundi was a serious problem, as these sources had previously financed at least 50% of its national budget. The government subsequently turned to other donors and aimed to self-finance its public expenditures. However, these goals are rendered more difficult by its ongoing

Monetary stability



Fiscal stability



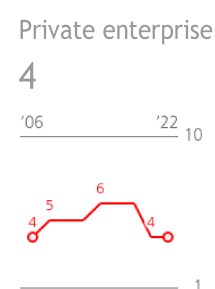
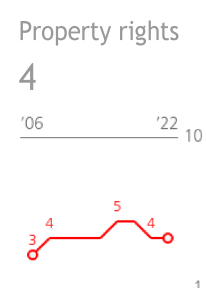
need to pay its clientelistic networks in exchange for security and loyalty. The inflation rate has been subject to rapid change, ranging from -0.7% in 2019 to 7.6% in 2020. With 71.8% of the population living below the poverty line, and wages frozen for the past four years, 31 trade unions have been pressing the government since the beginning of 2020 to adjust wages to keep up with inflation. In order to win back European donors, new President Ndayishimiye has signaled that he is willing to improve Burundi's record with regard to impunity and women's rights, and the EU entered into dialogue with Ndayishimiye at the end of 2020.

9 | Private Property

Family property (Itongo) in Burundi is bequeathed from generation to generation. The 1986 Land Code and customary law together form the basis of the legal structure governing land rights. Numerous contentious attempts at reforming the code over the past dozen years illustrate how politically charged land tenure issues are in the country. Land has always been a contentious issue and has become even more so with the growing population; thus, it has today become one of the country's main drivers of conflict drivers. Property law, land laws and related regulations are routinely abused, and families are used to going to court every 20 years to defend their plots. The Arusha Peace Agreement of 2000 aimed to help bring an end to these negative dynamics by demanding that a sub-commission be formed 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 barring opponents in land conflicts from filing appeals regarding decisions rendered 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 put in place as a last resort for plaintiffs. Both institutions are thus associated with efforts to obtain and keep a land certificate or land title. The law on the CSTB was revised in 2019, making the court accountable to the Supreme Court, requiring that its members hold specific qualifications, enlarging the court with a second chamber, involving magistrates and the Senate in the selection of its members, and curtailing its authority.

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, though 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 mainly hampered 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. In 2014, there were about 249,000 informal companies in Burundi, generally involving self-employment. Burundi consistently falls into the lowest ranks of the World Bank's Ease of Doing Business rankings (2020: 166 out of 190 countries). It is a predominantly rural country, with just 13.7% of the population living in cities (2019: 13.4%) and is thus one of the least urbanized countries in the world. The private sector is consequently mainly linked with the processing of agricultural products and with mining. The sector is neither diversified nor internationally competitive. An assessment by UNDP, AFDB, World Bank and UNICEF of the socioeconomic impact of the global pandemic of 2020 on Burundi's economy contains recommendations regarding emergency measures for the private sector, mainly focusing on providing credit and boosting the sector as a whole. Privatization in this sphere would be dangerous at this stage of structural difficulties.

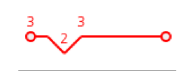
10 | Welfare Regime

Contributory social security programs used to be employment-based social insurance systems financed by the employer and the employee, and were managed by the state through institutions such as the Commission Nationale de Protection Sociale and the Institut Nationale de Sécurité Sociale, and through insurance programs such as Mutuelle de la Fonction Publique. However, the government adopted a National Social Protection Policy in 2011 and set up a strategy for it in 2015 that states that the Ministry of the Civil Service, Labor and Social Security has been tasked to “set up a social protection system.” A more inclusive social protection law was adopted in May 2020. This aims 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 for disabled people. The newly elected president also reiterated in 2020 that the social protection policy was one of his priorities. However, financing these programs will be a challenge, even if the new head of state successfully reinstates relations with European 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 government implemented a number of COVID-19 emergency measures, included reductions in the prices for water and soap, and prepared a National Preparation and Response Plan with a \$28.5 million price tag for the expected socioeconomic effects of the global crisis.

Social safety nets

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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, such as 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 roughly 15 percentage points. Although access to education is inclusive – 96% of all children go to school – it is in the tertiary education sector that the share of women strongly decreases. Women made up 51.8% of the labor force in 2020, down from 51.9 % in 2019.

Religion is usually not a dimension associated with inequality, but may affect opportunities indirectly, as membership within social networks can be affected by membership within a certain denomination.

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

The majority of the population is under the age of 18, a fact that has considerable effects on the society as a whole. Gaining access to arable land is regarded by UNICEF as a potential trigger for violence. Youth unemployment is by far the most worrying issue. Furthermore, only 34% of young people between 15 and 24 years of age had access to health care in 2018, and according to the National Statistical Office, 89.6% of all children between one and 14 years of age had experienced some form of violence as of 2017. However, according to several U.N. sources, young primary students enjoy equal access to education. Among Burundian refugees, distinctions were made in 2020 making it more difficult for exiled politicians and civil society activists to return.

Equal opportunity

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11 | Economic Performance

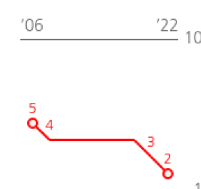
The Burundian economy is still largely agriculture-based, vulnerable to shocks and subject to environmental and social pressure. Thus, it is not in a position to produce significant long-term growth. Economic growth rates fell following the 2015 political and security crisis, but have recently begun to recover, if slowly. The African Development Bank projects that the economy will grow by 3.7% in 2020 and by 4.3% in 2021 on the back of higher coffee exports, a slight increase in public investment and prudent monetary policy.

Burundi is still described as one of the least developed countries on earth, with 71.8% of the population living below the poverty line, relatively high levels of inequality and growth expected to slow globally due to the COVID-19 pandemic. During the review period, hunger was experienced by a significant portion of the population, and food insecurity increased in 2020 due to unfavorable weather conditions. Burundi's current account is in deficit (10% in 2019), but this deficit is expected to decline owing to a sharp drop in oil prices and a rise in gold prices, one of Burundi's most profitable export goods. The central bank has identified vulnerability in the export sector and the high budget deficit as the primary risks to financial stability. The fiscal deficit (4.2% in 2019) could increase further in 2020 (forecast at 4.9% of GDP) and 2021 (forecast at 5.2% of GDP).

The country's gross debt rose to 65% of the GDP in 2020, from roughly 50% of GDP in 2018. The IMF granted some debt relief in 2020 in order to help stabilize the country. The inflation rate has fluctuated from -0.7% in 2019 to 7.6% in 2020. In June 2019, the official exchange rate was 1,842.4 francs to the dollar, an 11% depreciation since 2016. While the official unemployment rate has been around 1.4%, youth unemployment is regarded as rampant. Burundi's per capita income was estimated by the World Bank at \$260 in 2019, the lowest in the world (187 out of 187 countries). Any much-needed change will depend on the new President Ndayishimiye's capacity to rebuild relations with foreign donors who have, with few exceptions, suspended direct aid. The head of state's success 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 access to electricity, thereby 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.

Output strength

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12 | Sustainability

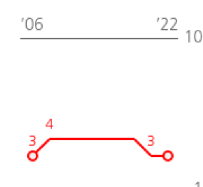
With one of the highest population densities on the continent (about 400 people per square kilometer), and with 90% of the population dependent on agriculture, Burundi depends on functioning ecosystems. A mountainous country with a tropical climate, it also relies on efficient land management practices. But the ambitious land reform provided for in the Arusha agreement was superficial at best and has not met expectations. Property law, and 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 constitute a real alternative, the steadily worsening issues of land degradation, erosion, loss of soil fertility and deforestation will be an increasing threat to livelihoods in this predominantly rural country.

Climate change is expected to generate more frequent extreme weather events, including heavy rainfalls and prolonged dry seasons in the north and in the basin between the 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, 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 increase school enrollment levels to 96%. On average, the government spends 20% of its national budget on education, and literacy levels are above the African average for both women and men. Stress factors such as climate change, violence and other threats have an impact on access to education. Vulnerable groups such as returning refugees and internally displaced people are among the most affected social groups. There is a sharp decline in attendance at the secondary school level (50% attendance), and even more so at the tertiary level. Today, 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 just 4,000 students. The

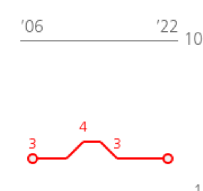
Environmental
policy

3



Education policy /
R&D

3



educational system is politicized – university students can be disciplined by withholding their state scholarships, which has resulted in frequent student strikes.

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

Burundi sits among the lower ranks of the U.N. Education Index 2019 with a score of 0.417 on a scale from 0 – 1. The literacy rate was 68.4% in 2017, public expenditure on education stood at 5.1% of GDP in 2018, and R&D expenditure was 0.2% of GDP (2018).

Governance

I. Level of Difficulty

Burundi faces several structural constraints that mutually reinforce each other, thereby keeping it in a disadvantaged position and making government intervention a very challenging task. This combination of geographic (landlocked) and demographic (densely populated) factors tends to produce land conflicts, which are regarded as the root cause behind Burundi's ongoing violent conflict. Burundi is also situated between two nations that have been in crisis for decades – the DRC and Rwanda – which in turn fuels Burundi's conflict.

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. The result is that educational systems and the economy are facing constant challenges when it comes to providing good nutrition, health and education to all young people.

A key government task has been to overcome the sociopolitical divides connected to questions of inequality and clientelism. About 50% of Burundi's national budget was financed by foreign donors before most bilateral aid was suspended following the 2015 crisis. The 2015 crisis destroyed much of the few advances Burundi had made since the end of the civil war. Climate change is also hitting the country hard and is expected to continue exacerbating an already severe situation with regard to land and the environment.

Burundi only felt mild effects of the global COVID-19 pandemic, with 109 active cases in January 2021 and just two reported fatalities. The socioeconomic effects are expected to have a greater impact than the health situation. Real GDP was expected to contract by 4.9% in 2020, and economic growth is projected to average 3.1% in 2021.

Structural
constraints

10



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

Burundi's formal civil society evolved as cooperatives in the 1950s, when distinctions between parties and civil society organizations could not always be made. A divide also exists between the formally organized groups that frequently associate with Western or international NGOs and more informally organized local organizations. Local, informal associations have a long history, but have become more organized and visible since the end of the civil war. Most formal NGOs are headquartered in Bujumbura. Estimates from 2006 indicate that 2,000 formal NGOs (so-called ASBL, or associations sans but lucratives) were registered with the Ministry of the Interior, and another 5,000 community-based organizations (so-called groupements) existed in the countryside without official registration. Other than that, the dependence on foreign aid and the lack of cooperation between formally registered NGOs contributes to their weakness.

Following the 2010 elections, repressive acts by the government toward civil society and international organizations rose steadily, peaking during the violent and contentious elections of 2015. The NGO law of 2018 requiring foreign NGOs active in Burundi to apply ethnic quotas when recruiting staff led to an NGO crisis between 2018 and 2019, in which all 130 foreign NGOs were at one point suspended. Publicly, the program was presented as an affirmative action program to promote Hutu employment, but Burundi experts assume it also served as a measure to further diminish space and have a chilling effect on all civil society organizations. The main factor reducing equality of opportunity is the autocratic regime – affiliation with the ruling party secures access to jobs and other opportunities. A significant share of people working in the independent media, civil society and opposition parties have left the country and today live in exile. This level of repression has eroded social trust, as citizens operate in an atmosphere of fear, with limited access to information.

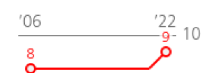
Burundian cleavages exist between rural and urban society, and between different elites with access to resources and clientelistic followers.

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 a delicate balance between communities that has preserved peace since the end of the civil war. Despite fears about escalating violence around the 2020 elections, during the reporting period violence did not flare up to the levels seen around the 2015 election, 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, obviously leading to altered constellations within the ruling party and for incoming President Ndayishimiye.

Civil society traditions

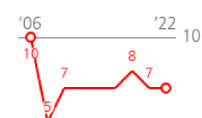
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Conflict intensity

7



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II. Governance Performance

14 | Steering Capability

In 2019 and 2020, the Burundian government continued to implement programs with a focus on socioeconomic development and humanitarian stabilization, but an isolationist approach to the donor community during much of this period undermined progress.

The guiding policy document was the Vision 2025 plan, put into action as a part of the country's National Development Plan (NDP). 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 top-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, goals set are somewhat high, and do not follow a coherent philosophy. While the priorities are in line with the analysis, and some budgetary adjustments show that the state invests in the areas prioritized, some key measures for achieving change are left undone. Multimillion-dollar projects are underway to support these initiatives, and debt relief efforts by the IMF and World Bank are aimed at enhancing Burundi's resilience, especially with regard to the economic impact of the COVID-19 pandemic. The World Bank's current portfolio in Burundi consists of 12 country projects and three regional projects that together carry a price tag of \$863.30 million.

Burundi has experienced a unique economic situation over the last five years, due in particular to the decline in foreign aid since 2015, which has caused both fiscal and balance-of-payments difficulties. To compensate for this loss, the government has mobilized domestic resources to a large extent, while also reaching out to new donors such as China, India and Saudi Arabia. However, this has not been sufficient to meet the continuously rising social demand.

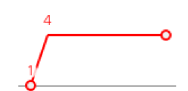
By making education free of charge in 2005, Burundi achieved significant progress in terms of quality and equal access to education, with a net enrollment rate in primary education reaching 96% in 2018/19, without significant variation based on region, gender or socioeconomic status. Overall government effectiveness has nevertheless been low, a fact attributed to weak institutions. The government mainly faces internal management constraints – with the militarization of the government sector, which is characterized by high levels of corruption, there is a constant drain of resources that are not used for their intended purpose. This also undermines the efficiency of cooperation with the private sector and other external partners.

Question
Score

Prioritization

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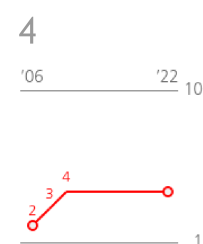
As a part of the government's ambitious NDP, it aims to completely transform the country's economy, turning it into a post-agrarian economy by 2027. To do so, however, it would need a drastic revision of fundamental governance and intra-party structures and mechanisms in order to prevent the constant drain of resources that renders most political projects ineffective. Under the current political constellation, this is hardly imaginable, even if the new President Ndayishimiye has taken isolated actions such as returning to European donors or 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 instance, it significantly enhanced access to education and women's political representation, and successfully conducted mass vaccination and mass testing campaigns respectively 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 are all actions that suggest the government might not yet be prioritizing the implementation of its own policies.

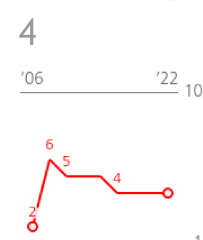
The new president, equipped with extensive powers, seems to be speaking in a softer tone than his predecessor, but is likely to represent continuity as the former minister for the interior and a general during the civil war. It is unrealistic to expect the existing structures to lead to changed results. The style of speeches by both the former and the new president – for instance, the use of moralistic pleas, religious rhetoric and blame games – also points toward an alternative analysis of the problem and an assumed logic of change. Joint efforts between foreign donors and the government, intending to strengthen technical aspects of policy implementation, sometimes lack proper coordination and are lagging behind schedule. Burundi plans to implement a national census in 2022, which will include estimates of agricultural potential as well as demographic data. This could help adjust plans to real demand.

While the country's overall sociopolitical development before 2015 kindled hope for 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. Its mandate was extended by another four years in 2018, and it 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.

Implementation



Policy learning



Step by step, Burundi has distanced itself from any 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 been shifting U.N. envoys, as well – Jamal Benomar, who was 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 not able to enter the country due to the late provision of information about a COVID-19 quarantine regulation. Former President Buyoya had been serving as AU Special Envoy for Mali and Sahel, but resigned at the end of 2020, after having learned that he had been convicted in absentia by the AU for having killed President Melchior Ndadaye, in the event that sparked the civil war. Because both former presidents Buyoya and Nkurunziza, as well as former mediator Mkapa, died in 2020, it will be even more difficult to find out the truth about the past.

15 | Resource Efficiency

Burundi continued its politics of austerity during the review period, with a prioritization of expenses and by continuing to pay salaries to its civil servants that were not adjusted for inflation, as it has for the past five years. In order to finance elections in 2020, the government made deductions from civil servants' salaries through the end of 2019. As the recruitment of local and provincial administration staff is also heavily influenced by the central government, this could be a means of perpetuating corrupt practices despite the progress made in decentralization.

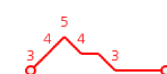
Burundi's growth rate is low, and the country is struggling with fluctuating inflation rates (the inflation rate veered from 15% in 2018 to -0.7% in 2019, and again to 7.6% in 2020); it can be assumed that these factors will take a toll on state efficiency with regard to utilizing financial and human resources. In June 2019, the official exchange rate was 1,842.4 francs to the dollar, an 11% depreciation since 2016. Public debt rose to 58.6% of GDP in 2019. At least 50% of Burundi's national budget was financed by foreign donors before most bilateral aid was suspended following the 2015 crisis. As Burundi was able to retain some international donors and find new sources for direct budgetary support, it has nevertheless been able to pursue some infrastructure projects.

However, while the 2019/2020 budget was mostly fully spent according to the annual fiscal report, according to Burundi's Ministry of Finance, expenses for development projects with external partners fell short of planned levels, with only about 50% of allocated funds. The budget plan for 2020/21 looks good on paper, with the bulk of

Efficient use of assets

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financial resources earmarked for local development, education, social protection and promotion of the economy, but critics assert that 90% of the budget is in fact spent on the government's operating costs.

The fiscal deficit (4.2% in 2019) could increase further in 2020 (to a forecast 4.9% of GDP) and 2021 (a forecast 5.2% of GDP). Decentralization processes under way in cooperation with the World Bank have contained measures designed to strengthen municipalities' tax collection and accountability toward citizens, among other factors. In 2020, local elections took place, and a new law on local municipalities' functioning was adopted. The law outlines the district council's functioning and the budgetary planning and oversight systems at the local level. Among other provisions, ethnic and gender quotas are to be upheld; however, the devolution of resources and competences seems rather restrained, and a law with a focus on resource transfer is still in the making. Despite the introduction of decentralized governance structures, municipalities continue to serve as the monitoring agency 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 full potential of devolution with regard to producing a more efficient use of resources is not being exploited.

Political and administrative decisions in Burundi are usually made centrally at the level of ministers and permanent secretaries, with little delegation to lower levels of the administration. The measures contained in the new constitution of 2018 contributed to concentrating power in the hands of the ruling party and the central government. The ruling CNDD-FDD party also won an overwhelming majority in both chambers of parliament in the 2020 elections, and the recruitment of staff at the national and provincial levels followed party preferences, leading to a militarization of the administration. Interministerial bodies for the coordination of initiatives between different ministries are often lacking. On paper, political stakeholders are supposed to spend money on prioritized areas of investment as laid out in the NDP. In practice, the goals actually set do not follow coherent policies or are not implemented consistently. Some key measures are left undone, and the government's absolute control over institutions and regular interference in minor public affairs indicates the absence of a common strategy owned by all stakeholders. The functioning of institutions such as the Special Court on Land and Other Assets, which was established in 2014 and placed directly under the president, was revised in 2019 and 2020, but there is no indication of an inclusive and transparent discussion about 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 subject to disappearance. Intra-party democracy is still weak, partly due to the effect of regionalism, thus reinforcing the impression the ruling party is not engaged in substantial initiatives based on real consensus.

Policy
coordination

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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 prevents the emergence of effective cooperation with private sector entities and other external partnerships. The government did develop a National Strategy on Good Governance and Anti-Corruption, the goal of which was to promote transparency and accountability, and to foster high-performing institutions. The strategy was in a process of 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. The state institutions meant to fight corruption were then dissolved in 2020. These institutions were weak in the first place, but their dissolution is a discouraging signal to the public and external partners alike. The isolated media reports on individuals arrested for corruption create the impression of a double standard. Overall, most citizens see it as far too dangerous to try to hold the powerful accountable for corrupt practices.

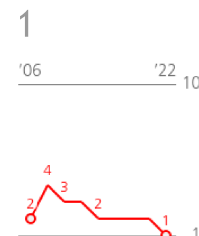
The World Bank and others have documented incidences of corruption linked with illicit cash transfers to European bank accounts, as well as numerous cases of conflict of interest to which the authorities have turned a blind eye. Evidence has emerged that high-ranking government and party officials possess real estate holdings and other assets in foreign countries that seem to be out of proportion with their official remuneration. Some senior office holders are accused of crimes against humanity. The complete impunity currently enjoyed by perpetrators of such crimes could promote a further deterioration of the situation.

16 | Consensus-Building

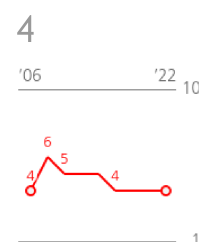
While Burundian leaders have never officially rejected the principles of democracy and a free-market economy, the country has moved further and further away from enacting them, at least as interpreted and applied by national and international stakeholders. Inclusive dialogue with opposing actors is no longer desired, as the failed AU and U.N. diplomatic missions encouraging political dialogue with opposition parties have shown. 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 all give 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

Anti-corruption policy



Consensus on goals



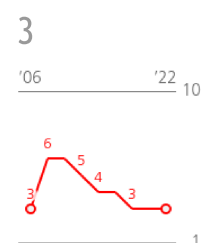
their realization seems rather fragile. In 2020, Burundi ratified the free trade zone between the Southern African Development Community (SADC), the Common Market for Eastern and Southern Africa (COMESA) and the East African Community (EAC). It has also ratified a treaty providing for an economic community of central African states (Communauté Économique des États de l'Afrique Centrale), and 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. Burundi's government officially consulted with the country's unions regarding civil servants' salaries; however, there is little visible cooperation with the Chamber of Commerce (Chambre de Commerce et d'Industrie du Burundi) or the Employers' Association.

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. Depending on President Ndayishimiye's success in achieving sanctions relief, the military might be able to prolong its mission in Somalia, which will probably satisfy it due to the ability to earn much higher salaries than at home. If he does not succeed, the military might be the only force left 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 should be on intra-party processes and the military in the future.

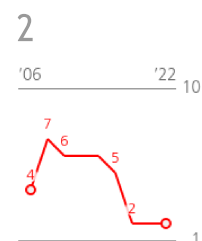
The government's unwillingness to acknowledge the legitimacy of opposing viewpoints has made it harder for it to build unity or grow its coalition. The current inability of the country's internal and external forces to find solutions for the main cleavages goes back to the CNDD-FDD's 2015 assertion: "Some of the Arusha provisions are invalid and cannot be used to resolve the current crisis ... these provisions were declared null and void by the Global Cease-fire Agreement." The party was referring to the South African-mediated cease-fire accords that the CNDD-FDD signed in 2003 when it 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 away top government posts to military personnel and disabled the checks and balances between different ethnic groups. Critics fear this will upset a 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 variables of the international system that

Anti-democratic actors



Cleavage / conflict management



always play in favor of others rather than Burundians. However, the large share of the national budget being devoted to community development, social services and economic development can be understood as an attempt to unite the population behind the government.

Up to 2014 – 2015, formally registered civil society organizations were consulted by the government regarding laws and policies. However, an increasingly repressive atmosphere reached its nadir in 2015 when President Nkurunziza announced his bid for a third term in office, and civil society began to protest against this act. Disciplinary measures such as a reregistration requirement have been common “soft” strategies aimed at keeping civil society in check. However, even before 2015, the state had used more severe tactics such as prosecutions, the blocking of bank accounts, intimidation, suspensions and even torture. The government continues to use these tools today. During the reporting period it also sought to divide the sector by accusing some organizations of being inauthentic, while identifying others as close collaborators – so-called *nyakuri*. In 2019, all 130 international NGOs were suspended and ordered to reregister in such a way as to disclose the ethnic makeup of their employee base; many organizations simply closed their doors rather than comply. One of the last remaining human rights organizations, PARCEM, was suspended after being accused of tarnishing the image of the country and its leaders.

As the government has shown little interest in engaging in peace talks with the exiled opposition, the AU, U.N. and EAC have 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 prolonged the mandate of Burundi’s Truth and Reconciliation Commission by another four years. The commission has produced impressive results – more than 70,000 witness reports and more than 4,000 mass graves identified, allowing more than 20,000 families to mourn their loved ones at last. It also decided to extend the time period in which crimes committed in colonial times could be committed. However, within the country’s overall context of repression and intimidation, it is doubtful whether the commission, which is accused of being biased, can contribute effectively to healing trauma, especially in the sense of guaranteeing that the crimes will not be repeated, a core element of transitional justice. The

Civil society participation

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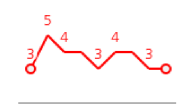
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Reconciliation

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mandate of the Special Court on Land Conflicts has also been prolonged and its functioning slightly modified, ostensibly to contribute to the resolution of land conflicts, but really narrowing reconciliation to mean land redistribution, and maybe even politicizing the process. Government measures to accommodate refugees from 2015 in the country are supposedly flawed, as former civil society and opposition party members apparently experience discrimination. The fact that relatively few refugees have returned is another hint that the government agenda does not prioritize reconciliation. Recently elected President Ndayishimiye has shown more openness than his predecessor, released some journalists from prison and even been commended by the United Nations for meting out isolated punishments for acts of violence perpetrated by the Imbonerakure. The treatment of women has also been ambivalent, as immense progress has been made in promoting women's rights and in promoting their political representation, but they remain discriminated against with regard to land inheritance and have been disproportionately harmed 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 the coordination of 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 focused primarily on socioeconomic development and humanitarian stabilization. According to Burundi's Ministry of Finance and World Bank project status reports, actual implementation of development projects with external partners has been slow, with only up to 50% of the planned budgets spent, and with projects lagging behind schedule. In 2020, President Ndayishimiye further structured his government's planned interventions by prioritizing the issues of good governance, education, agriculture and youth development, among others. He also took the long-overdue step over seeking to rebuild partnerships with European donors. Multimillion-dollar projects are currently underway to support economic development initiatives, and debt relief granted by the IMF and World Bank has aimed at enhancing Burundi's resilience, especially given the economic impact of the COVID-19 pandemic. The World Bank's current portfolio in Burundi consists of 12

Effective use of support

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country projects and three regional projects that together have a price tag of \$863.30 million. France has begun to support Burundi bilaterally in spite of the EU's overall agreement not to do so, and the EU entered renewed talks with President Ndayishimiye at the end of 2020.

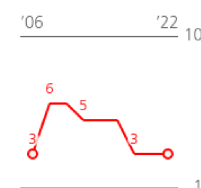
The stalemate between Burundi and an assortment of Western political players and international institutions intensified during the reporting period until, at the end of 2020, the new government and some donors began to reapproach one another. Burundi withdrew from the Rome Statute in 2017. Its refusal 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 indifference toward the virus, though some limited protective measures were put in place. Recently elected President Ndayishimiye reversed Nkurunziza's course, calling COVID-19 the country's "worst enemy" and providing for quick mass testing, but he still rejected vaccines from the COVAX initiative, leading to a mixed message with regard to credibility.

In 2020, Burundi ratified the free trade zone between SADC, COMESA and EAC, and also ratified a treaty providing for an economic community of central African states (Communauté Économique des États de l'Afrique Centrale). It has yet to ratify the treaty on the African Continental Free Trade Area, and the government's strategy toward joining this body is not yet clear. Tensions with Rwanda intensified during 2019, causing much worry about the stability of the already fragile Great Lakes Region, but President Ndayishimiye and Rwanda's President Paul Kagame restored relations in 2020, agreeing to cooperate on border security issues. The border with the Democratic Republic of Congo also remained an issue of concern, even though the Burundian and Congolese governments have cooperated in fighting rebel groups hiding in Eastern Congo. This is a sensitive topic for other regional powers involved in Eastern Congo, such as Rwanda and Uganda. When threats of Ebola spreading to Burundi from DRC erupted, the government was able to vaccinate more than 60% of the population in 2019. A large number of Burundian refugees still remain in neighboring countries, although some initial resettlements have taken place.

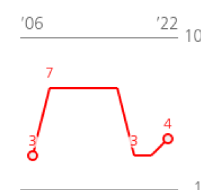
Credibility

3



Regional cooperation

4



Strategic Outlook

The past two years in Burundi saw a deepening of cleavages and a consolidation of political and economic power, but little progress on the issues that threaten the sustainability of the current order. The parallels between the former UPRONA and the autocratic rule of today's CNDD-FDD can easily be spotted: 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, but as clientelism is the working principle, the system in the future will need more and more resources to distribute, which it is unlikely to be able to create on its own. This could intensify the underlying conflict around scarce resources, which are also drained through corruption. As corruption remains the main resource drain, and is systemic, this will be the main issue to address in order to exit from the recurring patterns of cyclical conflict.

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. Thus, the government needs to focus on controlling population growth and transforming income generation patterns so as to relieve pressure on the land. Policies should provide incentives to slow population growth, foster industrial processing of goods from agriculture and mining, conduct a land and environmental reform to enhance food security and climate resilience, and create jobs for the many young people in the country. This latter point is especially critical, as 46% of the population is under 15 years of age, and the country's median age is 17.6.

The recently elected president's first 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. Any action taken by President Ndayishimiye to implement policies will depend on his ability to maintain productive relations with other elite figures in the party, such as new CNDD-FDD Secretary-General Reverien Ndikuriyo and Prime Minister Alain Guillaume Bunyoni, as well as with local elites. He will also need to win back foreign assistance beyond the few donors that he is currently working with. In his communication with donors, he should be open and realistic about the country's interests. Donors should apply "do-no-harm" principles – adapted to the Burundian context – throughout their project structures. They should not shy away from approaching the government while also drawing on a multitude of sources of information to gain a full understanding of conditions in Burundi. Donors should continue the dialogue on integrating the opposition party, as the continued exclusion of opposing forces would increase the risk of the formation of rebel groups that could challenge state security.

Burundi's economic growth has to date been closely tied to commodity prices, especially for gold and coffee. The tentative upward growth trend will probably be slowed by the effects of the global coronavirus pandemic. Burundi should quickly analyze its position within the EAC common market and the African free trade zone to identify niche areas in which it could offer skills and products currently absent in these markets. Based on this analysis, parliament could ratify the

African free trade zone agreement. Burundi's niche area could include marketing its excellent coffee, which is 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 quality of education, even 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 policies that allow for it to enter the common market slowly and protect certain areas of its economy, so that it does not end up in an inferior position vis-a-vis large economies such as Kenya, Nigeria or South Africa. In East Africa, there is significant competition for well-educated workers, and at least today, Kenya, Uganda and Rwanda are better equipped to provide highly educated young employees.

Finally, international institutions and forums such as the United Nations, the African Union and the East African Community should take the interrelated dynamics of conflict in the Great Lakes Region seriously, especially as the region has already shown its vulnerability to climate change. Climate resilience could become a new entry point for conflict-sensitive interventions with a regional rather than national focus.