

BTI 2016 | Burundi Country Report

Status Index	1-10	4.36	# 97 of 129	
Political Transformation	1-10	4.62	# 82 of 129	➔
Economic Transformation	1-10	4.11	# 103 of 129	➔
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	scale	score	rank	trend

This report is part of the Bertelsmann Stiftung's Transformation Index (BTI) 2016. It covers the period from 1 February 2013 to 31 January 2015. The BTI assesses the transformation toward democracy and a market economy as well as the quality of political management in 129 countries. More on the BTI at <http://www.bti-project.org>.

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Key Indicators

Population	M	10.8	HDI	0.389	GDP p.c., PPP \$	769.9
Pop. growth ¹	% p.a.	3.3	HDI rank of 187	180	Gini Index	33.4
Life expectancy	years	54.1	UN Education Index	0.370	Poverty ³	% 92.2
Urban population	%	11.8	Gender inequality ²	0.501	Aid per capita \$	52.2

Sources (as of October 2015): The World Bank, World Development Indicators 2015 | UNDP, Human Development Report 2014. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.10 a day at 2011 international prices.

Executive Summary

Burundi is currently experiencing a deep political crisis that has worsened severely since the elections of 2010 and continues to become even more polarized with the approaching 2015 elections. Despite initial signs of new dialogue between the government and the opposition, the fronts have hardened and the political scene is characterized by an authoritarian government, a weak, opportunistic and undemocratic opposition, harassment and intimidation by the security organs against opposition members, independent media and civil society activists. By pushing a constitutional amendment – which failed to pass by one vote – the president clearly showed his will to stay in power for a third term.

Public opinion before the parliamentary and presidential elections, scheduled for June and July 2015, respectively, was characterized by a deep-rooted animosity between the ruling coalition and parts of the opposition, but also by internal shortcomings and quarrels within the parties.

The dominant party under the leadership of President Pierre Nkurunziza, CNDD-FDD, is the offspring of the most important rebel movement of the civil war. The nucleus of the CNDD-FDD's leadership is still formed by the leaders from its time as rebel group, who have the mentality of obedient loyalty. Meanwhile, members of the formerly ruling Tutsi elite joined the party, out of opportunism or an intention to bridge the ethnic cleavage. The party probably still controls the majority of the electorate of peasants in the provinces, where it has been active in the civil war. But it is difficult to assess the actual preference of voters in free and fair elections. There are good reasons to assume that CNDD-FDD could still become the largest party due to its prestige as decisive force in the liberation of the peasantry from a century-long oppression.

Disturbing is the state of the opposition. Probably the strongest opposition party, the FNL, with a stronghold in the northwestern provinces, like the ruling party an offspring of a rebel militia, can by no means be considered a democratic movement.

Even though the attempted constitutional amendment to allow Burundi's president to serve a third term does not call into question the core of the Arusha compromise, ethnic power-sharing within the armed forces and fundamental principles of the constitution, such as the ethnic quota system, have been for the first time openly attacked. The CNDD-FDD's coalition partner UPRONA, which used to bend to all major decisions made by the ruling party, was effectively vetoing decisions that touch the heart of the Arusha Accords' (ethnic) compromise. However, the result was a deep internal crisis and the further weakening of the traditional Tutsi party. In addition, growing cracks within the ruling CNDD-FDD and the increasingly independently operating Imbonerakure youth wing offer an explosive potential for the upcoming elections.

Socioeconomic progress has been much slower than had been hoped for back in 2005, largely due to the country's large structural and historic economic problems and sociocultural conditions. Progress is limited by high levels of poverty, overpopulation, dependence on poor and underdeveloped agriculture with limited possibilities of higher productivity and exposure to volatile weather conditions, as well as world market prices, ecological constraints (drought and occasional floods) and a lack of exploitable natural resources. However, some progress has been made, mainly in the spheres of health care and general education. Furthermore, Burundi successfully completed the review of its three-year Extended Credit Facility (ECF), having largely attained the macroeconomic goals set by the IMF. In the period under review, the government furthermore started some infrastructural projects and pilot phases to exploit the country's dormant resources, such as nickel. However, it still counts almost entirely on external aid. The socioeconomic development of the country closely follows the guidance of the international organizations whose formulas are too optimistic, downscaling difficulties and not taking the realities of the Burundian situation into consideration. Promises made in the Poverty Reduction Strategy Papers (PRSPs) thus remain rhetorical and unrealistic.

In a nutshell, gains made in terms of political, social and economic transformation from the time of the Arusha Peace Agreement are increasingly endangered. The elections of 2015 will be key for the future of the country both in terms of the general idea of democracy and in terms of rather narrowly defined questions of stability. The question of whether the current president will run for a third term does not only spark conflicts with the opposition, but also divides powerful players within the ruling elite. Therefore, international partners should carefully assess election support as well as their overall aid strategies.

History and Characteristics of Transformation

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

In 1988, an internationally driven democratization process began, culminating in general elections in 1993, which brought Melchior Ndadaye from the Hutu majority party Burundi Democratic Front (FRODEBU) to power. High-ranking members of the army assassinated Ndadaye and other high politicians shortly after the elections, ostensibly out of fear of losing their privilege after a widespread (though cautious) restructuring of state institutions. The assassination sparked a full-fledged civil war (with an estimated 300,000 death) pitting Hutu rebel groups (primarily the CNDD-FDD and the FNL) against an all-Tutsi army. Through a mixture of political maneuvers and violence, 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 towards the peace process. Two main radical Hutu parties excelled in the years after 1993 and soon started fighting not only the army, but also each other: the PALIPEHUTU-FNL, founded already in the 1980s in a Tanzanian refugee camp, as well as the CNDD-FDD, which emerged from FRODEBU as the armed alternative.

A peace process, largely externally imposed (mostly by South Africa), 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 between Hutu and Tutsi with ethnic quotas for all political institutions. The armed conflict continued, as neither the CNDD-FDD nor the FNL were included in the peace deal. After several rounds of talks between the army and the CNDD-FDD, the Pretoria peace agreement was signed and the rebels joined the transitional institutions in 2004 largely to their advantage. By assuming control of 40% of the army, 35% of police posts, and a number of ministries and seats in parliament, the CNDD-FDD became the most powerful player in Burundi (besides the army and its allies in UPRONA), as FRODEBU did not have a military arm. In most parts of the country, armed hostilities ceased immediately after the signing of the Pretoria agreement. The remaining rebel group, the FNL, continued its armed struggle in the western provinces of Bujumbura Rurale, Bubanza and Cibitoke, but quickly weakened in the face of joint offensives by the army and the CNDD-FDD.

Serious military integration only began in 2005, creating an ethnically balanced army, removing what for decades had been the most important obstacle to peace. Overall, the reform of the army is considered highly successful. As early as 2007, Burundian units were deployed within the African Union peace forces in Somalia (AMISOM) and cooperation with security forces of neighboring countries in fighting rebels in the region soon began. In 2009, the first Hutu ex-rebel general was appointed army chief.

A referendum approved a new constitution that was based on the Arusha agreement and confirmed ethnic quotas 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 were largely considered the representatives of the hitherto neglected rural Hutu population and gained popularity for bringing the war to an end. In the last year of the transition, a sufficient number of Tutsi joined the ranks of the CNDD-FDD in view of the latter's expected electoral victory, so the party did not face any difficulties complying with the required ethnic quota. The CNDD-FDD ran a well-organized campaign backed by a large parallel administration in many parts of the country dating from its time as a rebel movement. FRODEBU lost much of its support for having been too compromising with UPRONA and the latter could only count on the minority Tutsi votes.

The new consociational government under the presidency of Pierre Nkurunziza was formed according to the constitution, comprising all parties, with 5% of the vote, and implementing the mandated ethnic quotas.

The early political transformation was, however, marked by power struggles within the ruling party mainly between the president (and his cronies) and Nkurunziza's main rival, CNDD-FDD Chairman Hussein Radjabu. A decision-making paralysis within the parliamentary group of the CNDD-FDD was "resolved" by the replacement of insubordinate parliamentarians with Nkurunziza loyalists. The CNDD-FDD furthermore took advantage of disputes within FRODEBU and actively encouraged a party split, resulting in the creation of FRODEBU-Nyakuri ("the true FRODEBU"), a party which would align with the CNDD-FDD in the 2010 elections. Ever since, the word "Nyakurisation" has become an expression for the CNDD-FDD's strategy of co-opting opponents' positions and taking advantage of their internal power struggles (later on, this would also affect the FNL and UPRONA).

A peace agreement with the FNL was signed in 2008. Increasing pressure from international and regional governments, the loss of a safe haven in neighboring Democratic Republic of Congo (DRC), the decrease in support by the Burundian population, and the wish of many FNL fighters to benefit from the country's demobilization programs all finally made FNL leader Agathon Rwasa agree to a complete demobilization of his fighters and the transformation of the FNL into a political party in 2009. Rwasa expected the FNL to become a major new force in the 2010 elections. However, the CNDD-FDD emerged as the clear winner of the communal elections with the vast support of the rural population, resulting in a 50% margin over its main opponent. Although both international and national observers considered the elections free and fair, accusations of intimidation by the CNDD-FDD were rampant, leading to the boycott of the

subsequent presidential and parliamentary elections by most opposition parties under the lead of the FNL and regrouped in the extra-parliamentary alliance ADC-Ikibiri – thereby excluding themselves from any democratic process. Both sides – the government and the opposition – thus had their share in the political polarization that followed. Being the only candidate, Nkurunziza was reelected with 91 % of the vote. Only through the participation of UPRONA and FRODEBU-Nyakuri in the parliamentary contest, the CNDD-FDD could establish a government in line with the consociational constitution, which requires the inclusion of more than one party. The absence of all other opposition parties, however, was a severe setback to the democratic transition of the country.

In the years after the 2010 elections, the political climate became extremely hostile and polarized and several attempts of a dialogue between the government and the opposition failed. While the opposition argues that the government violates the “spirit of dialogue” of the Arusha peace process, the CNDD-FDD bases its rejection of any compromise with the opposition on the fact that the CNDD-FDD was elected by the people, while the ADC-Ikibiri withdrew from the democratic process with its boycott, thereby losing its legitimacy as a political actor.

Harassment and persecution of opposition members, particularly of the FNL, but also of human rights defenders and independent media, increased. Main opposition leaders such as Agathon Rwasa (FNL), Alexis Sinduhije (MSD) and Léonard Nyangoma (CNDD) temporarily went into exile and parts of the FNL rearmed in DRC, shortly renewing wartime alliances with Congolese rebel groups and sporadically attacking Burundian territory. The most devastating attack caused the death of 39 people in a Gatumba bar whose owner was said to be close to the president. The government continuously denied the existence of political violence and framed the attacks as simple crime or terrorism. In January 2015, the remains of the FNL in South Kivu were defeated by the Congolese army, together with the U.N. Mission MONUSCO.

Over the course of 2013, the situation in Burundi first seemed to calm down, a tentative dialogue between the government and the opposition began and, by the end of the year, many opposition leaders had come back to Burundi. However, the turn of the year 2013-2014 was marked by renewed tensions, as President Nkurunziza tried to change important provisions in the constitution to allow for further consolidation of the CNDD-FDD’s power and so he could run for a third term. The proposed changes were seen by the opposition as a serious renunciation of the Arusha peace agreement, which so far had been a sort of founding document of the new democracy and a stabilizing factor amidst political tensions – but always regarded with high skepticism by the CNDD-FDD, which did not take part in its negotiation. Surprisingly, Nkurunziza failed to co-opt enough opposition parliamentarians so the legislature refused to pass the amendment. The attempt at a constitutional change coincided with the sacking of several opposition figures within the government, including the vice president (UPRONA), the passing of a highly contested law on the land commission, several cases of severe harassment of demonstrators, opposition politicians and human rights defenders, as well as rumors around the arming of youth militias in the DRC. A few months ahead of the 2015 elections, the political climate was extremely polarized and volatile with an increasingly authoritarian government and an opposition, which does not present a viable alternative. Furthermore, cracks within the CNDD-FDD became visible when Nkurunziza sacked

two of his closest cronies, Guillaume Bunyoni (head of police) and Adolphe Nshimirimana (head of the intelligence service). Although the ousting might also have been a sign to international partners who have become increasingly worried about human rights violations, developments in late 2014 suggest that Nkurunziza is trying to strengthen his grip on power by creating conflicts within his own power base. These internal struggles offer an explosive potential, given that the loyalty of the partially armed CNDD-FDD youth wing Imbonerakure seems to be divided between different actors within the party.

Amid political fighting, the country's economic and social transformation suffered. The government has not yet seriously tackled the country's structural problems. Apart from improvements in the provision of basic services (health, primary education), major political and socioeconomic reforms have not yet been seriously implemented. Economic transformation has begun very slowly and is riddled with structural constraints. The state continues to be the largest employer, and public procurement remains the government's main instrument of economic policy. Both employment and procurement policies are a magnet for politicization and corruption that reforms have so far been unable to countervail.

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

Question

Score

In principle, the state has had, since the establishment of an integrated army and police force in 2005, the monopoly on the use of force throughout the country. Formerly antagonistic elements of the former government army and rebel groups have been balanced by an elaborate quota system in all state security organs. Indeed, surmounting ethnicity in the hitherto mono-ethnic army is seen as the most important aspect of the Arusha agreement and subsequent Pretoria protocol, which are predicated on the idea that ethnic balance in the army will prevent future coups and state-sponsored ethnic violence.

Monopoly on the use of force

7

Until late 2008, the FNL rebel group severely challenged the monopoly on the use of force in the western provinces of Bujumbura Rurale, Bubanza and Cibitoke but, since their transformation into a political party in 2009, no single rebel group has posed a serious security threat in Burundi.

However, after the contested elections of 2010 and the exiling of important FNL members, smaller incidents of armed violence against state institutions or civilians – including an attack on a bar in Gatumba which left 39 people dead – have taken place, mainly in the former FNL strongholds in the west, but not always involving the FNL. Attacks are on the rise due to the elections in 2015, but will most probably drop again afterwards. The FDN and the Congolese army, FARDC, together with the U.N. Mission in Congo MONUSCO, are fighting against the FNL in South Kivu/DRC further reducing the threat posed by the FNL.

Despite these incidents, it is unlikely that the state's monopoly on the use of force will be seriously challenged to the point of renewed civil war. The CNDD-FDD often uses this state monopoly to sustain and enlarge its own power over dissident voices and opposition members. The police and secret service are in large part corrupt and unpredictable. The population's trust in the now-integrated army has risen significantly since the end of the civil war, but started to fade given the recent unexplained involvement of the FDN in neighboring Congo and rumors about internal conflicts.

An increasingly important player in the provision of insecurity are the Imbonerakure. The partially armed youth wing of the CNDD-FDD is particularly strong in some provinces, such as Bubanza, and increasingly meddles in local politics, creating fear among the population. It is unclear who is effectively controlling the Imbonerakure. This question becomes increasingly important given recent power struggles among heavyweights (Nkurunziza, Nshimirimana, Bunyoni) within the CNDD-FDD.

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

The decade-long political and socioeconomic discrimination against the Hutu has largely ceased due to an elaborate system of institutionalized ethnic power-sharing. The formula (still) provides for enough security guarantees for the Tutsi to make it acceptable to all – however, recent (failed) attempts by the president to erase central achievements of the Arusha peace agreement from the constitution have caused widespread fear among the Tutsi elite. Competing discourses about the past persist among elites and the population. These challenge the idea of national unity to some extent, at least regarding the common history.

The small minority of Twa (around 1% – 2%) is marginalized on all levels, despite special status within the power-sharing formula.

Burundi is a secular state and religious dogmas do not openly influence legal and political institutions. However, Christianity in various forms is very dominant and other religions (such as Islam) are effectively marginalized. From colonial times to the present, the Catholic Church has exerted a powerful influence on all levels of Burundian society. Since the civil war, Evangelical churches have mushroomed all over the country. A new law (2014) is supposed to contain the proliferation of churches. The president openly expresses born-again Christian beliefs and the first lady directs her own church.

In principle, the various churches do not exert any direct influence on politics. Indirectly, however, political decisions are often based on partly fundamentalist Christian values. Furthermore, religious dogmas have an enormous impact on social life and thereby on the success or failure of implementation of political decisions within the population. The rejection of contraception by the Catholic and born-again Christian churches effectively prevents the government from promoting family planning, which would be much needed given the link between overpopulation and poverty.

State identity

9

No interference of
religious dogmas

8

The penalization of homosexuality and abortion in 2008 has been very much pushed by various churches, and discussions of the topics have often been built on religious values. It is difficult to say whether the church acted as an interest group here, or whether politicians based their decisions on their own Christian belief, independently of the church as an institution.

Due to the country's small size, high population density and long history of central control, public administration adequately covers the entire territory. Administrative structures are generally small and poorly funded, but have larger responsibilities than in many other African states. Burundi is characterized by a "big man" ("grand chef") political culture and administrators are often jestingly considered "kings" of their commune. In 2005, the government committed to a comprehensive, externally supported decentralization process, which has yielded some results, such as the establishment of locally elected hill councils and the transfer of competencies to lower-level administration. It is hoped that decentralization will change the passive mentality toward politics that prevails in Burundi's rural population. However, decentralization is largely understood in terms of service delivery and less in terms of political emancipation of the local population. Furthermore, long bureaucratic procedures, politicization and a lack of competence have all slowed down the process.

The smallest administrative entity is the "colline" (hill). Since 2005, elected hill councils have been responsible for small-scale development activities as well as conflict mediation in their neighborhoods. Hill council members are supposed to be independent of political parties. However, even at this smallest level of the polity, the CNDD-FDD has considerable influence. That influence at the lower level is exercised mostly by the ruling party, rather than the established administration. This leads to discontent among the traditional institution of Bashingantahe who – due to their alleged link to the former regime – are effectively sidelined by the ruling party. In provinces where the FNL or other political parties (e.g., the MSD) are influential, such as Bujumbura Rurale or Bubanza, local power is openly contested. The hills are grouped in 117 communes forming 17 provinces.

Access to health services is improving but not yet sufficient. Burundi averages one doctor per 19,231 inhabitants (the WHO recommends one doctor per 10,000). The proportion of the population with access to safe drinking water is around 60% nationwide with an enormous gap between the urban and rural populations. Access to adequate sanitation is extremely low in rural areas (13%) and still low in urban areas (33%). Many primary rural schools have been rebuilt or expanded. The quality of education, however, is still very low and teachers are unequipped and underpaid. Teacher strikes and closed boarding schools, due to a lack of resources, are on the rise. Local jurisdiction is underpaid and highly susceptible to corruption.

Superficially, the president gives much attention to the improvement of rural areas, visiting villages and rural areas frequently. These activities have clearly boosted the president's reputation among the rural population and significantly contributed to his (and the CNDD-FDD's) electoral victory in 2010. However, in some parts of the countryside, discontent is growing due to ongoing poverty, public mismanagement and the growing influence of the ruling party's youth wing Imbonerakure.

2 | Political Participation

The first post-civil-war elections, in 2005, were generally considered free and fair. However, with the landslide victory of the CNDD-FDD, the presidential party was able to solidify its political position and gain control over most state institutions. The 2010 elections were therefore regarded by all political players as decisive for the country's future power configuration. Therefore, the sequence and modalities of the elections and the composition of the Independent Electoral Commission were the source of considerable controversy, but a compromise was ultimately reached. The climate of the election campaign was very hostile. Although marred by only a few incidents, opposition parties and sympathizers were to some extent subjected to harassment and intimidation by state organs. The ruling party made full use of state facilities and resources, and received much more coverage by the state-controlled media. All this contributed to an uneven playing field.

In the first communal electoral round, the CNDD-FDD was able to consolidate its majority position in the north, center and east, whereas in the capital and the south, it remained in a minority position. Its main competitor, the FNL, which was organized as a party only one year earlier, won 58% of the votes in its stronghold Bujumbura Rural, where it had been active as a rebel movement. Despite some irregularities, no convincing evidence of fraud was produced, and local and international election observers alike gave a positive assessment of the overall conduct of the voting. There is no evidence that without harassment and irregularities the CNDD-FDD's margin of victory in the communal elections (+7%) would have been substantially different. Most opposition parties nevertheless decided to boycott the subsequent electoral rounds, under the leadership of the FNL, and regrouped in the extra-parliamentary alliance ADC-Ikibiri. Both the presidential and parliamentary elections were held in conformity with regulations, but as Nkurunziza did not face any opponent in the presidential elections, and only UPRONA and FRODEBU-Nyakuri took part in the parliamentary contest, the population had no chance to engage in an open electoral contest on the national level.

The years following the elections were marked by increasing polarization. While the opposition argues that the government violates the "spirit of dialogue" from the Arusha peace process, the CNDD-FDD rejects any compromise with political players who are not democratically elected. Despite tentative attempts to renew political

Free and fair
elections

6

dialogue and the return from temporary exile of important opposition leaders, the political climate remained hostile in the run-up to the 2015 elections. The key controversies were a potential third term for the incumbent president, as well as manipulation of and restrictions on the opposition.

In March 2013, the parliament rejected a constitutional amendment, which would have allowed Nkurunziza to run for a third term. Surprisingly, Nkurunziza failed to co-opt enough opposition parliamentarians and eventually missed the required four-fifths majority by only one vote. UPRONA's and FRODEBU-Nyakuri's refusal to align with the CNDD-FDD came mostly out of fear of losing their own privileges, but this is also a sign of some remains of democratic consciousness. Nevertheless, it seems probable that Nkurunziza will run for a third term. It remains an issue of interpretation whether Nkurunziza has in fact already fulfilled two mandates in the strict sense of the constitutional term limit, since in the first post-war elections of 2005, he was elected by parliament and not directly. It is improbable that the contested election commission will verify the eligibility of a presidential candidate with regard to term limits. The only institution which could prevent Nkurunziza from presenting himself is the Constitutional Court, which will only act on demand of the president himself, the president of the Senate or the president of the National Assembly – the latter two are Nkurunziza loyalists.

Despite renewed attempts by the internally splintered opposition, it is unlikely that a credible common candidate will be presented. The attempt at a constitutional change coincided with the sacking of several opposition figures within the government (including the vice president (UPRONA)) and the harassment of the extra parliamentary opposition. The arrest and detention of former Vice President and potential presidential candidate for FRODEBU Frédéric Bamvuginyumvira, who was (after a while) accused of corruption, was characterized by serious irregularities. After having already severed legal regulation of the establishment of new parties and coalition-building in past years, the government recently tried to exclude opposition candidates and parties from elections by means of criminal prosecution or on formal grounds.

None of the parties (with the notable exception of the FNL) has so far presented a political program worth the name. The CNDD-FDD makes use of its widespread network and control of most parts of the local administration in its election campaign, while the reach of the opposition parties remains largely confined to the capital.

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

Effective power to govern

3

Since a major “clean up” of internal dissidents in 2007, the ruling CNDD-FDD is largely united in its decision-making. Recent cracks within the ruling elite around the ousting of close confidants of Nkurunziza, however, suggest that internal dissidence is still an issue. However, powerful (military) individuals – who formed part of the CNDD-FDD armed struggle during the civil war – outside political institutions have considerable influence on the top CNDD-FDD decision-making body. The veto power of the military as an institution, however, is limited due to its ethnic balance. Tutsi-officers within the army still play an important role. However, the veto power of the Tutsi minority using the army – which was strong before the civil war – is continuously diminishing.

The recent failure of the president to change the constitution demonstrated that the CNDD-FDD’s coalition partner Uprona, which used to bend to all major decisions made by the ruling party, is effectively vetoing decisions that touch the heart of the (ethnic) compromise agreed upon in the Arusha peace process.

In some cases, local CNDD-FDD politicians make decisions which reach beyond their mandate – such as arresting individuals. It is not clear whether they act purely on their own behalf or at the approval of the party leadership. In some parts of the country, the CNDD-FDD youth wing Imbonerakure has become increasingly powerful and it is difficult to know who effectively controls these partially armed young men.

Because of the country’s high financial dependency on foreign aid and the good will of its principal international partners and donors (above all the World Bank, IMF, Asian Development Bank, European Union), the government is obliged to consult with them about all financially relevant policy matters.

In principle, the constitution guarantees freedom of association and assembly. Political parties are considerably (but intentionally) constrained by the provisions of the constitution that stipulate an obligatory mixed ethnic membership. Further laws introduced in the last few years – clearly meant to weaken the political opposition – restrict the establishment of new and the survival of existing political parties. A law on demonstrations and public assemblies provides for government envoys in public assemblies and permits the dissolution of assemblies to preserve public order. In order to prevent spontaneous protests, the government has banned the popular habit of engaging in sports in groups (such as running) in public places in the capital. During the observation period, several demonstrations by the political opposition and civil society were permitted but met with excessive police force. After a

Association / assembly rights

5

demonstration by the opposition party MSD in 2014, which turned violent, 21 people were sentenced to life imprisonment and 24 people to five to 10 years in prison after a one-day trial.

In principal, the constitution guarantees the freedom of expression. In practice, however, the freedom of expression is severely restricted. With the elections approaching, criticism of the government – such as allegations of military action in DRC or of the arming of the CNDD-FDD’s youth wing – is often countered with accusations of “threat to public security.” The CNDD-FDD regards independent media and civil society organizations as hostile to their politics and has tried to control and restrain critical voices since the party’s accession to power. Critical news coverage, as well as all other forms of public expression, are inhibited by legal restrictions.

Freedom of
expression

4

Numerous cases of intimidation, arrest and extrajudicial killings of journalists, members of the political opposition and civil society activists are well documented by national and international NGOs. In 2014, the internationally renowned civil society activist Pierre-Claver Mbonimpa was imprisoned for several months and only released provisionally (under pressure from the European Parliament, as well as U.S. President Obama) after alleging that Burundian youth were being armed in neighboring DRC.

The deterioration of the situation for the media and civil society organizations is especially worrisome, as these entities have so far been an important counterbalance to the government. Respected personalities like Mbonimpa are considered conflict-mitigating by the majority of the population, which explains the continuing massive mobilization in favor of his liberation.

3 | Rule of Law

The separation of powers between the various state organs and a system of checks and balances exist both legally and in practice. However, both chambers of the legislature have had difficulties opposing decisions made within the inner power circle. Since the opposition’s boycott of the 2010 elections, the CNDD-FDD holds the overwhelming majority in the new National Assembly and Senate, which has further reduced the constitutionally weak position of the parliament, and thus its potential for countering the executive branch of government. The recent rejection of a constitutional amendment by the parliamentary opposition (UPRONA and FRODEBU-Nyakuri), despite attempts at co-optation, (mostly by promising high-ranking positions) shows that the CNDD-FDD is not omnipotent. However, this rejection should not be mistaken as a sign of functioning democratic checks-and-balances, either. UPRONA rejected the bill because it endangered some of its own privileges and not because of a genuine democratic consciousness.

Separation of
powers

4

Over the last two years, it has become clear that neither the internally splintered extra-parliamentary opposition nor civil society is able to become an effective countervailing power. The government has passed several laws further restricting democratic expression outside the parliament. The effectiveness of the Ombudsman's Office and the National Independent Human Rights Commission (CNIDH) is very limited, the Truth and Reconciliation Commission (CVR) still has not been implemented, but is already highly contested, and so is the new election commission CENI. State power is rarely subjected to independent decisions by the judiciary.

The army remains the most important player when it comes to checks and balances. But it is doubtful whether the army or different factions within the army respect democratic institutions. The effective power relations within the army have continuously changed over the years from Tutsi domination to an increasing influence of former CNDD-FDD fighters.

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

Independent
judiciary
4

In general, Burundi's judiciary bends to the will of the executive, but occasionally makes independent decisions. In a dubious mid-2006 treason case, the Supreme Court made a decision against strong government pressure, but succumbed to it in other highly political cases (such as the expulsion of dissident parliamentarians from the legislature as a result of their disagreement with the official party line). Recent signs that the judiciary is obviously politicized include the ongoing court case against opposition politician Frédéric Bamvuginyumvira and the show trial and disproportionate sentencing of dozens of young demonstrators from the MSD party in March 2014.

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.

In general, a climate of absolute impunity for public officeholders prevails. Cases of apparent high-level corruption and dubious deals have become known, but have had no visible consequences for the persons implicated. Some vigilant NGOs investigate such cases and make them public, but generally without effecting any improvement in the situation. Transparency in governmental decisions and de facto accountability are practically nonexistent. Furthermore, offering bribes is largely considered normal within the Burundian population. After Burundi scored much higher in the East African Bribery Index of 2012 than the previous year, the country worsened again to become the second most corrupt country after Uganda in 2013. The police, judiciary and land services are the institutions most prone to petty corruption.

Prosecution of
office abuse
3

There is no systematic infringement of civil rights associated with people's status as members of societal groups (e.g., gender, religion or ethnicity). However, repression against members of the political opposition by police, the secret service and the youth wing of the CNDD-FDD (Imbonerakure) is on the rise with the 2015 elections. Intimidation of critical voices, unlawful imprisonment without trial, "disappearances" and politically motivated extrajudicial executions are frequently reported by NGOs and the media. The Imbonerakure have become increasingly powerful and violent and act with impunity.

Civil rights
3

A special commission in charge of investigating allegations of extrajudicial killings by the national police and secret service was established in 2012; it arrested a few individuals, but denied the existence of extrajudicial killings orchestrated by the state. Major pending cases of alleged extrajudicial killings were not addressed.

In 2014, several cases of arbitrary detention and imprisonment occurred. After a demonstration by the opposition party MSD in 2014, which turned violent, 21 people were sentenced to life imprisonment and 24 people to five to 10 years in prison after a trial, which lasted only one day. The opposition politician and potential presidential candidate in the 2015 elections, Frédéric Bamvuginyumvira was arrested on dubious grounds. The civil rights activist Pierre-Claver Mbonimpa was arrested and denied proper access to health care in prison.

Violence against women and girls is rampant and perpetrators rarely face persecution. The passing of a law regulating inheritance has been postponed since 2004, so judges and the general population still apply customary law that prevents women from inheriting. Even if women do inherit land, they often sell it immediately in order to protect themselves from harassment by male family members.

4 | Stability of Democratic Institutions

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

Performance of
democratic
institutions
3

The government's formal legitimacy is based on the elections of 2010, but this legitimacy is significantly impaired by the election boycott carried out by most opposition parties, as well as the authoritarian mode of governance of the ruling party and its inner power circle. There is a glaring discrepancy between the formally correct composition of the democratic institutions and the almost complete factual absence of a valid and representative opposition. Since the various institutional levels (including the judiciary) are all controlled by the same dominant party, there is much less friction than would be the case if several competing political forces were present.

At the same time, the dominance of the CNDD-FDD impedes an effective system of checks-and-balances. The remaining opposition (UPRONA and FRODEBU-Nyakuri) hardly ever opposes CNDD-FDD decisions within political institutions. A notable exception was the recent failed attempt to change the constitution.

Although the present situation is obviously deficient in comparison with conventional democratic standards, this cannot be exclusively blamed on the ruling party; indeed, the radical opposition parties and their boycott – which was a (failed) tactic to provoke a state crisis in order to advance the oppositions own interests, rather than a reflection of democratic values – bear equal responsibility for the current situation.

In a formal sense, practically all relevant political and societal actors operate within the framework of the Arusha Accords and constitution, and thus appear to have accepted the new democratic dispensation. 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 it is not only ethnic affiliation, but also loyalty to the ruling party). However, this criticism has so far been rather modest, with the exception of the FNL. The latter, to this day, questions the fundamental principles of the new democratic order, and has over the last years retained (and made use of) its option to return to violent activity, if the results of political contests do not meet its expectations.

With the attempt to modify the constitution, the ruling CNDD-FDD for the first time tried to change the entire post-war framework, including the ethnic quota system and important provisions for political power-sharing. The CNDD-FDD was not part of the original negotiations, and has always been critical of them. The CNDD-FDD's leadership is deeply influenced by its experience as a rebel organization, leaning toward authoritative and uncompromising behavior, and it tends to be skeptical of professional politics in general (including those of CNDD-FDD politicians who joined the party after 2004). It has only accepted the Arusha peace agreement and subsequent constitution because they presented the best strategy for consolidating its power and legitimacy, using democratic elections and power-sharing as a means to secure its position over time. Being at a point where it has almost total control over state institutions, the CNDD-FDD's commitment to democratic institutions decreased and the ruling party now seems eager to change the framework in which it has to operate to its benefit.

In the eyes of the political opposition, the legitimacy of democratic institutions has decreased with the increasing dominance of the CNDD-FDD. However, all opposition parties still seem to believe in the democratic system as such, as they were preparing for the upcoming elections and did not indicate that they would again engage in a boycott.

Commitment to
democratic
institutions
3

5 | Political and Social Integration

Since 2010, the highly polarized party system is characterized by one dominant ruling party, its junior partners and few extra-parliamentary opposition parties. The level of polarization between the government and the opposition is extreme. UPRONA members of government generally bend to CNDD-FDD decisions in order to stay in power, thereby paltry disgruntling the party's own base. Only recently has UPRONA shown signs of true opposition towards the CNDD-FDD, when it rejected a constitutional amendment. Due to the long history of one-party rule and the fact that the CNDD-FDD and the FNL have their roots in rebel movements, only UPRONA and FRODEBU exhibit a rather strong degree of political professionalism. This is not to be mistaken for broad social rootedness. Although UPRONA has a rather stable constituency in the Tutsi community, it is largely constrained to the urban elite. All parties exhibit a high degree of clientelism and fragmentation. During the reporting period, the major opposition parties UPRONA, FRODEBU and the FNL split into different factions. Nkurunziza is able to hold the CNDD-FDD together by both co-opting and ousting potential troublemakers within the party. Since the CNDD-FDD is dominant in all state institutions due to the election boycott by the opposition, its clientelistic politics are especially obvious. Although political parties are required to comply with ethnic quotas, they are still largely seen as Hutu or Tutsi parties and ethnic voting is common. The CNDD-FDD's high election results are a mixed result of popularity among the rural population, clientelism and blatant pressure on voters. Thus, Burundi's problem is not so much the proliferation of parties and the fragmentation of the party system, but the accumulation of power in one party (causing Burundi to become a de facto one party state) and the polarization between the ruling party and the remains of its opposition.

Party system
5

The scope of well-articulated interest groups and professional associations is relatively limited. However, there are an increasing number of grassroots organizations and a number of influential unions, the most important being the unions of tradespeople, teachers and journalists. Practically all interest groups are subject to the historical experience of ethnic mistrust that has permeated Burundian society, although this tendency has begun to change. Interest groups tend to be fragmented, locally based, politicized, with a narrow focus and little impact. Ethnic mistrust is increasingly overshadowed by mistrust due to party affiliations, with increasing polarization between individuals and organizations loyal to the CNDD-FDD and those associated with the opposition.

Interest groups
4

The first and hitherto only Afrobarometer survey of 2012 indicates a strong approval for democracy as the preferred political system. These results correspond with available qualitative assessments as well as the high rate of voter participation in the election of 2010, despite the opposition's election boycott and the absence of genuine choice. Due to limited quantitative data on attitudes toward democracy before 2012, it is however difficult to judge developments over time.

Approval of
democracy
n/a

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.

Trust in the army is, however, remarkably high in rural as well as urban areas. This can be seen as a major success of post-war institutional reform, as the army used to be one of the major obstacles to peace in Burundi before and during the war and has today managed to gain the image of a professional, disciplined and nonpartisan force.

After years of inter-communal violence, the level of trust among citizens has strongly increased since the end of the civil war, the establishment of a consociational political system and, most of all, an ethnically balanced army.

Social capital
4

Small NGOs, churches and traditional authorities work on the reestablishment of mutual support and self-help. However, competing versions of the past still exist between Hutu and Tutsi, and comprehensive reconciliation has not yet taken place. Twa continue to be excluded at all levels of society. The – real or perceived – increase in violence (“banditry”) in rural areas, as well as some neighborhoods in the capital in the months before the 2015 elections, led to an increase in publicly uttered mistrust, which at times takes on ethnic forms.

Mistrust is most pronounced along political lines, between individuals loyal to the CNDD-FDD and the rest of the population. A fear persists that the ruling party and its youth wing infiltrate and control all levels of society.

Given the dire economic situation of the rural population, coupled with high population density, self-help is often not a choice but a necessity. The focus of the rural population remains on local issues, therefore, cooperation hardly goes beyond local boundaries. Furthermore, it often takes on a “policing” character, such as neighborhood night patrols and thus cooperation is often a sign of mistrust against a perceived “other.” The reestablishment of mutual support and cooperation should not belie the fact that the rural population continues to be prone to authoritarianism and elite manipulation.

II. Economic Transformation

6 | Level of Socioeconomic Development

Question
Score

Socioeconomic
barriers
2

Burundi remains one of the least developed countries according to the 2014 Human Development Index, ranked at 180th (out of 187 countries), but scored a little better than in 2011 (185th out of 187). The food and hunger situation according to the Global Hunger Index for 2014 is still extremely alarming with Burundi being the worst affected country in the world. In the 2010 Multidimensional Poverty Index (MPI), which takes into consideration deprivation in health, education and living standards, 81.3% of Burundians are multidimensional poor and 48.2% of the population lives in severe poverty. Poverty is relatively evenly distributed among rural Hutu, Tutsi and Twa, and it disproportionately affects women.

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

Burundi scores higher on the 2013 Gender Equality Index (within the World Bank's Country Policy and Institutions Assessment Index, CPIA) than the Sub-Saharan average (4.0 vs. 3.2), due to its extensive gender quotas in all political institutions (according to the HDI women hold 34.9% of seats in parliament). However, looking at the Gender Inequality Index (GII), which measures discrimination in health, education and the labor market, Burundi's score of 2014 (0.501, 104th out of 152 countries) is still low but a little better than two years ago (0.476). This reveals that in areas not subject to quotas, gender inequality is still pervasive. According to the HDI, only 5.2% of women over 25 have at least some secondary education versus 9.3% of men. Participation in the labor force includes 83.2% of women, versus 81.8% of men. Women usually work in physically demanding, low or non-paid job (such as agriculture). Apart from quota-affected positions in state institutions, women are almost absent from white-collar jobs. In the last few years, primary and secondary school enrollment among girls has increased and the government has adopted – at least on paper – a policy of promoting gender equality.

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

Economic indicators		2005	2010	2013	2014
GDP	\$ M	1117.3	2026.9	2714.5	3093.6
GDP growth	%	0.9	3.8	4.6	4.7
Inflation (CPI)	%	13.5	6.4	8.0	4.4
Unemployment	%	7.3	7.1	6.9	-
Foreign direct investment	% of GDP	0.1	0.0	0.3	-
Export growth	%	17.0	20.2	3.0	5.4
Import growth	%	61.7	26.4	8.0	5.0
Current account balance	\$ M	-5.7	-301.0	-253.3	-
Public debt	% of GDP	137.0	40.3	32.8	30.5
External debt	\$ M	1287.9	620.9	682.7	-
Total debt service	\$ M	40.0	4.4	33.3	-
Cash surplus or deficit	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	19.0	31.6	22.1	21.0
Public expnd. on education	% of GDP	3.6	6.8	5.4	-
Public expnd. on health	% of GDP	3.2	5.5	4.4	-
R&D expenditure	% of GDP	-	0.14	-	-
Military expenditure	% of GDP	4.4	-	2.2	2.0

Sources (as of October 2015): The World Bank, World Development Indicators 2015 | International Monetary Fund (IMF), World Economic Outlook, October 2015 | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database 2015.

7 | Organization of the Market and Competition

Several structural factors impede the establishment of a market-based competitive economy. Resources are scarce. The bulk of the economy is based on the (largely informal and subsistence-focused) agricultural sector, which accounts for just over 30% of GDP but occupies close to 90% of the population. More market-based competition in this sphere is hardly useful, as it would not benefit the rural poor.

Market-based
competition
4

Competition is further hampered by the fragile political arrangement between former adversaries, and a general tendency toward clientelistic politics.

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

Burundi occupies a lower Doing Business rank than in the previous year (152nd versus 150th), but has improved in many procedures. Due to the difficult access to financing and high corruption, Burundi remains one of the least competitive economies in the world and scores worse than two years ago (ranked 139th out of 144 countries in the Global Competitiveness Report 2014-2015 vs. 134th in 2012-2013).

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

Anti-monopoly
policy
4

In the Global Competitiveness Index 2014-2015, Burundi ranks slightly better than two years ago (up two ranks) at 134th (out of 144 countries) in the category “effectiveness of anti-monopoly policy.” The anti-monopoly policy is hardly enforced and not much attention is paid to this topic.

Burundi has committed to trade liberalization policies as laid out by the Common Market for Eastern and Southern Africa (COMESA) Free Trade Agreement, which Burundi joined in 2004, and the EAC Customs Union, which it joined in 2009. Both regional organizations recently committed to bilateral trade deals with the EU in the framework of the Economic Partnership Agreements (EPAs). This could in the near future also influence trade liberalization in Burundi. Burundi’s average tariff rate is 6.4%.

Liberalization of
foreign trade
4

Burundi does not yet fully comply with the WTO's common external tariff (CET) system.

Despite some progress in harmonizing trade within COMESA and EAC, non-tariff barriers (NTBs) remain high in Burundi. Customs and administrative procedures are lengthy and partly discriminatory. Especially the complex and at times confusing clearance formalities and control operations at the Bujumbura port are considered an obstacle to free trade.

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

The banking system is moderately well organized and has a presence in most provincial centers, but is to a large extent concentrated in the capital city Bujumbura. Many of the rural poor do not have access to finances. However, in the last years, micro-financing has made some progress.

The most important banks are foreign owned, mostly Belgian.

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

Although the government has only minor shares in commercial banks, it manages to exert considerable influence on the appointment of managers and board members and exercise a certain level of control over the financial sector, resulting in conflicts with private shareholders. Empirical data on the efficiency of the overall weak banking sector is not available.

The central bank is legally independent of the government, but is strongly influenced by informal oversight from the IMF.

8 | Currency and Price Stability

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

Continuously high inflation is a major threat for the vast rural population, which lives on the breadline. Inflation was extremely high in 2008 (26%). After a brief decrease

Banking system
3

Anti-inflation /
forex policy
6

in 2009 – 2010 (on average 4.3%), inflation reached another peak in 2012 (18%) and then decreased to a moderate 5.4% in 2014 (estimates), despite heavy foreign aid. This could be due to lower taxes for basic goods in 2012. Inflation is projected at 7% for 2015-2016. Inflation control is difficult, with prices for food and general agricultural products, a high proportion of the country's consumable goods, subject to the vagaries of changing weather conditions.

The government's heavy reliance on the inflow of aid resources has forced it to more or less follow conditions of financial orthodoxy set by external donor institutions. This is reflected in the second generation PRSP (2012). In principle, however, fiscal discipline is a low priority for the government, as opposed to more popular agendas such as the extension of basic services. Given the extensive quota system laid out in the constitution, the government is obliged to maintain an oversized army – whose engagement in Somalia has much alleviated the financial burden that comes with it – as well as public sector. Fiscal deficit – financed by domestic borrowing – will further increase due to election expenditures in 2015 – most of all in the unlikely case that external donors decide to cut aid due to bad government performance. Nevertheless, during its latest review of the three-year ECF, in December 2014, the IMF considered government performance broadly satisfactory, despite delays in reform implementation, and gave a positive outlook for 2015, with decreasing inflation and stable economic growth at around 4.7%.

Macrostability

6

9 | Private Property

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

Property rights

5

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

Private enterprise
6

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

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

In principle, existing private companies can operate freely, however many constraints remain. Despite improvement in many procedures, Burundi occupies a lower Doing Business rank than in the previous year (152nd versus 150th).

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

The CNDD-FDD elite increasingly tries to control the formal private sector but has difficulties due to a lack of capital and expertise. This can be read as a sign that there are at least limits to the power and capacity of the ruling party, despite its control of political institutions and parts of the security apparatus.

10 | Welfare Regime

Burundi lacks public social safety nets for most of its population, excepting a small group of government and parastatal institution employees, including the top echelons of the military. Even for these figures, resources provided are fairly minimal. Recently, policymakers decided to subsidize maternity care and healthcare for children under five years of age and HIV and malaria patients. The government's goal, set in the PRSP II, of enrolling 50% of the population in the informal sector and 40% of the rural sector in a health insurance system appears out of reach in the near future.

Social safety nets
3

The long years of civil war have disturbed or even destroyed traditional social structures in many areas, but most features of traditional rural solidarity systems have survived to a considerable extent, and still provide a crucial foundation for at least a

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

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

Since the introduction of free primary education in 2005, access to basic education is distributed evenly among ethnic groups and genders. Looking at higher education levels, discrimination against women is considerable (with only 51% female-to-male enrollment in tertiary education, as opposed to 99% in primary education). In terms of access to employment, ethnic and gender quotas have begun to improve access to opportunities for the hitherto marginalized groups of Hutu and women, but this is only the case where the quotas apply (i.e., in political and administrative positions). Furthermore, the government's clientelistic politics (and need for control) favors individuals loyal to the CNDD-FDD at all levels of the public sector. Thus, even in rural areas, political affiliation is increasingly becoming 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.

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

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

Equal opportunity
5

11 | Economic Performance

Burundi remains one of the poorest countries in the world, with 93% of the population living under the poverty line of \$2 a day (2006) and per capita GDP based on purchasing power parity growing very slowly from \$700 in 2009 to around \$770 in 2013.

Output strength

4

In Africa, only the Democratic Republic of Congo's and the Central African Republic's PPP GDP is lower. More than 90% of the population lives on tiny plots of land that hardly yield enough food for subsistence, leading to the undernourishment of large parts of the population and the requirement to import food.

Although inflation decreased to 5.4% in 2014, the effects of enormous ups and downs in inflation rates during previous years still have an impact.

Despite a number of initiatives undertaken since 2005, overall macroeconomic performance has remained disappointing and even lackluster. This has been partially attributable to unfavorable climatic conditions (drought, floods) and corruption.

A new ECF (about \$6 million) was accorded in February 2012. Despite delays in reform implementation, the IMF confirmed during its last review of the ongoing ECF that the macroeconomic goals, including continuing GDP growth at around 4.7% have been met and gave a positive outlook for 2015. Nevertheless, growth remains below the African average. Major reforms of tax revenue, finance and debt management are still due.

The negative current account balance slightly decreased to -10% of GDP, but this figure has little informative value as almost 50% of Burundi's GDP is externally funded. Given the limited possibilities for increasing the production of agrarian export goods (coffee, tea, cotton, sugar), the value of imports has continually grown faster than have export receipts, with no sign of improvement of the structural trade deficit.

The government has recently initiated some major infrastructure projects, including fiber optics, hydropower and roads construction and a pilot project in nickel mining, but these plans remain rather ad hoc and unsustainable. The government still relies almost fully on foreign aid. The second PRSP set unrealistic goals as it is largely drafted to please the IMF and World Bank and hardly considers the particular situation in Burundi.

12 | Sustainability

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

Environmental
policy
4

Burundi occupies one of the lowest ranks in the Environmental Performance Index (EPI 2014: 167th out of 187th – a trend that is rather stable in recent years). The most pressing problems are soil erosion due to overgrazing, monoculture (most of all, palm oil in the low lands) and the extension of agriculture into marginal lands, the decline in Lake Tanganyika's water level and deforestation for agriculture and fuel. Given the extreme land scarcity and population pressure due to high birth rates and refugee returns, measures to stop environmental degradation are urgently needed. Conflicts over land will be on the increase in coming years.

The government has so far neglected these pressing issues, despite commitments to environmental protection and sustainable resource management (as set in the second PRSP).

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

Education policy /
R&D
3

One of the popular measures of the CNDD-FDD after 2005 was to introduce free primary education for all. As a consequence, the number of pupils suddenly shot up without adequate provision of teachers, classrooms or school supplies. Teacher strikes have become frequent and, in 2014, some important boarding schools had to send their pupils back home due to a lack of food provisions for the children.

Gross primary school enrollment continuously increased to 137% (2012, due to older children going to school now) with near gender equality. The enrollment rate plunged to 28% (2012) for secondary education, and stood at only 3% (2010) for tertiary education, with female-to-male enrollment dropping to 73% (2012) for secondary and only 51% (2010) for tertiary education.

Due to the long marginalization of the majority Hutu population, the literacy rate is below the African average.

Research expenditures are very low and largely externally financed. Expensive modern R&D activities are practically nonexistent. The national university in Bujumbura is inadequately equipped and the level of teaching quality is low.

Due to the government's neglect of higher education, politicized employment policies and an increase in petty corruption among university staff, Burundian degrees are losing credibility in other African countries. The share of public spending on education was as high as 5.8% of GDP in 2012. However, this rather large share of GDP is somewhat misleading, as most of it is externally financed.

Transformation Management

I. Level of Difficulty

The structural constraints hampering successful political and economic transformation are extremely high. They include a very low absolute level of socioeconomic development; a difficult geographical situation (landlocked, high-cost transport arteries); precarious ecological conditions; overpopulation in combination with limited land resources; severe poverty; the need to integrate many returning refugees, internally displaced persons and ex-combatants back into society; poor infrastructure; a lingering ethnic polarization (although this no longer inevitably present in daily life) with memories of a very violent recent history; a generally low level of education (mainly among Hutus and generally among the rural population); a lack of experience with market-based entrepreneurship; and a still relatively inexperienced group of political leaders (from the standpoint of technical and administrative competencies).

Structural
constraints
9

Traditions of civil society organization are fairly weak, and largely confined to the capital, although this situation has begun to change quite remarkably during the last few years. More organized forms of civil society are beginning to emerge at the local level, and Bujumbura-based NGOs are expanding their activities into rural areas.

Civil society
traditions
8

Growing political polarization is also felt in the realm of civil society, confronting traditional NGOs which are perceived by many Hutu and the ruling party as loyal to the former Tutsi government, and younger but increasingly influential organizations largely controlled by the CNDD-FDD (called “Nyakuri,” meaning “true” in Kirundi). Given the advantage in education and organizational capacity, long-established organizations such as Ligue ITEKA, OLUCOME and others (most of which are organized under the umbrella of the FORSC) are respected partners for donors, which gives rise to the argument by the CNDD-FDD, and those NGOs loyal to it, that the international community is in cahoots with the old Tutsi elite.

The ruling party tries to restrict and control civil society as much as possible, partly by legal means, partly by blatant harassment.

Despite its shortcomings, civil society – most of all, the independent media – was in recent years the only credible counterbalance to the increasingly authoritarian regime and a fragmented and unreliable political opposition. However, becoming willingly or unwillingly involved in political power struggles, the credibility and conflict-mediating role of civil society began to shrink.

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

The 2000 peace agreement and subsequent constitution very much focused on the alleviation of ethnic discrimination by introducing a complex ethnic power-sharing system. This political order, in combination with an ethnically mixed army and a regime shift to a democratically legitimate Hutu-led government has, to a large extent, led to the appeasement of the original inter-communal conflict to the point that ethnicity has ceased to be the most important conflict line.

However, some fundamental underlying conflict issues – a huge gap between the (urban) rich and the (rural) poor, clientelism, corruption, oppression of dissident voices, and the concentration of power in the hands of a small and often ruthless elite – have not been addressed.

This has led to the somewhat paradoxical situation in which the ruling CNDD-FDD, although largely adhering to the legal requirements of the constitution (e.g., ethnic quotas and the inclusion of other political parties), continues to hold political power almost exclusively in its own hands. The result is the resurgence of a fierce power struggle between the CNDD-FDD and its political opposition. This has led in recent years to violence and acts of harassment on both sides, as well as crackdowns on demonstrations, politically motivated murder and armed clashes involving the FNL, as well as small rebel formations and government forces.

Conflict intensity

7

II. Management Performance

14 | Steering Capability

Question
Score

Prioritization

4

Officially, the government is willing to focus on long-term goals regarding constitutional democracy and a socially responsible market economy as laid out in a socioeconomic program dubbed Vision Burundi 2025. Since October 2012, the second PRSP is supposed to translate the strategic pillars of Vision Burundi 2025 into projects and programs. The PRSP follows almost 100% of the guidelines of the IMF and World Bank and hardly takes Burundi's social, political and economic particularities into consideration. It is largely written in order to secure further external funding and donors' belief in its effectiveness and hardly realistic. Nevertheless, donors granted \$2.5 billion in international aid in 2012 – showing their continuing interest in staying involved in Burundi, despite concerns about serious governance deficiencies.

Strategic priority has so far been given to superficial programs which increase the popularity of the government, such as primary education and maternal and child health.

The capacity of the government for autonomous policy formulation is and will remain extremely limited. Given the country's overwhelming dependency on external aid and the relative lack of national expertise, the role of external agencies such as the International Bank for Reconstruction and Development (IBRD) and the IMF in setting priorities will remain very strong.

Despite the rhetorical commitment and the international support, it is doubtful that the government will be able to continuously follow and maintain its set priorities. Very substantial political and socioeconomic problems, and the pressing demands for short-term relief of the dire socioeconomic situation of the population, restrain the government's ability to pursue strategic long-term goals. Furthermore, amid a hostile political climate and the government's increasingly authoritarian style, long-term goals are very often sidelined by short-term interests, particularly maintaining and extending the ruling elite's power. This tendency worsened with the approach of the 2015 elections.

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

Implementation
4

With regard to its political aims, the ruling party has been quite successful in conceiving of programs securing its political appeal, that is, policies regarding the provision of basic services, such as schooling or health care. However, implementation is more of a quantitative than qualitative nature, and not necessarily in compliance with objective overall developmental goals. The initial euphoria after many years of war has given way to widespread disillusionment concerning an improvement in the situation of the majority of the population.

Despite major reform progress concerning priorities set by international organizations, according to the last review by the IMF, implementation of tax revenue, finance and debt management reforms are still due.

The political leadership has generally proved to be fairly flexible, even to some extent simply opportunistic, in its pursuit of concrete policy measures.

Policy learning
4

It has clearly learned from past experience with respect to avoiding ethnic polarization, and has been cautious to adhere, for the most part, to the provisions of the constitution. This tendency has been seriously tainted by its attempt to change the constitution in 2014.

The overcoming of ethnic polarization is a historical step that outweighs many other defects of the government and is conceived as such by the population. However, it has become increasingly apparent that the ruling party's elite has problems unlearning the military approach to politics that the CNDD-FDD embraced during its time as an armed movement. Past experience concerning the violent consequences of authoritarianism, state-sponsored violence and exclusion do not seem to impede the CNDD-FDD from resorting to similar measures as former authoritarian governments. Instead, the government increasingly learns – albeit slowly – to deal with the international community's habitus, demands and support in order to advance the short-term interests of the ruling elite, including the consolidation of its own power.

There are hardly any innovative approaches with respect to socioeconomic policies. The prevailing attitude is one of pragmatism, largely in line with the requirements outlined by donors. Governmental activities are generally characterized by administrative routine, and much less by efforts to introduce dynamic or innovative new approaches. Widespread postwar expectations of new, dynamic development policies have thus been disappointed so far.

15 | Resource Efficiency

In all past regimes in Burundi, the state's efficiency in utilizing financial and human resources was low, and largely determined by patronage considerations, a bloated bureaucracy and the resource hunger of dominant security organs. With a deepening corruption crisis, the government has lost much credibility with regards to its commitment to the efficient use of assets. Efficient public recruitment is constrained by the necessity to fulfill ethnic and gender quota. Most importantly, however, procurement is riddled with political influence. Effective and independent auditing is almost nonexistent.

Efficient use of
assets

3

Decentralization reforms are underway; however, the CNDD-FDD is omnipresent even at lower levels of the administration and, thus far, decentralization concerns service delivery almost exclusively and less political self-government and financial autonomy. Typically for a post-war setting, the government is forced to retain an oversized military and police force.

Budget plans have repeatedly been too ambitious and real expenditures have often deviated a great deal from initial calculations, owing to overoptimistic growth and revenue forecasts. This is due to both nontransparent budget planning and inexperienced government personnel.

Burundi's concessional external debt remained relatively stable over the last few years, ranging from \$350 to \$400 million.

The complex composition of the government, mandated by the constitution's quota requirements, makes efficient coordination of the activities of various ministries and other public bodies very difficult, since the politicians in decision-making positions tend to seek to bolster their own public profiles and pursue their own priorities without adhering to a coherent and coordinated overall government strategy. The almost unchallenged control the CNDD-FDD gained after the boycotted elections of 2010 facilitates policy coordination. However, this does not necessarily improve matters. The ruling style of the government has become increasingly authoritarian, exerting authority based on patronage and corruption rather than democratic standards and efficiency.

Policy
coordination

4

The government has put the fight against corruption at the center of its program since the first elections in 2005, launched a "zero tolerance" campaign and designed a national strategy for good governance, including the creation of a series of anti-corruption agencies, such as a specialized anti-corruption police brigade and an anti-corruption court.

Anti-corruption
policy

2

The possibilities for large-scale corruption are limited, given the scarceness of resources, the tight control over almost all development projects and efforts by

international and bilateral aid agencies. Nevertheless, when possibilities emerge, there is an alarmingly high level of corruption at all levels, including the very top of the government. Petty corruption is especially pronounced in the police and judiciary. Isolated cases of corruption have been prosecuted, but, by and large, a climate of impunity prevails.

Anti-corruption measures have become even less credible since the ruling party gained almost unchallenged control over all state administration after the election boycott in 2010. Public procurement and employment in the public sector have become increasingly politicized. Furthermore, the government tries to capture the private sector, extending its control over banks, land tenure and privatization processes. Proximity to the government is generally prioritized over the criteria of competence and merit in all sectors. In fact, clientelism is essential to the CNDD-FDD's cohesion, and anti-corruption measures are therefore almost exclusively designed to appease donors.

Given the small size and strong centralization of the Burundian economy, this is a serious source of potential violent conflict in the future.

16 | Consensus-Building

So far, all relevant actors have agreed – albeit reluctantly – with the concept of consociational democracy as codified in the 2005 constitution, stipulating a complex ethnic (and gender) quota system in all public elected and administrative bodies and the security organs, including the overrepresentation of Tutsi which was an indispensable security guarantee to end the civil war. However, in early 2013, the president introduced a constitutional amendment which affected the core principles of the consociational model, including the ethnic quota and the system of two vice presidents. The latter is the only provision stipulating not only ethnic but also political power-sharing, as the two vice presidents cannot be of the same ethnicity and “political party.” Traditionally, one of the posts goes to the former ruling party UPRONA. Given the fact, that the ruling CNDD-FDD is able to fill the Tutsi quota in the institutions with its own people, the post remains the last bastion of the traditional Tutsi representatives – apart from the army. Despite attempts at co-optation, the CNDD-FDD lacked one vote in parliament to pass the bill. The fundamental agreement on consociational rule has since been deeply unsettled. Even before this new turn, it has already become apparent that the consociational model, even as laid out in the 2005 constitution, does not exclude a relapse into a de facto one-party state. Whereas the current government fulfills all the requirements of the constitution (and bases its legitimacy on legal conformity and the fact that it is democratically elected), the opposition decries the ruling party for acting against the “spirit of Arusha” (and the constitution), which was built around the idea of consensus and political dialogue. Since the contested elections of 2010, there is a

Consensus on goals

4

decreasing consensus on the interpretation of the peace agreement and constitution. Furthermore, pro-democratic arguments of both the government and the opposition do not necessarily mean that either side agrees with democratic values per se. Rather, discourse on democracy is used as a means to legitimize one's own and discredit the other's position, as well as to retain or regain power.

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

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

Anti-democratic
actors
4

During the election period of 2010, the CNDD-FDD exploited its control of the public administration, thereby severely distorting the playing field in the electoral contest. The opposition, for its part, violated the principles of competitive democracy by boycotting the presidential and parliamentary elections (except UPRONA). Attacks by the FNL and clashes between members of the MSD and the police suggest that parts of the opposition have a tendency to resort to violence as a result of having lost faith in the democratic process.

The CNDD-FDD rejects any political dialogue, claiming that the opposition squandered its legitimacy by disrespecting the democratic values of the Burundian state. At the same time, the government has made use of all available means to control and intimidate dissident voices (co-optation, legal restrictions, and intimidation). Efforts by national and international NGOs (and churches) to establish a dialogue between the government and the opposition have repeatedly been boycotted by different competing groups. Thus, all sides engage in unfair play while claiming that they only react to the other side's antidemocratic behavior.

The electoral contest in the run-up to the 2015 elections was already flawed. The government tries to neutralize competitors by legal and illegal means (such as arrests and intimidation). The opposition underlines its willingness to participate in the elections and new alliances are being formed, but some opposition politicians have already withdrawn their cooperation from the electoral commission, which they consider biased.

The ethnic quota system theoretically prevents the army from staging a coup d'état or engaging in one-sided violence. The police is much more politicized due to its uneven make-up in terms of ethnic and political affiliation – large parts of the police are still former Hutu rebels. The same is true for the secret service. The ruling party's youth wing, Imbonerakure, is especially problematic and increasingly showing characteristics of a regime militia used to oppress dissident voices. The Imbonerakure are hardly controllable by any reform-oriented actor. Even voices within the CNDD-FDD critical of the Imbonerakure have been silenced.

The consociational democratic model stipulated by the 2005 constitution is meant to overcome the deep-rooted political, social and economic cleavages that have long divided the Burundian society. The complex architecture of the new political order focuses on discrimination along ethnic lines and to date has been able to gradually alleviate the ethnic conflict to the point that ethnicity has ceased to be the primary line of confrontation.

The interethnic confrontation has now shifted to an increasingly authoritarian system of governance and a power contest between different political parties (which are still associated with ethnic groups, although the contest has broadened to include intra-Hutu competition). This cleavage today permeates all levels of the polity in the capital and in those areas where opposition parties (mainly the FNL and the MSD) have a constituency. The result is a climate of fear of both repressive measures by the government and its stooges and violence on the side of the opposition, such as attacks by a rearmed FNL and small clashes between members of the MSD and police and/or members of the CNDD-FDD. Given the war fatigue in the population, it is unlikely that the cleavage will result in serious armed conflict. However, the risk of falling back into a repressive one-party state like the UPRONA military regime of the past looms large. As the political leadership is part of the problem, it cannot be expected to play a moderating role. On the contrary, recent developments suggest that political leaders are increasingly falling back into old patterns of cleavage exacerbation. This is especially true for the ruling party (e.g., through openly questioning the consociational model, legal restrictions on opposition parties, harassment of civil society and opposition members and violence by the Imbonerakure), but the opposition also has a share in contributing to the escalation.

Efforts by churches and national and international civil society organizations have so far not yielded results. This is not surprising, as the conflict is less ideological than related to personal power. As long as both sides try to secure their privilege, dialogue will only be successful if it is aimed at accommodating elite interests.

Cleavage /
conflict
management
5

The present political leadership – like that of previous regimes – does not feel comfortable enough or sufficiently established to freely and generously accommodate the critical expressions of civil society groups, even though such groups are relatively weak, and limited in number and scope. The government regards established civil society (most importantly human rights defenders and independent media) as Tutsi-dominated and hostile and makes use of any available means (legal and illegal) to suppress it. Intimidation, harassment and outright persecution by security agents of the state are on the rise. Within this logic, the government encourages the creation of alternative (read: loyal to the government) civil society organizations (called “nyakuri,” meaning “true” in Kirundi).

Civil society participation
3

There is a vague recognition of the need to deal constructively with the violent history of Burundi, but this has been largely ignored, in the interest of preserving the privilege of the politico-military elite – both on the side of the ruling party and on the side of its adversaries. In fact, the rejection of mechanisms to legally prosecute past injustices is one of the few points of consensus between the government and the opposition.

Reconciliation
4

Given the fact that most political and military elites are in one way or another implicated in the commission of atrocities during the war years and earlier ethnic pogroms, they are reluctant to dig too deeply into the past. A truth and reconciliation commission (TRC) was proposed in the Arusha Peace Agreement. However, despite heavy international pressure, implementation has consistently been postponed. A new TRC law in 2014 foresees truth finding and reconciliation, but excludes legal prosecution – amounting to a de facto amnesty. Although the majority of people interviewed in a public consultation by the technical committee which has been preparing the TRC since 2011, as well as the United Nations, opted for a mixed commission, the TRC is purely national. Furthermore, the election of 11 TRC members in December 2014 provoked widespread criticism from civil society activists, who deplore that four of the members are politically affiliated and that civil society members have not been included.

17 | International Cooperation

Given the country’s structural deficiencies and the devastating effects of the long years of war, the government has no option but to rely very heavily on the support of international donors. Therefore, the state administration generally attempts to at least appear to make good use of external support, knowing that there are hardly any other sources available. However, it is also aware of the interest of foreign donors in implementing their programs in Burundi and in treating the country as a success case of post-conflict peacebuilding. Pervasive corruption and an increasingly authoritarian style of government, as well as many cases of expected (and almost unavoidable) shortcomings in dealing with aid procedures, have, for example, not deterred

Effective use of support
6

international donors from granting unexpectedly high support (around \$2.5 billion in 2012). The government takes a clear stance concerning the closing of the BNUB office, exhibiting a growing self-confidence towards the international community.

The second PRSP was drafted mostly externally and did not take into account hard facts regarding Burundian political and economic dynamics; thus, it is hardly realistic.

When executing aid programs, the government tries to act as a reliable and credible partner in its dealings with international actors. However, credibility has seriously decreased with a deepening corruption crisis and an increasingly authoritarian governing style.

Credibility

5

The democratic legitimacy of the government had already been severely tainted in the course of the 2010 elections and has not improved since, given new restrictive laws on opposition and media, harassment and persecution of human rights activists and opposition politicians and the recent attempt to change key parts of the constitution, including the presidential term limit. However, the reactions of international donors are naturally slow and cautious, and the Burundian government is fully aware of this. The unexpectedly high donor grant of \$2.5 billion in 2012 confirmed the interest of donors in continuing their cooperation with Burundi.

The government is fully aware of the need for good neighborly relations with all countries in the sub-region. Fairly cordial relations were established above all with Tanzania and Rwanda, the country's most important neighbors. However, relations with both countries have soured. Tensions with Tanzania revolve around the presence of Burundian refugees on Tanzanian territory and their return. Relations with Rwanda have soured due to Kigali's quarrels with Dar es Salaam. The recent discovery of unidentified corpses in a lake bordering Rwanda has furthermore caused concern about relations between the predominantly Hutu government of Burundi and the predominantly Tutsi government of Rwanda. The presence of the FDN on Congolese territory has caused some polemics within Burundi, but has not soured relations with Kinshasa – a sign that both governments made a (non-public) agreement about it.

Regional
cooperation

7

Since its full integration into the East African Community (EAC) in July 2007, Burundi remains the community's weakest member, appears to be little committed and largely depends on the other EAC members' willingness to pursue the ambitious agenda of the EAC. In 2014, a cross-border payment system and the expansion of the single customs territory advanced the EAC, but a lot still remains to be done if the community is to alleviate Burundi's socioeconomic problems.

Burundi provides large numbers of peacekeepers to the African Union Mission to Somalia (AMISOM) and some military and police to other conflicts, such as Chad and the Central African Republic. The rewards to the government in terms of income and training of soldiers are important for financing the army.

Strategic Outlook

At the time of writing (January 2015), Burundi is at the crossroads of its political future. The upcoming elections will be decisive for the country's future development – either towards a less deficient political system or towards an autocratic government.

Over the last two years, the CNDD-FDD has reinforced its control over the entire government. Although the constellation of the government is in line with the principles laid out in the constitution, the country is increasingly becoming a de facto one-party state. The army remains the main guarantor of the current arrangement. Although the ethnic balance within the army, and the (albeit decreasing) influence of Tutsi generals, will most probably prevent the country from falling back into a situation of civil war, the army does not prevent the government from becoming increasingly autocratic.

Despite recent resistance to the constitutional amendment of the coalition partners UPRONA and FRODEBU-Nyakuri, which hitherto largely adhered to the ruling party's will, the parliamentary and extra-parliamentary opposition remains weak, opportunistic, undemocratic and vulnerable to manipulation by the CNDD-FDD. Harassment and intimidation by the security organs of opposition members, independent media and civil society activists are on the increase and will further stabilize the ruling party's power. Cracks within the latter are a cause for concern. Nkurunziza's attempts to regain international legitimacy by ousting notorious hardliners from central government positions should be regarded with caution – these are more attempts to centralize power in his hands – potentially leading to an omnipotent presidency and trouble with alienated strongmen – than a serious concession to internal and external criticism.

At the time of writing, it seems more than probable that Nkurunziza will run for a third term and rule the country for another five years. Even after the failed attempt to change the constitution, his possibilities to do so are manifold (introduce another constitutional amendment, interpret the current constitution in his favor with or without the backing of the Constitutional Court). Given the huge advantages of incumbency, the continuing popularity of the CNDD-FDD within the rural population, and the weak and fragmented opposition, a victory seems inevitable. Although the political opposition has made efforts to reunite in recent months, its cooperation remains opportunistic, parties are fragmented and no credible candidate to counter Nkurunziza's re-election is in sight.

Given these circumstances, international donors should seriously reassess election support, as well as their overall aid strategies. This is not only important with regard to the situation in Burundi, but also because similar scenarios are looming large in DRC, Rwanda and Congo-Brazzaville. However, with the closing of the BNUB office, an important international critic will leave the scene, which makes it more difficult for external donors to seriously criticize and credibly condition their own policies. The latter should focus on strengthening what remains of the post-

war democratic transformation by taking a hard stance towards the government's crackdown on civil society, media and the opposition and supporting the latter – albeit with the necessary caution. The simple fact that a party is in opposition to and suffers from oppression from the increasingly authoritarian government can mask the fact that many opposition parties present no viable alternative, with their weak structures and opportunistic and notorious leaders (whose tendency towards authoritarian government and/or lists of war crimes do not necessarily fall short of those of the CNDD-FDD elite). Support for civil society and the media should be a priority of international donors. This includes active support of independent media and human rights defenders and taking a clear stance against oppressive laws that effectively restrict dissident voices. Any support of civil society and the media requires careful assessment though, given the proximity of many organizations to either the old (UPRONA) or the new (CNDD-FDD) regime.

Given the high population pressure, extreme land scarcity and increasing droughts, there is a pronounced need for improved environmental protection measures suitable to the current socioeconomic situation, which have so far been neglected. Any development politics concerning land-governance should be very carefully assessed, given the current contestation of the CNTB and the high conflict potential land issues hold.

A lot remains to be done concerning the transformation of the economy towards greater social sustainability and equality orientation. Corruption and nepotism are on the rise. The current tendency of international donors risks sustaining continuous aid without meaningful conditions, as aid transfers are less costly than renewed civil war, especially with regard to developments in the neighboring DRC. However, it will be important to focus on the implementation of the (so far rhetorical) promises of political and economic reform in order to improve the dire situation of large parts of the rural population and not to further exacerbate the increasingly polarized political climate. Externally drafted PRSPs that are unrealistic, in that they do not take the situation on the ground into consideration, but instead aspire to goals set by the IMF and World Bank, are obviously not the best means to reach this aim.

The most promising long-term possibilities rest in the promotion of tourism and services, and particularly in the promotion of mining and energy production. Donors should focus on development in these areas. Major projects have already been started. However, it will take many years until they yield results and they will not significantly alleviate the problem of unemployment. Therefore, Burundi will remain for an indefinite time dependent on foreign aid.