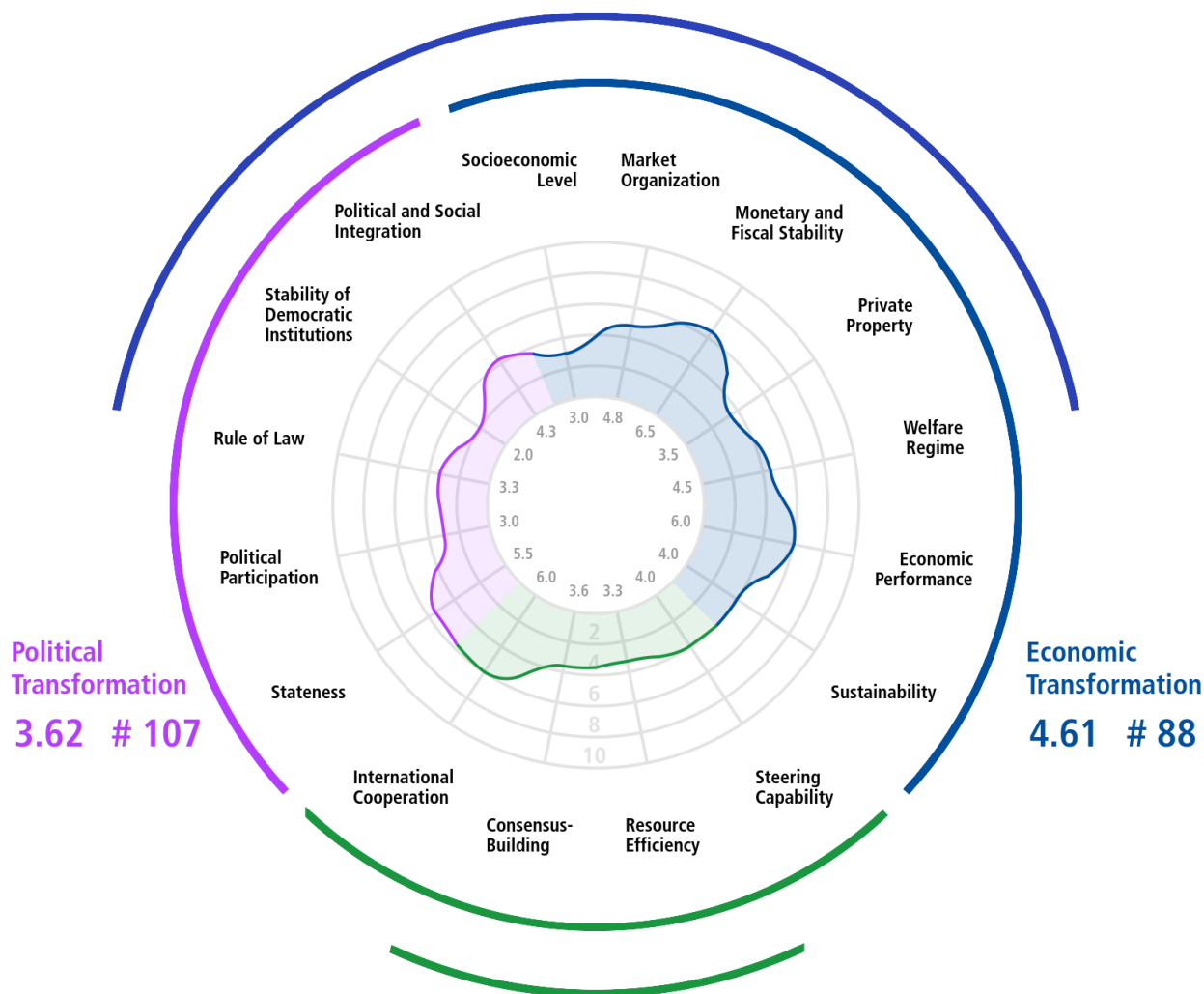


Cameroon

Status Index

4.11 # 105

on 1-10 scale out of 137



Political Transformation
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on 1-10 scale out of 137

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

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Key Indicators

Population	M	26.5	HDI	0.563	GDP p.c., PPP \$	3773
Pop. growth ¹	% p.a.	2.6	HDI rank of 189	153	Gini Index	46.6
Life expectancy	years	59.3	UN Education Index	0.547	Poverty ³	% 47.0
Urban population	%	57.6	Gender inequality ²	0.560	Aid per capita \$	51.6

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

Executive Summary

There has been little change in the political and economic conditions in Cameroon. Despite seriously weakening secessionist militias, the government has not managed to resolve the conflict in English-speaking regions. The Anglophone conflict continues to significantly impact the integrity of the state, social integration and socioeconomic development. Controversial elections further entrenched the rule of President Paul Biya and the Cameroon People's Democratic Movement (CPDM) and perpetuated an essentially autocratic regime. Reforms to combat corruption and transform the economy have stalled. Cameroon has maintained its role as a credible international partner on several issues but has failed to create mechanisms that would allow it to manage transformation. There is substantial resistance to reforms that could undermine the current regime, and therefore Cameroon struggles to strategize its development goals and use its resources more effectively.

The Anglophone crisis continued to dominate political discourse in Cameroon. The government escalated its brutal counterinsurgency efforts. However, insurgent groups have been able to attack government assets with ease. For its part, the insurgency movement is split across multiple political factions and dozens of local militias. These militias have increasingly targeted civilians in retaliation for perceived collaboration with the government or in order to extort them. In October 2019, the government convened a Major National Dialogue, with the intention of fostering a solution to the conflict. However, some Anglophone factions boycotted the proceedings. Since then, the government has granted Anglophone regions "special status" and allowed indirect regional council elections for the first time. These developments were met with skepticism by major Anglophone groups and are primarily seen as symbolic. In 2020, the government announced a major reconstruction program, but this has not yet been implemented. The diversion of troops to Anglophone regions has exacerbated the security situation in the Extreme North Region and Cameroon's conflict with Boko Haram.

The autocratic nature of Cameroon continues to prevent political and economic reform. The legitimacy of elections held in 2019 and 2020 is questionable given the security situation in Anglophone areas. The current party of government owes its political dominance to its historical status as the former ruling party during Cameroon's period of single-party rule. Cameroon maintained positive economic growth and moderate macroeconomic conditions, but also faced significant headwinds given the slowdown in economic activity in Anglophone regions and the suspension of production at the SONARA oil refinery. Fundamentally, public corruption and state intervention in the economy remain the key impediments to broader economic growth. The rate of improvement in human development is flat, private investment is constrained and there is an alarming growth in public debt. Patronage and centralization of power are key features of the regime. While there are islands of reform, the autocratic nature of Biya's administration largely precludes real transformation.

Internationally, Cameroon kept its position as the key pillar of the CEMAC region and remained engaged with multilateral and bilateral lenders. Cameroon maintained its military cooperation with Chad and Nigeria and has been engaged in internationally led regional security operations. The perception of Cameroon as a key ally in an unstable region has removed much of the leverage that international actors have over Cameroon's political and economic transformation. While the Anglophone crisis has increased scrutiny of the administration, by and large, the international community has been unwilling to push for real change.

In March 2020, Cameroon reported its first cases of COVID-19 and has since been engaged with international actors to muster an effective response. Cameroon has been one of the major sites of COVID-19 in Africa, although the number of identified cases is still just 30,000. In response, the government mandated mask-wearing in public areas, launched a screening program and limited gatherings to 50 people. Restrictions on business establishments and educational facilities were lifted by June. In addition, Cameroon secured international funds for a three-year response program that includes tax alleviation for businesses, increased health care spending and social assistance for vulnerable households. These efforts appear to have mitigated some of the impact of COVID-19, but there are likely to be longer-term effects.

History and Characteristics of Transformation

Cameroon's economic and political trajectory post-independence is characterized by long periods of stability and economic growth, which essentially changed in the early 1990s with the dual impact of structural adjustment policies and democratization. Under Cameroon's first president, Ahmadou Ahidjo, there were improvements in agriculture, education, health care and transport. Nonetheless, Ahidjo's repressive rule over Cameroon's heavily centralized state lasted for 20 years. Moreover, Ahidjo was perceived as being biased toward his co-ethnics from northern Cameroon. The discovery in 1977 of modest offshore oil deposits significantly accelerated economic growth, but also increased rent-seeking and corruption. The political transition from Ahidjo to Paul Biya in 1982 was one of the few peaceful transfers of power in French-speaking Africa at the time. An economic crisis started in 1985 and 1986 led to a stark reduction in state spending, including in vital areas such as education and health care. While Biya promised a "New Deal" that would include structural reform, he came to rely more heavily on his southern co-ethnics, who were given senior positions in the military, government, ruling party and the economy. This exacerbated public corruption and resistance to democratic and economic reform. By the late 1980s, Cameroon was mired in a severe economic crisis.

In 1989, Cameroon entered into a structural adjustment loan agreement with the World Bank. The program included typical components, such as reforms of the banking sector, privatization of state-owned enterprises, deregulation of trade and marketing organizations, and a reduction in government expenditure. The program did not include monetary intervention since Cameroon is a member of the CFA franc zone. However, the process of reform remained sluggish until the early 2000s. The World Bank identified Cameroon as one of the most disappointing adjusters of the period. The pace of reform picked up after 2000 when some major state-owned enterprises were privatized, and competition was allowed into the banking and telecom sectors. Cameroon was eligible for the IMF's Heavily Indebted Poor Countries Initiative (HIPC), which significantly lowered Cameroon's debt burden. Cameroon made progress on stabilizing macroeconomic benchmarks and measures of well-being. Nonetheless, international lenders noted continued resistance to reform and slippages due to poor governance and rampant corruption. Cameroon began to rely heavily on non-concessional lending to finance major infrastructure projects and invested less in human development.

Cameroon's democratic transformation was driven by the economic crisis of the 1980s, but also occurred in tandem with regional developments. As in other African countries, civil society agitation, mass protests and international pressure compelled the regime to acquiesce to multiparty elections. Many parties were subsequently formed, the majority of which depended on ethnic or limited regional support. However, pressure on the regime to reform the constitution prior to the election failed, and the 1992 parliamentary and presidential elections were heavily manipulated, and resulted in a narrow victory for the regime. Since then, the regime has been able to sideline opposition and transition to "electoral authoritarianism." There have been modest

improvements in political rights and civil liberties, but no allowance has made been for a transition of power. The opposition has remained divided, and many elements have been co-opted. In 2006, the regime inaugurated the large-scale anti-corruption campaign “Operation Sparrowhawk,” which has been used to target political opponents. In 2008, the National Assembly abolished presidential term limits, which led to large-scale protests in major cities and state violence. In 2014, a wide-ranging anti-terror law was passed, which gave the regime broad discretionary powers to define crimes against the state and use military tribunals to prosecute opponents. In 2018, at the age of 85, Paul Biya won another term in office in another disputed election, marking his 35th year in power.

Cameroon has recently faced critical armed challenges to state authority. Since 2009, the jihadist group Boko Haram has operated along the Cameroonian-Nigerian border in the Extreme North Region. While the conflict is now below its 2013–14 peak, it has taken a significant toll. On the other hand, English-speaking regions in Cameroon are now in the midst of an acute conflict, as several armed separatist groups repeatedly clash with government forces. These areas have long expressed a deep sense of linguistic and cultural discrimination, which dates back to the colonial era and the abolishment of federalism in 1972. The conflict has had a devastating human impact and shut down key elements of the Cameroonian economy.

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

Transformation Status

I. Political Transformation

1 | Stateness

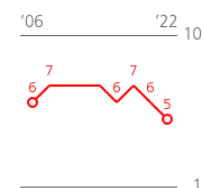
The state's monopoly on the use of legitimate force is fairly uncontested across most parts of the country. However, a few armed non-state groups have attempted to challenge it. An ongoing secessionist movement in the English-speaking regions of Cameroon (North West Region and South West Region) significantly challenges the state's monopoly on the use of force. In October 2017, the self-proclaimed Interim Government (IG) and the Ambazonian Governing Council (AGC) both claimed regional independence from Cameroon. These groups operate alongside several local and increasingly uncoordinated militias and bandits engaged in insurgent activities against the government, of which the Ambazonia Defense Forces (ADF) is the most important. Militant groups also target civilians who they perceive as having cooperated with the government or being unwilling to support insurgent activities, such as economic and political boycotts. Civilians are also frequently kidnapped for ransom as a way for groups to raise funds and for bandits to access financial resources. Despite a prolonged counterinsurgency effort marshaled by the Cameroonian government, the crisis has not abated and attempts to find a political solution have not achieved any sustainable success. Since 2017, over 500,000 people have been displaced, 45,000 have become refugees and nearly 1.5 million people are in need of humanitarian aid. Over 3,000 people have been killed in the crisis, of which over 1,000 are civilians.

The state's monopoly on the use of force is also challenged in the remote Extreme North Region. Since January 2020, the Islamist group Boko Haram has become more active, in part because Cameroonian troops were redeployed to Anglophone regions. There are numerous self-defense vigilante groups, with approximately 14,000 members, and these groups have been implicated in criminal activities like cattle stealing, smuggling and banditry. Similarly, the fallout from the conflict in Central African Republic (CAR) has impacted the eastern border. The situation worsened following the violence that accompanied the December 27, 2020, election in CAR. Armed groups engage in banditry and kidnapping, which has led to frequent border closures and limited commerce.

Question
Score

Monopoly on the
use of force

5



A large percentage of the population accepts that Cameroon is a legitimate nation-state, but the growth of the secessionist movement in English-speaking regions has presented a significant challenge. Anglophone identity is linked to Cameroon's unique bifurcated colonial heritage, which led to a federation between a larger French-speaking and a smaller English-speaking territory. A process of political centralization and the abandonment of federalism in 1972 have raised perceptions of cultural, economic and political discrimination among Anglophones. In many circles this is referred to as the "Anglophone problem." Until recently, the majority of Anglophone demands have been contained within the notion of a unified Cameroon.

A protest movement that began in November 2016 evolved into a widespread secessionist movement. There are currently two rival political bodies that advocate for "Ambazonian" independence – the Interim Government (IG) and the Ambazonian Governing Council (AGC). The former oversees the Ambazonia Self Defense Council (ASDC) and the latter the Ambazonia Defense Forces (ADF). Both groups enjoy significant popular support and have faced heavy government repression. Since January 2018, the IG has been split between a wing currently imprisoned in Cameroon under the leadership of Julius Ayuk Tabe and a diaspora wing led by Samuel Ikome Sako. Much of civil society and the political class in English-speaking regions support a return to federalism, but not necessarily secession from Cameroon. In the last few months, significant human rights abuses perpetrated by self-proclaimed secessionists and bandits have undermined the legitimacy of the secessionist movement among Anglophone citizens. While the perception of discrimination remains strong among Anglophones, the incapacity of armed groups to challenge government underlines the need for a political solution.

The Anglophone crisis has generated a broader debate about the best way to manage Cameroon's diversity, which is one of Africa's highest. The crisis is taking place in a context of accelerated ethnic polarization in which demands for decentralization reflect the ambitions of ethnic entrepreneurs and will have lingering consequences on state identity.

There is generally a separation of church and state, although this provision is not explicitly defined in the constitution. There is no official state religion in Cameroon, although the population is deeply religious. Religious freedom is guaranteed, and the legal and political order cohabits with a multitude of local religious practices. As a Catholic himself, Biya's administration enjoys close ties with members of the Catholic Church, while many northern politicians have ties to Muslim religious leaders, known as Fons or Lamidos. These latter figures have always been key allies of incumbent presidents and remained so when Biya came to power in 1982. Local religious leaders have at times been given substantial leeway to manage local affairs. Legal codes adopted from the colonial era explicitly recognize customary and Muslim law. Local courts (known as Alkali courts in Anglophone regions and

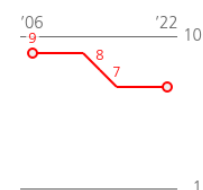
State identity

5



No interference of religious dogmas

7



Tribunaux de Premier Degré in Francophone regions) have at times overruled statutory law, especially with regard to issues of inheritance, succession and personal law. Extremist jihadists of Boko Haram have been active in northern Cameroon, but their impact on relations between the state and religion is very limited at best.

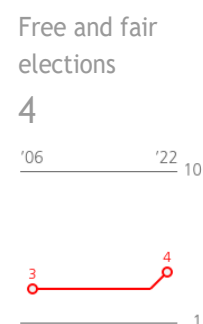
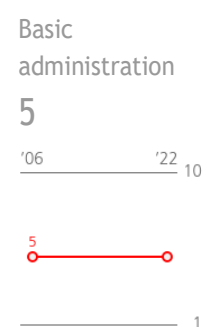
However, it should also be noted that socially conservative values espoused by major religious organizations have likely influenced the government's attitude toward the LGBTQ+ community. Same-sex sexual activity is illegal in Cameroon and can result in a sentence of up to five years in prison.

Cameroon is a deeply centralized state. Government agencies and administration are present in most parts of the country but are largely ineffective in terms of performance or the provision of public services. Cameroon is divided into 10 regions, each governed by a presidentially appointed governor and indirectly elected council. The regions are subdivided into 58 divisions or departments, which are headed by presidentially appointed divisional officers. Departments are divided into sub-divisions that correspond with 360 elected municipal councils and 14 unelected urban councils. Despite constitutional provisions, decentralization has only partially been implemented and has not translated into effective resource allocation (local councils do have the ability to levy local taxes and licensing fees). Consequently, access to public services remains limited, especially in rural areas where roughly half the population lives. Only half of the country has access to improved sanitation facilities and in rural areas this rate is even lower at 20%.

All levels of government are eroded by corruption. It is common to find instances of petty corruption among the police, judiciary, and tax and customs officials. While several high-level government officials have been prosecuted for corruption, many have had charges dropped and it is assumed that many elites in Cameroon are involved in large-scale corruption. Prosecutions of high-level elites, which is referred to locally as “Operation Sparrowhawk,” are perceived as politically motivated against Biya's rivals.

2 | Political Participation

Multiparty elections and near universal suffrage have been extended since 1992. However, concerns about electoral integrity have persisted. While outright fraud has declined, opposition parties have rejected results and accused the election management body ELECAM of bias. The president appoints all members of ELECAM, and issues with voter registration and election management have persisted. Indicatively, voter turnout has consistently declined since 1992. Elections have been postponed twice (2012 and 2018) for political purposes, and state-run media does not ensure equal access to all major candidates and parties. The incumbent president, Paul Biya, has been in power since 1982 and removed term



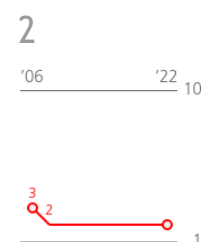
limits in 2008. Both senatorial and regional council seats are filled via an indirect election by an electoral college of municipal councilors. This gives the regime a significant advantage. Moreover, 30% of Senate seats are appointed by the president and 22% of regional councils are filled by state-recognized traditional chiefs.

The Anglophone crisis has further eroded faith in elections. In 2018, senatorial and presidential elections were held amidst a tense security environment in Anglophone regions. Turnout was only 10% due to frequent curfews and the threat of violence from separatists. Opposition parties filed over 18 complaints with the Constitutional Court, all of which were rejected. In February 2020, the SDF and MRC boycotted the legislative and municipal elections over concerns with the security environment and the impartiality of elections. Turnout in Anglophone regions was once again abysmally low and candidates who participated in the election process were violently targeted by separatist groups. Similarly, the regional council elections of December 2020 were boycotted by the main opposition parties.

While Cameroon has a nominally democratically elected legislature, regional and local councils, political power is heavily concentrated within the office of the presidency. The constitution of Cameroon provides the president with extensive formal powers; including the ability to singlehandedly appoint ministers and senior civil servants. Presidentially appointed governors, district officers, and sub-district officers wield significant political power that can override elected officials. Similarly, government-recognized traditional authorities are also dependent on the presidency and can exert influence over elected officials. The president is also the commander-in-chief of all military units and appoints the bulk of the senior officer core. Presidential power is amplified through ambiguously defined emergency powers. The president can suspend the rule of law for renewable three-month terms. These powers were expanded in 2014 with the passage of an anti-terror bill that defined terrorism as any activity that threatened the functioning of the state and allowed for certain crimes to be prosecuted in a military tribunal.

The president of Cameroon wields additional power over elected officials through his control of the ruling party and his centrality in the Cameroonian political system. Since the ruling CPDM dominates politics in Cameroon, it is the main avenue for most political ambition. As chairman of the party, the president essentially controls the political and administrative careers of party and elected body members and can cultivate a following of political loyalists. In addition, Paul Biya has been in power for over 39 years, and during that time he has created extensive patronage networks throughout the state apparatus and military. These patronage networks hold together a tenuous multiethnic coalition, which makes it difficult to accuse Biya's administration of being biased against any one ethnic group. The question of succession has loomed large in Cameroon for many years and many elites believe that a challenge to Biya's authority would lead to destabilization.

Effective power to govern



In principle, the constitution guarantees the freedom of association and assembly, but in practice these rights are significantly curtailed. Generally speaking, citizens can create associations and political parties. There are currently over 100 registered political parties and numerous civil society groups. However, in January 2017 the government used its authority under the 2014 anti-terror bill to ban two Anglophone advocacy groups: The Southern Cameroon National Council (SCNC) and the Cameroon Anglophone Civil Society Consortium (CACSC) for openly supporting the secessionist claim.

Assembly rights are more often hindered than association rights. Throughout the Anglophone crisis, the government has resorted to severe violence to counter peaceful demonstrations and used emergency declarations to impose curfews. In other parts of Cameroon, political opposition has been increasingly restricted. In the past, the state apparatus would deny permits for groups to assemble for unspecified reasons. More recently, the state has suppressed activities under the guise of the 2014 anti-terror bill and the COVID-19 pandemic. For instance, defeated presidential contender Maurice Kamto and 350 of his supporters in the MRC party were detained for nearly 10 months on charges of insurrection. In January 2020, in Yaoundé, Douala, Bafoussam and other cities across the country, police arrested several dozen protesters who participated in a rally to denounce irregularities in the October 2018 presidential election, the ongoing crisis in the two Anglophone regions and poor management of infrastructure projects associated with the 2019 African Cup of Nations. In 2020, Kamto spent 78 days under house arrest, and MRC rallies and marches were selectively banned on numerous occasions citing the COVID-19 restriction on gatherings of over 50 people implemented in March 2020. They remain banned until further notice (i.e., they remained banned at the end of the current review period), according to the Global State of Democracy indices. Gatherings of more than 10 persons were discouraged. While partly legal, necessary and proportional, the government has used restrictions in a discriminatory manner. According to the same source, members of the main opposition political party MRC have been arrested for distributing health materials among the population.

As with freedom of association and assembly, the constitution only provides token protections for freedom of speech. State media is under strict government control, while private media outlets are vocal and critical but often face intimidation. Cameroon's media regulatory body, the National Communication Council (CNC) frequently bans newspapers and sanctions journalists for reporting on censored issues and spreading supposedly false information. Cameroon's libel laws are particularly lenient, which allows the government to prosecute reporters and media outlets for defamation and insulting the presidency. The 2014 anti-terror bill has considerably expanded the range of offenses that the government can censor media over. This power was used to limit reporting on government activities during the fight against Boko Haram in northern Cameroon.

Association / assembly rights

4

'06 '22 10



1

Freedom of expression

2

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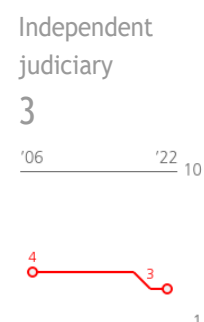
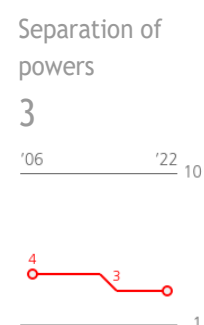
1

The environment for freedom of expression has declined noticeably since the start of the Anglophone crisis in 2016. Between 2016 and 2020, dozens of journalists and local reporters were detained under the 2014 anti-terror law for their reporting on the crisis. For instance, in 2018, editor Michel Biem Tong was charged with being an apologist for terrorism and spreading false information. In September 2020, a number of journalists were arrested following reporting on anti-government protests. Freedom of expression was also significantly curtailed when the government regularly shut down internet services to Anglophone regions between January 2017 and March 2018. Internet service has remained spotty.

3 | Rule of Law

Given the formal powers provided to the presidency and the ruling party's decade-long domination of the country's institutions, neither the legislature nor judiciary are able to hold the executive to account. The ruling party controls the overwhelming majority of seats in parliament (152 out of 180) and the Senate (88 out of 100) and controls the bulk of the local municipal councils (316 out of 360). Opposition figures do hold some leadership positions in the legislature, but their influence is limited and demands for investigative commissions are routinely blocked. Since the president can control the CPDM nomination process, this further guarantees a compliant legislature. The speaker of the National Assembly, regime loyalist Cavayé Djibril, has held the position since 1992. In the Senate, Marcel Niat Nijifendi has held the speakership since the creation of the institution in 2013. The president also essentially appoints the judiciary since the president chairs the consultative Higher Judicial Council of Cameroon. The Prime Minister's Office, which was created in 1992, is also appointed and its role is limited to government coordination. Given the extraordinary powers already afforded to the executive, a state of emergency has not been declared to combat COVID-19. Rather, the government has used its existing authority to introduce public orders for the sake of public health, and its administrative capacity to restrict movement and assembly. Legislative and judicial review of COVID-19-related decrees exists only in theory.

The judiciary in Cameroon is subordinate to the executive. While the constitution provides that judicial power is independent of legislative and executive power, the president is noted as the guarantor of the judiciary's independence. The president is responsible for appointments, promotions, and disciplinary sanctions under the advice of the Higher Judicial Council. However, the president chairs that council and appoints most of its members, and therefore wields ultimate control over the careers of justices and magistrates. While justices enjoy tenure, the president can use disciplinary standards to transfer justices, stifle promotions, temporarily dismiss justices, and force early retirement. In addition, the judiciary is highly dependent on the executive for its financing, and the executive can use decrees to delay salaries and allowances. In 2018, a Constitutional Council was finally formed, as required



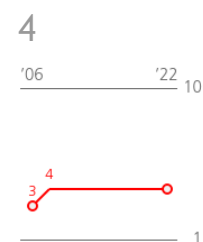
by the 1996 constitution. This council took responsibility for constitutional law away from the Supreme Court and is responsible for adjudicating disputes during presidential elections. The president appoints the Constitutional Council's eleven members for renewable six-year terms. Clément Atangana, who was perceived as a CPDM insider, was appointed as the council's president.

The independence of the judiciary is further undermined by the creation of special tribunal and court systems for the prosecution of financial crimes and terrorism. In 2011, a special criminal court was created to deal with cases of public financial misappropriation. However, many view this court as a way for the ruling regime to punish political detractors and opponents. The 2014 anti-terror bill defines terrorism broadly to include any activity that threatens the territorial integrity of the nation and allows the government to fast-track prosecutions through a military tribunal rather than through the normal judicial system. Opponents of the bill note that these new powers have been used to stifle political dissent and freedom of expression, in particular over the government's activities in northern Cameroon to combat Boko Haram and in Anglophone regions.

Public corruption is pervasive, and prosecutions of offenders are selective and typically politically motivated. Cameroon has had several institutions ostensibly created to fight corruption. In 2000 the National Anti-Corruption Observatory was founded but lacked a sustained financial basis or any independence from the executive. In 2006 the National-Anti-Corruption Commission (NACC) replaced this institution, and in 2011 the Special Criminal Court was created to prosecute state officials involved in particularly egregious corruption scandals. In 2006 a coordinated anti-corruption effort known as "Operation Sparrowhawk" was launched, which continues to operate to this day. Consequently, there have been several high-profile prosecutions of public officials including ministers, a former prime minister and several managers of state-owned corporations. According to the U.S. State Department, as in previous years, the Special Criminal Court opened new cases and issued verdicts on some pending cases. For instance, on March 8, 2019, the court placed former defense minister Edgar Alain Mebe Ngo'o and his wife in pretrial detention at the Yaoundé Kondengui Central Prison. Authorities accused them of financial malpractice in association with the purchase of military equipment, when Mebe Ngo'o served as minister of defense.

However, observers note that these anti-corruption drives are slow moving, half-hearted and used to silence critics. For instance, in 2012 former Minister of Health Urbain Awono was sentenced to 20 years in prison for embezzlement in relation to a fake contract to deliver mosquito nets to hospitals. But Awono was arrested in 2008 following his criticism of the abolishment of presidential term limits. In 2012 interior minister Marafa Hamidou Yaya was arrested and sentenced to 25 years in jail for his involvement in a scandal relating to the purchase of a new presidential jet (the "Albatross Affair"). The following year the former Prime Minister Ephraim Inoni was sentenced to 20 years in prison for embezzlement. Both Yaya and Inoni

Prosecution of
office abuse



were seen as potential challengers to President Paul Biya. Despite these prosecutions, many other trials have stalled, and Cameroon continues to top corruption watchdog lists. Likewise, the executive has not implemented a 1996 law that requires public officials to declare assets (Law 2006/001).

The biggest loophole in these anti-corruption laws lies in their inability to prevent the phenomenon. The focus seems to be on repression, which provides the president and government with yet another opportunity to use and abuse these laws to manage patronage networks.

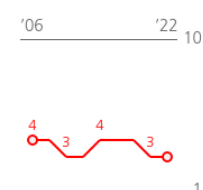
On paper, citizens enjoy the right to seek redress for alleged wrongs through administrative procedures or through the legal system. However, according to an assessment by the U.S State Department, both options involve lengthy delays and there are problems enforcing civil court orders due to bureaucratic inefficiency and pervasive corruption. Many civil rights are frequently violated, especially for political opponents. As in previous years, supporters of the Anglophone secessionist movement are increasingly targeted. Likewise, the government has declared states of emergency and imposed curfews in Anglophone areas and parts of northern Cameroon, which has significantly restricted freedom of movement. It is common for the government to arbitrarily detain hundreds of people and hold them for long periods in administrative detention. Prison conditions are notoriously harsh with overcrowding, subpar sanitation, food shortages, and systematic torture and rape. Moreover, the increased use of military tribunals under the guise of the 2014 anti-terror law has severely restricted civil rights. In 2017, leaders of the Anglophone protest movement were temporarily placed in a military tribunal without bail or due process. In 2020, Maurice Kamto was placed under virtual house arrest without formally being charge.

There is also evidence of significant discrimination and unequal access to justice. Since 2011, the LGBTI community has faced a series of trials, because homosexuality is criminalized in Cameroon. According to a 2013 Human Rights Watch report, Cameroon prosecutes homosexuality more aggressively than any other country in the world. Women also suffer from judicial and de facto discrimination in terms of inheritance, employment and property rights. Domestic violence is believed to be widespread and female genital mutilation impacts approximately 1% of women. In northern Cameroon, the government continues to monitor Muslim places of worship and has previously banned full-face veils after Boko Haram perpetrated some attacks using female suicide bombers.

Since March 2020, the government has enforced a number of measures to combat COVID-19. These include a ban on gatherings of more than 50 people, the compulsory mask-wearing in certain public settings, the closure of bars and restaurants after 6:00 p.m., restrictions on movement, and the requisition of private health care facilities, hotels and vehicles to support the state's COVID-19 response. These measures, which fall below the level of the complete lockdowns enforced in some contexts, are commensurate with public health measures taken elsewhere.

Civil rights

3



4 | Stability of Democratic Institutions

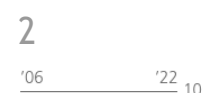
Cameroon is an autocracy with a façade of democratic republican institutions that have not developed a life of their own. The National Assembly and the Senate cannot be considered democratic institutions. Rather, these institutions are arenas where the regime can placate the ambitions of elites through patronage and corruption. Deficiencies in terms of democracy and rule of law are deep-rooted and are an inherent element of the political architecture on which Paul Biya's rule rests. This bleak reality is mirrored in popular attitudes that reflect an increasing disappointment in democracy in Cameroon. According to recent Afrobarometer surveys, over 50% of Cameroonians believe that Cameroon is non-democratic. The escalation of the crisis in Anglophone regions into a full-blown secessionist insurgency is another indicator of the failure of democratic politics in Cameroon.

The main goal of Cameroon's institutions under Biya is regime survival. Democratic institutions are subjected to this goal and therefore underperform significantly.

Cameroon is a strongly personalized electoral autocracy, with little commitment to democratic institutions. The president's centralization of power means that he can manipulate institutions to position supporters and punish detractors. The president weakens democratic institutions by holding cabinet meetings only at random. The ruling party, the Cameroon People's Democratic Movement (CPDM), does not even convene regular party congresses, as the party's chairman, President Biya, decides even these. There is no apparent institutional mechanism within the ruling party for choosing a successor, and a succession crisis is likely at some point in the future that could further destabilize democratic institutions.

Opposition parties and civil society organizations have historically participated in democratic politics but have also frequently boycotted elections or refused to participate in the National Assembly. The Anglophone conflict has further undermined belief in democratic institutions. The government's difficulty in calling on democratic institutions to mediate and find a consensus is significant in this regard.

Performance of democratic institutions



Commitment to democratic institutions



5 | Political and Social Integration

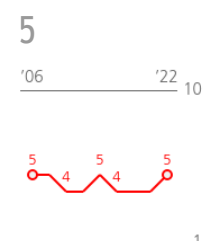
Cameroon's party system is characterized by a dominant or hegemonic ruling party, which is surrounded by an increasingly fragmented array of opposition parties. Voter volatility is not pronounced as far it is possible to assess it in an electoral autocracy and with frequent opposition boycotts of elections. Ideologically, differences are small. Polarization primarily stems from personal rivalries and tensions between the communities that parties represent (although it would be wrong to portray parties as primarily ethnic in nature).

Outside of the ruling party, political parties are institutionally weak and have limited social roots. Five parties have consistently won some representation in the National Assembly: the SDF, NUDP, UPC, UDC and MDR. Of these, only the SDF has consistently be in opposition, although it currently holds only five legislative seats. Each party is rooted in a specific region or is strongly ethnic. For instance, the UDC is only competitive in Bamoun, while the NUDP is considered a northern party. The SDF, NUDP and UPC have all experienced severe factionalism and party splits. Cameroon also has over 300 "mushroom parties," which compete in elections with no intention of winning seats. In 2018, former CPDM-member Maurice Kamto formed the MRC as a vehicle for his presidential election campaign. Although it holds no legislative seats, the MRC has become a major opposition party and appears particularly influential in urban areas.

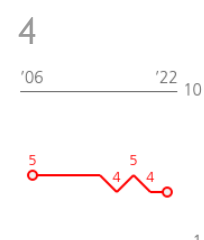
The ruling party is the only party that has a presence throughout the country, which reaches right down to the village level. However, in reality, this is an unfair advantage that the party gained due to two factors. The first factor is the party's former status as the ruling party during the country's period of single-party rule. The second is Biya's extraordinary longevity in power and the extreme centralization of power around the president. Extensive clientelistic networks have cemented the ruling party's position and eroded the support basis for opposition parties, which do not benefit from the same financial resources.

A number of societal interests are represented in Cameroon, but many interests are under-represented and those interests that are organized often suffer from weak membership and government intervention into their affairs. Formal workers can form trade unions, and the Confederation of Cameroon Trade Unions (CCTU) coordinates most union activity. However, membership remains low (~200,000) and the vast majority of workers in Cameroon are in the under-represented informal sector. Moreover, the CCTU is heavily monitored, and the government has also encouraged the creation of rival organizations. Agricultural interests are organized into a number of cooperatives, but these are much stronger in West and Northwest regions. The business community is organized into at least three employers' associations or unions (GICAM, MECAM and ECAM). However, relations

Party system



Interest groups



between the associations are often conflict-ridden and their leadership sometimes has strong ties with the ruling party. Cameroon also has various elite associations based on villages and ethnic groups, which are often penetrated or co-opted by the ruling party. Women are relatively under-represented in Cameroon's interest groups. Likewise, there is no real advocacy network for civic education, governance or democracy.

Since 2016, interest groups in Anglophone areas have come under intense repression. In January 2017, the government banned the Southern Cameroons National Council (SCNC), which advocated for secession, which is considered a crime under Cameroon's law. The government also banned the Cameroon Anglophone Civil Society Consortium (CACSC), which was an umbrella organization that brought together local legal groups, teacher unions and student organizations to advocate for a redress of cultural and economic grievances.

Cameroonians are generally in favor of a democratic system however the recent trend has been negative. According to the latest Afrobarometer poll, 62% of Cameroonians are not at all or not satisfied with the state of their democracy, and generally register low levels of trust in most institutions (in particular the election commission, parliament, and the police). There has also been a decline in support for the notion of democracy in Cameroon. In Afrobarometer's 2017/2018 survey, 62% of Cameroonians preferred democracy to other forms of government, which is down from 67% in 2014/2015. These trends are primarily evident among the Anglophone population.

Approval of
democracy

n/a

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n/a 1

In a way, Cameroon demonstrates a trend seen in other parts of Africa, namely that popular demands for democracy are only partially met.

Elections in Cameroon are generally non-violent. While losers might reject the results of an election, they have not organized violent protests. However, the current secessionist movement in Anglophone areas reflects a rejection of the state of democracy in Cameroon and the notion that the conflict can be resolved through some kind of democratic procedure.

Social capital in Cameroon is primarily bonding rather than bridging. Intercommunal trust is weak, as evident in the prevalence of ethnic associations and the importance of kinship in general. These patterns often extend from rural to urban areas, where it is common to find village associations that cater to communal life. Likewise, perceptions of ethnic bias in the distribution of resources, and accusations of under- or over-representation of certain groups in state structures and prestigious institutions permeate political discourse. Government narratives of national unity are based on an open policy of regional balancing. The latter aims to achieve an equal representation of communities in the state apparatus. Critics argue that this reinforces primary identities. These tendencies are exacerbated by persistent economic insecurity, which leads ordinary citizens to seek recourse

Social capital

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through their primary identity. During the COVID-19 pandemic, the government encouraged citizens to contribute to a Health Solidarity Fund. The fund generated over \$40 million in contributions (primarily from politicians and corporate entities), much of which was apparently embezzled.

One of the side effects of the Anglophone crisis is the popular debate it has sparked about the type of state organization Cameroon needs. How best should power be decentralized? For many ethnic entrepreneurs, the debate about federalism is an opportunity to create new avenues for rent in the form of federated states along ethnic lines.

The Francophone-Anglophone division is currently the most significant barrier to social capital and the crisis has significantly exacerbated this tendency. Trust between French-speaking and English-speaking Cameroonians was likely very low before the conflict. But the spread of violence has had a twofold effect. First, it has widened the chasm between the two communities and allowed the government to portray Anglophones as terrorists who threaten the stability of the country. Second, violence has frayed bonds within the Anglophone community and citizens have not been spared violence from separatists. For example, in November 2018, separatists kidnapped 79 schoolchildren near Bamenda, likely in an attempt to force a boycott of the education system. There are also frequent reports of attacks against so-called informants and regime collaborators (referred to as “black legs”). A similar dynamic eroded social capital in northern Cameroon at the peak of the war against Boko Haram.

II. Economic Transformation

6 | Level of Socioeconomic Development

Cameroon’s economic structure and performance do not meet the criteria for a socially responsible market democracy. Despite significant improvements in poverty alleviation and human development since the 1990s, Cameroon still ranks low, and the rate of improvement has stalled. Cameroon has currently only met one of the Millennium Development Goals (MDG2: net school enrollment). The Anglophone crisis and ongoing threat from Boko Haram in the Far North have had a devastating humanitarian impact. The United Nations has reported that over three million people are in need of humanitarian assistance, and that over a million have been displaced or made refugees. These issues were compounded by the COVID-19 outbreak, which has nearly doubled the number of vulnerable people. Preliminary assessments show that 80% of formal businesses have made changes to cope with the economic slowdown, which has particularly impacted women in microenterprises.

Question
Score

Socioeconomic
barriers

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With a per capita GDP of \$1,507 in 2019, Cameroon is a lower middle-income country. Cameroon's calculated HDI value of 0.556 now places it at the very low end of the "medium human development" spectrum and the country is ranked 153 out of 189. Life expectancy is 59 years old, 47% of the population lives on less than \$3.20 a day. This reflects only a slight improvement from levels in 2010. Likewise, the record of improvement in other development indicators has been mixed. Between 2010 and 2019, infant mortality fell from 110 per 1,000 births to 51 per 1,000 births, which is still considered high. On the other hand, primary school completion rates have remained flat at 70% for many years.

In addition, socioeconomic development is strongly shaped by persistent inequalities. Over 40% of the population lives in rural areas, and poverty is heavily concentrated in the rural Extreme North and East Region. In addition, approximately 38% of the urban population lives in slums with poor sanitation conditions. Cameroon's HDI value falls to 0.366 when accounting for inequality, far below the average for medium HDI countries (0.483). Gender inequality is also an issue, most evident in differences in educational attainment and labor force participation. Cameroon's Gender Inequality Index score is currently 0.56, which is slightly above the average for medium HDI countries (0.489).

Economic indicators		2017	2018	2019	2020
GDP	\$ M	35009.3	38694.2	39007.4	39802.1
GDP growth	%	3.5	4.1	3.7	0.7
Inflation (CPI)	%	0.6	1.1	2.5	2.4
Unemployment	%	3.4	3.4	3.3	3.6
Foreign direct investment	% of GDP	2.3	2.0	2.6	-
Export growth	%	-1.6	2.3	5.0	-6.7
Import growth	%	-0.6	8.1	10.6	0.4
Current account balance	\$ M	-949.8	-1409.3	-1695.1	-
Public debt	% of GDP	37.7	39.6	42.3	45.8
External debt	\$ M	10073.2	10925.8	12849.4	13863.9
Total debt service	\$ M	720.8	1061.8	1142.6	1243.8

Economic indicators		2017	2018	2019	2020
Net lending/borrowing	% of GDP	-3.4	-2.2	-	-
Tax revenue	% of GDP	12.2	12.8	-	-
Government consumption	% of GDP	11.1	11.1	10.9	11.1
Public education spending	% of GDP	3.2	3.1	3.1	-
Public health spending	% of GDP	0.1	0.2	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	1.2	1.1	1.1	1.0

Sources (as of December 2021): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

7 | Organization of the Market and Competition

Market-based competition is structured by a number of legal frameworks to streamline the ease of doing business, but nonetheless there are significant hindrances to a free market environment. Cameroon is party to the Central African Economic and Monetary Union (CEMAC) framework. Likewise, Cameroon is also a member of the Organization for the Harmonization of Business Law in Africa (OHADA), a set of laws and regulations to streamline business regulations in 17 African countries. Cameroon's banking is also subject to the Bank of Central African States (BEAC), and it is also a foundational member of the African Intellectual Property Organization (OAPI).

However, the conditions for a free market are not fulfilled. Nearly 90% of the population is employed in the informal economy, and state intervention, corruption, and poorly functioning public institutions are persistent impediments. The state exercises price and import controls on certain goods, such as primary foodstuffs and petrol. There are also over 130 state-owned enterprises that dominate certain aspects of the economy. According to the World Bank's Ease of Doing Business Index, Cameroon ranks 167 out of 190, with the process of starting a business requiring an average of 13.5 days and six procedures and costing 24.6% of GNI per capita. Specifically, while Cameroon performs slightly better than the regional average in terms of the costs of starting a business, processes for registering property are lengthy and expensive, and businesses spend approximately twice as long and 33% more money securing import permits. Low levels of property registration have led to disputes in rural areas. Despite membership in OAPI, intellectual property is poorly protected given weak enforcement mechanisms and the influence of supply countries like China and India.

Market
organization

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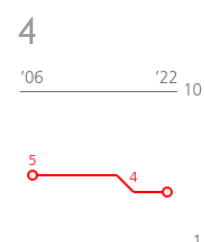
On the positive side, there are no restrictions on currency conversion by foreign investors or heavy restrictions on access to foreign exchange for investment purposes. Likewise, there are few restrictions on foreign direct investment (FDI), but the abovementioned factors have limited FDI to 2% of GDP. Between 2019 and 2020, the government improved contract enforcement by adopting a law that regulates all mediation as an alternative dispute resolution mechanism, and improved access to credit by adopting the Economic and Monetary Community of Central Africa framework for licensing and operating credit bureaus.

The National Competition Commission (NCC) in the Ministry of Commerce is the national authority, which in theory enforces competition rules. However, in reality competition in many sectors is restricted, in part due to the pervasive presence of over 130 state-owned companies and a single marketing board for agricultural exports. For example, Cameroon Telecommunications (CAMTEL) controls national telephone and internet infrastructure and is expanding into the retail mobile sector. But it faces serious competition from private providers. There is also a national refinery (SONARA), sugar company (CAMSUCO), palm oil company (SOCAPALM), cotton company (SODECOTON), and brewery (Brasseries du Cameroun). According to the IMF, weak corporate governance has led to deteriorating profitability and significant public debt, which further burdens the government budget. In addition, the government has come under criticism for preferential treatment given to French companies such as Total in the oil sector, Lafarge in the building material sector, and Société Générale in investment banking.

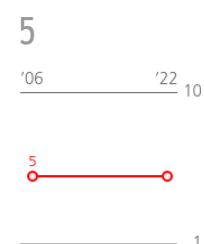
Cameroon depends heavily on the export of commodities (oil, gas, timber, and agricultural products such as cocoa and coffee) for its economy. The European Union is Cameroon's largest trade partner (approximately one-third), followed by China, Malaysia, the United States, Nigeria, and Chad. Cameroon adheres to the multilateral trade system, in particular the agreements of the WTO, the agreements of the World Customs Office (WCO), and common trade rules set out by CEMAC. Cameroon has signed a number of limited bilateral trade agreements and has maintained a few Foreign Trade Zones (FTZs) where certain trade barriers are reduced. Cameroon's membership in the Commonwealth and Franc Zone are also meant to facilitate trade. In 2016, the Economic Partnership Agreement (EPA) with the European Union came into effect. The EPA provides Cameroon with duty free exports of most goods to Europe in exchange for a reduction in tariffs on EU imports. In December 2020, Cameroon ratified the African Continental Free Trade Area (AfCTFA), although it has not yet been implemented.

However, there are still formal barriers to free trade, and corruption and institutional weakness limits free trade in practice. According to the World Bank's 2020 Doing Business report, Cameroon ranks 186 out of 190 in terms of ease of trade. Complex and inefficient bureaucracies, particularly at the Douala port, translate into long delays and high costs. Cameroon applies CEMAC's common external tariff, which

Competition policy



Liberalization of foreign trade

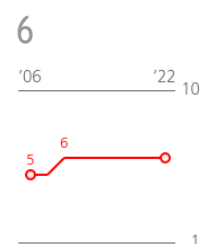


sets four tariff rates ranging from 10% on raw materials to 30% on certain consumer goods. In reality, this masks much higher costs due to lengthy and at times costly permit and registration processes. There are also issues with customs valuation practices on certain products (certain textiles, meat, imported sugar alcohol and nicotine products), which are not always based on the transaction value but a reference price set by the government. There are no export subsidies or import quotas in place, but the government imposes grade certifications on the export of coffee, cocoa, gold, and diamonds, and bans the export of certain types of forestry products as a means of environmental conservation.

Cameroon has 15 commercial banks and over 800 microfinance institutions. The Central African Banking Commission (COBAC) regulates the banking sector, and the regional Bank of Central African States (BEAC) acts as the central bank. Political pressure has occasionally been used to grant bad loans that are almost never repaid. BEAC lost credibility after embezzlement schemes in 2009 and 2010 implicated some of the organizations most senior administrators. The IMF notes that while Cameroon's financial system is the largest in CEMAC, it remains shallow and highly concentrated. The four largest banks account for 59% of total bank assets, and Yaoundé and Douala generate about 90% of all bank credits and deposits. There has been improvement in bank profitability and liquidity, and by the end of 2020 the capital to asset ratio stood at 8.9%. But four banks (~13% of all bank assets) are in distress and three have negative capital. Likewise, the percent of non-performing loans rose to 13%, which is indicative of declining economic activity, particularly in the construction and extractive industries. A series of interventions during the COVID-19 pandemic have helped to stabilize the banking sector. Both BEAC and COBAC have eased liquidity requirements, and the government temporarily reduced the tax burden on businesses and accelerated reimbursement of VAT credits.

By and large, banking services are not readily available outside of major urban areas or to small retailers and enterprises. Although microfinance institutions and mobile money meet small-scale saving and borrowing needs, as of 2020 less than 15% of Cameroonians have access to financial services. Banks have the reputation of being very risk-averse, particularly in charging prohibitive prices to support micro, small and medium-sized businesses.

Banking system



8 | Monetary and fiscal stability

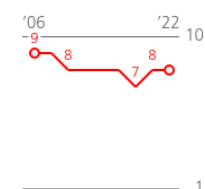
Monetary policy is managed by the regional central bank, the BEAC, which seeks to limit inflation and is fairly independent of the Biya government. This task is facilitated by Cameroon's inclusion in the CFA franc zone, which has maintained a fairly stable currency. Following an agreement in 2018, the government has made greater efforts to increase the repatriation of foreign exchange and stabilize BEAC's reserves. Likewise, Cameroon began to share mining and oil contracts with the BEAC. Consumer price inflation between 2018 and early 2020 rose slightly to 2.5%. This rate is below the CEMAC convergence criteria of 3% inflation. The real effective exchange rate index stood at 96.7 in 2019 (most recent data), which reflects a rather healthy foreign exchange situation.

Like many other countries in sub-Saharan Africa, Cameroon has increased public investment over the last decade, which has been funded primarily by non-concessional debt. Consequently, Cameroon has rapidly accumulated public debt over the past decade, which now stands at 43% of GDP. The majority of that debt (~75%) is external, with China as the major lender. In recent years Cameroon's ability to pay its external debt has been impacted by a decline in oil revenues and conflict in northern Cameroon and Anglophone regions. In addition, state-owned enterprises currently hold an unknown amount of debt, which the IMF approximates at 12.5% of GDP. Cameroon has run deficit of between 2% and 5% of GDP for the past few years. The fiscal impact of the COVID-19 pandemic has been mitigated by international assistance. In 2020, the Cameroonian government provided a set of tax accommodations for businesses and developed a three-year \$825 million response program. Funds for this program were made available by two IMF-sponsored Rapid Credit Facilities and participation in the World Bank's Debt Service Suspension Initiative.

Nonetheless, broader fiscal trends, while not unsustainable or necessarily alarming, have raised concerns with the IMF. The IMF notes discrepancies in reporting between the Ministry of Finance and Cameroon's debt agency, the Caisse autonome d'amortissement (CAA). Many debt-funded projects move forward without approval from the National Public Debt Committee (CNDP), and loan tracking remains inadequate. In 2018, the IMF assessed that Cameroon's risk of debt distress was high and recommended stricter implementation of fiscal constraints. In 2020, the IMF recommended a new debt strategy to address the financial viability of the SONARA oil refinery, which was hit by an explosion that destroyed parts of its productive capacity. Cameroon's Ministry of Finance has noted that infrastructural investments are needed and expressed confidence in future growth. Likewise, Cameroon has committed to continued prioritization of concessional loaning.

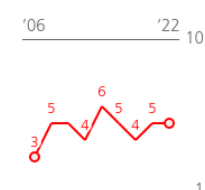
Monetary stability

8



Fiscal stability

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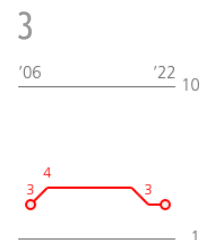
9 | Private Property

Property rights are recognized in Cameroonian law, including the rights of communities and farmers. In principle, liens must be recorded in the contract and there is a registry of land title. However, land registration rates in Cameroon are extremely low, and less than 1,000 titles are issued a year. Just 2% of Cameroonian land is registered, concentrated in urban areas. In rural areas, land is mostly subjected to specific land tenure regimes, which has led to conflict over informal sales of land and illegal occupation. Large-scale agricultural investments in rural areas have also led to conflict with local communities. Cameroon also ranks 175 out of 190 countries in terms of ease of registering property. It takes substantially longer in Cameroon to register projects, and individuals and business spend on average 14% of the value of the property during the registration process, as compared to the average 7% in sub-Saharan African and 4% in high-income OECD countries. Since 2016, the conflict in Anglophone regions has further challenged property rights. According to human rights organizations, over 200 villages in English-speaking regions have been destroyed.

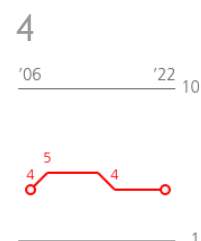
A number of other issues restrict property rights in Cameroon. First, the Cameroonian government can expropriate private land from any person or entity for the sake of public interest. The government has used this right to facilitate major infrastructure projects like hydroelectric dams and roads. While there is a compensation process in place, over the years corruption schemes have marred several cases. Second, while Cameroon hosts the headquarters of the African Intellectual Property Organization (OAPI), there are few legal structures or enforcement mechanisms. Infringement of intellectual property in media, pharmaceuticals, software and print is common, and intellectual property rights are deteriorating due to an influx of Chinese and Indian counterfeit goods.

The oldest and most important business association, Groupement Inter Patronal du Cameroun (GICAM), continues to press the government to simplify procedures. Private companies can act freely in principle, but in reality, they encounter barriers to development. Paul Biya's regime has long been wary of substantial private capital formation that it cannot control. Cameroon's attractiveness to domestic and foreign investors varies from sector to sector. Recently, private international firms have expressed interests in the mining sector (e.g., iron ore, cobalt, bauxite), but few investments have actually been injected. Despite privatization efforts, state-owned enterprises still dominate many sectors and strategic positions, most evidently in oil refining. The Cameroon Development Corporation (CDC), a parastatal, is actually the country's second largest employer after the state. The climate for private business declined considerably given the conflict in Anglophone regions. Nigerian trade and investments across the border have declined, and the government's frequent shutdown of internet services has limited a range of businesses, in particular the nascent tech sector known as "Silicon Mountain" around Buea.

Property rights



Private enterprise



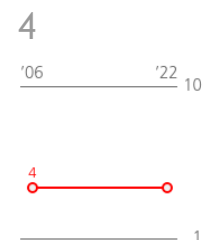
10 | Welfare Regime

State measures to alleviate social risk are limited. The public social insurance system (Caisse nationale de prévoyance sociale, CNPS) only covers 10–20% of Cameroon’s workforce, most of whom are in the formal sector. The CNPS was for a long time overextended, poorly managed, and plundered as a slush fund for the government. However, reforms have recently been introduced to strength and expand the CNPS. As of 2014, the informal sector contributes voluntarily, and in 2016 the government raised the contribution rate from 2.8% to 4.2% and increased the size of pensions. In 2018, the CNPS began to experiment with the mobile payment of benefits. Nevertheless, for the vast majority of the informal sector, family structures, churches and other solidarity networks are the only viable option for reducing risk. Cameroon also has an informal system of community savings, known as “tontines,” which offers some degree of social security. During the COVID-19 epidemic, the CNPS increased family allowances by 60% and pensions by 20%.

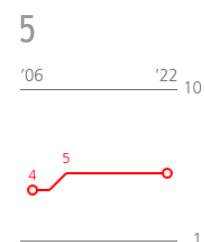
Other elements of social welfare are also weak. The national health care system was reformed in 1985 and introduced cost recovery efforts. However, Cameroon spends just 5% of its GDP on health care expenditure, although that ratio did increase slightly to confront COVID-19. This translates into a poor and overextended health service. Cameroon has no unemployment scheme, and sickness and maternity benefits are dependent on the employer rather than social insurance risk pools. A pilot social assistance program (Filets Sociaux), primarily funded by international donors, offers a public works and unconditional cash transfer to the most in-need households. The program was recently expanded to Anglophone regions and currently covers nearly 11,000 households. Cameroon’s COVID-19 response includes support for vulnerable households and the creation of a Unified Social Register to identify vulnerable households.

Equal opportunity is only partially achieved, and discrimination based on gender, ethnicity and political preference exists. Cameroon has ratified many international conventions and accords to eliminate discrimination against women. In practice, women continue to encounter barriers to economic, cultural, educational and policy participation. While women form 47% of the labor force, women make up 25% of the Senate and 34% of the National Assembly, largely due to gender quotas. Only 10% of municipal councils are led by women and there are only a few female cabinet ministers. Women are under-represented among diplomats, public administrators and magistrates. The disadvantages experienced by women are reflected in other measures. Compared to women, men register higher literacy rates (82.6% vs 71.6%), enrollment rates (female/male ratio 0.9 in all sectors) and labor force participation rates. According to the United Nations, many social practices limit equal opportunities for women. More than a third of women report domestic abuse and half report physical violence. One-third of women report being married while still a child and 1% report genital mutilation.

Social safety nets



Equal opportunity



Discrimination based on ethnicity and political preference is very apparent. Membership in the CPDM is often an informal prerequisite for accessing business loans, and government services and tenders. Since 2016, the issue of Anglophone representation has taken center stage and ushered into an ongoing insurgency. Anglophone activists cite cultural, economic and political grievances that date back to the abolishment of federalism in 1972. These include the diversion of major infrastructural investments, the absence of accommodation for English in educational testing and the relegation of British Common Law to a secondary status. The government has tried to address these issues by launching a teacher recruitment drive, creating a Common Law Bench on the Supreme Court, and revising training at higher education facilities. In 2019, Anglophone regions received “special status” recognition. However, as with the previous reforms, it is not clear what this means in practice.

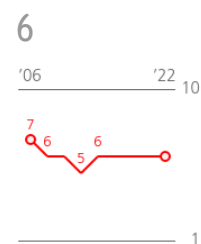
In addition to the Anglophones, the U.S. State Department reports that the Baka people, derogatorily known as Pygmies, are often discriminated against and are not represented in higher offices of government. Other forms of discrimination are also prevalent. As in other African countries, albinism and HIV-positive status suffer from significant social stigma. LGBTI rights are not protected in Cameroon, and members face severe discrimination. Same-sex sexual activity is illegal, and each year members of the LGBTI community are jailed, harassed or revealed publicly.

11 | Economic Performance

Cameroon is the CEMAC’s largest and most diversified economy, but several challenges limit the country’s potential for economic growth. Cameroon’s economic growth is sustained by an expansionary policy approach, which invests heavily in infrastructure and public works. This has been financed by a combination of domestic debt and bilateral borrowing. The deep-sea port of Kribi began operations in October 2020 and is predicted to increase trade and the production of natural gas. After several delays, the highly anticipated Memve’ele hydroelectric plant is scheduled to begin operations in early 2021. Likewise, oil revenues were predicted to rebound following a decline over the past few years. Cameroon has registered steady economic growth of around 4% and inflation of 2.5% for 2020, but this is still below what is required to fundamentally restructure the economy. The unemployment rate stood at 3.4% in 2020, but this does not fully reflect actual numbers.

Nonetheless, the country faces significant headwinds due to ongoing structural issues and numerous crises. Cameroon still depends on world prices for raw materials and on a narrow formal employment sector. The government relies primarily on VAT and taxes on goods and services, which leads to a low tax to GDP ratio (13% in 2019). The ongoing Anglophone crisis continues to limit

Output strength



agricultural production, primarily of cocoa, coffee and palm oil. The crisis could also expand an already large defense budget, which will divert resources away from investment in infrastructure. The COVID-19 pandemic is projected to significantly impact economic growth, with the IMF likely to revise GDP growth downward for 2020, possibly into recession territory. Likewise, even with significant international aid, Cameroon's fiscal deficit is expected to rise to 5% of GDP. These developments could have further long-term impacts on economic output.

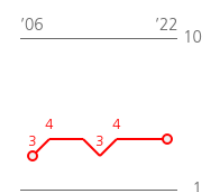
12 | Sustainability

Environmental concerns are taken into account, but there are insufficient environmental initiatives or regulations, and enforcement is deficient. Cameroon relies heavily on fossil fuels for energy production, and there have been severe issues with land, water, and air pollution. Increased investments in palm oil, mineral extraction, and road development have led to higher rates of deforestation over the past decade (~1% annually, the second highest in the Congo-Basin). There is little regulation of the use of pesticides, and poor waste management systems have led to the discharge of large amounts of refuse directly into the environment. Similarly, industrial waste and poor management of wastewater (less than 1% of sewage water is treated) have degraded water sources and supplies. The government has little money to even measure air pollutants, but rates are likely rising rapidly in major cities due to urbanization. Cameroon is also highly susceptible to climate change, which has led to desertification in northern regions.

The current legal and regulatory environment is inadequate for these challenges. In 2009 Cameroon created the National Climate Change Observatory (ONACC) as a national implementing body of climate change policies. Similarly, in 2012 the Ministry of Environment, Nature Protection, and Sustainable Development (MINIPED) formed a Steering Committee to direct legislation on deforestation and forest management. Neither body has produced significant guidelines or proposed legislation. In 2017 MINIPED began a pilot reforestation effort through a grant from the Bonn Challenge initiative. In 2011 the legislature passed a new electricity sector law that mandated that new developments should give preference to renewable sources but made exceptions for when such resources are scarce or of high cost. Discussions have been ongoing for many years about revising Cameroon's 1994 Forest Law, but there is no new legislation on the horizon. Cameroon currently ranks 139 in Yale's Environmental Performance Index, which represents a slight upward trend, mainly because of progress in the areas of biodiversity and habitat as well as sanitation and drinking water. However, little progress (and possibly even a deterioration) has been reported in terms of emissions and measures to counter climate change. Cameroon is a signatory to the Convention on Biological Diversity, and participates in other regional and global environmental efforts, including the 2015 Paris Accords.

Environmental policy

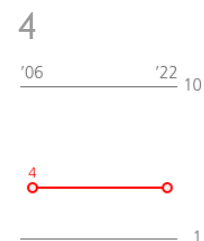
4



Cameroon has made progress in education policy, most notably with its increased literacy rate and near 100% enrollment in primary school education (primary school fees were abolished in 2000). Likewise, the secondary school enrollment rate has improved and currently stands at 62%. Public expenditure on education has been relatively constant over the past 10 years (averaging 3% of GDP). Cameroon's United Nations Education Index has likewise been approximately 0.5 for the past decade. Little data exists for expenditures on research and development.

Despite this progress, there are serious issues with the educational system. There are regional disparities in levels of access, and enrollments are far lower in the North and Extreme North regions. Levels of income and gender also lead to unequal levels of access to educational opportunities. Absenteeism of teachers and corruption in the Ministry of Education and school education has impacted the quality of education. Tertiary education has received far less investment than primary and secondary education. The Anglophone crisis has also had a significant impact on the quality of education in these regions. Secessionist militias have intimidated families and school personnel and prevented schoolchildren from attending classes. Anglophones have long complained about unequal access to education due to language requirements. Anglophone separatists have also deliberately targeted the educational sector and many schools have been closed for long periods of time.

Education policy /
R&D



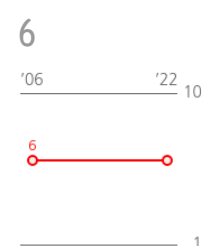
Governance

I. Level of Difficulty

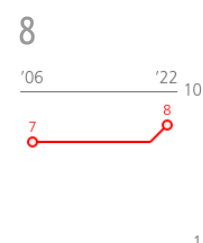
Structural economic and social constraints on governance in Cameroon are moderate, particularly in comparison with neighboring land-locked countries. Cameroon's HDI places it in the medium developed category. A number of typical features of African economies are present in Cameroon that can be regarded as structural constraints. This includes a strong reliance on natural resources as a source of export revenues and national income, a reduction in human resources due to exposure to tropical diseases, rural poverty, and more recently desertification due to climate change. Oil prices have not recovered as much as expected, but the exploration of offshore natural gas has the potential to compensate. Still, Cameroon has one of the more diversified economies on the continent, and the most diversified economy among the CEMAC countries. There are many structural features that are advantageous: a relatively large and educated workforce, a vast endowment of natural resources, favorable geographical and climatic conditions, access to the sea, and a strategic location straddling Central and West Africa. While Cameroon has been an epicenter of the COVID-19 outbreak in Africa, the total number of cases remains low (~30,000). This is not to downplay the importance of structural constraints, which have undoubtedly shaped political institutions and policymaking in the past. Moreover, colonial legacies partially underlie the current crisis in Anglophone regions. However, most obstacles to political and economic transformation are due to government policies rather than structural factors.

There are a variety of civil society traditions in Cameroon, but decades of authoritarian rule have limited its development. Compared to other African countries, a large proportion of civil society organizations did not emerge independently and are not immune to political machinations. Under Cameroon's first president Ahmadou Ahidjo, independently organized interests were highly distrusted and co-opted by the state. While civil society played an important role in the transition to multiparty elections in the early 1990s, it has since undergone a process of fragmentation and political demobilization. Many of the more recent civil society groups are explicitly ethnic and used as vehicles for securing government patronage. Participation in NGOs is limited to towns and cities, and many of these organizations lack even basic offices. Approximately 50% of the population live in rural areas, where they are integrated into local civil society traditions and participate in community-level events but are not part of national

Structural
constraints



Civil society
traditions



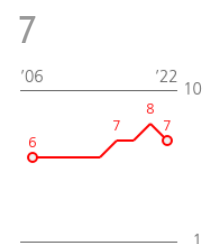
movements. There has been a steady decrease in electoral participation. The Anglophone crisis has exacerbated much of this and created more severe issues of social trust. Some civil society organizations in the Anglophone regions have been banned, particularly those advocating for secession. The conflict has exacerbated the perception among some Francophones that Anglophones want to destabilize the country in order to reach their goal of self-determination.

For the past few years, Cameroon has been faced with serious social conflicts. The Anglophone conflict has taken a heavy humanitarian and economic toll. Over 3,000 people have been killed, 700,000 internally displaced and 41,000 have become refugees. Government forces have come under heavy criticism for their indiscriminate use of violence, including the alleged destruction of over 200 villages and the use of torture. The separatist movement is highly fragmented. Several separatist elements have systematically targeted civilians who are perceived as government collaborators or who appear to have violated the economic and political boycotts imposed by the separatists. The COVID-19 pandemic only led to temporary and limited cease-fire agreements. Concurrently, the conflict with the Islamist extremists of Boko Haram in the Extreme North accelerated in 2020. Since 2014, 300,000 people have been displaced and at least 1,500 killed. The government has also come under considerable criticism for its human rights violations there. Boko Haram was never a popular movement in northern Cameroon, but it has created rifts within the Muslim community.

The potential for other forms of violence is real, given pervasive structural problems and a high degree of polarization. Ethnic, regional and possibly religious identities are reinforced, and are often suggested in private and public discourse to evoke alleged marginalization or favoritism. The practice of scapegoating certain groups to mobilize support or secure legitimacy for would-be leaders is not uncommon. Such ethnic or community polarization seems to be on the rise in Cameroon. Anglophone demands for federalism have sparked a debate about the adequacy of the country's state forms. Some political and academic figures openly advocate for a federal system, which would lead to creation of states along ethnic lines. This has sharply exacerbated inter-community polarization and sown the seeds of potential further destabilization.

Some groups are persistently framed in confrontational terms. For example, the West Cameroonian Bamiléké are widely believed to be entrepreneurial and to monopolize economic power. As a result, they are often accused of being overly ambitious. Such criticisms were recently lobbed at presidential candidate Maurice Kamto. Other groups like the Beti (Paul Biya's co-ethnics) are perceived as highly entrenched in the upper echelons of political power and unwilling to ever cede that power.

Conflict intensity



II. Governance Performance

14 | Steering Capability

The government sets strategic priorities, most notably with its Cameroon Vision 2035 program, the 2010–20 Growth and Employment Strategy Paper (GESP), and a commitment to the United Nation’s Sustainable Development Goals (SDGs). In particular, the GESP focuses on economic growth and poverty reduction. In the words of the paper, the GESP searches “for growth and redistribution of its fruits right down to the most vulnerable segments of the population with special emphasis on women and the youth.”

However, the political leadership’s prioritization is heavily dependent on political expediency and sometimes external actors. For instance, the GESP was drafted in cooperation with the IMF and is often much more concerned with the political survival of Paul Biya. A strong economic policy team has helped Cameroon commit to large-scale infrastructural projects like the dredging of Kribi’s deep-sea port and the construction of a hydropower plants. At the same time, an elite group of educated technocrats and a handful of reform-oriented bureaucrats have helped to establish stronger macroeconomic conditions through targeted privatization of state-owned enterprises, reforms to public expenditure management, and liberalization of fiscal and monetary policy. Many of these reforms were hard fought with multilateral lenders after decades of non-compliance and remain incomplete. With international support, Cameroon has been able to provide a measured response to the COVID-19 pandemic. As described above, Cameroon secured international funds for a three-year response program, which includes tax alleviation for businesses, increased health care spending and social assistance for vulnerable households. However, the president has made no public appearance for several months.

But these important developments aside, much of the government appears to be oriented around the political survival of a narrow stratum of elites. Corruption is still rampant in the Cameroonian government, and only half-heartedly prosecuted. Many government institutions are not led by competent individuals, but rather used as opportunities to positions supporters so they can access patronage resources. This extends to an oversized cabinet (the largest in Africa), a bloated civil administration, and a very weak national legislature. The pockets of technocratic expertise that do exist inside these bureaucracies have limited steering authority. Decisions almost always have narrow political objectives, namely regime survival. Real reform of political and economic institutions would eat away at the ability of regime supporters to access patronage, and therefore threaten a core feature of the regime.

Question
Score

Prioritization

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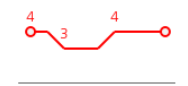


Pervasive corruption, limited accountability, and a fragmented bureaucracy limit the implementation of many major policy initiatives. Cameroon has passed its IMF reviews with satisfactory marks. The IMF notes Cameroon’s leadership role in CEMAC and its ability to meet most of the required macroeconomic benchmarks (with the noted exception of a ceiling on non-concessional borrowing). However, the IMF also notes persistent issues with public finance management reform, bank sector reform, the balance sheets of state-owned enterprises, and cost planning for nearly two-dozen major projects. Likewise, implementation of the GESP suffers considerably not only from falling oil revenues, but also from poor execution due to corruption. Many programs are also unevenly implemented, which perpetuates regional inequalities between the Extreme North/East regions and the rest of the country. Conflict in Anglophone regions has also limited the government’s ability to implement reconstruction programs in North West and South West regions. Since COVID-19, there has been less progress on larger policy goals, as international lenders focus on weathering the crisis and ensuring fiscal sustainability. As with prioritization, corruption underlies a political logic that aims to help keep the current regime in power.

Implementation

4

'06 '22 10



The political leadership has shown limited willingness to learn from its mistakes, but it listens to advice and adapts to some outside calls for reform. During COVID-19, the government worked with international organizations to develop appropriate responses, which included tax alleviation for business and support for vulnerable populations, but simultaneously rejected civil society efforts to solicit donations and raise funds to combat COVID-19. The government is very sensitive to criticism, particularly in the political realm. Mild forms of critique unleash harsh reactions, as evident in the crackdown on freedoms of expression surrounding the fight against Boko Haram and the Anglophone crisis. Officials typically use their power extensively and ignore critical voices. Serious efforts to engage in dialogue on controversial issues are simply absent. Committing to a reform program by its own initiative is rarely observed.

Policy learning

4

'06 '22 10



15 | Resource Efficiency

The government is inefficient in its use of assets, and resources are primarily deployed to satisfy political incentives. Pockets of administrative efficiency exist, and Cameroon has been able to balance budgets, but corruption is rampant in the public sector. The government loses vast resources during the process of public procurement, and informally must account for leakage at the local level during program implementation. The cabinet and civil administration are bloated, and appointments are not always made based on merit and expertise but political expediency. For instance, in Yaoundé, there is a minister of public health, a secretary of state to the Ministry of Public Health delegated from the president’s office and 10 regional representatives of the Ministry of Public Health. Such

Efficient use of assets

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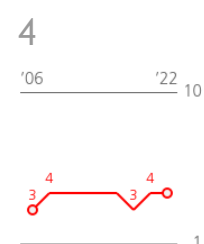
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repetition and redundancy is common across government. In December 2018, the finance minister announced that up to 25,000 civil servants receiving pay were either deceased or no longer working for the state. Decisions on the distribution of resources are similarly tainted by political considerations rather than effectiveness. For example, the WHO has found severe geographical inequalities in the distribution of health personnel, with rural regions with high infant mortality rates suffering the most. In 2020, it was reported that funds from the IMF COVID-19 relief packages had been embezzled or spent with little transparency.

Political centralization and corruption severely limit policy coordination. While the prime minister has coordination responsibilities across government ministries, the government often fails to come to decisions since it must wait on the president's decisions. Paul Biya cultivates leadership by absence. Biya is rarely available for his ministers, with at one point two years passing between cabinet meetings. The bloated size of Cameroon's government further limits policy coordination. Most ministers are appointed based on perceptions of political loyalty. The presidency maintains a shadow cabinet that mirrors all ministerial departments. Real decision-making power lies with the presidency, which leaves the government with little room to maneuver. This creates a conflict-ridden environment, where there is often competition and poor coordination within individual ministries. It is difficult to implement policies effectively at the local level for the same reason: governors, district officers and sub-district officers are all political appointees who owe their careers to the president. The recent implementation of decentralization measures led to some new developments. Elected officials, even from the ruling party, appear to be more inclined toward service delivery than to political loyalty, thereby creating a virtuous circle that could improve the use of state assets. In 2017, the World Bank highlighted the fragmentation of coordination and monitoring mechanisms for public investments. Coordination mechanisms like local public investment monitoring committees are weak, and often compete with other government entities and do not effectively share information. During COVID-19, Paul Biya's absence from public life for nearly two months raised questions about the government's ability to manage the crisis. In addition, COVID-19 revealed significant coordination issues between the Ministry of Public Health and Ministry of Finance, the former of which was tasked with reimbursing hospitals for the free provision of services.

Policy
coordination



The government has structures in place to detect and prosecute corruption. However, in reality, these are poorly enforced and perceived as highly politicized. The two main institutions that prosecute corruption are the National Anti-Corruption Commission (NACC), within the Office of the Presidency, and the Special Criminal Court. Since 2006, there has also been a coordinated anti-corruption drive known as “Operation Sparrowhawk,” which has reportedly produced dozens of convictions. The Supreme Court’s Audit Bench is said to have some independence from the government, but most government finances are under the purview of the Supreme State Audit, which reports to the president and is therefore not completely independent.

In collaboration with multilateral lenders, the CEMAC region has moved to harmonize public finance management, but Cameroon is just at the start of that process. Standard budgetary practices are frequently not respected by ministries. The National Procurement Regulation Agency (ARMP) within the Ministry of Public Works regulates public procurement, but specific rules are circulated as presidential decrees (the Public Procurement Code). In 2015 the ARMP moved much of the process online in order to reduce the prevalence of petty bribery. State-owned enterprises are often informally exempt from official public procurement processes. Office holders are not held accountable since Article 66 of the Cameroonian constitution, which requires civil servants to declare assets, is not enforced. Likewise, Law 2006/001, which expands the range of public officials who should declare conflicts of interest, is not enforced. Finally, while public financing is available to parties there is little regulation or transparency. It is assumed that the ruling CPDM can raise money from the business elite without disclosure or any cap on contributions.

16 | Consensus-Building

Cameroon’s government lacks any real willingness to seek consensus with major political players. Having survived Cameroon’s single-party era, Biya’s administration has maintained the modus operandi and political habitus of a dominant party, which is unwilling to tolerate competition. The authoritarian nature of the regime silences debates and pushes major actors in society and elements of the electorate to tolerate the status quo. Likewise, the perpetuation of ethnicity as a basis for political gain limits the degree of consensus over democracy. The lack of consensus over democracy is evident in the controversial nature of recent elections (Paul Biya’s re-election in 2018 and the CPDM’s decimation of the opposition in 2019). Attempts to end the Anglophone crisis are also one-sided. In October 2019, the government hosted a major national dialogue, which involved only some of the country’s major parties. Policy developments such as recognition of special status in Anglophone regions and the December 2020 regional council elections (a provision of the 1996 constitution that was never implemented) have been heavily criticized by non-government parties.

Anti-corruption policy

3

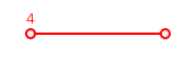
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Consensus on goals

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The authoritarian nature of the Cameroonian administration limits consensus on the nature of the economy. A reform-minded elite does exist, particularly among the younger generation of elites, but they have only achieved consensus on marginal improvements to economic management and broader measures of macroeconomic stability. There remain heavy restrictions on capitalist enterprise and significant state intervention in the economy, which sustains the political coalition that perpetuates the Biya regime.

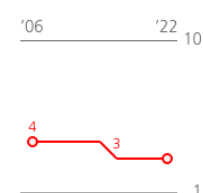
Cameroon's authoritarian regime precludes the emergence of strong reform-minded political actors. The few reformers that do exist, from within and outside of the ruling party, do not have the clout to rein in non-democratic actors, who constitute the vast majority of government and public administration personnel. The most significant anti-democratic actor is the president himself. The re-election of Paul Biya in 2018 maintained the status quo and further limited any reform momentum within the administration. As long as Biya is in office, it is safe to assume that potential reformers will be hesitant to act for fear of repression. Biya's control over the ruling party and decimation of any opposition – political and civil society based – leaves little room for reform-minded interests to gain power.

The political leadership is largely unable to manage cleavage-based conflict, and actually takes steps to encourage societal and political fragmentation. The policy of “regional balancing” (i.e., public sector appointments that respect regional quotas) has been poorly implemented and has not prevented several identity groups from claiming that they are under-represented in government and public administration. Major divisions exist between the north and south of Cameroon, Anglophone and Francophone communities, urban and rural areas, the west and east of the country, and Christian and Muslim communities. An internal debate within the CPDM about who should succeed Paul Biya is also about which ethnic group will emerge on top. Many anticipate that this process will end up in violence, in part because the military is also divided along ethnic lines. Paul Biya has patiently built this governance architecture. Biya benefits from the division and multipolarity that this architecture creates, since it ensures a strong base of supporters, recruited from all Cameroon's ethnic groups, for the regime.

The inability to manage cleavage-based conflict is most evident in the Anglophone regions. The Francophone-Anglophone division has historically been one of the most difficult long-term cleavages to manage. The government's delegation of an ad hoc committee to negotiate with protesters while simultaneously using state violence exacerbated tensions. The platforms and concessions that the government has implemented in response to this conflict – such as the Major National Dialogue of 2019, the special status designation and the 2020 regional council elections – did carry the support of Cameroon's major Anglophone groups but have not fundamentally changed the conflict.

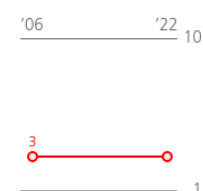
Anti-democratic actors

3



Cleavage / conflict management

3

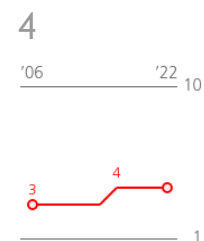


The political leadership fails to promote social capital and is largely indifferent to the role of civic engagement. Likewise, the government frequently ignores civil society, which it considers an oppositional force. In 2017, the government banned the Southern Cameroon National Council (SCNC) and the Cameroon Anglophone Civil Society Consortium (CACSC), which cut off its main avenue of dialogue with the Anglophone movement. The government has also escalated its attack on freedom of association and expression, under the pretense of the threat of terrorism and the legal coverage of the 2014 anti-terror law. This attitude toward civil society participation is true in other realms. The government generally snubs civil society groups and thereby ignores the potential expertise some civil society groups may have on specific issues (climate change, poverty reduction, economic transformation). Consultation of civil society groups throughout the process of the poverty reduction strategy prescribed by the World Bank was not systematic and remained selective. Local planning councils are often co-opted by government and are not arenas for civil society participation. During the COVID-19 epidemic, the Cameroonian Survival Initiative was deemed illegal by the government due to its association with political rival Maurice Kamto.

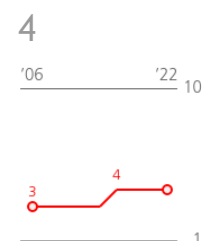
The government appears unable and unwilling to publicly cope with legacies of violence and past injustices. Cameroon has gone through several phases of widespread violence and state repression that are rarely given the national spotlight. The most significant case would be the UPC rebellion of the late 1950s and early 1960s, which was violently repressed by the French and Cameroonian government. Until today, this liberation movement is disparagingly referred to as a “rebel” movement. Other moments include the bloody coup attempt of 1984, the “years of burning” in the context of moving toward multiparty elections and the 2008 nationwide protests against the abolishment of presidential term limits.

More recently, the government has had to cope with the legacy of its conflict with Boko Haram in the Extreme North and the ongoing brutality of its confrontation with Anglophone separatists. In July 2018, video emerged of two women, a child and a baby executed by armed men in the Extreme North. This exposed fresh wounds over the government’s brutal tactics against Boko Haram, which often led to severe civilian collateral damage. In 2020, the government had to respond to several major human rights violations, including a massacre in Ngarbuh that took 22 lives, including 14 children. After international pressure, the government accepted responsibility and arrested nine soldiers.

Civil society participation



Reconciliation



17 | International Cooperation

Cameroon's leadership use international partners primarily for engagement on issues of economic development and regional security, but very little on questions of democracy and governance.

The government is committed to the Sustainable Development Goals (SDGs), and its Growth and Employment Strategy Paper (GESP), which focuses on economic growth and poverty reduction, and targets vulnerable segments of the population, especially women and young people.

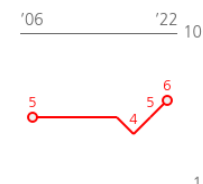
Many of the major aid donors are present in Cameroon, targeting a range of sectors. The World Bank has ongoing projects worth \$1.4 billion. In 2017, the government signed a three-year extended credit facility with the IMF, which has been renewed several times (and with which the government drafted the GESP). The European Union contributes funds and expertise to combat illegal deforestation and the Agence Française de Développement (AFD) funds various projects. The WHO and many other NGOs operate programs and offer technical expertise. USAID is engaged on issues regarding HIV/AIDS, while the United Kingdom's Department for International Development closed its offices in 2004 and ended all programming in 2011. Since COVID-19, the government has extended two Rapid Credit Facilities, accepted the World Bank's debt relief program and received \$45 million in World Bank funds to support the education sector. Political leadership uses this assistance, but this does not translate into a consistent long-term strategy for development.

Since the growth of the Boko Haram threat, Cameroon has also increased its regional and international security cooperation. Cameroon contributes troops to the Multinational Joint Task Force (MNJTF) and has allowed the Nigerian and Chadian army to enter its territory. Likewise, Cameroon has permitted the United States to operate a drone base in the Extreme North.

Cameroon lacks international partners to support efforts to improve democracy and governance. The Commonwealth Secretariat and the Organization Internationale de la Francophonie are the most persistent observers, but they have also been the subjects of criticism for their unwillingness to seriously criticize the regime and the state of democracy. Cameroon receives relatively low amounts of democracy aid and is not home to major institution building efforts. The programs funded through USAID and the National Endowment for Democracy (NED) are focused on promoting youth leadership and mitigating the impact of conflict in northern Cameroon. The European Union funds the Civil Society Strengthening Programme (PASC) but has had difficulty finding local contract partners.

Effective use of support

6



Cameroon's superficial stability as well as its strategic position in a restive region provides the government with an enormous amount of leniency with international partners. With the spillover of Boko Haram since 2014 and the Central African Republic crisis, diplomats and international aid workers have found further reasons to ignore the poor implementation of reform initiatives and to support the regime. This was once again notable with the tepid international response to the crisis in Anglophone region. Outside of diplomatic calls for peaceful dialogue, no serious pressure has been exerted to force parties to the negotiating table.

Consequently, and evident throughout its engagement with the international community, Cameroon has been able to skirt major reforms and resist real structural change to its politics or economy.

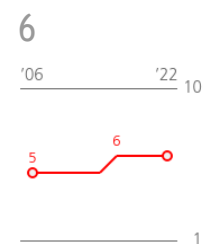
Although it is seen as the pillar of the CEMAC region, Cameroon's credibility as a reliable partner has been mixed. For decades, Cameroon was a reliable partner of the French in the international arena, especially during disagreements with powerful states like the United States. Yet, in 2003 Cameroon was willing to abstain on a possible U.N. Security Council resolution on the Iraq War in exchange for American military aid. Similarly, Cameroon abstained from a U.N. vote that backed the "Goldstone Report" on the 2005 Israel-Gaza conflict, with the United States reportedly offering to support Cameroon in its territorial dispute in the Bakassi Peninsula. Cameroon is now a reliable partner in regional security operations but is also not a party to the International Criminal Court (ICC). Cameroon is a member of the Extractive Industries Transparency Initiative (EITI), which tries to monitor and tackle corruption and mismanagement in mining and oil industries. The latest reforms in the extractive sector include the review of the Mining Code in 2016, which makes it mandatory for companies to comply with transparency requirements as per the EITI. In February 2020, the EITI in Cameroon published the EITI report for the 2017 fiscal year.

Unlike other countries in the region, Cameroon has avoided reputational damage due to its response to COVID-19.

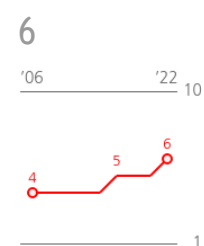
Cameroon is a member of many regional organizations, such as the African Union, the monetary union of the CFA franc zone, and the Economic and Monetary Community of Central Africa (CEMAC). Within CEMAC, Cameroon is the most important market and producing economy.

Cameroon has fostered closer ties with Chad and Nigeria, in particular on security issues. After resolving the Bakassi Peninsula dispute, relations with Nigeria have improved. Nigeria and Cameroon partner on issues of regional security to fight Boko Haram, and in early 2018 the Nigerian government extradited members of the self-proclaimed "independent Ambazonia" government. Nigeria has also allowed Cameroonian troops to cross the border in pursuit of separatist militias. In 2003, Cameroon and Chad completed the Petroleum and Pipeline Project, which

Credibility



Regional cooperation



connected oil fields in Doba to Kribi. Cameroon has played a key role in supporting the Central African political process through regional organizations like the CEMAC and Economic Community of Central African States. However, this regional cooperation has not translated into leadership on broader issues of regional integration in Central Africa, which remains poorly developed in comparison to other regions in sub-Saharan Africa.

Strategic Outlook

Despite some progress on macroeconomic reform, Cameroon remains mired in a state of malaise, which it seems unable or unwilling to overcome. With the 2018 re-election of Paul Biya, Cameroon has bucked a continental trend, which has seen aging rulers ousted from power or forced to resign, as in Angola and Zimbabwe. While the Anglophone crisis helped place issues of political stability at the forefront of voters' minds, Biya's re-election is indicative of Cameroon's unpreparedness to cope with change. Indeed, the question of a "post-Biya" Cameroon is one of the recurring themes in all analyses of Cameroon over the past two decades. Biya will likely pass away while in office and Cameroon is not prepared either politically or institutionally for this event. That transition is likely to be very contentious and potentially violent. Mutual distrust and factionalism, and a politics based on ethnic balancing makes the question of succession a zero-sum scenario in the eyes of many.

A permissive international environment, which views Cameroon as an "island of stability" in a strategically important environment, has sustained this reality. Cameroon's close relationship with France, and more recently the United States, has shielded it from serious criticism of its state of democracy and economy. Moreover, international support has helped ensure that Cameroon remains in the good graces of international lenders. This cooperation is likely to continue, especially given the COVID-19 pandemic, and will provide the regime with some protection from the domestic challenges it faces.

Even if the transition following Biya's departure is relatively peaceful, the institutions in place and the style of politics inculcated over the past 30 years are likely to continue. The use of patronage to build political support has been the primary cause of widespread public corruption. The regime's resistance to economic and political reform is driven by the elite's dependence on rents derived from the state to sustain political support. Unless political incentives are realigned, it will be difficult for reform-minded elites to exert sufficient control to push Cameroon toward real economic and political transformation. Much depends on the specifics of what happens after Biya leaves office, but a pathway to real democratic transformation is not ensured by Biya's departure.

For this reason, the economic returns on Cameroon's infrastructural investments and exploration of offshore natural gas are likely to be limited. Without policy reform and an equal investment in human capital, economic gains will likely remain limited to a few, and will be eaten away by corruption and bureaucratic inefficiencies. Cameroon does not spend enough money on health care or education, and state intervention in the economy limits the ability of the private sector to grow and create jobs that can lift the country out of poverty. Combating corruption, liberalizing the bureaucracy and investing in the rule of law should be government priorities, but are not currently supported by appropriate political incentives. The current outlook involves the economy continuing to muddle through, displaying some signs of fiscal and macroeconomic strength, but performing far below its potential.

This prolonged period of malaise has also had a severe social impact, which is likely to continue and get worse. There is a massive demand for jobs and viable livelihoods among Cameroonians under the age of 25 (roughly 60% of the population). Coping with this demand will remain a key challenge for Cameroon in the years to come. However, nowhere is the breakdown of social trust more evident than in the Anglophone regions. The degree of violence has polarized society. The government is divided about the right way to approach the crisis. While some members follow a pure law and order approach, others are more open to a political solution. The conflict will likely continue into the near future and have a serious toll for years to come.

Cameroon's response to COVID-19 appears to be fairly effective, but the regime seems ill-prepared to deal with the economic fallout. Without international assistance, Cameroon will likely suffer due to substantial fiscal pressures and urgent balance of payment needs in the near future. It is estimated that over 80% of both formal and informal businesses have experienced a slowdown in activity. Addressing these challenges will likely take focus away from the major economic and political transformations that are fundamentally needed to place the country on a more sustainable path.