

STRATEGIC POSITION NOTE

« *The French Strategic Context on Critical Minerals and French Guiana (2022-2026): A Window of Opportunity to Secure* »

Institut de l'Atlantique Sud – June 2026

French Guiana is no longer merely an overseas territory facing persistent challenges of internal security, economic development, and environmental protection. It now constitutes a **strategic lever of critical sovereignty** for France and the European Union, in a geopolitical context marked by structural and growing dependence on Chinese supplies of critical minerals and metals essential for the energy and digital transition. Between 2022 and 2026, four institutional and regulatory pillars converged to radically transform the strategic context of French Guiana in the field of mineral resources. This convergence creates a **historic but fragile window of opportunity**, whose securing requires a structural reading of hybrid vulnerabilities and an integrated approach combining security, sustainable development, and regional cooperation, particularly with Brazil. This note follows in the wake of the **National Strategic Review**, the **Military Programming Law 2024-2030**, and the European **Critical Raw Materials Act**, which underscore the imperative to reduce critical external dependencies and secure strategic supply chains. It proposes a forward-looking analysis and actionable recommendations for institutional decision-makers and strategic partners.

The Four Pillars of the Transformation (2022-2026)

Date	Event
Jan. 2022	Varin Report on securing supplies of critical metals
Dec. 2022	Creation of DIAMMS (Decree n°2022-1550) and appointment of the interministerial delegate
March 2024	Action plan of the France-Brazil strategic partnership and launch of DTEMS
March 2025	Launch of the mineral resources inventory in French Guiana
August 2025	Decrees implementing the mining code reform (specific provisions for French Guiana)
Nov. 2025 / Jan. 2026	Senate Report n°135 « The Guiana Plateau » – diagnosis and 20 recommendations
April 2026	Progress report on the mineral resources inventory in French Guiana – focus on Sillon Nord

KEY FIGURES

- **Illegal gold production in French Guiana:** estimates 4 to 8 tonnes/year (vs ~1 tonne legal recent) – predominantly exogenous (Brazilian networks via Suriname)
- **French dependence:** nearly 100% imports for numerous critical minerals (lithium, rare earths, niobium...)
- **Bilateral partnerships:** 15 strategic partnerships signed by France since 2022 in the framework of resource diplomacy
- **Potential of French Guiana:** Mineral resources inventory underway (results expected 2028-2029) – focus on Sillon Nord for lithium, niobium, tantalum, rare earths and associated substances

I. THE FOUR PILLARS OF THE FRENCH CONTEXT (2022-2026)

1. Varin Report (January 2022) and creation of DIAMMS (December 2022)

The report submitted by Philippe Varin to the government in January 2022 constituted the founding diagnosis of the French strategy for securing supplies of critical mineral raw materials. It highlighted the structural vulnerability of French and European industry in the face of the concentration of value chains, particularly under Chinese influence, and formulated structuring operational recommendations: creation of an observatory, a dedicated investment fund, strengthening of resource diplomacy, and reinforced interministerial governance. The most tangible implementation was the creation, by Decree n° 2022-1550 of 10 December 2022, of the Interministerial Delegation for Supplies of Strategic Minerals and Metals (DIAMMS), placed under the Prime Minister. This interministerial coordination body, embodied by a high-level delegate, made it possible to articulate the actions of the ministries of Economy, Foreign Affairs, Ecological Transition and the Armed Forces, while closely associating industrialists. It also spurred active diplomacy that led to the signing of 15 strategic bilateral partnerships, including the High-Level Dialogue on Energy Transition and Strategic Minerals (DTEMS) with Brazil, formalized in the action plan of the Franco-Brazilian strategic partnership of 28 March 2024.

2. Inventory of mineral resources in French Guiana (launched March 2025, progress report April 2026)

The inventory of mineral resources in French Guiana was launched in March 2025 as part of the national inventory program. A progress report was presented in Cayenne on 23-28 April 2026, with a particular focus on the Sillon Nord, one of the five targeted regions. Full results are expected for 2028-2029. This modernized inventory, relying on cutting-edge geophysical and geochemical exploration methods, aims to fill knowledge gaps regarding the subsoil of French Guiana. Beyond gold, traditionally dominant, it will make it possible to assess the potential in lithium, niobium, tantalum, rare earths and associated substances – critical minerals for batteries, permanent magnets, electronics and defense technologies. French Guiana could thus contribute to the diversification of French and European supply sources, provided that the conditions of governance, security and social acceptability are met.

3. Reform of the mining code and implementing decrees of 27 August 2025

The reform of the mining code, initiated by the Climate and Resilience Law of 2021 and completed by ordinances in 2022, found its operational culmination with the publication, on 28 August 2025 in the Official Journal, of four implementing decrees (notably Decrees n° 2025-851, 2025-853 and following). These texts lift several legal and administrative locks that hindered legal exploitation, while strengthening environmental, social and governance requirements. In French Guiana, specific provisions aim to favor legal exploitation in areas affected by illegal gold mining, to impose financial guarantees adapted to artisanal Guyanese operators, to improve the traceability of gold production and to systematize the opinion of the Grand Conseil Coutumier on exploitation applications in areas of collective usage rights of Amerindian and Bushinengue communities. This reform constitutes a major lever to substitute a legal, traceable and fiscalized mining economy for the shadow economy that thrives on border porosities.

4. Senate Report n°135 (2025-2026) « The Guiana Plateau: Affirming France as a Key Regional Actor »

Tabled on 19 November 2025 and presented in January 2026, Senate Information Report n°135 provides an uncompromising diagnosis of the situation on the Guiana Plateau. It highlights the scale of illegal gold mining – estimated at between 5 and 10 tonnes of gold per year depending on the periods, with recent legal production of around 1 tonne –, its predominantly exogenous character (more than 96% of the actors involved being foreign, mainly Brazilian networks operating from Suriname via the Maroni) and the persistent border porosities that make it a durable logistical corridor for transnational hybrid networks. The report also alerts on external appetites, notably Chinese, for the resources of the Plateau and on the risks of regional destabilization. It formulates 20 recommendations calling for a paradigm shift: moving from « repressive containment » – which has reached its limits – to a strategy of secure legal valorization, combining reinforced action against structured networks, development of a responsible legal mining sector, increased cooperation with Brazil and Suriname, and affirmation of France as a key regional actor in the Amazonian space.

II. THE WINDOW OF OPPORTUNITY AND ITS STRUCTURAL LOCKS

The convergence of the four pillars analyzed above creates a real and favorable window of opportunity to reposition French Guiana as a strategic contributor to French and European mineral sovereignty. However, this window is fragile and liable to close if the structural locks are not addressed with the same rigor as the technical, legal and geological aspects.

1. Illegal gold mining: a structural and hybrid phenomenon

Far from being a simple phenomenon of opportunistic delinquency, illegal gold mining in French Guiana is a structured, profitable and resilient system. Recent estimates indicate 4 to 8 tonnes of gold extracted illegally per year (compared to around 1 tonne via the legal channel), involving several thousand people, mainly Brazilian garimpeiros operating from the Surinamese bank of the Maroni. The logistical networks (fuel, equipment, food, gold) are sophisticated and rely on durable cross-border corridors. Chinese actors have been identified in the past in supply and laundering chains, confirming the hybrid dimension of the phenomenon. Repressive operations, although necessary and sometimes crowned with success (significant seizures of equipment in 2025), reach a « glass ceiling ». Without a credible economic substitution strategy and durable securing of corridors, the void created by dismantlements is quickly filled.

2. Border porosities: Maroni and Oyapock as hybrid corridors

The Maroni (border with Suriname) and Oyapock (border with Brazil) rivers constitute natural logistical axes that are difficult to control throughout their course. These porosities do not only concern gold mining: they also facilitate flows of narcotics, weapons, people and potentially other forms of organized crime or hostile foreign influence. In a structural reading, these corridors represent potential tipping points where state or non-state actors could exploit governance weaknesses to extend their influence over the strategic resources of the Guiana Plateau.

3. Environmental, social tensions and project acceptability

The emblematic Montagne d'Or project was blocked due to legitimate environmental and social concerns, illustrating the difficulty of obtaining social acceptability for large mining projects in French Guiana. Current projects are mostly medium-sized gold projects (Espérance, Boulanger, Dieu-Merci, PER Basse-Mana and others), carried by often modest-sized operators. The acceptability of future critical minerals projects will depend on high environmental and social

standards, inclusive governance (including Amerindian and Bushinengue populations via the Grand Conseil Coutumier) and equitable distribution of economic benefits on the territory.

4. Critical minerals still in inventory/exploration phase

Unlike gold, whose potential is known and exploited (legally or illegally), the critical minerals identified as priorities by the French strategy (lithium, niobium, rare earths...) are still in the evaluation phase via the mineral resources inventory. The results expected in 2028-2029 will constitute a major tipping point: either they will confirm significant potential, justifying reinforced investments and securing; or they will reveal limited or difficult-to-exploit resources, reducing the immediate strategic interest of French Guiana in this field. Anticipating these alternative scenarios is essential not to miss the window.

In summary, the window of opportunity exists, driven by clear political and institutional will since 2022. But it will only materialize if the structural locks – hybrid illegal gold mining, border porosities, social acceptability and uncertainty about the real potential in critical minerals – are addressed through an integrated, anticipatory and partnership-based approach, particularly with Brazil.

III. RECOMMENDATIONS: SECURING THE WINDOW THROUGH AN INTEGRATED APPROACH

The 20 recommendations of Senate Report n°135 constitute a solid and relevant base. The Institut de l'Atlantique Sud proposes to enrich this roadmap with a structural reading of tipping points and an integrated approach combining security, development, regional cooperation and anticipation. Five priority and actionable recommendations are formulated below.

Recommendation 1: Treat illegal gold mining as a structural and hybrid phenomenon

Beyond ad hoc repressive operations, adopt a long-term strategy aimed at dismantling the transnational logistical and financial networks that structure the shadow economy. This implies strengthening intelligence, increased judicial and operational cooperation with Brazil and Suriname, and particular attention to financial flows and laundering. The objective is not only to reduce extracted volumes, but to render the economic model of illegal gold mining unviable in the medium term.

Recommendation 2: Accelerate the transition to secure legal exploitation with high environmental and social standards

Implement without delay the provisions of the August 2025 decrees allowing the installation of legal operators on sites previously exploited illegally, while guaranteeing exemplary environmental, social and governance standards. Systematically associate the Grand Conseil Coutumier in decisions and develop mechanisms for sharing benefits with local communities. Traceability of legal gold (via blockchain or equivalent systems) must become a standard to access demanding European and international markets.

Recommendation 3: Strengthen France-Brazil cooperation on traceability and corridor securing (explicit link with DTEMS 2024)

The High-Level Dialogue on Energy Transition and Strategic Minerals (DTEMS), launched in March 2024 within the framework of the Franco-Brazilian strategic partnership, offers a privileged institutional framework. It should be fully activated on the components « securing cross-border corridors », « mineral traceability » and « fight against hybrid networks ». A joint France-Brazil-French Guiana task force, associating security forces, customs and operators, could be established to operationalize these objectives. The shared vision of a responsible and sovereign « Blue Guyana – Blue Amazon » constitutes a powerful mobilizing narrative.

Recommendation 4: Use the mineral resources inventory as the basis for an integrated security + development strategy

The results of the inventory (progress report 2026, full results 2028-2029) must be integrated from now on into interministerial strategic planning. If the potential in critical minerals is confirmed, a strategy of securing and responsible valorization must be prepared in advance, including infrastructures, local workforce training, environmental and social standards and public-private partnerships. If the potential proves limited, pivot towards a strategy of sustainable valorization of known resources (legal gold, aggregates, etc.) and economic diversification of the territory.

Recommendation 5: Develop a structural anticipation capacity for tipping points

Critical tipping thresholds (intensification of hybrid flows, discovery or not of significant deposits, shift in social acceptability, evolution of external actors' strategies) can be anticipated 12 to 24 months in advance through a structural reading of institutional and hybrid vulnerabilities. The Institut de l'Atlantique Sud proposes to accompany institutional actors in the development and use of adapted anticipation tools (such as the IEDM – Threat Dynamics Evaluation Indicator – and the Structural Risk Index), making it possible to identify weak signals and systemic risk configurations before they become critical. This anticipation capacity is complementary to existing mechanisms and strengthens the resilience of the French strategy on the Guiana Plateau.

CONCLUSION AND POSITIONING OF THE INSTITUT DE L'ATLANTIQUE SUD

France has, between 2022 and 2026, a historic opportunity to reposition French Guiana as a pillar of its mineral sovereignty and its regional influence in the Amazonian space. This opportunity is the fruit of an unprecedented convergence: a shared diagnosis (Varin Report), operational interministerial governance (DIAMMS), a modernized legal framework (mining code reform), geological knowledge in the process of being updated and a senatorial diagnosis calling for a paradigm shift (Report

n°135). However, this window will not materialize by itself. The structural and hybrid locks – structured illegal gold mining, border porosities as corridors for transnational networks, social acceptability tensions and uncertainty about the real potential in critical minerals – require being addressed with the same analytical and operational rigor as the technical and legal aspects. Without an integrated, anticipatory and partnership-based approach (particularly with Brazil via DTEMS), there is a real risk of seeing the window close, to the detriment of French and European sovereignty as well as the sustainable development of French Guiana. The Institut de l'Atlantique Sud proposes to accompany this strategic transition by providing a structural and anticipatory reading of the institutional and hybrid vulnerabilities of the Guiana Plateau. By combining geopolitical expertise, analysis of transnational networks and tools for evaluating threat dynamics (IEDM / Structural Risk Index), the Institute can contribute to identifying critical tipping points 12 to 24 months in advance and to formulating integrated recommendations aligned with the objectives of shared France-Brazil sovereignty in the Blue Guyana – Blue Amazon space. This contribution is part of a logic of public service and institutional partnership, at the service of Guyanese authorities and Brazilian partners. The objective is to transform a fragile opportunity into a durable strategic advantage, for the benefit of security, prosperity and shared sovereignty in the South Atlantic.

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Note: This position note was prepared by the Institut de l'Atlantique Sud on the basis of open sources and public documents. It does not commit the institutions mentioned and aims to contribute to the strategic debate and public action.