

WAVERLEY GATEWAY GUIDE

Connecting International Capital with Emerging & Frontier Markets

FRENCH GUIANA

America South

Dialogue | Trust | Partnership

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WHERE AND HOW TO ENTER

KEY INVESTMENT LOCATIONS

Location / Region	Strategic Importance	Priority Sectors
Cayenne (capital)	French Guiana's administrative and commercial capital	Financial services, administration, commerce
Kourou (Guiana Space Centre)	Europe's only spaceport, now flying a regular Ariane 6 launch cadence after years of development delay	Aerospace, satellite launch services, space-sector logistics
Parc Amazonien de Guyane (southern interior)	Epicenter of a record illegal gold-mining crisis, with roughly 100 of the territory's 189 known clandestine sites located inside the park	Limited near-term investment; environmental remediation and security services only
Saint-Laurent-du-Maroni (Suriname border)	Second city and principal logistics corridor for cross-border illegal mining and trafficking along the Maroni River	Limited near-term investment; border security and logistics only
Montagne d'Or site (Paul Isnard, western Guiana)	Site of a long-stalled legal mega gold-mining project, effectively blocked on environmental grounds since 2019	Legal large-scale gold mining (currently dormant)
Offshore Exclusive Economic Zone	Underexplored waters extending the Guyana-Suriname basin play, where nearby discoveries have driven a regional offshore oil boom	Offshore oil and gas exploration
Mana / Sinnamary agricultural corridor	Established agricultural zone offering diversification away from the space and mining sectors	Agribusiness, agriculture

INVESTOR ENTRY ROUTES

- Aerospace and space-sector investment tied to Ariane 6's now-operational launch cadence at the Guiana Space Centre
- Legal gold-mining investment contingent on the long-stalled Montagne d'Or project or new concessions, positioned against the illegal-mining backdrop
- Offshore oil and gas exploration investment in licenses extending the Guyana-Suriname basin play into French Guiana's EEZ
- Agribusiness investment in the Mana/Sinnamary corridor, diversifying beyond the space and mining sectors
- EU-structural-fund-backed infrastructure and development investment, leveraging French Guiana's Outermost Region (RUP) status
- Security and environmental-remediation services investment supporting the Harpie anti-illegal-mining operation and proposed mercury-pollution mitigation ("loi Mercure")

MARKET-ENTRY OBSERVATION

French Guiana's defining economic anchor, the Guiana Space Centre at Kourou, enters this briefing on genuinely firmer footing: after years of Ariane 6 development delays, the rocket is now flying a regular cadence (successful launches in June and August 2026 alone), re-establishing Europe's sovereign launch capability from French soil and underpinning a significant share of the territory's formal employment. The broader economy remains structurally fragile, however: unemployment stood at 17% in 2025, and only 42% of the working-age population is employed - the lowest rate among France's Caribbean and Guiana overseas territories - as population growth continues to outpace job creation.

Political continuity has also been abruptly disrupted. Gabriel Serville, president of the Collectivité Territoriale de Guyane since 2021 and a driving force behind the territory's statutory evolution and regional cooperation, died on September 30, 2026 after a multi-year battle with cancer, leaving a leadership vacancy at the head of French Guiana's unified territorial government just days before this briefing. Separately, the illegal gold-mining crisis has reached a record scale: roughly 189 active clandestine sites were recorded in early 2026 (about 100 inside the Amazonian Park), mercury contamination continues to poison the Wayana and Tiriyo Indigenous peoples, who have asked the French state to "declare war" on the practice, and the long-running Harpie military operation - while continuing to dismantle sites and make cross-border arrests with Interpol - has drawn criticism from local associations and lawmakers as insufficient given rising gold prices and the involvement of armed groups crossing from Brazil. A proposed "loi Mercure" would toughen mercury-pollution penalties, and the territory's legal large-scale Montagne d'Or gold project remains stalled years after being effectively blocked on environmental grounds, even as nearby Guyana and Suriname's offshore oil boom has renewed interest in French Guiana's own underexplored waters.

INVESTOR RISK & MARKET ACCESS

KEY ENTRY BARRIERS

Issue	Potential Impact	Possible Mitigation
Sudden leadership vacancy at the territorial government	CTG president Gabriel Serville's death on September 30, 2026 leaves no confirmed successor at the head of French Guiana's unified territorial government	Monitor the CTG succession process before engaging on matters requiring territorial-government sign-off
Record illegal gold-mining crisis	Roughly 189 clandestine mining sites, mercury pollution poisoning Indigenous communities, and the involvement of armed groups crossing from Brazil have outpaced the long-running Harpie military operation's enforcement capacity	Avoid operations in or near active clandestine mining zones and monitor the proposed "loi Mercure" and enforcement trends
Weak formal labor market	17% unemployment and only a 42% employment rate reflect a structural shortfall in formal job creation relative to population growth	Build realistic workforce-availability assumptions and consider training/development partnerships with local institutions
Stalled legal large-scale gold mining	The Montagne d'Or project remains effectively blocked on environmental grounds years after it was first halted	Treat large-scale legal gold-mining entry as a long-horizon, policy-contingent opportunity rather than a near-term one
Commercially unproven offshore oil potential	Despite proximity to Guyana and Suriname's offshore oil boom, French Guiana's own waters have not yet produced a confirmed commercial discovery	Treat offshore exploration as early-stage and high-risk pending further drilling results
Cross-border security pressure on the Maroni River	Saint-Laurent-du-Maroni and the Suriname border corridor remain a logistics route for illegal mining and associated trafficking	Avoid near-term operations in the border corridor pending security stabilization
Narrow economic base dependent on French/EU transfers and the space sector	The territory's formal economy remains heavily dependent on French state transfers, EU structural funds, and the Guiana Space Centre specifically	Diversify investment exposure beyond the space sector and monitor French budget and EU funding-cycle developments

INVESTOR RISK NOTE

Waverley views French Guiana as anchored by a genuinely strengthening space-sector franchise - Ariane 6's return to a regular launch cadence is a real positive signal - sitting alongside a structurally weak labor market, a worsening illegal gold-mining and mercury-pollution crisis, and a sudden leadership vacancy at the territorial government following its president's death. Investment should concentrate on the space, agribusiness and offshore-exploration opportunities while treating the interior mining regions and border corridor as no-go zones for now.

MARKET ACCESS

French Guiana is a French overseas department/region and an EU Outermost Region (RUP), giving investors eurozone currency certainty, full French legal and tax-framework protections, access to EU structural funds, and a direct institutional link to the European single market from South American soil.

WHO SHOULD THE INVESTOR MEET?

INSTITUTIONAL LANDSCAPE

Actor	Why It Matters	Waverley Engagement Angle
Collectivité Territoriale de Guyane (CTG)	Unified regional/departamental government currently without a confirmed president following Gabriel Serville's September 2026 death	Primary point of engagement for territorial development and infrastructure matters, pending leadership clarity
Prefecture of French Guiana (French State representative)	Represents the French state locally and oversees security policy including the Harpie operation	Primary channel for security-policy and state-investment engagement
CNES / Arianespace (Guiana Space Centre)	Operates the Guiana Space Centre and coordinates the Ariane 6 launch program	Primary point of engagement for aerospace and space-sector investment
Harpie Operation command (French Armed Forces / Gendarmerie)	Leads military and police operations against illegal gold mining, with continuing but contested effectiveness	Monitor for enforcement developments relevant to interior and border-region operations
DEAL Guyane (state environment and mining regulator)	Oversees mining permitting and environmental review, including the stalled Montagne d'Or project	Primary channel for legal mining-sector licensing and environmental compliance
Parc Amazonien de Guyane	Manages the protected area at the center of the illegal-mining crisis and liaises with affected Indigenous communities	Reference point for environmental and Indigenous-community engagement in the interior
EU structural-fund bodies (Outermost Region framework)	Administers EU development funding available to French Guiana under its RUP status	First point of contact for EU-funded infrastructure and development projects

CURRENT INTERNATIONAL BUSINESS CHANNELS

Most inbound capital flows through CNES/Arianespace-coordinated aerospace investment, DEAL Guyane-regulated mining-sector licensing, EU structural-fund facilitation for infrastructure and development projects, and direct engagement with the Prefecture for security-sensitive or state-linked ventures.

INVESTOR PROFILE BEST SUITED

Best suited to aerospace and space-sector investors supporting the Ariane 6 launch program, agribusiness investors in the Mana/Sinnamary corridor, and early-stage offshore oil and gas explorers comfortable with an unproven basin. Not suited to investors seeking exposure to the interior mining regions or the Suriname border corridor given current security and environmental conditions.

FROM INTELLIGENCE TO ENGAGEMENT

STEP 1: Confirm sector fit

Decide between aerospace/space-sector, agribusiness, or offshore oil and gas exploration investment.

STEP 2: Engage the relevant sector institution

Open discussions with CNES/Arianespace, DEAL Guyane, or EU structural-fund bodies depending on sector focus.

STEP 3: Monitor the CTG leadership succession

Track the process to confirm a new Collectivité Territoriale de Guyane president before engaging on territorial-government-linked matters.

STEP 4: Assess interior and border-region security conditions

Avoid the Parc Amazonien interior and Saint-Laurent-du-Maroni border corridor for any near-term physical operations.

STEP 5: Track the Montagne d'Or and mercury-legislation developments

Monitor the stalled legal mining project and the proposed "loi Mercure" as signals of the sector's longer-term direction.

WAVERLEY'S ROLE

- Track the Collectivité Territoriale de Guyane's leadership succession and its implications for territorial development projects
- Monitor the Harpie operation's effectiveness and the proposed "loi Mercure" mercury-pollution legislation
- Coordinate introductions to CNES/Arianespace, DEAL Guyane and EU structural-fund bodies for sector-specific entry
- Screen aerospace, agribusiness and offshore-exploration opportunities against current security and governance conditions

INVESTOR CALL TO ACTION

Waverley Gateway positions investors to capture French Guiana's strengthening space-sector franchise and EU-backed development funding, while explicitly tracking the territorial government's leadership vacancy and the worsening illegal gold-mining crisis - engage now in the space and agribusiness sectors while treating the interior and border regions as no-go zones.

[Sector screening](#) -> [Governance and security due diligence](#) -> [Institutional introductions](#) -> [Structured entry](#)

WAVERLEY INVESTOR INTELLIGENCE & OPPORTUNITY PIPELINE

Near-term opportunities concentrate in aerospace and launch-services investment riding Ariane 6's restored cadence, agribusiness investment in the Mana/Sinnamary corridor, EU-structural-fund-backed infrastructure projects, and early-stage offshore oil and gas exploration extending the Guyana-Suriname basin play.

POSITIONING

French Guiana offers a genuinely strengthening space-sector franchise - Europe's only spaceport now flying a restored Ariane 6 launch cadence - alongside EU Outermost Region development funding and underexplored offshore oil potential.

That franchise sits alongside a structurally weak labor market, a worsening illegal gold-mining and mercury-pollution crisis, and a sudden leadership vacancy at the territorial government. Waverley frames French Guiana as a space-sector-led opportunity best entered while actively avoiding the interior mining regions and the Suriname border corridor.

SELECTED SOURCES

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