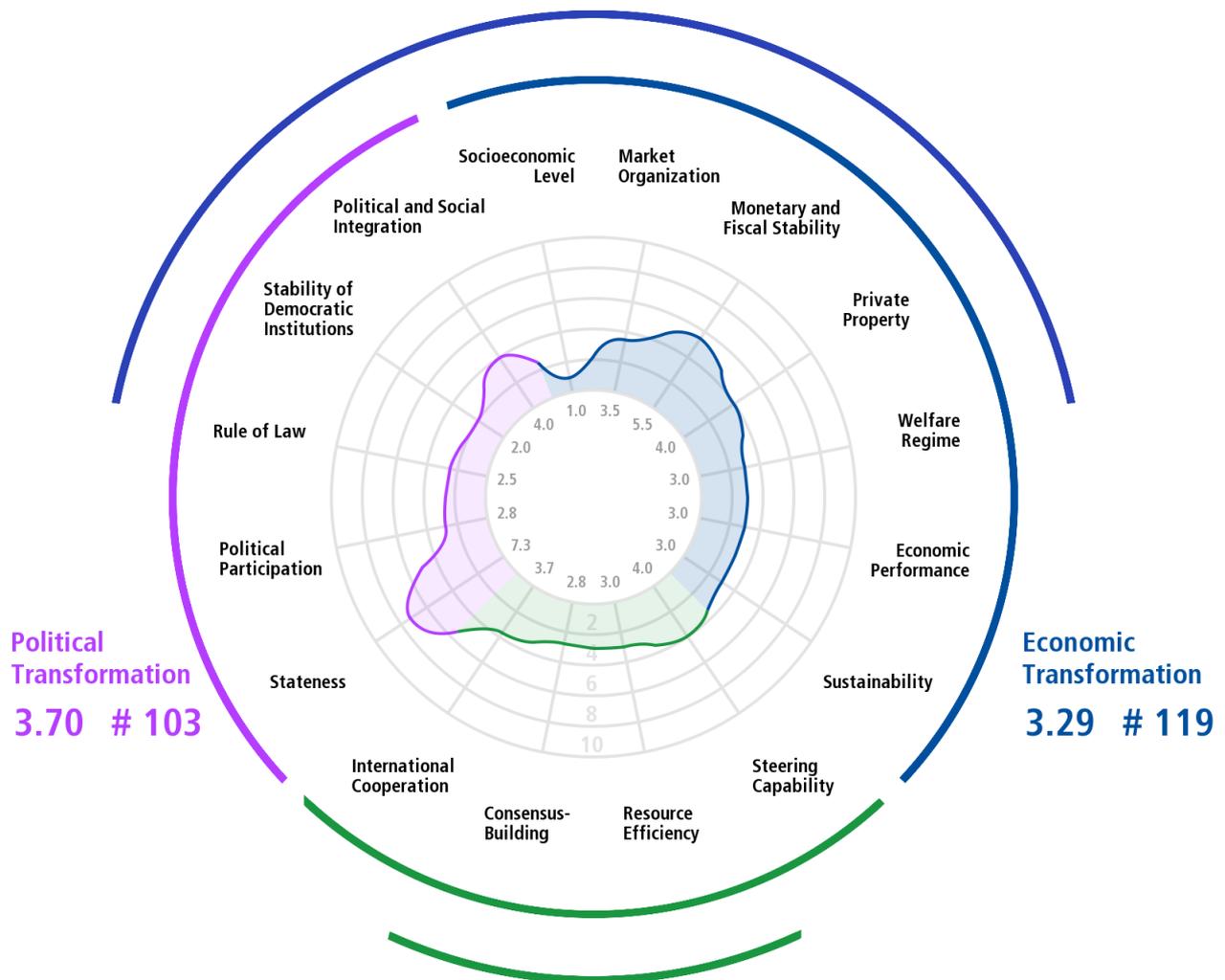


# Burundi

## Status Index

**3.49 # 118**

on 1-10 scale out of 137



**Political Transformation**  
**3.70 # 103**

**Economic Transformation**  
**3.29 # 119**

## Governance Index

**3.23 # 119**

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2020**. It covers the period from February 1, 2017 to January 31, 2019. The BTI assesses the transformation toward democracy and a market economy as well as the quality of governance in 137 countries. More on the BTI at <https://www.bti-project.org>.

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**Key Indicators**

Population	M	<b>11.2</b>	HDI	<b>0.423</b>	GDP p.c., PPP \$	<b>743</b>
Pop. growth <sup>1</sup>	% p.a.	<b>3.2</b>	HDI rank of 189	<b>185</b>	Gini Index	<b>38.6</b>
Life expectancy	years	<b>60.9</b>	UN Education Index	<b>0.418</b>	Poverty <sup>3</sup>	% <b>89.3</b>
Urban population	%	<b>13.0</b>	Gender inequality <sup>2</sup>	<b>0.520</b>	Aid per capita \$	<b>39.6</b>

Sources (as of December 2019): The World Bank, World Development Indicators 2019 | UNDP, Human Development Report 2019. 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

Since 2015, Burundi has been in a worsening economic crisis. Rising unemployment and declining purchasing power have led to impoverishment of the population and the risk of reversing the socioeconomic progress made since 2000. Politics became extremely authoritarian, arbitrary arrests, political assassinations and torture occurred almost daily. By the end of the reporting period, more than 1,000 people had been killed and around 345,000 had fled the country. Since 2015, political unrest has persisted with the government targeting opposition while the military, police and Imbonerakure (the ruling party's youth wing) were responsible for numerous killings, abductions, acts of torture, rape and arbitrary arrests. As a result, the health and education situation is deteriorating as many doctors leave the country and scholarships or teachers' salaries are unpaid. At the same time, the Burundian government is exacerbating the situation through various measures. During a controversial referendum in May 2018, numerous violent outbreaks and arrests were observed. New taxes were introduced to finance elections and some banks got into trouble after being forced to grant further loans under pressure from the government. Burundi remains one of the poorest countries in the world with a population of approximately 11 million people. There are a multitude of parties outside the parliament that are only weakly anchored in the population and often only pursue local or regional interests. The internal cohesion of the ruling party is vulnerable. The functioning of the government is fragile and can be endangered by splits in party unity. The extra-parliamentary opposition is characterized by absence, since their leaders fled the country in 2010. Attempts have been made to change the electoral code for 2020 elections, putting the participation of political opponents at risk. Presidential candidates are asked to apply with an amount of BIF 50 million (instead of the previous sum of BIF 15 million) into the public treasury account at the National Bank.

The changes to the constitution, the introduction of religious references and the presentation of President Nkurunziza as “Eternal Guide,” and the relocation of the capital from the shores of Lac Tanganyika to Gitega, deep in the central highlands and the former capital of Burundi’s monarch, raises serious questions about intentions to pave the way for a re-establishment of a monarchy.

Internationally, Burundi has become increasingly isolated. The United States and the EU imposed sanctions on individuals close to President Nkurunziza. The U.N. terminated the Burundian police units within the U.N. Police Mission in the Central African Republic, the EU delayed payments for Burundian AMISOM soldiers over a row with the AU to find a way of bypassing the Burundi government in the distribution of salaries, almost all major donors withdrew or redirected their budgetary aid, many development programs were closed and even partners with little or no interest in human rights issues such as China became extremely cautious with their investments. Burundi did not attend the AU Summit in Rwanda in March 2018 nor the EAC Summit in November 2018. Withdrawal from the Rome Statute further fostered Burundi’s isolation but can simultaneously be seen as an attempt by Burundi to foster a different kind of alliance with those countries critical of the International Criminal Court (ICC), in particular South Africa, Kenya and other African governments. The government entered into open hostilities with its neighbor Rwanda, sparking fears of a new crisis.

## 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. Today 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, eliminating large parts of the Hutu elite in a genocide that went largely unnoticed by the public in 1972. In 1993, an internationally driven democratization process culminated in general elections, bringing Melchior Ndadaye from the Hutu majority party Burundi Democratic Front (FRODEBU) to power. High-ranking members of the Forces Armées Burundaises (FAB) assassinated Ndadaye shortly after the elections, an event that sparked a full-fledged civil war (with an estimated 300,000 death toll) pitting Hutu rebel groups (primarily the CNDD-FDD and the National Forces of Liberation or FNL) against an all-Tutsi army. The former president Pierre Buyoya (1987–1993, UPRONA) managed to regain power in a coup d’état in 1996. Splits on both sides of the Hutu-Tutsi divide occurred along regional and class lines and found their expression in different stances

toward the peace process. Two radical Hutu parties excelled in the years after 1993 and soon began fighting not only the army, but also each other: the PALIPEHUTU-FNL, founded in the 1980s in a Tanzanian refugee camp, as well as the CNDD-FDD, which emerged from FRODEBU as the armed alternative. An externally imposed peace process culminated in the Arusha Peace Agreement between UPRONA and FRODEBU (and a plethora of smaller parties) in August 2000, introducing a transitional government based on consociational power-sharing with ethnic quotas for all political institutions. After several rounds of talks between the army and the CNDD-FDD, the Pretoria peace agreement was signed and the rebels joined the transitional institutions in 2004 under favorable conditions. By assuming control of 40% of officer positions in the army, and 35% in the police, as well as a number of ministries and seats in parliament, the CNDD-FDD became the most powerful player in Burundi besides the army and its UPRONA allies.

Military integration only began in 2005, creating an ethnically balanced army (Forces de Défense Nationale, FDN). The reform of the army was considered highly successful, a view that must be reassessed due to the attempted military coup in 2015. A new constitution, based on the Arusha agreement and confirming ethnic quotas, was approved in February 2005. The first post-war elections of the same year – considered free and fair with a voter turnout of 90% – brought an outright victory to the CNDD-FDD. The ex-rebels had an extensive network covering large parts of the country and were extremely popular with the neglected rural Hutu population.

Although both international and national observers considered the elections free and fair, accusations of intimidation by the CNDD-FDD were rampant. Being the only candidate, Nkurunziza was re-elected with 91% of the vote. The absence of all other opposition parties however was a severe setback to the democratic transition of the country. After the 2010 elections, the political climate became extremely hostile and attempts at dialog between the government and the opposition failed. Harassment and persecution of opposition members, particularly of the FNL, but also of human rights defenders and independent media increased. Main opposition leaders temporarily went into exile and parts of the FNL rearmed in the Democratic Republic of the Congo. The government and civil society discussed a bill on setting up a Truth and Reconciliation Commission and a Special Court, which brought up issues such as impunity and governmental reform. The process around the Truth Commission revealed that a multitude of local peacebuilding, mediation and anti-trauma organizations had been active during and since the civil war. Studies found the population's priorities were peace and economic progress and that the large majority had understood that the concept of ethnicity had been used as a manipulative weapon by politicians.

Since early 2014, the situation worsened: the government turned increasingly authoritarian and took a number of legal and extra-legal measures to consolidate the CNDD-FDD's power. Importantly, principles of the Arusha agreement, such as the ethnic quota system and the political power-sharing between different parties at the head of the state were for the first time openly called into question.

It soon became obvious that president Nkurunziza and elites in his party did not plan to relinquish power as constitutionally prescribed after serving two mandates. Under enormous pressure and the forced exile of its vice-president, the court cleared the way for Nkurunziza's re-election.

Arguing that in 2005 the president was elected not by popular vote but indirectly through parliament and senate, the court declared that Nkurunziza had only served one constitutionally relevant term so far.

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

The failed coup attempt provoked a massive crackdown on civil society groups, raids in oppositional neighborhoods and the destruction of all independent media. New rebel groups were formed in the neighboring Democratic Republic of the Congo but remained largely inactive, with no large-scale attacks. Most opposition politicians went into exile. A new opposition platform CNARED was formed in Belgium.

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

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

## Transformation Status

### I. Political Transformation

#### 1 | Stateness

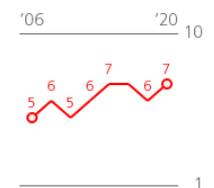
The peace accord that brought an end to Burundi's 12-year ethnic civil war guaranteed that the future army would be split 50-50 between minority Tutsi and majority Hutu. While the army has been reformed in line with the Arusha Agreement, the agreed quotas were not implemented in the police force and were not applied strictly to the national intelligence service (Service national de renseignement, SNR). The formal integration (with international oversight and assistance) of Hutu into the previously Tutsi-dominated army began in 2004 and was largely complete by 2014. However, the integration of police (75% of police were former rebels) remained incomplete by 2014. Significant reforms to the judicial system are also proposed in the constitutional reform bill, which for the first time introduces ethnic quotas for the judiciary (60% Hutu and 40% Tutsi). The danger is that this referendum may also be laying the groundwork for reversing ethnic checks and balances. With this reform, Nkurunziza follows the other heads of state in the region (Rwanda, Uganda) who have strengthened their position of power with constitutional amendments. Up to now, the constitution permitted only two presidential terms of five years to the same candidate. This has now been expanded to seven years. The 54-year-old has been the head of state and head of government since 2005. By the end of 2018, the government adopted an historic bill making Gitega – once the capital of the former monarchy - the political capital and Bujumbura the economic capital.

Although the overall situation in the country is calm, continued incidents of cross-border violence point to the fact that the country's borders are largely open and insufficiently protected. UN reports mention that rebel and criminal groups have several times crossed Burundi's borders from DRC, Tanzania and Rwanda in 2018 to conduct attacks in Burundi. Refugee issues still affect Rwandan-Burundian relations and Rwanda's military presence on its border with Burundi has increased. The state may hold a monopoly on the use of force within Burundi, but it may, as in the past, be challenged by groups that form outside the country.

Question  
Score

Monopoly on the  
use of force

7



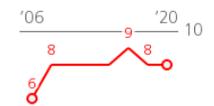
The legitimacy of the nation-state remains unquestioned. Unlike most other sub-Saharan African states, Burundi enjoys a long (pre-colonial) history of national unity, with a common national language (Kirundi) and few cultural differences within the population. The violent struggles between the Hutu majority and the Tutsi minority have always been about controlling the state and its resources, not about belonging to the nation.

The elaborate system of power-sharing institutionalized by the Arusha Agreement – designed to initiate the process of reconciliation, democratization and peaceful development – seems to have completely collapsed since the controversial referendum in May 2018. Under the new governing arrangements, the president can now select a powerful prime minister from his own party and a weak and largely ceremonial vice-president from the opposition. At the same time, according to UNHCR reports refugees are returning to Burundi. Some 44,000 Burundian refugees have so far been helped to return to their country voluntarily. They cite the improved overall security in the country, the desire to reoccupy farmland, and the desire to reunite with family as reasons for returning.

In Burundi, the Church has historically played a critical role in opposition to the state. The Catholic leadership was quick to condemn ethnic massacres in the 1970s and has served as a voice of the people. During Burundi's crisis in 2015, the Catholic church in Burundi – which retains the allegiance of more than 73% of the population – has openly opposed President Nkurunziza's attempt to stay in power. However, Burundi is a secular state and religious dogmas do not openly influence legal and political institutions. Christianity in various forms is dominant and other religions (such as Islam) are effectively marginalized. Since the civil war, evangelical churches have mushroomed all over the country. Religious dogmas have an enormous impact on social life and therefore on the success or failure of the implementation of political decisions that affect the general population. President Nkurunziza has been criticized for instrumentalizing religious matters in an effort to bolster his power. Nkurunziza belongs to a community of born-again Christians (Eglise du Rocher) and is perceived by his community as the savior of Burundi. Lately another new element has been introduced into the constitutional text in the form of religious references, but also in the oaths of allegiance applying to the different political mandates. The introduction of religious references into the constitution, the mystic tendencies of the presidential couple, the recent proclamation by his party of President Nkurunziza as "Eternal Guide," and the relocation of the capital from the shores of Lac Tanganyika deep into the central highlands to Gitega – the former capital of Burundian's monarch - raise serious questions about intentions to pave the way for re-establishment of a monarchy.

#### State identity

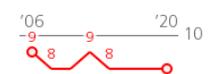
8



1

#### No interference of religious dogmas

8



1

Due to the country's small size, high population density and long history of central control, the public administration adequately covers the entire territory. Administrative structures are generally small and poorly funded, but have larger responsibilities than in many other African states. The smallest administrative entity is the "colline" (hill). The proportion of individuals using the internet is estimated to have increased to 5.5% in 2017 (from 1.5% in 2016). With an economy in recession since 2015, living conditions and access to services are deteriorating. Many Burundians must find a second job, indulge in petty corruption or eliminate non-essential spending to survive. Access to health services is deteriorating. The effects of the economic crisis are leading to a contraction in health care services and a weakening governance of the sector. The national health policy's objectives – in particular universal health coverage by 2025 – appear completely unrealistic. Many primary rural schools have been rebuilt or expanded thanks to foreign aid. The quality of education, however, is still very low and teachers are ill-equipped and underpaid. Teacher strikes and closed boarding schools due to a lack of resources are frequent. Public sector management has suffered as checks on the running of public bodies have all but stopped.

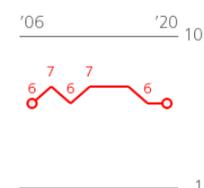
## 2 | Political Participation

Until May 2018, the constitution provided for elections every five years. The international community as well as international NGOs have stated that the electoral process has been overshadowed by lack of transparency, the suspension of media outlets, and attempts to pressure voters. The destruction of the private and independent media outlets illustrates that there are few press freedoms. Two weeks before the controversial referendum, the national communication council (CNC) of Burundi suspended operations by the British Broadcasting Corporation (BBC) and Voice of America. The referendum held on May 17, 2018, saw the presidential term increase from five to seven years. The two-term restriction, as stipulated in the previous constitution, was preserved. However, the key change is that the terms only count if they are consecutive. This paves the way for a "Putin-Medvedev" governance-model in which the president, after completing his maximum number of terms, may continue to influence politics for a while through a puppet president and then return to presidential election.

Long before the past presidential elections in 2015, there were growing signs of increasingly authoritarian governance, an arming of CNDD-FDD youth wing (Imbonerakure), which has since become a veritable party militia, and the systematic suppression of opposition votes. President Pierre Nkurunziza's decision in April 2015 to stand for a disputed third term sparked a political, human rights and humanitarian crisis, which continues to have devastating consequences for many people in Burundi. According to the United Nations, over 450,000 Burundian refugees fled since the start of the crisis in 2015 and remain outside of the country, and an estimated 3 million Burundians need humanitarian assistance, representing over a quarter of the country's total population.

### Basic administration

6



### Free and fair elections

3



Draft revisions of the constitution that went into effect in May 2018 could be used to allow for a reinstatement of a monarchy. Most notably, the new Article 4 of the states that the “status and re-establishment of the monarchy must be the object of the referendum,” sheds light on the dictatorial ambitions of Pierre Nkurunziza. This could be used to restore a monarchical system that was abolished in 1966. Since the 2015 election crisis, Nkurunziza and his immediate entourage are effectively governing the country in an authoritarian way without any checks and balances. Democratic institutions have been hollowed out and internal dissidence from within the CNDD-FDD has been largely silenced as a result of major “clean-ups” of internal critics within the party and the army before, during and after the 2015 election period and coup attempt. However, the ruling elite as well as the military are far from immune from internal splits. In fact, an implosion of the ruling party as a result of power struggles in the current crisis is an immediate threat to what is left of political stability in the country. However, during the crisis, the government has proven resistant to international pressure from donors, the UN and regional organizations, and the 2018 referendum was financed without international support. Despite the withdrawal of funds by major donors and targeted sanctions of individuals close to Nkurunziza, the president has managed to take a direction of selective cooperation with those international partners who support his political course in the private economy without threatening his political decisions and interfering in political affairs. Nkurunziza has also strengthened his ties with China. According to the International Crisis Group, Burundi spends much effort on furthering its relationship with China. Amid political fighting, the country’s economic and social transformation has suffered tremendously. The government has never seriously tackled the country’s structural problems. The little that had been done in the past, such as improvements in the provision of basic services such as health care and primary education were almost nullified in the months after the election crisis.

In Burundi, the legal basis for civil society activities was not created until 2005 with the introduction of a democratic constitution. In principle, the constitution guarantees freedom of association, assembly and expression. However, several laws and decrees on public assemblies introduced in the past few years impose far ranging restrictions. These include: a provision for government envoys in public assemblies; a provision for the dissolution of assemblies to preserve public order; a ban on the popular habit of engaging in sports in groups (such as running) in public places in the capital and a one-day limit on the duration of demonstrations. Even before these laws and decrees, which reached their peak during the referendum on the constitution in May 2018, civil society actors were never sufficiently involved in political processes. Since January 2018, dozens of opponents of the referendum were arbitrarily arrested. There is a lack of funding, vocational training and basic skills such as negotiation or facilitating dialog. The importance and activity of civil society is closely linked to the democratization process.

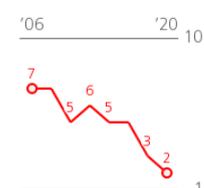
Effective power to govern

3



Association / assembly rights

2

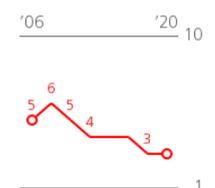


However, in Bujumbura, despite increasing state restrictions, there are some strong civil society actors, such as the APDH or the organization of the société civile appuyées et renforcé (OSCAR), which pursue their goals clearly and with commitment. They are committed to good governance, the protection of human rights, the promotion of women and young people and the handling of land conflicts by promoting reconciliation initiatives and trauma work. Various unions, such as the COSYBU (confederation of the syndicate of Burundi) have recently been organizing strikes protesting against politics, the current sharp increase in food prices and inflation, as well as education and energy issues. Although they are committed, the effectiveness of NGOs in Bujumbura, despite their courageous work, is constrained by financial dependence on external donors and increased intimidation by the government. The political and human rights crisis that began in Burundi in April 2015, when President Pierre Nkurunziza announced that he would run for a disputed third term, continued through 2017, as government forces targeted real and perceived opponents with near total impunity. Security forces and intelligence services – often collaborating with members of the ruling party’s youth league, known as the Imbonerakure – were responsible for numerous killings, disappearances, abductions, acts of torture, rapes and arbitrary arrests. There are lengthy registration processes for civil society organizations, and harassment and intimidation of organizations critical of the government has been observed, including the banning of ten important civil society organizations in 2016. Staged demonstrations take place on a regular basis, managed by the ruling party in order to prove the continuing existence of rights to association and assembly. In December 2018, people were protesting against a BBC documentary film showing the alleged systematic killings of opposition members by the police and intelligence in the film called secret torture facilities. In 2018, the government screened civil society organizations to investigate their compliance with a 2017 law governing NGO operations. This led to the suspension of 130 foreign NGOs for three months in October 2018 and the withdrawal of several large foreign NGOs in the beginning of 2019.

The systematic repression of independent media has been part of the governing party’s strategy for years. Since the 2015 crisis, freedom of expression is almost nonexistent. Before 2015, in the months before the elections, criticism of the government – such as allegations of military action in DRC or of the arming of the CNDD-FDD’s youth wing (Imbonerakure) – was often countered with accusations of “threatening state security” and critical news coverage, and all public expression was inhibited by legal restrictions. With the brutal suppression of an army coup attempt in May 2015, all independent media were destroyed. Remnants of the media and civil society groups have reorganized in exile using the media platform SOS Burundi and a small radio, which tries to communicate news over the border from Rwanda. In addition to the systematic pressure on the population by state security agencies and the Imbonerakure, the government obstructed independent reporting on the processes surrounding the referendum. On May 4, 2015, the national Burundian

Freedom of expression

3



communications authority (CNC) blocked the BBC and Voice of America international media agencies for a six-month period on the pretext of press crimes and unprofessional behavior, as well as the use of prohibited frequencies. Radio France International and one of the last independent Burundian radio stations, Isanganiro, were warned that they would face similar consequences for their coverage.

### 3 | Rule of Law

There is very little state separation of powers: the president determines the politics, the appearance of which he negotiates informally with the political decision-makers and the army. The constitution of Burundi provides for an independent judiciary. The Constitutional Court (Cour Constitutionnelle) and the Supreme Court (Cour Suprême) are the highest courts. The military court (Cour militaire) rules on crimes of soldiers or other military personnel. The national police and the national intelligence service (national de renseignement, SNR) are responsible for internal security in Burundi. The police and judiciary in Burundi are heavily affected by corruption. The separation of powers between the various state organs and a system of checks and balances exists legally but no longer in practice. Since the masquerade elections of 2015, both chambers of the legislature are dominated by the CNDD-FDD and are loyal to Nkurunziza's inner circle.

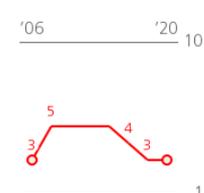
Given the crackdown on the political opposition, civil society and the media, there is no effective democratic countervailing power left in the country.

Government commissions are either ineffective (the ombudsman's office and the national independent human rights commission, CNIDH), contested (the national election commission, CENI) or not yet established (the truth and reconciliation commission, CVR).

The judiciary is heavily influenced by politics. The justice system needs urgent reform. The controversial re-election of President Nkurunziza in 2015 saw restrictions on the freedom of the press and the curtailment of human rights. The judiciary is set up as a distinct and separate institution, theoretically able to operate independently from all other organs of the state. However, judicial appointments are made by the government (by the minister of justice, in consultation with the president). In general, Burundi's judiciary bends to the will of the executive. Occasional independent decisions of the Supreme Court remain the exception. The ruling of the Constitutional Court that Nkurunziza's third term bid was legal – after its vice-president fled into exile – was evidence of the lack of independence of the judiciary at the highest level. Members of the lower levels of the judiciary are poorly trained and equipped, and the entire judicial system is prone to the temptations of corruption. Changes to the criminal procedure code introduced a month before the referendum may have made it easier to commit these violations. On April 18, 2018,

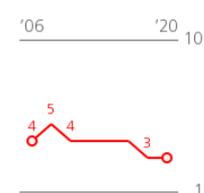
Separation of powers

3



Independent judiciary

3



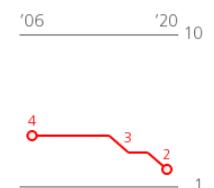
the deputies in the Burundi parliament approved the reform of the criminal procedure code, which allowed the security forces to conduct multiple searches day or night without a search warrant and to increase the prerogatives of the state regarding surveillance and cyber-surveillance.

Apart from the Constitutional Court, the other main public institution charged with human rights protection and promotion is the ministry of solidarity, human rights and gender. Since its creation, the ministry has however failed to undertake any meaningful measures to promote the constitutional provisions on human rights. There have been numerous reports of abuse of rights by military forces and police. In general, a climate of absolute impunity for public officeholders prevails. Some vigilant NGOs investigate such cases and publicize them, but generally without effect. Transparency in governmental decisions and accountability are practically nonexistent. The few prosecutions of corruption that have occurred were politically motivated to remove government opponents and critics. Furthermore, offering bribes is generally considered normal by the Burundian population. Since 2012, Burundi has continuously ranked lowest in the East Africa Bribery Index. It became the country with the highest likelihood of bribery in 2014, and the police, land services and judiciary are the institutions most prone to petty corruption. In November 2017, the Burundian government declared its withdrawal from the statute of the International Criminal Court (ICC), which has been investigating war crimes committed by forces loyal to President Pierre Nkurunziza's government against their political opponents.

The human rights situation in Burundi is classified as tense or worrying. Serious human rights violations by security forces including arbitrary arrests, attacks, torture and rape have occurred since 2015 and continue to occur with impunity. The rights of freedom of expression, association and assembly of NGOs and human rights organizations are frequently violated. According to the Burundian NGO Ligue Iteka between April 2015 and May 2018, 1,710 murders, 486 cases of forced disappearances, 558 victims of torture and 8,561 arbitrary arrests, have occurred. It is worrying that until October 2016, five human rights organizations have been banned, namely the forum pour le renforcement de société civile (FORSC), the forum pour la conscience et le développement (FOCODE), the action chrétiens pour l'abolition de la torture (ACAT), the association burundaise pour la protection des humits humains et des personnes détenues (APRODH) and the réseau des citoyens probes (RCP). On April 26, 2018, the regional court of Ntahangwa sentenced the human rights defender Germain Rukuki to 32 years in prison for "participation in an insurrection," "undermining state security" and "rebellion." Violence against women and girls is rampant and perpetrators rarely face persecution. Albinos face a particular threat from discrimination and violence. The Burundian government's order in December 2018 that the UN Human Rights Council office should be closed by February 2019 also signifies an unwillingness to disclose information and to allow the international community to help protect Burundian citizens' rights.

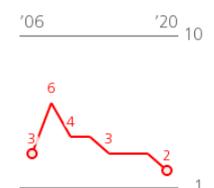
#### Prosecution of office abuse

2



#### Civil rights

2



#### 4 | Stability of Democratic Institutions

From a strictly formal perspective, all conventionally required democratic institutions exist in Burundi. This is the case for both legislative chambers, the judiciary, governmental structures at various levels and the professional public administration. After the boycott by all major opposition parties of the parliamentary elections, the lower house lacks legitimacy. During and after the 2015 elections, the ruling party's inner circle became authoritarian to such an extent that democratic contest is at the moment simply impossible: both the opposition and moderate elements within the CNDD-FDD itself have been persecuted, forced into exile or otherwise silenced. Another indicator of increasing authoritarianism is the arrest warrant issued against the former president Paul Buyoya (1996-2003). Buyoya is currently the African Union's representative in Mali and a respected figure on the continent as well as internationally. The Burundian government issued an international arrest warrant against Buyoya, 11 former senior officials and five civilians close to him over the 1993 killing of Melchior Ndadaye. According to the African Union, this arrest warrant may affect ongoing peace efforts in the region. There is no evidence to support the warrant. Regionalism, lack of checks and balances and insufficient interministerial and multi-sectoral cooperation lead to difficulties in the preparation and implementation of government decisions affecting several ministries and public bodies, for instance when dealing with land and environmental issues, weakening the state's capacity to deliver services to its citizens.

The referendum in 2018 provoked strong reactions from a range of stakeholders. The Catholic church argued that the timing was not appropriate to review the constitution. Burundi's exiled opposition groups formed an alliance called CNARED and called for a boycott of the referendum. According to the BBC, the vote has been considered by some to be a "death knell" to the 2000 Arusha Accords.

The government's stance toward the Arusha Accords is not only an expression of its current will to cling to power. The CNDD-FDD was not part of the original negotiations and has always been critical of them. The CNDD-FDD's leadership is deeply influenced by its experience as a rebel organization, leaning toward authoritative and uncompromising behavior, and it tends to be skeptical of professional politics in general. The current crisis reveals that there is a general need to reconsider the meaning of the Arusha Accords to the wider population. The ethnic quotas are criticized both by Hutu, who are unhappy with the overrepresentation of Tutsi, and by Tutsi, who argue that ethnic affiliation often outweighs merit (although in practice it is not only ethnic affiliation, but also loyalty to the ruling party).

Performance of democratic institutions

2

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Commitment to democratic institutions

2

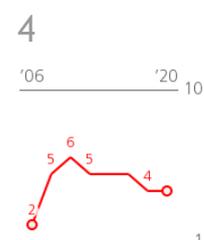
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## 5 | Political and Social Integration

The departure from basic democratic principles in Burundi in 2010 occurred after several opposition parties alleged that local elections were subject to widespread fraud and boycotted the subsequent parliamentary and presidential elections. The opposition formed a new party, the Alliance des Démocrates pour le Changement au Burundi (ADC-IKIBIRI) in 2010, which included members of the CNDD, FNL, FRODEBU and MSD. Soon after, Agathon Rwasa, the leader of the FNL that was admitted as a political party in 2009, went into hiding. The leader of the opposition MSD (Mouvement pour la Solidarité et le Développement), the popular journalist Alexis Sinduhije, was also forced to leave the country in 2010. The third party leader, Léonard Nyangoma of the CNDD, which had joined the ADC-IKIBIRI, also went into exile. When Nkurunziza dismissed his Tutsi UPRONA vice-president in February 2014, an intergovernmental conflict had already broken out in the run-up to the elections. In 2015, the entire extra-parliamentarian opposition was forced into exile and has regrouped as the Conseil National pour le Respect de l'Accord d'Arusha, pour la Paix et la Reconciliation au Burundi et de l'Etat de Droit (CNARED) in Belgium. Before and during the elections of 2015, the former junior partner of the CNDD-FDD in the government, UPRONA, split into different factions. In January 2019, the president of the party, Abel Gashatsi, was asked to stand down, accused of mismanagement and violation of internal regulations. Currently the CNDD-FDD governs the country together with satellite parties and faces no opposition – neither parliamentarian, nor extra-parliamentarian – from inside the country. The exiled umbrella organization CNARED was born out of necessity and not a shared political ideology among the member parties. Their common interest is to regain political strength and their goal is the resignation of Nkurunziza. They have attempted to collectively engage in an internationally mediated dialog with the government. Since the creation of CNARED in 2015, different members have already left the council such as the Burundian Democrats Rally (RDB) in January 2019 due to dissatisfaction with the achievements of the council. However, so far, the government has chosen not to recognize CNARED. There are a multitude of parties outside the parliament that are only weakly anchored in the population and often only pursue local or regional interests. The internal cohesion of the ruling party is vulnerable. The functioning of the government is fragile and can be endangered by splits in party unity. The extra-parliamentary opposition is characterized by absence, since their leaders fled the country in 2010. Attempts have been made to change the electoral code for 2020 elections, putting the participation of political opponents at risk. Presidential candidates are asked to apply with an amount of BIF 50 million (instead of the previous sum of BIF 15 million) into the public treasury account at the National Bank.

Party system



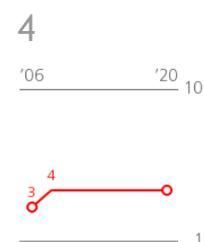
Burundi has few well-articulated interest groups and professional associations. Before the crisis of 2015 there had been an increasing number of grassroots organizations and a number of influential unions, the most important being the unions of tradespeople, teachers and journalists. Nevertheless, all interest groups are subject to the historical experience of ethnic mistrust that permeates Burundian society. With the polarization of the entire society into those loyal to the CNDD-FDD and those affiliated with the opposition, members of interest groups have been subject to persecution and forced into exile, in a similar fashion to opposition parties and civil society groups.

Overall, however, a “dormant tension” seems more likely to spread; public criticism is nonexistent. Despite increasing state restrictions, there are some strong civil society actors, such as the APDH or the organization of the société civile appuyées et renforcé (OSCAR), which pursue their goals clearly and with commitment. They are committed to good governance, the protection of human rights, the promotion of women and young people and the handling of land conflicts by promoting reconciliation initiatives and trauma work. Civil society is important in Burundi, especially since the government acts in an increasingly authoritarian way. Various unions such as the COSYBU (confederation of the syndicates of Burundi) have recently been organizing strikes protesting against politics and the current sharp increase in food prices and inflation, as well as education and energy issues. Although they are committed, the effectiveness of NGOs in Bujumbura, despite their courageous work, is constrained by financial dependence on external donors and increased intimidation by the government.

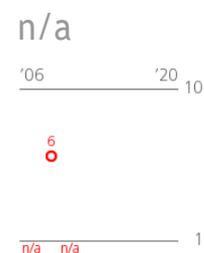
There are a number of unions (confédération des syndicats du Burundi, COSYBU, and confédération syndicale du Burundi, CSB), economic and professional associations (association des employeurs au Burundi, InterCafé Burundi), churches and political parties as well as NGOs. Their influence, already limited before 2015, has further waned due to intimidation and the economic downturn in the country.

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

## Interest groups



## Approval of democracy



The current crisis, which has gripped Burundi for more than three years, has seen violence and alarming human right violations across the country. According to estimates, over 800 people have been killed, and more than a quarter of a million have fled the country. In a conflict that has torn communities apart and destroyed social relations, building trust among the population is very difficult. Outbreaks of violence are a daily occurrence, and people are continuing to flee into neighboring countries. Peace remains a fragile process.

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

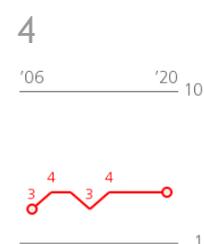
Burundian society is characterized by the existence of associations, community organizations and clubs including self-help groups, traditional associations, charitable organizations, art and sports groups. These groups meet frequently and comprise large numbers of the population – however, they do not last long, often split up, and new groups are created. These groups do not necessarily create trust. Many families' economic situation puts them under severe pressure, and the clashes between the police and young people in urban neighborhoods have destroyed the thin level of trust that had been built up after the civil war.

## II. Economic Transformation

### 6 | Level of Socioeconomic Development

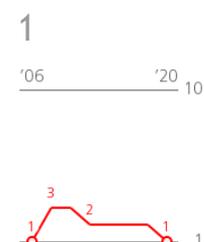
In the wake of the political and security crisis engulfing Burundi since 2015, the economy has suffered a sharp decline. The return and integration of displaced refugees poses an additional problem. With an economy in recession since 2015, Burundians' living conditions and access to services are deteriorating. The poor levels of nutrition amongst the rural population mean that a large percentage of the population (approximately 70% - 80%) live below the poverty line. According to a UN Security Council report from November 2018, the number of food insecure people has decreased by 35% in 2018 after two consecutive relatively good agricultural seasons, yet 1.7 million people are still deemed food insecure. Due to insufficient data, the 2015 and 2016 Global Hunger Index could not be calculated for Burundi; in 2014, Burundi was at the top of the list worldwide in terms of hunger severity. In the 2010 Multidimensional Poverty Index (MPI), which takes into consideration deprivation in health, education and living standards, 89.5% of

#### Social capital



#### Question Score

#### Socioeconomic barriers



Burundians are multidimensional poor and 48.2% of the population lives in severe poverty. The ministry of energy and mining also raised the price of electricity in 2017. Poverty is relatively evenly distributed among rural Hutu, Tutsi and Twa, and it disproportionately affects women. Following consultations under Article 96 of the Cotonou Agreement, which provides for the suspension or change in terms of EU aid if one of the parties does not respect human rights, democratic principles and the rule of law, the EU and its member states – until then Burundi’s main donors – withdrew direct budgetary support in 2016. Agriculture still represents 40% of the country’s GDP and provides a livelihood for more than 70% of the economically active population, but fertilizer deliveries were frequently delayed in 2017. In a move to offset the decreasing aid from traditional donors, the government increased taxes, which affected food prices, drawing more Burundians into poverty. After the referendum of 2018, the economy is experiencing further declines.

Economic indicators		2015	2016	2017	2018
GDP	\$ M	3104.4	2959.2	3172.4	<b>3078.0</b>
GDP growth	%	-3.9	-0.6	0.5	<b>1.6</b>
Inflation (CPI)	%	5.5	5.6	16.1	<b>-2.8</b>
Unemployment	%	1.6	1.6	1.5	<b>1.5</b>
Foreign direct investment	% of GDP	1.6	0.0	0.0	<b>0.0</b>
Export growth	%	-13.8	6.0	31.7	<b>-3.7</b>
Import growth	%	-2.0	-11.6	13.1	<b>20.1</b>
Current account balance	\$ M	-373.2	-339.7	-360.0	<b>-</b>
Public debt	% of GDP	45.3	48.4	51.7	<b>58.4</b>
External debt	\$ M	626.0	602.8	614.0	<b>589.3</b>
Total debt service	\$ M	26.9	33.4	35.1	<b>29.3</b>

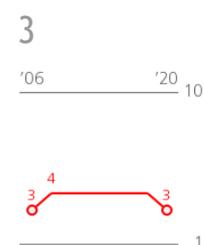
Economic indicators		2015	2016	2017	2018
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	22.4	23.5	-	-
Public education spending	% of GDP	6.4	4.7	4.8	-
Public health spending	% of GDP	2.5	1.8	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	2.2	2.1	1.9	1.9

Sources (as of December 2019): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

## 7 | Organization of the Market and Competition

Several structural factors impede the establishment of a market-based competitive economy. Resources are scarce. The bulk of the economy is based on the predominantly informal and subsistence-focused agricultural sector. This accounts for just over 40% of GDP but employs approximately 90% of the population, most importantly women. More market-based competition in this sphere is hardly useful, as it would not benefit the rural poor. The country is characterized by high levels of economic opportunism, including corruption on all levels of administration and direct intervention in the economic sphere by politicians in order to influence economic activities in accordance with political and personal interests. Access to financing and corruption have also been mentioned as key problematic factors for doing business in an executive opinion survey conducted by the World Economic Forum 2017 to 2018. Membership of the East African Community (EAC) since 2007 was an important step toward the economic development of Burundi, the weakest East African state. The situation has worsened since 2015. A common market of the five member states has been in existence since 2010. This is intended to facilitate trade in goods and provides for a freedom of establishment for workers. But in November 2018 the EAC summit was postponed due to the absence of Burundi. Burundi is ranked 168 among 190 economies in the ease of doing business by the latest World Bank annual ratings. The rank of Burundi deteriorated to 168 in 2018 from 164 in 2017. Access to electricity and finances are the most pressing issues. In 2019, a further increase in government debt can be expected. During recent years, Burundi has actively undertaken reforms to improve the business environment. Foreign and domestic investments receive equal treatment, and foreign investment is generally not subject to state screening.

Market organization

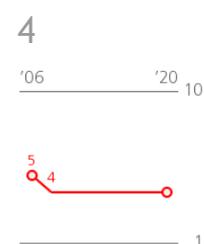


Due to the small size and particular structural features of the national economy, there is hardly any practical scope for the effective control of existing monopolies or oligopolies. The accession in 2007 to the wider East African Community (EAC) market may slowly have some practical bearing on this situation by confronting Burundian economic actors with competition from the more advanced EAC partner countries. Anti-monopoly policies are rarely enforced and little attention is paid to this topic. In 2017, Burundi enacted a competition law, but it has yet to be operationalized.

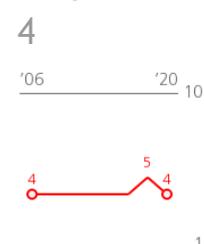
Since 2005, Burundi's annual economic growth rate has averaged 4.5%. 90% of the population is dependent on subsistence agriculture. Following presidential elections in April 2015, the situation in the country descended into political instability and economic decline. According to the Observatory of Economic Complexity, Burundi ranks a lowly 180th on a scale of country exports. In 2016, Burundi's exports were worth \$178 million while imports were worth \$358 million, resulting in a negative trade balance of \$179 million. The top exports were gold, coffee and tea. In 2016, the GDP of Burundi was \$3.0 billion and its GDP per capita was \$777. Burundi has committed to trade liberalization policies as laid out by the Common Market for Eastern and Southern Africa (COMESA) Free Trade Agreement, which it joined in 2004, and the EAC Customs Union, which it joined in 2009. According to the Heritage Foundation's 2018 Index of Economic Freedom, Burundi's average tariff rate is 5.4% and importing goods is costly and time-consuming. Burundi does not yet fully comply with the WTO's Common External Tariff (CET) system. Despite some progress in harmonizing trade within COMESA and EAC, non-tariff barriers (NTBs) remain high. Customs and administrative procedures are lengthy and partly discriminatory.

Traditionally, the state in Burundi either fully owned or had controlling shares in most Burundian financial institutions. The banking system is relatively well organized and has a presence in most provincial centers, but is to a large extent concentrated in the capital city Bujumbura. Bank credit was often issued on the basis of political connections rather than projects' expected returns. A large fraction of bank loans were never repaid and poor management led many banks to the brink of collapse, prompting the central bank to bail them out. Three traditional commercial banks, namely Bancobu (Banque Commerciale du Burundi), Bujumbura Credit Bank (BCB) and Interbank Burundi (IBB), together represent 75% of total bank assets, credit and deposits and savings. The lack of competition in the banking industry has prevented the sector from modernizing. In general, the small financial sector in Burundi is dominated by banks. The most important banks are under foreign ownership, mostly Belgian. There are also 36 microfinance institutions and eight insurance companies. According to the Heritage Foundation just 2% of the population own bank accounts. The majority of the rural poor do not have access to mainstream finance and rely on informal lending. Burundi is characterized by a narrow credit market that favors persons close to the political elites. The government has only

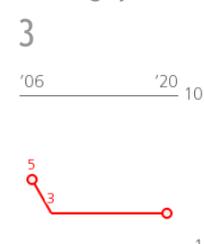
#### Competition policy



#### Liberalization of foreign trade



#### Banking system

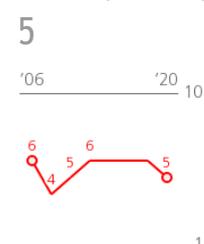


minor stakes in commercial banks, while two banks are majority-owned by the state. Nevertheless, the government manages to exert considerable influence on the appointment of managers and board members and exercises a certain level of control over the financial sector, resulting in conflicts with private shareholders. Empirical data on the efficiency of the overall banking sector is unavailable. The banking sector has been described by the African Development Bank as resilient and characterized by a high level of capitalization due to respect for prudential rules. Since the crisis in 2015, non-performing loans (NPL) have been declining significantly (14.2%). The main challenge is that 83.0% of all loans were short to medium term, so that access to long-term financial resources remains constrained. The central bank is legally independent of the government, but during the recent political crisis, it has been vulnerable to government interference. According to the International Crisis Group, at the end of 2017 the finance minister required the Burundi Commercial Bank (Banque Commerciale du Burundi – Bancobu), the Burundi Bank of Commerce and Investment (Banque Burundaise pour le Commerce et l’Investissement – BBCI), the Bujumbura Credit Bank (Banque de Crédit de Bujumbura – BCB), the National Bank of Economic Development (Banque Nationale de Développement Economique – BNDE), as well as the Urban Habitat Fund (Fonds de Promotion de l’Habitat urbain) to pay their end-of-year dividends to the state rather than to their staff. According to the World Bank, the share of non-performing loans out of total loans was 13.6% and the capital to assets ratio was 12.2% in 2018. The central bank aims to improve the regulatory framework for telecommunication companies with regard to their financial services by starting a cooperation with the regulatory body for telecommunication l’Agence de Régulation et de Contrôle de Télécommunications (ARCT).

## 8 | Monetary and fiscal stability

The withdrawal of European donors has rendered the government helpless to deal with the social crisis it faces. The leaders’ main concern is to secure enough funds to support their political and security networks. The central bank is formally independent and pressure from the government is limited by its dependency on international financial institutions. All foreign exchange dealings have been liberalized, with rates determined by currency auctions under the guidance of the central bank. The official exchange rate has been held relatively stable for a number of years. However, the black market for currency exchange with its deviating rates is flourishing. With the crisis that began in 2015, foreign currency has become extremely scarce and informal exchange rates have skyrocketed. The real effective exchange rate index (2010 = 100) in Burundi was 131.0 in 2017, an increase from 85.9 in 2007. Since the crisis of 2015, foreign currency has become scarce in Burundi and the government has attempted to hold back the little that is left from private customers via its influence on the central bank. Continuously high inflation is a major threat for the vast rural population, which lives on the breadline. A decade ago, inflation was extremely high at 26% (2008) and the annual rate of inflation averaged

### Monetary stability



11.1% from 1974 to 2018. The purchasing power of most Burundians has decreased as wage increases have failed to keep pace with inflation. However, in the current crisis, the rate of inflation plunged to a record low of -8.40% in October 2018, and consumer prices fell 7.3% year-on-year to November 2018, with 9.1% food price deflation.

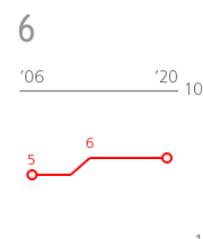
The government's heavy reliance on international aid has forced it to more or less follow conditions of financial orthodoxy set by external donor institutions. This is reflected in the second-generation poverty reduction strategy paper (2012). In principle, however, fiscal discipline is a low priority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

Despite the post-war integration of Burundi's security organs and a major clean-up of the army in the aftermath of the 2015 coup attempt, the government is obliged to maintain an oversized army and police force, whose engagement in U.N. and AU missions had hitherto much alleviated the financial burden associated with their size. The U.N. however, terminated the Burundian police units within the U.N. Police Mission in the Central African Republic and the EU delayed payments for Burundian AMISOM soldiers over a row with the AU over how to bypass the Burundi government when paying salaries. Government consumption represented 21.5% in 2016. The fiscal deficit – financed by domestic borrowing – has increased due to election expenditure in 2015 and the withdrawal of aid by major donors. In its latest review of the three-year extended credit facility (ECF) in March 2015, the IMF considered government performance broadly satisfactory. Public debt was at 58.8% in 2017. The total external debt in 2017 amounted to 61.3%. There are no reliable data concerning general government consumption expenditure. There has been a significant decrease in the exchange rate against foreign currencies like the dollar and euro since October 2017.

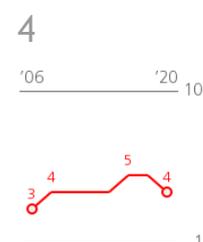
## 9 | Private Property

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

### Fiscal stability



### Property rights



As a result of bureaucratic and political barriers, as well as widespread corruption and the ongoing political crisis, the private sector is weak. The number of businesses is low and Burundi lacks a significant urban middle class. Deflation, currently at 8.4%, is causing a further deterioration in the income situation of the population. Business conditions in Burundi remain persistently poor (Doing Business Ranking 2018: 164 out of 190 states). The Global Competitiveness Index (GCI) also shows that Burundi is one of the least competitive economies in the world. The Burundian economy is largely based on an informal and subsistence-based agricultural sector. Privatization in this sphere would be dangerous at this stage of structural difficulties. In reality, the public sector is almost exclusively under the control of the ruling party, and positions are allocated according to party loyalty rather than merit. Nevertheless, some privatizations have occurred (including the coffee sector), though often with direct and dubious influence by the government, and in ways that were inconsistent with market principles or social requirements.

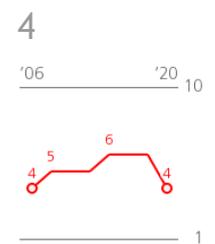
In principle, existing private companies can operate freely, however many constraints remain. Burundi still occupies one of the lowest Doing Business ranks (155).

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

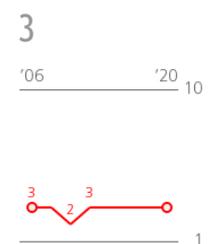
## 10 | Welfare Regime

The majority of the population in Burundi lack public social safety nets, except a small group of government and parastatal institution employees, including the top echelons of the military. Even for these individuals, resources are fairly minimal. Maternity care is subsidized, as is health care for children under five years of age, patients with HIV and patients with malaria. However, these services are inconsistently funded. The government's goal, set in the PRSP II, of enrolling into a health insurance system 50% of the population in the informal sector and 40% of the rural sector is financially impossible in the short term. The freezing of aid by Burundi's traditional donors has resulted in tremendous budgetary cuts: 72% cut in water and environment, 54% in health and 30% in education. The most visible effect of the inadequate social protection system is the prevailing high level of food insecurity. Approximately 1.67 million Burundians out of a population of 11 million are estimated to be severely food insecure (FAO GIEWS 2018). Chronic malnutrition, as measured by child stunting (the prevalence of low height-for-age), is rampant in Burundi. At 55.9%, Burundi's child stunting level is the highest of all countries covered in the Global Hunger Index. The long years of civil war have disturbed if not destroyed traditional social structures in many areas, but most features of traditional rural solidarity systems have survived to a considerable extent, and still

### Private enterprise



### Social safety nets



provide a crucial foundation for at least a minimal social safety net for individuals within a family or village context. By far the biggest problems are faced by the many former refugees, internally displaced persons and returned ex-combatants, created by the war, who have been (and to a minor extent still are) repatriated into uncertain surroundings without being able to rely on any organized safety systems. Even the traditional village-level solidarity is being strained due to the effects of extreme overpopulation in the rural areas and worsening ecological conditions. Life expectation at birth in 2016 has deteriorated to 57.5 years.

Family is core to Burundian society. Polygamy is officially banned, but continues to exist, especially in the rural areas. Traditionally, Burundian society is patriarchal. The position of women is still very traditional in rural areas, being subordinate to the man. Rapes and violence against women are rarely prosecuted. Traditionally, women are not allowed to speak in the presence of men. Other types of violence against women also exist: forced prostitution, housemaids who are treated like slave labor and violence in marriage.

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

Since the introduction of free primary education in 2005, access to basic education is distributed evenly among ethnic groups and genders. The literacy rate is at 61.6%. Looking at higher education levels, discrimination against women is considerable with a 4:10 ratio of female-to-male enrollment in tertiary education. In terms of access to employment, ethnic and gender quotas have started to improve access to opportunities for the hitherto marginalized groups of Hutu and women, but this is only the case where the quotas apply (i.e., in political and administrative positions). The situation is particularly difficult for women, due to religious and cultural factors. Women face legalized discrimination with regard to inheriting property. Furthermore, the government's clientelism and need for control favors individuals loyal to the CNDD-FDD at all levels of the public sector. Thus, even in rural areas, political affiliation has become the most important factor in access to opportunity.

Despite a gender quota of at least 30% women in all political institutions, little has changed concerning the cultural exclusion of women from decision-making in the household, inequality in customary law (most importantly concerning inheritance and property rights) and the high exposure of women and girls to gender-based violence. Women account for 52.4% of the labor force, most of them working in labor-intensive jobs (e.g., in the agricultural sector). Given that women are responsible for childcare, firewood collection and other physically demanding tasks, their health is

Equal opportunity

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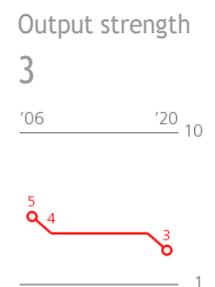


disproportionately at risk. Twa remain almost completely excluded from any opportunities, despite the legal mandate to integrate them into political institutions.

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

## 11 | Economic Performance

From a socioeconomic point of view, Burundi remains one of the least developed countries according to the 2014 Human Development Index, ranked 185 out of 189 countries. Slow growth and low productivity, particularly in the agriculture sector, which is the primary source of employment and livelihood for the majority of the population, have resulted in persistently high levels of poverty. More than 90% of the population live on tiny plots of land that hardly yield enough food for subsistence. This leads to the undernourishment of a large proportion of the population and the requirement to import food. Since 1980, the index has worsened from 0.23 to its present 0.42. The suspension of foreign aid continues to hurt the budget, which posted an estimated deficit of 8.2% of GDP in 2017, despite the introduction of higher taxes on commodities. With a per capita GDP based on purchasing power parity at \$771 Burundi in 2017 still has the second lowest score in Africa after the Central African Republic and Somalia. Economic growth is expected to continue at a slower pace: it was approximately 0.4 % at the start of 2019. The local economy depends heavily on agriculture, which accounts for more than a third of GDP, on commodity exports, and on fuel and food imports. Overall public debt increased from 46.1% in 2015 to 58.8% in 2018. Youth aged 15- to 24-years remain the most vulnerable social group, as unemployment in 2018 stood at 55% in rural areas and 65% in urban areas. Unemployment rates were highest in the northern regions (54.9% compared to 38% in the south). Compounding these challenges is the steep downward trend of the Burundian franc, which will continue to exert pressure on consumer prices: inflation is projected to increase from 16.1 % in 2017. After a relatively low inflation of 5.5 % in 2015, Burundi is now experiencing the most serious inflation rate. The unemployment rate in Burundi remained (without any informal economy) unchanged from the previous year at 1.5%.

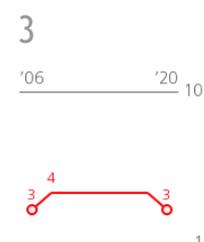


## 12 | Sustainability

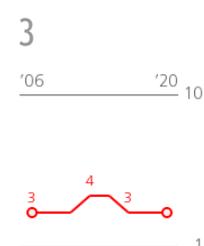
Burundi is struggling with significant ecological problems and is extremely vulnerable to climate change. By 2050, average annual temperatures are projected to increase by up to three degrees. This drastic change in climate will increase the prevalence of flooding, land degradation, reduction of soil fertility, reduction of water resources, and the frequency and intensity of extreme weather events. The high population density (402.98/km<sup>2</sup>) in Burundi means all agricultural land is in use, but subsistence agriculture characterizes rural areas, with only coffee and tea produced for export. High population growth (3.2%) will further aggravate the situation in the food sector, as the soil is already being intensively farmed where possible. To feed the growing population, substantial areas of forest have already been cleared for agriculture, but poor agricultural practices have harmed soil fertility and integrity. In addition, burning of biofuel indoors continues to expose the population to severe air pollution. The increasing pollution of Lake Tanganyika by industrial wastewater represents a serious problem. There is urgent need for action in order not to endanger this important freshwater resource. Burundi has a number of key documents relevant to developing a national plan. There is an outline of the country's climate-sensitivities, forming a foundation for documents such as: the Vision Burundi 2025 (2011); the strategic framework for growth and fight against poverty 2012 to 2015; and the national strategy and action plan on climate change.

The education system in Burundi is in a poor state, highly politicized, often paralyzed by strikes, subject to procedural irregularities and highly dependent on external financial support. The entire education system suffered heavily during the civil war. Child labor is widespread. Children and adolescents often suffer in areas of nutrition, health and education. The problem of child soldiers is also common in Burundi. The education issue is still a sensitive topic since it is linked to memories of segregation and violence. Primary school enrollment has been free since 2005, a big step for the government and a big improvement over previous conditions. Burundian primary school students have achieved the highest score in the 2014 survey among francophone sub-Saharan African countries (PASEC). This is despite, according to OCHA, only 11% of schools in Burundi providing school meals and an average student-to-teacher ratio of 72:1. According to the World Bank, Burundi's overall literacy rate in 2014 (last available data) was 61.6% (2014). The literacy rate is higher for men (69.7%) than it is for women (54.7%). Gross primary school enrollment is at 127% (due to older children being admitted to school) with near gender equality. The enrollment rate for secondary education is 48.4% (2018), higher than in the previous reporting period (last data available was 2017: 37.9%). Female-to-male enrollment was 1.0 for secondary and 0.3 for tertiary education.

Environmental  
policy



Education policy /  
R&D



## Governance

### I. Level of Difficulty

Burundi's structural constraints are severe. Since its inception in 1971, Burundi has been on the U.N.'s list of the world's 48 least developed countries. It is a landlocked, densely populated country. The domestic political situation is still influenced by the aftermath of the civil war. National development strategies are implemented very slowly, and the government is hesitant toward liberalization and privatization in the economic sphere. Land conflicts slow development. Land transformation is crucial as 80% of the population operate at an economic level of subsistence. Overcoming the sociopolitical and ethnic problems is necessary in all policies. Conflicts between social groups have complex historical root causes, and due to high levels of traumatization among the population as well as the conflicts' connection with existential needs they are difficult to resolve. The immediate post-conflict phase can quickly relapse into another cycle of violence. Demographics – Burundi being the second most densely populated country on the African continent – add another dimension of complexity, especially as plot sizes per family continue to decrease. The fertility of the land, the usually sufficient amount of rainfall and the high quality of coffee produced in Burundi are insufficient to counterbalance the difficulties. The overwhelmingly open borders that Burundi shares with other countries experiencing conflict are used by rebel groups and government-led military groups as hiding places and training grounds and turn Burundi into a transit country for minerals from DRC. This adds yet another structural constraint on governance and leads to a large number of weapons still being in the country. Before the recent 2015 political crisis, Burundi was one of the world's most aid dependent countries with donor funds representing more than 50% of the government budget. Currently, Burundi is on the brink of a severe humanitarian and social emergency.

At the end of 2018, Nkurunziza declared Gitega the new political capital. Many see it as an attempt to re-establish a monarchy, since Gitega was formerly the royal workplace.

The age structure in Burundi shows a large proportion of young people. Nearly half of the population (46%) is under 15 years old. The challenges facing the education system and the economy are enormous. The astonishing fact that Burundi scored best in the 2014 test of education systems in francophone Sub-Saharan Africa (PASEC) shows that there is high potential among Burundian children. However, child labor is widespread and represents a serious risk to children in Burundi today. Children and adolescents are suffering in the areas of nutrition, health and education – roughly 50%

Structural  
constraints

10



1

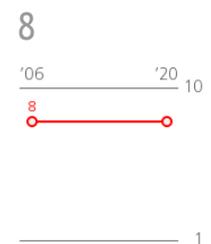
of children were chronically malnourished in 2018. The problem of child soldiers has also been common in Burundi, the long-term effects of which being another limiting factor concerning effective governance.

In Burundi, the legal basis for civil society activities was not created until 2005 with the introduction of a democratic constitution. Among other things, it expressly guarantees freedom of association and expression. From that point until the present, however, civil society actors are insufficiently involved in political processes and there has been little advancement since the end of the civil war. Since the 2010 elections, repressive acts by the government have intensified against opposition members, civil society and international organizations. Tensions between civil society and government officials have been worsening since 2015, when President Nkurunziza announced his bid for a third term in office.

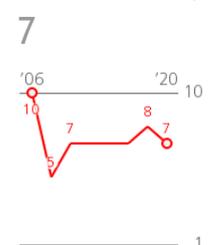
Critics argue that liberal peacebuilding has resulted in the creation of a civil society populated with organizations that are artificial and externalized. Traditions of civil society organization are fairly weak, and largely confined to the capital, although this situation had begun to change quite markedly during recent years. The weakness of civil society has its roots in the dictatorships of the Tutsi military and its ethnic bias. More organized forms of civil society had started to emerge at the local level, and Bujumbura-based NGOs were expanding their activities into rural areas. Rural-based associations are also often overlooked in the capital city, although the majority of the population lives in these areas. These rural associations have managed to pacify entire districts, disarm the population and reintegrate thousands of returning refugees after the civil war. There are many examples of the hidden effectiveness of local civil society. One is the case of escalating conflicts in Nyanza Lac in 2013 to 2014 that led to the very quick formation of a civil society network of locally-based associations that managed to calm the situation by facilitating talks between refugees and residents. A second are the many peacebuilding and reconciliation initiatives in the country.

Burundian society has been traditionally characterized by a system of social checks and balances linked to the monarchy and the professional specializations of different ethnic groups. Real ethnic divisions emerged when Belgian colonizers subjected the majority Hutu (and the small minority Twa) to an oppressive rule by the Tutsi elite. Tutsi domination continued after independence, and manifested itself in military regimes, repeated massacres initiated by both ethnic groups and genocide committed against the Hutu in 1972. Relations between Hutu and Tutsi – who share a common language, culture and religion – has always had a very tangible socioeconomic dimension, thus constituting more of a class relation than anything else. Whereas for the years after the Peace Agreement, the ethnic dimension seemed to be rather subdued and the population had understood that it had been used as a means to justify and fuel violence, several political groups have relapsed into the dangerous rhetoric of ethnicity.

Civil society traditions



Conflict intensity



Several indicators relate directly to ethnicity. The protest movements in May 2015 were not influenced by ethnicity, but in response, the ruling party has placed increasing emphasis on ethnic distinctions. 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 a civil war. Another indicator relates to the recent government decision to ban international organizations who violate an article in the general framework for cooperation between the Burundi and foreign NGOs, an amendment made in 2017 that means recruitment of national staff must respect ethnic quotas laid out in the constitution. The law requires the recruitment of local staff at 60% Hutu and 40% Tutsi. International NGOs such as Handicap International, operating in Burundi since 1992, who did not accept ethnic quotas for their staff were forced to stop their activity. Although the homicide rate in 2018 is unknown, Amnesty International claims that dead bodies had been found in the street on a regular basis throughout the year. The number of Burundian refugees living outside the country was around 350,000 in 2018. The overall security situation, according to the U.N. Security Council, is calm and had seen further improvements in 2018.

## II. Governance Performance

### 14 | Steering Capability

Burundi has adopted “Vision 2025” as its development policy goal, in which the main areas are the improvement of the justice system, the transformation of the economy, the strengthening of civil society and the compatibility of land management with nature conservation. Although “Vision 2025” remains the government’s strategy, the likelihood of achieving its objectives appear to be severely compromised by the current sociopolitical crisis. On the occasion of the 56th anniversary of their country’s independence, President Nkurunziza announced that the government had made a ten-year strategic plan to consolidate the country’s independence. The government appears to have great difficulty in steering economic growth and using financial resources over the long term. Burundi has not yet managed to achieve its overall goals; the deficits are too great in most areas. The most pressing problems are the need to reduce extreme poverty and hunger and promote education and environmental protection. Despite the political and ethnic polarization and the decline in international support since 2015, the World Bank remains willing to invest in public institutions in order to deliver key services in Burundi. Until 2020, the World Bank will allocate an overall budget of \$27 million to finance projects that support local agriculture, community development, education and health care.

Question  
Score

Prioritization

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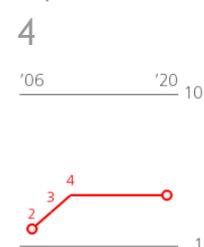


Officially, the government is willing to focus on long-term goals regarding constitutional democracy and a socially responsible market economy as presented in “Vision 2025.” Since October 2012, the second PRSP is supposed to translate the strategic pillars of Vision 2025 into projects and programs. The PRSP follows almost 100% of the guidelines of the IMF and World Bank and fails to take Burundi’s social, political and economic particularities into consideration. The international development organizations in Burundi have been very important in the field of poverty reduction, emergency aid and support in the education, health and economic sectors at the local level.

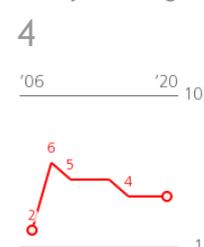
Implementation both in political and economic terms is inefficient, weak and has worsened: There are many signs of a hardening of the government’s policies: the passage of Burundi’s controversial May 2018 referendum to alter nearly a third of the articles from the 2005 constitution enhances the power of the ruling CNDD/FDD party and there is now a strong risk that the 2000 Arusha Peace and Reconciliation Agreement will be overturned. Another indicator is the recent suspension of international NGOs for three months for failing to comply with a January 2017 law and ethnic quotas applying to staff recruitment. All of Burundi’s existing independent coalitions have been multiethnic, which has helped to promote reconciliation over time. The new amended constitution, however, imposes stiff new conditions on independent caucusing. Individuals are now required to sever all political ties, wait three years and submit proof that they have done so before forming coalitions. These changes give the CNDD/FDD full control of the executive branch, granting it new powers to pass laws with little legislative resistance, removing the safeguards that allowed for greater participation and representation of political and ethnic minorities, and weakening checks and balances.

The 2005 elections were seen as a glimmer of hope. The war-weary population saw the non-violent polls as the starting point for a new future. The will and ability of the ethnic groups to reach political compromise and social consensus were internationally recognized before 2015. Burundi’s withdrawal from the International Criminal Court was viewed with concern, particularly over the crimes committed in the country. These crimes appear to have continued unabated. The Burundian government justified its decision by accusing the International Criminal Court (ICC) of being an instrument of the world powers used to intimidate poor countries. The ICC’s decision to investigate the human rights situation in Burundi met with categorical opposition from the government. While many Burundians and the international community believed the ethnic problem had been solved with the Arusha Accords, it has returned to the fore during President Nkurunziza’s third term. Burundi had been well on the way to bridging the ethnic-social divide in society through sharing power in the government. According to a report by the International Crisis Group, President Nkurunziza and his party are now developing a doctrine that mixes personality cult, religion and historical mythology to justify his prolonged stay in power. The referendum and the NGO law of 2018 means overcoming ethnic

#### Implementation



#### Policy learning



polarization is now seriously endangered. Fortunately, so far, the population has not bought into the government's increasingly inflammatory rhetoric. The government's legal proceedings against former Burundi president and current High Representative of the African Union (AU) illustrates that the unresolved past is still affecting current policy decisions.

## 15 | Resource Efficiency

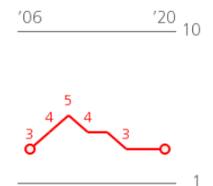
Controlling inflation and pursuing an appropriate exchange rate are recognized as important goals and tools of government economic policy. The Burundian revenue authority (OBR) aimed to raise BIF 720.2 billion in 2017.

According to the African Development Bank, in part thanks to the central bank's continued expansionist monetary policy, inflation was an estimated 12.7%, though other sources cite a lower rate. Due to low economic growth and average annual inflation, state efficiency in utilizing financial and human resources are low. With some international aid payments frozen, the budget deficit increased to an estimated 8.8% in 2018, and public debt remained high. The official exchange rate was 1795 Burundian francs per dollar in October 2018, representing a depreciation in value from the 1670 francs in October 2015. Burundi's government has launched a fundraising drive for elections in 2020, presented as "voluntary" but condemned by rights groups as "organized robbery." The state has introduced obligatory public "contributions" (i.e., in the context of the referendum), forcing civil servants and ordinary Burundians to donate extra money to state coffers in the guise of performing a "highly patriotic duty." The Burundian government in cooperation with the World Bank initiated a project to invest in local infrastructure that included a small component of modernization of the local administration. The incentive system for staff performance needs to be adapted so that performance assessment criteria are applied more vigorously and corruption at that level is curbed.

Efficient coordination of the activities of various ministries and other public bodies is very difficult, since politicians in decision-making positions tend to seek to bolster their own public profiles and pursue their own priorities without adhering to a coherent and coordinated government strategy. The unchallenged power of the CNDD-FDD after the boycotted elections of 2010 and cemented since 2015 facilitates policy coordination. Interministerial coordination remains weak. Decisions are usually made centrally at the level of ministers and permanent secretaries with little delegation of power to lower levels of the administration. While 60% of all court cases deal with land conflicts, the government has not yet been able to establish and sustain mechanisms to solve them. Land and property rights are unprotected, and the commission nationale terres et autres biens (CNTB) formed in 2014 to solve land conflicts remains an unpredictable factor in an unstable policy environment. One of the effects of this is that much-needed long-standing land reforms have still not been

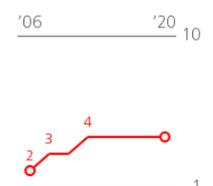
Efficient use of assets

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Policy coordination

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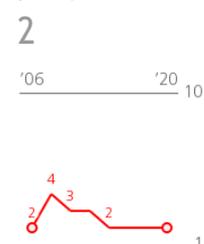
implemented. Up to the present, violence continues, opposition politicians and journalists continue to disappear, and murders and torture are reported. Three years after the beginning of the crisis, President Nkurunziza caused new concern among the population of Burundi and the U.N. with his announcement that he would run for office again in 2020. There is a climate of fear in Burundi; the country is becoming increasingly like a surveillance state. Members of the opposition in exile, represented by the National Council for the Respect of the Arusha Agreement and for Peace and Reconciliation in Burundi and the Re-establishment of the Rule of Law (CNARED) play little role in policy for obvious reasons. Interparty democracy and cohesion are weak, in part due to unresolved challenges of regionalism.

Nine years after the official government declaration that there would be zero tolerance of any act of corruption, corruption remains a serious problem at all levels of the state. In addition to human rights, the fight against corruption is one of the most urgent tasks facing the Burundian government, although the extent of its own involvement often seems unclear. Time and again, corruption scandals weaken the government. Problems include the lack of a clear political agenda, hesitant intervention by civil society, an intimidated press, and a lack of reform in resource management. Organizations which address corruption and human rights issues such as Human Rights Watch, Freedom House, Anti-corruption and economic malpractice observatory (OLUCOME), L'Observatoire de l'Action Gouvernementale (OAG) and FORSC Burundi are repeatedly victims of threats and legal proceedings. The international NGO Avocats sans Frontières (ASF) closed its office in Bujumbura in December 2018, as did Handicap International, due to a new law that requires staff recruitment using ethnic quotas.

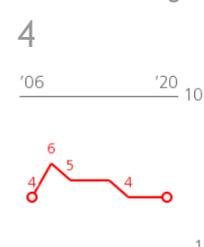
## 16 | Consensus-Building

The “yes” vote in Burundi’s constitutional referendum on May 17, 2018 increases the likelihood of the demise of Hutu-Tutsi power-sharing agreements in public institutions. The president introduced the new amended constitution on June 7, 2018 as a document that should unite all Burundians and that refers to “independent decision-making free from external interference” as a new paradigm. Against the background of Burundi’s history, the civil war years and the authoritarian society, it is impossible to speak of a real participation of civil society groups in sociopolitical decisions. Since the 2010 elections, repressive actions by the government have intensified, not only against opposition members, but also against civil society and international organizations, which have reported repeated obstructions, intimidation or imprisonment of sociopolitical actors and journalists. A 2018 report by Human Rights Watch sees no significant improvements in the overall situation in Burundi with regard to democracy and freedom of the press. To the present day, journalists are at great risk. Freedom of the press no longer exists, with journalists living in

### Anti-corruption policy



### Consensus on goals



constant fear. After three years of unrest, Burundi has fallen further down the rankings of countries by press freedom to 159 out of 180 states in 2018.

The principle of market economy has not been openly challenged by the government or any influential societal actor or institution. However, the attempt to apply affirmative action at a high economic price in favor of one ethnic group – even though it is the majority of the population - shows that there is no consensus about market mechanisms as guiding principles of action. Following the withdrawal of its main donor (the EU) and faced with increasing security costs, the government has become ever more desperate for new partners. It has introduced new taxes on the entire population and developed a wide array of alternative revenue sources. Government corruption has hindered the development of a private sector. The purchasing power of most Burundians has decreased as wage increases have not kept pace with inflation.

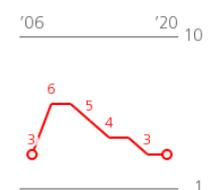
The distinction between democratic reformers and anti-democratic actors is extremely blurred, as there is evidence of anti-democratic elements among the government and opposition. In December 2018, President Nkurunziza considered holding a referendum to remain in power until 2034. There were fears that during the referendum there would be severe intimidation of those voting no and the opposition. As the referendum approached, the fears were proven well-founded. International media were banned. Three days before the referendum there was another outbreak of violence. The Imbonerakure continue to play an important role in politics and are seen by many Burundians as a serious threat. The 2015 crisis revealed that the inner circle around President Nkurunziza would not refrain from using any means – legal or illegal – to cling to power, even in the face of international isolation. At the end of 2018, Nkurunziza announced his intention to make Gitega the new political capital.

Since the beginning of the crisis, the government rejects any attempts at political dialog, claiming that the opposition squandered its legitimacy by disrespecting the democratic values of the Burundian state.

The ethnic balance provided for in the 2005 constitution has been rolled back in several ways. The consociational democratic model stipulated by the 2005 constitution was meant to overcome the deep-rooted political, social and economic cleavages that have long divided Burundian society. The new constitution, adopted during the May 2018 referendum, replaced the 2005 constitution that came into force after the signing of the 2000 Arusha Peace Accords and helped to end a civil war. The power-sharing framework in that previous constitution has clearly been unable to prevent a de facto one-party government. Fundamental underlying issues such as the gap between the (urban) rich and the (rural) poor, clientelism, corruption, oppression of dissident voices, and the concentration of power in the hands of a small and often ruthless elite, have never been addressed. With the three-month suspension of some international NGOs, the political leadership aggravated cleavage-based conflicts. At the beginning of 2019 several international NGOs left the country, after

Anti-democratic actors

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Cleavage / conflict management

2



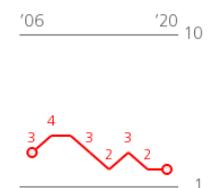
the government required all foreign aid groups to commit to having 60% of their local employees be Hutu and 40% Tutsi – the same quota that applies to government agencies. The government also required foreign NGOs to provide staff lists identifying employees by their ethnicity

The fact that civil society actors have been insufficiently involved in political leadership has been a consistent problem. There is a lack of a financial support, vocational training and basic skills such as negotiation or dialog methods. Participation by citizens in decision-making processes of state institutions has therefore so far been rudimentary. Against the background of Burundi's history, the civil war years and the authoritarian society, it is impossible to speak of a real participation of civil groups in sociopolitical decisions. Since the 2010 elections, repressive actions by the government have intensified not only toward opposition members, but also civil society and international organizations. According to the Human Rights Report (2019), numerous political opponents have been arrested, intimidated or held incommunicado in unknown locations. Victims include members of the National Liberation Forces (FNL), the Movement for Solidarity and Democracy (MSD) and other opposition parties. Some were accused of having told their members to vote against the referendum in May 2018.

An Inter-Burundi dialog being conducted under the auspices of the East African Community, facilitated by Benjamin Mkapa, former president of the United Republic of Tanzania, and in which Ugandan President Yoweri Museveni is mediator, has now completely stalled. At the 19th EAC summit in February 2018, Mkapa concluded that the dialog process was characterized by a lack of clear will on the part of the Burundian government to include in discussions the various actors implicated in the crisis. The ongoing stagnation of the process is especially worrying given that the wounds of the past remain unaddressed. Since 2011, the transitional justice and reconciliation processes have been accompanied by tensions between the Burundian government, local NGOs and external actors such as the United Nations, the European Union and donor countries. The initial mandate of Burundi's Truth and Reconciliation Commission (TRC), officially launched in March 2016, was to investigate the interethnic conflict covering the period between 1962 and 2008. In September 2016, the TRC began to collect testimonies. However, given the politically oppressive and ethnically charged atmosphere in the country and the vast numbers of Burundians who have fled since 2015, there is little hope that the process will be neutral and people encouraged to testify freely. In a climate of fear, intimidation, lack of free speech and a ruling party that maintains a tight grip on power, the need to overcome a long period of intense conflict is critical. However, new violations of human rights are already occurring. One example is the strategic shift of the commission nationale terres et autres biens (CNTB) in mediating land conflicts and the redistribution of land and jobs, which is now guided by a consideration for ethnic affiliation.

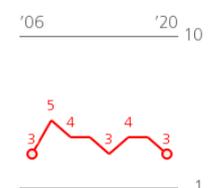
#### Civil society participation

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#### Reconciliation

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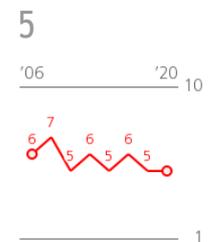


## 17 | International Cooperation

Burundi is heavily dependent on bilateral and multilateral donors from the international community. Development cooperation plays a major role in Burundi's economic and social development. The government on August 22, 2018, launched a 10-year national development plan anchored in the Sustainable Development Goals and focused on 36 key targets. It invited international donors to the event in an attempt to secure for funding of the plan. The plan requires funding of \$2.5 billion. Following consultations under Article 96 of the Cotonou Agreement in 2016, which provides for the suspension or change in terms of EU aid if one of the parties does not respect human rights, democratic principles and the rule of law, the EU and its member states withdrew direct budgetary support to Burundi. The EU had been until the 2015 crisis one of the government's main donors, but has severely curtailed financial assistance due to human rights abuses, and now increasingly channels funds through international NGOs, U.N. agencies or development aid agencies from EU member states instead of through Burundian government ministries. It should be noted, however, that the EU and member states such as Germany and Belgium who both withdrew aid still provide humanitarian assistance to the population, as well as continued funding of programs directly related to the population's needs such as health care, food security, energy and rural development. In December 2018, the AU asked Burundi to reduce the number of soldiers it contributed to the AMISOM mission in Somalia by 1,000 by February 28, 2019. This would imply a decrease in funds from the total of €15.7 million that Burundi receives from the AU. Burundi is the second biggest contributor to the 21,500-strong peacekeeping force with 5,400 soldiers, second only to Uganda, which contributes 6,200, and ahead of Djibouti, Kenya and Ethiopia. The Burundian government is seeking new private and public-sector donors and is approaching new stakeholders such as China, Egypt, Saudi Arabia, Russia and Turkey.

The World Bank – Burundi's largest non-European donor – only marginally adjusted its current commitments of around \$650 million in national and regional programs. According to International Crisis Group, the World Bank has no concerns in supporting specific sectors, including government ministries. The African Development Bank also continues to work with line ministries and the finance ministry as it did prior to the 2015 crisis. Funding to the U.N. Peacebuilding Fund and International Conference of the Great Lakes Region is set to enter a new term. Humanitarian assistance remains well below its target with only 52% of the 10-year plan funded.

Effective use of support

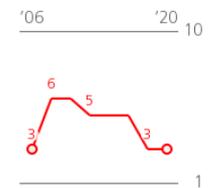


Politically, Burundi is at a total impasse that could have significant security repercussions, if the currently stalled process of dialog is not rapidly relaunched in a constructive and inclusive manner. The government's increased taxes meant the first quarter of 2018 recorded tax and nontax income 19.2% higher than in the first quarter of 2017. Government spending increased 4.6% from 2017 levels. Internationally, the Burundian government is developing its collaboration with China and Turkey. Only recently, China constructed a \$20 million presidential palace in Bujumbura. In October 2017, Burundi became the first nation to withdraw from the International Criminal Court, echoing a broader development of impunity in the country. In 2018, the government repeatedly refused to cooperate with the U.N. Human Rights Council-mandated Mission of Inquiry.

The situation of Burundian refugees in neighboring countries remains a sensitive political issue and represents the most neglected refugee situation in the world. The situation of Burundians who have fled to Rwanda is uncertain, and the refugee camps in Tanzania are growing in size. Many intellectuals flee to Rwanda, but the majority head to Tanzania, Uganda or the DRC. According to a report by the UNHCR, an average of 300 refugees still flee Burundi each month. The impartiality of the EAC mediation with regard to the Burundian crisis is tangible but has so far met with no success. Recently the Inter-Burundi dialog conducted under the auspices of the East African Community and facilitated by Benjamin Mkapa, former president of the United Republic of Tanzania, and in which Ugandan President Yoweri Museveni is mediator, completely stalled. There were fears of a civil war in Burundi – politically as well as ethnically based – that could have destabilized the entire Great Lakes region. There were also fears that the rebels would perpetrate ethnic violence after the president gave them an ultimatum, threatening them with pursuit by any means. Recent attacks that took place in May 2018 in the Western province of Cibitoke have been attributed to an armed group led by Alexis Sinduhije, a Burundi opposition leader living alternatively in DRC and Rwanda. Relations between Burundi and Rwanda have deteriorated as the Rwandan government reciprocated accusations against Burundi, alleging that Burundian authorities have given support to a Rwandan rebel group operating along the border in the Nyungwe forest. The disagreement between Rwanda and Burundi appears to be drawing in other EAC partners. Signs of widening cracks among East African Community (EAC) member states have emerged with regard to the 20th Ordinary Summit of Head of States of the East African Community held in December 2018. Burundi postponed this meeting for a second time, citing the need for more time for “preparation.” On a regional level, the position of Burundi remains sensitive.

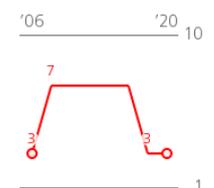
### Credibility

3



### Regional cooperation

3



## Strategic Outlook

As the time of writing (January 2019), Burundi remains in political, economic and social crisis. The absence of an inclusive political dialog in Burundi has left the country fragile amid humanitarian, economic and financial difficulties, and ongoing security threats. Since his announcement revising the constitution on December 12, 2017, President Pierre Nkurunziza warned that those who dared to “sabotage” the project “by word or action” would be crossing a “red line.” The latest U.N. Security Council report states that the security situation in the country improved in 2018, and that in general, the situation was calm. According to the latest report by Human Rights Watch (2019), in the period leading up to the referendum in May 2018, police, intelligence services, and members of the Imbonerakure killed, raped, abducted and intimidated suspected opponents of the ruling party, the National Council for the Defense of Democracy-Forces for the Defense of Democracy (CNDD-FDD).

The economy has improved somewhat in 2018. Real GDP growth increased to an estimated 1.4% in 2018. The slight recovery in GDP was due to a resurgent services sector (7.4% growth) following the return of relative calm, and increased production of key export items such as coffee and tea.

Due to reduction in the provision of aid, the EU has lost leverage over Nkurunziza’s government in recent years. However, it should retain a strong interest in preventing growing instability, which could have a regional impact. The EU and its member states should closely monitor the authoritarian tendencies of the government and continue to explore channels for pressuring the government while offering supporting to the population. The EAC should take the lead in a more sustainable and comprehensive peace process. It should engage top-level mediators that are completely independent from political organizations or offices and who are very familiar with the local context. The few remaining aid programs targeting the Burundian population should apply “do-no-harm” principles in their operations. The Inter-Burundi dialog, which began in 2014 under the leadership of the East African Community (EAC), stalled, hampered by an apparent unwillingness among regional leaders to press Nkurunziza to make real concessions. The Inter-Burundi dialog’s facilitator, former Tanzanian President Benjamin Mkapa, stated in his last and final report in February 2019 that he quit the mediation process out of frustration as the Burundian government no longer demonstrated any interest in participation.

According to International Crisis Group, it is highly likely that after the 2014 to 2020 funding period the EU will scale back its aid for development from 2021 onward, although its humanitarian assistance and support for the intermediate category of “resilience” (health, food security, nutrition, and energy) is likely to remain in place. Bilateral donors such as the Netherlands and Belgium are likely to move in a similar direction over the next few years.

The main challenges facing Burundi include the fact that the opposition parties are extremely destabilized and divided and that the Peace Agreement of Arusha with its intention of power

balance is very tangibly threatened. There are reports that President Nkurunziza is considering not running for another presidency in 2020, but a significant political shift is most unlikely. A draft bill on the electoral code for 2020 elections is currently being discussed where any presidential candidate will only be admitted if they deposit BIF 50 million into a public treasury account opened at the National Bank BRB. The current deposit is BIF 15 million.

It is necessary for the EAC leadership, the African Union and possibly the United Nations to take seriously the conflict and escalating tensions between Burundi and Rwanda and the fact that they pose a threat to regional and continental stability. On the basis of the analysis presented in this report, including the flagrant flouting of the human rights situation in the country and the recent adoption of repressive laws targeting foreign NGOs and local non-profit associations, it is crucial not to accept Burundi's deadlock and to instead redirect suspended aid toward civil society organizations through direct financial support. The international community must also promote in a much stronger and coherent manner peaceful coexistence and the strengthening of social cohesion.