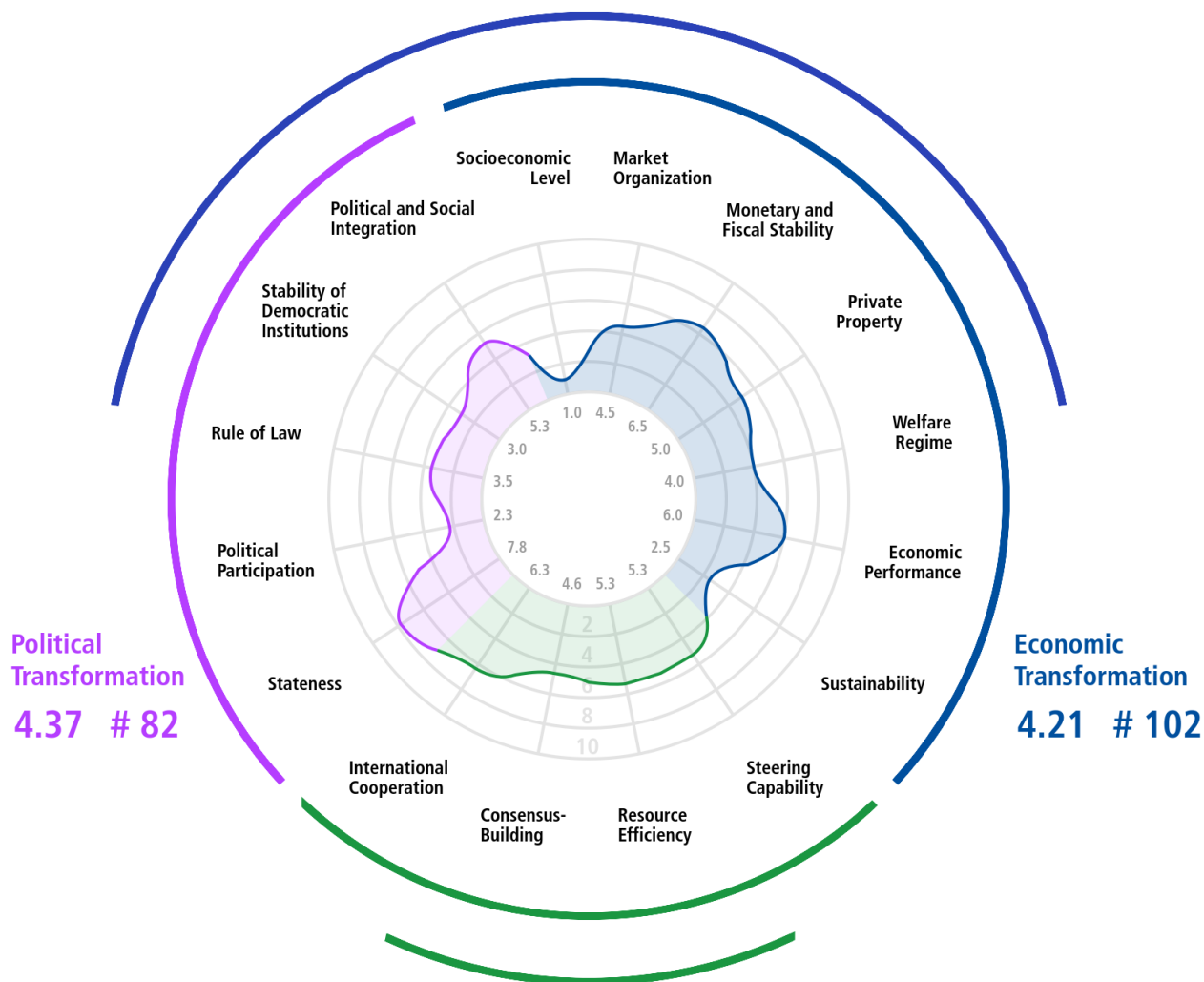


# Guinea

## Status Index

**4.29 # 96**

on 1-10 scale out of 137



## Governance Index

**5.09 # 52**

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2024**. It covers the period from February 1, 2021 to January 31, 2023. 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>.

Please cite as follows: Bertelsmann Stiftung, BTI 2024 Country Report – Guinea. Gütersloh: Bertelsmann Stiftung, 2024.

This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

## Contact

Bertelsmann Stiftung  
Carl-Bertelsmann-Strasse 256  
33111 Gütersloh  
Germany

### Sabine Donner

Phone +49 5241 81 81501  
[sabine.donner@bertelsmann-stiftung.de](mailto:sabine.donner@bertelsmann-stiftung.de)

### Hauke Hartmann

Phone +49 5241 81 81389  
[hauke.hartmann@bertelsmann-stiftung.de](mailto:hauke.hartmann@bertelsmann-stiftung.de)

### Sabine Steinkamp

Phone +49 5241 81 81507  
[sabine.steinkamp@bertelsmann-stiftung.de](mailto:sabine.steinkamp@bertelsmann-stiftung.de)

**Key Indicators**

Population	M	<b>13.9</b>	HDI	<b>0.465</b>	GDP p.c., PPP \$	<b>3187</b>
Pop. growth <sup>1</sup>	% p.a.	<b>2.4</b>	HDI rank of 189	<b>182</b>	Gini Index	<b>29.6</b>
Life expectancy	years	<b>58.9</b>	UN Education Index	<b>0.346</b>	Poverty <sup>3</sup>	% <b>46.6</b>
Urban population	%	<b>37.7</b>	Gender inequality <sup>2</sup>	<b>0.621</b>	Aid per capita \$	<b>43.4</b>

Sources (as of December 2023): The World Bank, World Development Indicators | UNDP, Human Development Report 2021-22. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.65 a day at 2017 international prices.

## Executive Summary

The review period was shaped by the National Committee for Reconciliation and Development (CNRD) coup d'état in September 2021 and the subsequent political events. Most importantly, a trial was begun to prosecute those accused of organizing and carrying out a large-scale massacre in a football stadium in September 2009. Among the accused is former junta chief Moussa Dadis Camara, who expressed surprise upon his arrest and subsequent incarceration in September 2022, upon returning to the country.

Guineans are following the trial with great interest, as they also follow news of those accused by the Court for the Repression of Economic and Financial Crimes (CRIEF). While nearly everyone is pleased that decades of impunity appear to be ending with accountability, many also observe that those accused in these and other judicial processes are often current or potential critics of the ruling junta.

The CNRD has set itself an ambitious program of reforms during its announced 40-month transition. In addition to the trials and several large public works projects already begun under the last government, it has committed to writing a new constitution, conducting a national census, making new electoral lists, and holding separate communal, regional, legislative and presidential elections. No prior Guinean government has achieved so many major – and contested – undertakings in such a short time, and going by past experience, all of these things would normally take at least a decade to achieve. Because the junta is not bound by any meaningful checks or balances, it can move faster than an elected government, but therein lies its weakness. While it may be able to break through the political logjams that have slowed prior governments, the lack of consultation in its activities may yield laws, institutions and officials with limited legitimacy.

As of yet, international actors have been pleased to see any progress, and both Guineans and diplomats note a marked improvement from the later Conde years, which were widely considered to be characterized by high levels of corruption and an autocratic style of governance. However, several red flags are already visible. Many consider this government to heavily favor the Maninka ethnic group, as did the previous government. Banning demonstrations and arresting opposition

leaders are also signs that have triggered nervousness about possible authoritarian tendencies familiar to Guineans from past governments.

Guinea has successfully rebounded from the COVID-19 pandemic, as it did from Ebola, and experienced 1.4% per capita GDP growth in 2021. With more than 90% of its exports originating from the mining sector, these economic benefits often fail to improve the lives of the poor, particularly in rural areas. Rural poverty rates are significantly higher than those in urban areas. Guinea has recently witnessed a substantial increase in electricity production thanks to newly constructed hydroelectric dams, and its electrical grid is expanding rapidly. Currently, the Transguinean railroad is under construction, with the primary goal of transporting iron ore from the Simandou site to a port located in the Forecariah area, south of Conakry.

## History and Characteristics of Transformation

France colonized Guinea at the end of the 19th century. The colonial state fostered the formation of an indigenous class of public sector employees, which became the core of Guinea's national movement. After World War II, a socialist trade union movement led by Ahmed Sékou Touré organized various social groups to demand self-government. On Sept. 28, 1958, Guinea voted against General de Gaulle's referendum on membership in a *Communauté Française*, which would have included all of French West Africa. France severed all relations with Guinea, and on Oct. 2, 1958, Guinea declared independence under President Sékou Touré.

As the Cold War raged, Guinea pursued a socialist vision of development in an era of transformation. Touré sought to eliminate the deficiencies of the colonial period, particularly with regard to infrastructure and basic needs. He placed significant emphasis on nation-building, women's emancipation and youth empowerment. Touré also aimed to end the country's dependence on Europe, and proposed the formation of a United States of Africa with Ghana and Mali. Guinea developed into a totalitarian state with strong isolationist features, while maintaining relatively strong relations with the Soviet Union, the United States and West Germany. Touré's regime – encompassing the first republic until 1982, as well as the second republic with a new constitution until 1984 – became notorious for its torture camps, where numerous real and imagined opponents were detained and died. Guinea also gained worldwide notoriety for its succession of actual and fabricated coup attempts, including the “Coup Peulh,” which was attributed to an entire ethnic group. By the time of Touré's death in 1984, approximately one-third of the Guinean population had left the country.

After Touré's death, the military seized power under Colonel Lansana Conté. Following the end of the Cold War, a new multiparty constitution (third republic) was introduced in 1991, emphasizing democracy and a market economy. Since then, multiparty democracy has been defined by a winner-takes-all approach to gaining control of the government and utilizing it to allocate resources to members of the ruling party and their followers.

Greater opportunities for private business led to the emergence of wealthy businesspeople who relied heavily on corrupt government relations. President Conté and his family leveraged their political power to personally benefit from many of these new business prospects. Despite this, overall economic growth rates remained low, and a significant portion of the population continued to live in poverty. President Conté failed to establish a true democracy, or at least one that would enable a peaceful transfer of power. Manipulated elections, as well as oppression and intimidation, poisoned the political atmosphere. Despite the influx of donor funds, there was no tangible improvement in economic development. Following the rigged parliamentary and presidential elections respectively held in 2002 and 2003, Guinea's economy began to rapidly decline, worsened by President Conté's illness. Additionally, Guinea became a key hub for transshipping Latin American cocaine to Europe. In response to the ongoing political, economic and social crisis, trade unions initiated general strikes in 2006 and 2007, which attracted massive participation.

Beginning in the 1990s, Guinea was affected by civil wars in neighboring Sierra Leone (1991 – 2002), Liberia (1989 – 2003) and Côte d'Ivoire (2002 – 2011). At times, there were over 1 million refugees in the forest region. By 2006, most refugees had left Guinea or integrated into its population. An attack by Liberian government forces and associated groups in late 2000 was quickly repelled but resulted in severe destruction in some parts of the border regions.

Conté died in office at the end of 2008. Captain Moussa Dadis Camara and a group of lower-ranking officers subsequently seized power in a coup. Initially welcomed, they governed in an increasingly erratic and authoritarian manner that eroded their support. These abuses reached a climax with a significant massacre. On September 28, 2009, opposition groups gathered for a peaceful protest at the national stadium, only to be attacked by an army squad made up of individuals close to Camara. During the assault, 158 civilians were killed, over 100 women were raped and more than 1,000 people were injured. In December 2009, Dadis Camara's aide de camp, Sidiki "Toumba" Diakité, attempted to assassinate the president. Camara sought refuge first in Morocco and then in Burkina Faso. For numerous years, the victims and their families awaited a trial that would investigate the massacre and hold those responsible accountable.

In 2010, Guinea's transitional government organized the country's most open multiparty presidential election to date. The elections were highly contested, with candidates Alpha Condé (RPG) and Cellou Dalein Diallo (UFDG) advancing to a second round. Condé was declared the winner amidst claims from Diallo and his supporters that the election had been rigged. Alpha Condé had a notable history as an opposition leader, previously opposing Sékou Touré. In 1970, he was sentenced to death in absentia and subsequently spent much of his life in France. There, he became a university professor and a prominent and well-connected member of the Parti socialiste.

During his first term, Condé gradually restored some order to the economy and reinstated civilian control of the military. The West African Ebola epidemic from 2013 to 2015 affected Guinea, as well as its neighbors Sierra Leone and Liberia. Although the epidemic resulted in an economic crisis, Guinea quickly recovered.

Relations between the government and the opposition remained acrimonious. The latter – especially Cellou Dalein Diallo and his UFDG – claimed that the legislative elections in 2013, the presidential elections in 2015 and the local elections in 2018 had been manipulated in favor of President Condé and the ruling RPG.

In 2019, Conde initiated a process of revising the constitution with the primary goal of altering the age limit for the presidency and the term limits then in place. This revision was aimed at enabling him to effectively serve as president indefinitely. Utilizing the COVID-19 pandemic as a pretext, the government suppressed public demonstrations and expedited the constitutional referendum. Subsequently, in the 2020 presidential election, Conde secured a third term in office.

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

Since the coup in September 2021, the junta has established a strong monopoly on the use of force. There are no known insurgent or rebel groups, the state has outlawed demonstrations, and most of the political opposition is either imprisoned or outside the country. The possibility of a countercoup from within the military is plausible; however, this would only signify a change of leadership, rather than a challenge to the military state's monopoly of force across the entire territory. This marks a departure from the end of the Conde period, when various opposition groups risked imprisonment and death by taking to the streets and demonstrating.

One word on the lips of both political actors and ordinary people in Guinea today is "inclusion." Almost all Guineans consulted for this study embrace the nation-state as legitimate. Moreover, most citizens welcomed the departure of Alpha Conde in 2021, given that they considered his government to have engineered a constitutional coup over the course of 2021, with unacceptable levels of corruption and nepotism and violent repression of dissent.

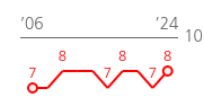
At the same time, many people remark upon the overrepresentation of ethnic Maninka and near-absence of ethnic Peuhl in the present government. While individuals from the Forest Region are represented in the civilian face of the government, Forestiers are also feeling increasingly scapegoated by this government in the context of the September 28 trial, in which the primary individual accused is Dadis Camara, the head of state under the 2008/09 junta.

Citizenship per se is not an issue that has been weaponized, as seen in Cote d'Ivoire, for instance. However, some Guineans, particularly ethnic Peuhl, feel they are being marginalized.

Question  
Score

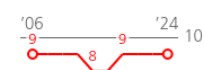
Monopoly on the  
use of force

8



State identity

9



1

Guinea's population is predominantly Muslim, and Islamic schools are widespread across the country. The state is secular and does not intervene in the religious practices of the Christian population, which makes up approximately 10% of the population, or in the religious life of the growing number of reformist Muslims. However, historically, the state has been concerned with maintaining control over religious authorities, who were frequently incorporated into patronage systems.

On Jan. 26, 2023, the Minister of Justice made aggressive public remarks about pursuing those accused of “ritual crimes” in the forest region, reviving memories of the socialist-era repression of ancestral religious practices.

The state administration provides for law and order, as well as some health education and social services. However, these services are perceived as inconsistent and inadequate by the majority of Guineans. Notably, one significant advancement has been made in the provision of electricity, which can be attributed to the construction of hydroelectric dams during the Conde administration. In 2020, 44.7% of the population had access to electricity, representing a notable increase compared to the 2010 figure of only 28%, as reported by the World Bank. Despite these improvements, it is predominantly urban areas that have benefited, while many rural regions still lack access to electricity.

According to World Bank data, 64% of Guineans had access to water in 2020 – a percentage that has hardly changed over the past decade. However, the percentage of Guineans with access to at least basic sanitation increased from 20.2% in 2010 to 29.8% in 2020.

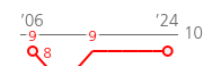
The newly renovated Donka Hospital in Conakry is also a bright spot in the health sector. However, it primarily benefits urban residents of Conakry rather than the population living in the interior.

## 2 | Political Participation

The government in power since September 2021 is a military junta and, thus, by definition, outside all democratic norms. The current leadership has announced an ambitious plan to oversee a consultative process to write a new constitution, conduct a national census, revise the electoral lists, and then hold communal, regional, legislative, and presidential elections – all while pursuing prosecutions of those who have stolen state funds. If all of these processes culminate in a turnover of power by January 2025, as promised, Guinea will be on a solid footing for a democratic reset. However, for the moment, there is no democratic process in place, and it remains to be seen whether the junta has both the will and the power to enact its reformist agenda.

No interference of religious dogmas

9



1

Basic administration

5



1

Free and fair elections

1



1



There are no elected political representatives in Guinea. The government is ruled by a junta led by Col. Mamady Doumbouya, which has designated itself the National Committee of Reconciliation and Development (CNRD). Doumbouya is the only named member of the CNRD, and he serves as its head. Other members remain unidentified. The CNRD has assumed broad powers and appears to have the political will to move forward along several fronts at once, including with anti-corruption trials, the September 28 massacre trial, the construction of public works in Conakry and the process of renovating state institutions. The National Assembly has been replaced by a National Transitional Council made up of 81 members appointed by the CNRD, representing political parties, civil society, trade unions, the private sector and various other social groups. They will play a legislative role during the transitional process, and their independence and margin of maneuver in relation to the CNRD remain to be seen.

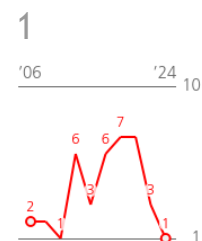
The junta has banned demonstrations and large political gatherings, and has arrested members of the National Front for the Defense of the Constitution, a pro-democracy group. While Guineans agree that anti-corruption indictments against political figures such as Cellou Dalein Diallo are likely to be well-founded, they also recognize that they appear to be politically motivated, and it seems unlikely that the three exiled major political party leaders – Alpha Conde, Cellou Dalein Diallo and Sidya Touré – will return anytime soon.

The press has remained relatively free, with private radio stations and print publications continuing to operate more or less freely, and expressing a range of opinions. However, the military has proved hostile to pro-democracy activists and groups. In May 2022, the junta banned demonstrations in public spaces. Pro-democracy activists have been arrested or gone into hiding, including three pro-democracy leaders associated with the National Front for the Defense of the Constitution. These individuals were arrested for making “insulting remarks” against the junta. These circumstances have chilled political speech and constrained public expression.

### 3 | Rule of Law

The CNRD controls the executive and has handpicked the members of the National Transition Council, which currently stands in for the legislative arm of government. While many Guineans applaud the “courage” of the judiciary in pursuing politically volatile dossiers such as the September 28 massacre trial, or in pursuing figures such as Kassory Fofana and Cellou Dalein Diallo for the embezzlement of state funds, they simultaneously recognize that most of those pursued by the state are also considered political competitors or critics of the junta. This double-edged use of judicial processes has made the judiciary appear as if it is performing tasks assigned to it by the executive. At the same time, while Guinea’s judiciary has long been neglected by

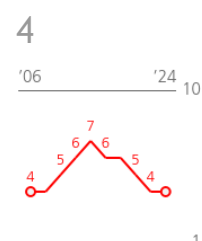
Effective power to govern



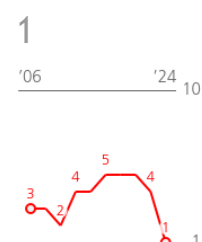
Association / assembly rights



Freedom of expression



Separation of powers



the government, it has historically exercised some measure of independence. The widely watched public trials relating to the September 28 massacre, which are being prominently managed by members of the judiciary, may help strengthen the idea among the general public that the judiciary can hold the junta accountable, even if weakly and unevenly.

The judiciary is institutionally differentiated, but under the currently governing military junta it answers directly to the executive. Numerous cabinet reshuffles have signaled that the CNRD will not hesitate to remove ministers who fail to achieve the junta's objectives.

The current Minister of Justice, Charles Wright, himself experienced the fickleness of the junta. He was named the chief prosecutor of Conakry in December 2021 and, one month later, accused the head of the Gendarmerie of having made extra-legal arrests of members of the Alpha Conde government. The next day, both Wright and the Gendarmerie chief were suspended by CNRD decree, only for Wright to be rehabilitated six months later when he was named Minister of Justice. Shortly thereafter, he announced the trial of those accused of organizing the stadium massacre carried out on September 28, 2009. He has also been an ardent voice for restoring the independence of the justice sector in Guinea, despite the fact that he himself serves at the pleasure of Col. Doumbouya and the other unnamed members of the junta.

In its everyday functioning at municipal levels, most Guineans consider the judiciary to be highly corrupt – consistently ruling in favor of those who offer the biggest bribe or who can use the influence of the state to determine judicial outcomes.

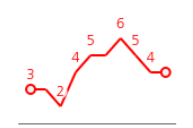
Officeholders appear to be subject to prosecution to an extent unseen in Guinea since the end of the socialist period. However, just as during that time, there is an element of unpredictability in the choices of whom to prosecute, giving the impression that the ultimate objective of these prosecutions is to underline the sovereign power of the executive. Most Guineans are delighted to see these officials being called to account, though human rights organizations have criticized the government for the fact that the correct judicial process has often fallen by the wayside in these trials.

In this context, it is notable that the government overseen by this military junta has not hesitated to prosecute fellow officers and soldiers. Most of those in the dock for the September 28 trial are former officers, and the government is also prosecuting soldiers accused of pillaging Alpha Conde's home as he was being arrested during the coup in September 2021. The ruling junta has also called for the prosecution of 188 senior officials and former ministers, including ex-president Conde, for alleged corruption.

Independent judiciary

4

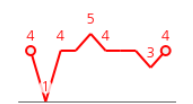
'06 '24 10



Prosecution of office abuse

4

'06 '24 10



Basic civil rights, such as the rights to life, liberty and physical integrity, are generally respected. Other rights, such as the rights of assembly and free speech, are curtailed, though the press is relatively free compared to representatives of the political parties.

Cases of sexual violence against women represent one area that requires significant change. In many parts of Guinea, the norm is to resolve cases of rape “a l’amiable” between senior men representing the involved families. However, in Conakry, this model is increasingly being challenged by women in public. Despite this trend, the judicial system can still be weaponized against individuals who speak out about such cases. For example, women’s rights activist Moussa Yero Bah was recently subject to a successful defamation complaint brought against him, which effectively silenced women’s voices.

Other forms of identity – including sexual orientation, race, ethnicity and religion – are not used to discriminate against citizens.

#### 4 | Stability of Democratic Institutions

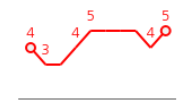
The CNRD junta has appointed a mixed civilian-military administration called the National Transitional Council to replace the National Assembly and has installed a territorial administration. As such, there are no democratic institutions. The junta has given assurances that it intends to complete the transition by January 2025, 40 months after taking power. This process is being planned and implemented solely by the CNRD, with no meaningful checks or balances from any other institution. Therefore, this would be an autocratic process leading toward democracy, if this is indeed what takes place.

The coup has taken place under the shadow of a process by which Alpha Conde pushed through changes to the Guinean constitution, which were largely intended to allow him to seek a third presidential term. The overwhelming majority of Guineans considered this to be a constitutional coup and illegitimate. This means that the CNRD coup itself could potentially be seen as a pro-democracy development, even though it is illegal. In this complex setting, the CNRD and the institutions it has appointed are not technically democratic but are viewed by most people with cautiousness and general support as they lead toward a democratic revival.

#### Civil rights

5

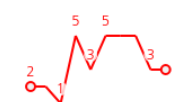
'06 '24 10



#### Performance of democratic institutions

3

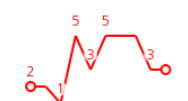
'06 '24 10



#### Commitment to democratic institutions

3

'06 '24 10



### 5 | Political and Social Integration

In the wake of the coup, an increasing number of Guineans openly assert that the older class of politicians, who have exerted control over the major political parties, have become outdated. Many of these politicians are widely regarded as corrupt, with Cellou Dalein Diallo and Alpha Conde having specifically gained reputations for aggravating interethnic tensions instead of presenting political agendas.

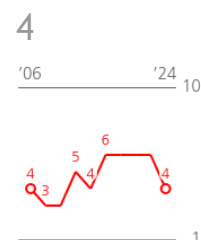
It remains to be seen whether new parties will emerge under the junta, as the CNRD has arrested members of the Front national pour la défense de la Constitution, one of the most likely places for a new generation of political leaders and parties to emerge. There are also questions as to whether the CNRD itself might become a party or transform into one under another name.

There are civil society groups representing journalists, lawyers and the business sector. Trade unions represent workers in many sectors of the economy. Women and youth, who have been organized as interest groups since the socialist period, continue to assert their interests through civil society organizations.

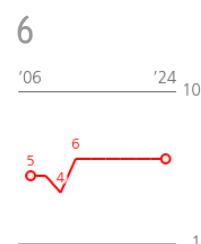
According to the most recent Afrobarometer survey (2019), 77% of Guineans consider democracy to be the best form of government, while 76% believe presidents should be limited to two terms. Additional Afrobarometer questions reveal that the majority of Guineans are dissatisfied with the way democracy is practiced in their country and have little trust in political parties, the electoral commission and the courts.

Guineans have proven resilient in the face of disastrous governance for many decades. This is largely due to the high levels of trust they are able to deploy within localized spheres such as the family, the village or the neighborhood. Multiparty politics have introduced an element of ethnicization that most people deplore, though they insist that ethnic cleavages tend to emerge around election times and quickly diminish afterward. There is also a noxious legacy from the socialist period when the government developed a network of informants and spies that some Guineans suggest has reemerged since the coup. A brighter legacy of the socialist period lives on in the sense of shared national solidarity felt by many Guineans despite the ethnicization that the political realm has undergone in recent decades.

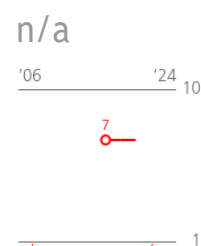
Party system



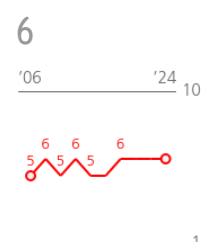
Interest groups



Approval of democracy



Social capital



## II. Economic Transformation

### 6 | Level of Socioeconomic Development

Guinea is one of the poorest countries in the world, despite having the second-largest bauxite reserves in the world and the world's highest-grade iron ore, in addition to substantial diamond and gold resources. It was ranked 182nd out of 191 countries and territories in the United Nations' 2021 Human Development Index. According to the World Bank, 46.6% of the population lives below the poverty line. It is important to note that there is a significant urban-rural divide. In Conakry, the poverty rate is 15.7%, while in the rural Labe region, it is 72.4%, as reported in the World Bank's 2021 Poverty Assessment. Additionally, in terms of multidimensional (non-monetary) poverty, the rate in Conakry is 6.3%, while the interior regions range up to a rate of 49.4%.

Guinea is highly unequal, not only along the rural-urban divide but also along gender lines. It ranks 12th from the bottom in the UNDP's Gender Inequality Index. According to the UNDP's measure of the loss of human development due to inequality, Guinea is 8th from the bottom, with a loss of about 36% of potential longevity and health, education, and living standards due to inequality.

Economic indicators		2019	2020	2021	2022
GDP	\$ M	13442.9	14177.8	16091.8	<b>21227.7</b>
GDP growth	%	5.6	4.9	3.9	<b>4.7</b>
Inflation (CPI)	%	9.5	10.6	12.6	<b>10.5</b>
Unemployment	%	5.0	5.9	5.8	<b>5.7</b>
Foreign direct investment	% of GDP	0.3	1.2	1.2	<b>3.1</b>
Export growth	%	6.9	-8.6	39.3	<b>-2.7</b>
Import growth	%	-3.8	-6.7	64.8	<b>-2.9</b>
Current account balance	\$ M	-314.6	2684.8	4638.7	<b>3350.2</b>
Public debt	% of GDP	38.6	47.8	41.5	<b>33.1</b>
External debt	\$ M	3005.3	4161.0	4702.0	-
Total debt service	\$ M	112.9	136.2	163.4	-

Question  
Score

Socioeconomic  
barriers

1

'06 '24 10



Economic indicators		2019	2020	2021	2022
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	15.4	17.3	16.3	<b>16.6</b>
Public education spending	% of GDP	1.9	2.4	2.0	<b>2.0</b>
Public health spending	% of GDP	0.9	1.0	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	1.4	1.4	1.5	<b>2.0</b>

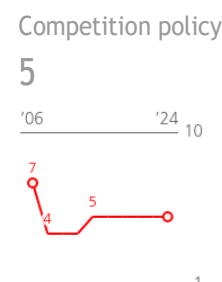
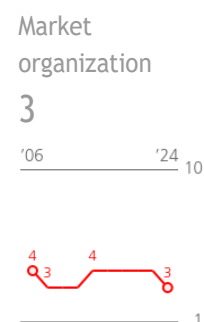
Sources (as of December 2023): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

### 7 | Organization of the Market and Competition

There are significant barriers to entry in most markets. Estimates suggest that outside of the mining sector, 90% or more of the economy operates informally. Even mining itself is characterized by a bifurcation: gold and diamonds are mostly mined artisanally, while bauxite and iron are in the formal sector. Prices of goods other than petrol are typically determined by market forces. Additionally, there is significant cross-border mobility of labor and capital, as seen in the artisanal gold mines around Siguiri.

The Dadis Camara and Alpha Conde governments were accused of negotiating corrupt mining deals, leading to high-level corruption trials in the United States and Switzerland, as well as indictments in Guinea following the junta’s takeover. Private sector actors complain that the small formal sector is often targeted both by government officials and competitors in the informal sector for spurious lawsuits and other demands for payment. The banking sector has become more formalized over the past 20 years, but private sector businesses complain that, as a result, it is extremely difficult to access credit.

Business and law sector participants tend to agree that the laws in Guinea are sound but that they are not consistently applied. The state has intervened in markets since the socialist period, and this has continued to varying degrees through the present. The current junta government has been aggressive in pursuing anti-corruption prosecutions – or at least arrests – but given the informal manner in which the Guinean political economy operates, almost anyone could be credibly accused of breaking some laws. This has introduced significant uncertainty into the markets.



European ambassadors report that few companies from the global North want to enter the Guinean market, even if some will ship their products to be sold by others in Guinea. The perception of instability and corruption is a disincentive. In the mining sector, there are North American, Arab, Russian, Chinese and Anglo-Australian companies active. Guinea's rich bauxite and iron reserves are enough to tempt some, including Rio Tinto, to try to manage these risks.

Chinese companies are present in the manufacturing and mining sectors, and Arab (mainly Lebanese) businesses have operated in Guinea for over a century. The simple average of the most favored nation tariff rates is 12.1%.

Guinean banks' capital-to-assets ratio is 11.2%, significantly higher than the international median of 8.7% and the third-highest in Africa. This reflects the considerable risk of making loans in Guinea, with the share of non-performing loans hovering around 10% in recent years. As these numbers indicate, and as business owners are quick to point out, this means it is very difficult to get loans in the formal sector in Guinea, meaning that many rely on informal sector loans with higher interest rates and very short (usually 30-day) repayment schedules. There is no stock market in Guinea, and the country does not figure in the World Bank's Bank Regulation and Supervision Survey.

## 8 | Monetary and fiscal stability

International financial institutions and private sector actors are generally satisfied with the monetary policy under the junta. The inflation rate has been high, fluctuating between 10% and 12.5% between 2018 and 2022. Most recently, this has been the result of international supply chain disruptions caused by COVID-19 and the Russian invasion of Ukraine.

The government has allowed the exchange rate to float freely, with the U.S. dollar worth approximately GNF 9,000.

Guinea's primary fiscal challenge is its low rate of tax receipts, totaling about 12% of GDP, significantly lower than the median West African rate of 18%. In 2021, Guinea's fiscal balance amounted to approximately \$4.6 billion, representing a noteworthy shift from the negative balances observed between 2011 and 2019 (excluding 2017).

A significant number of new bauxite mining operations, along with increased production from the country's gold mines, indicate that this trend should persist. Guinea's overall public debt in 2021 stood at a manageable 42.5% of GDP and has decreased further since the military coup. As for external debt, it amounted to \$4.2 billion in 2020, with total reserves reaching \$1.2 billion. The total debt service in 2020 amounted to \$137 million, which is easily manageable considering the mining royalty receipts, provided that the political and governance situations remain stable.

Liberalization of foreign trade

5

'06 '24 10



1

Banking system

5

'06 '24 10



1

Monetary stability

6

'06 '24 10



1

Fiscal stability

7

'06 '24 10



1

### 9 | Private Property

Land tenure and titling are highly contentious issues. In urban areas, the CNRD junta has seized numerous buildings as part of an initiative to reclaim national patrimony. This endeavor has faced criticism on two fronts: its seeming arbitrariness and occasional political motivations, as well as the ambiguity surrounding the status of some parcels. In Guinea, many plots of land have been titled multiple times, while others are state-owned but may have been temporarily ceded to individuals at certain moments.

In the countryside, distinct yet related land ownership uncertainties discourage individuals from making investments in agricultural production methods, such as the installation of irrigation systems, which would enhance productivity. These factors compel the majority of Guineans to engage in informal operations, thereby subjecting them to the risk of having their rights revoked and being expelled. Conversely, rights pertaining to other types of property offer greater security.

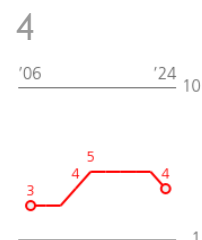
Private companies are permitted by law. Those in the formal sector, and thus subject to Guinean laws and regulations, comprise a relatively small portion of the economy. Those in the informal sector mostly manage incursions by state authorities by reaching negotiated understandings with them in an ad hoc manner. Most payments routed toward state institutions are, in fact, captured by individuals. Protection of the private sector is thus a fluid and relative concept for most businesses, and the arrival of a new government, whether by coup or election, means reestablishing the personalized relations that allow all other activities to move forward. Businesses in the private sector complain that, although they pay the required taxes, customs and other costs, they are still beset by demands for the same suite of informal payments as their colleagues in the informal sector, effectively punishing them for operating in a more transparent way.

### 10 | Welfare Regime

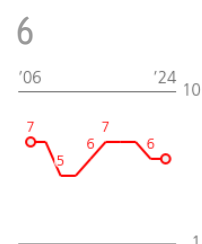
The social safety net in Guinea is weak. Spending on health rose from 0.3% of GDP in 2009 to 0.9% in 2019 but is still very low by international standards, especially among countries with modest GDPs. Life expectancy at birth is 62 years, placing Guinea in the bottom 20 countries worldwide. Employees in the civil service receive small pensions after retirement. In the past, many were allowed to remain in the public housing where they had resided during their time as government employees, but recent land reclamations in a general context of rampant land speculation mean that housing security is disappearing.

In rural areas, there is effectively no state-provided safety net; however, extended families care for their elderly and ill members informally.

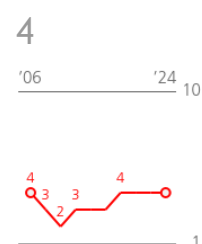
Property rights



Private enterprise



Social safety nets



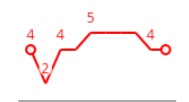


The literacy rate for men in Guinea is about 54%, which is double the rate for women (27.7%). While there are eight girls enrolled in primary school for every 10 boys, that ratio drops to 40% at the tertiary level. Guinea's female workforce participation rate is 53%, one of the highest in the world. The low levels of literacy and education suggest that women face significant disadvantages in their work lives. Child marriages, which are almost invariably arranged or forced marital unions, are especially common for girls living in rural areas.

Equal opportunity

4

'06 '24 10



## 11 | Economic Performance

Guinea's GDP per capita has risen from around \$1,800 in adjusted dollars per year in 2015 to about \$2,800 in 2021. The primary driving force behind this growth is the mining sector, with the number of bauxite mines quadrupling during this period and gold mining also experiencing significant growth. However, the majority of Guineans have not experienced the benefits of these GDP increases, as the wealth generated by the mining industry does not reach most citizens. With mining accounting for over 90% of exports, Guinea's economy is in need of diversification. The situation is a textbook example of the "Dutch disease," in which the mining sector's wealth hinders the development of other sectors, resulting in a net weakening of the economy instead of its strengthening.

Output strength

6

'06 '24 10



In 2021, the inflation rate reached 12.6%, effectively erasing any modest gains that Guineans may have experienced.

The unemployment rate stood at 6% in 2023, but so few people work in the formal sector that this number is almost meaningless. More importantly, the vast majority of people with a high school or university education are either unemployed or underemployed.

While many of the country's economic fundamentals (current accounts balance, public debt ratio and monetary policy) have remained stable even under the junta, the level of foreign direct investment is extremely low. At just 1.2% of GDP in 2020 – a strikingly low figure considering the capital-intensive nature of mining – it demonstrates how cautious foreign companies are when considering potential investments in the country.

Although some tax rates are among the highest in Africa – banks are taxed at a 35% rate, for example – the small size of the formal sector and inefficient collection mean that in 2022, Guinea only collected 12% of GDP in taxes, the lowest rate in West Africa.

## 12 | Sustainability

Guinea has several UNESCO biosphere reserves dating from the 1980s and 1990s, particularly in the rainforest region in the country's southeast. Today, a major concern is the significant harm caused to both human and ecological systems by major projects, notably mines and hydroelectric dams. The limited number of projects operating under the auspices of the World Bank's International Finance Corporation (IFC), or Guinea's own Code Minier, are required to adhere to strict social and environmental regulations. However, most construction in Guinea in recent years, including roads, railroads and dams, has been carried out by Chinese companies that do not necessarily comply with these standards. In the case of the railroad from the Simandou iron mines to the port in Forecariah, the multinational Rio Tinto holds a 50% stake in both the mine and the railroad and is therefore adhering to IFC standards.

There have been significant complaints about certain mines in the Boke and Kindia areas, where companies have at times refused to engage in further discussions beyond the initial expropriation negotiation. Poisoning of water sources and the generation of massive amounts of dust that blanket everything are two constant grievances relating to bauxite areas.

Many observers insist that Guinea has sound laws supported by some international actors, such as the IFC, but argue that these protections are applied only in exceptional cases rather than as the rule.

University professors complain that many of their students do not arrive at university with the skills that will enable them to thrive in a tertiary educational setting, and that the underfunded universities do not provide professors or students with the equipment, time and institutional structure necessary to pursue innovative research. Some manage productive research profiles despite the numerous challenges, but they are in the minority.

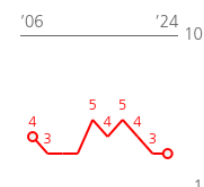
Public spending on education hovers around 2% of GDP – one of the lowest such rates in Africa. The U.N. Education Index, which measures average educational attainment, places Guinea seventh from the bottom among much poorer countries, such as South Sudan, Chad and Niger.

Secondary and primary school teachers frequently assume additional employment due to their low and unreliable pay. Public schools have high enrollment rates and limited resources. The insufficient availability of books and materials causes many students to progress through the education system without fully acquiring the necessary proficiency in literacy, mathematics and French language communication skills.

There is no public data on R&D spending.

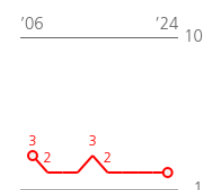
Environmental  
policy

3



Education policy /  
R&D

2



## Governance

### I. Level of Difficulty

The structural constraints facing Guinea are immense. It is one of the world's poorest countries, despite its significant mineral, hydroelectric and agricultural potential. The official literacy rate is 39%, but in most areas of the country (outside the capital), it is likely only half that. Infrastructure, including roads, electricity, water and sewers, is inadequate in all regions. According to the World Bank's Human Capital Index, Guinea ranked 163rd out of 173 countries, indicating that a child born in Guinea will achieve only 37% of their potential compared to one who has access to comprehensive health, education and other services.

It is worth noting that these structural constraints have not improved appreciably under democratically elected or military governments, whether socialist or market-oriented policies have been pursued.

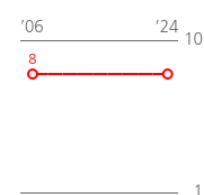
Since the demonstrations and general strikes organized by labor unions in 2006/07, civil society has become increasingly bold and vibrant in Guinea. The country has always had dynamic and courageous citizens, but the independent sphere of civil society had not previously been imaginable under the highly repressive revolutionary government. Guinea now has vibrant online radio and print press organizations, civic associations, and human rights and women's rights leaders who are eager to comment on current events.

Guinea presents a paradox as most Guineans are quick to insist that ethnicity is not a highly important aspect of their daily lives. A high percentage of Guineans are the products of and/or in mixed marriages, and religion and ethnicity are not important for neighborly or civic relations. At the same time, politicians, many of whom have almost no political program to offer, regularly make their living in Guinea by stoking ethnic mistrust and violence. Especially during the lead-up to elections, many Guineans, especially young men, seem eager to join in such violence. The fracture between ethnic Maninka and Peuhl is the one most often identified, but that between the Forestiers and Konianke, a subgroup of the Maninka, has yielded even more casualties, especially in the region around N'Zerekore.

Peuhl in Guinea speak of being marginalized by the junta government, although not targeted in the explicit ways they were under the Camara and Conde administrations. The upcoming elections will mark the end of a "wait-and-see" attitude and could potentially lead to a rise in interethnic clashes.

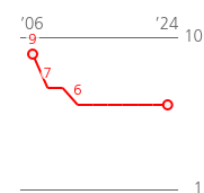
Structural constraints

8



Civil society traditions

6



Conflict intensity

6



Despite its many problems and periodic outbursts of interethnic violence, Guinea stands alone among its six neighbors in resisting the pull toward civil war, separatist insurgency or jihadism.

## II. Governance Performance

### 14 | Steering Capability

The CNRD junta has publicly identified its priorities and has begun to implement them. It has agreed to a packed timetable of activities that includes rewriting the constitution, conducting a census, redoing the electoral lists, and holding communal, regional, legislative and presidential elections. All of this is supposed to happen within 24 months. The government is also pursuing various public works projects and is holding a high-profile trial of those accused of being responsible for the September 28 massacre. The political will to achieve these goals seems to be real, but most Guineans and many observers doubt that any government would have the capacity to achieve them in just two years. This is compounded by the fact that every decision about such policies or reforms must reportedly be approved by Col. Doumbouya himself.

The junta announced a 10-point plan shortly after assuming power. In its initial 15 months in office, its primary accomplishments included compelling an older generation of civil servants and military officers to retire, initiating the September 28 massacre trial, and conducting a national consultation (Assises Nationales). Several items on the plan still await implementation, and it appears that the current tasks could require many years to accomplish, particularly if they are executed through consultative processes rather than by decree.

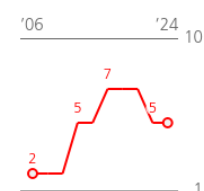
The junta has demonstrated its ability to adapt and learn over time. It appears that its members have learned from both the previous Dadis Camara junta and the relatively lawless coup governments in Mali and Burkina Faso. They have taken note of the actions they should avoid if they aim to maintain popular and international support and acquiescence. The government became increasingly authoritarian and brutal between March and August 2022, with the arrest of critics, the prohibition of demonstrations and the killing of several demonstrators in the streets.

Since September 2022, there has been a softening of tone. Much of the population has been mesmerized by the September 28 massacre trial, and the junta has sought to gain approval of its transitional road map from ECOWAS and other actors. There are indications that a French public relations firm has intervened at the level of the presidency, offering guidance on how the junta should present itself. However, this process remains personalistic and anti-technocratic.

Question  
Score

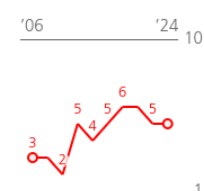
Prioritization

5



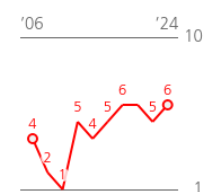
Implementation

5



Policy learning

6



## 15 | Resource Efficiency

The CNRD has made it a priority to reduce corruption and inefficiencies in government. Clearing the rolls of the civil service and the military of older and/or ghost workers has been their main strategy for achieving this goal. Many observers have noted that, at least in the short term, the sudden removal of experienced staff has resulted in a noticeable decline in the state's ability to function effectively.

Macroeconomic indicators have improved, state debt is manageable and international financial institutions are satisfied with the current monetary policy. Tax revenues remain the lowest in West Africa, at 12% of GDP compared to a regional median of 18%.

Long-standing decentralization initiatives have effectively been curtailed, as the government has frozen the accounts of communal governments as it conducts audits to root out corruption. In cases where the junta has accused local officials of stealing public funds, it has replaced them with appointed officials instead of holding new elections.

On one hand, all policies seem to come from the CNRD, if not directly from the head of the junta. Ministers have been abruptly fired when they have been perceived to be following their own agendas.

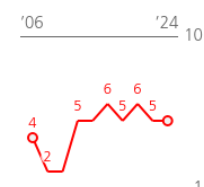
On the other hand, there is a sense that the government is trying to do too much all at once, and while these activities can work in tandem, the desire to “fix” every aspect of Guinean political, social and economic life risks making the perfect the enemy of the good.

In addition to his highly unpopular efforts to secure a third mandate, Alpha Conde was particularly disliked by Guineans for the increasing levels of corruption under his administration. The junta has been praised for its efforts in combating corruption, including the establishment of the Court for Repression of Economic and Financial Crimes, which focuses on cases of large-scale embezzlement, as well as its dedication to addressing corruption at the local level. However, many individuals also note that those who are targeted and prosecuted for financial crimes, though likely guilty, also tend to be perceived or actual opponents of the junta. It remains uncertain whether those closely associated with the junta will be subject to the same treatment.

The National Agency for the Fight against Corruption – founded under the Conde government but then perceived to be not effective – still exists, but civil society actors never mentioned it during conversations contributing to this analysis.

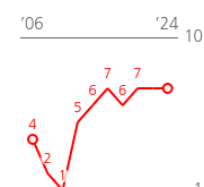
Efficient use of assets

5



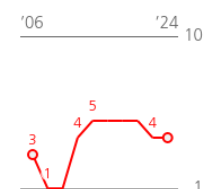
Policy coordination

7



Anti-corruption policy

4



## 16 | Consensus-Building

There is widespread consensus on the necessity of the democratic reforms identified by the junta. Not everyone agrees that all of them must be achieved before the CNRD leaves power or that they can be achieved in the given two-year timeframe. There is ambivalence regarding the suppression of the rights to assemble and demonstrate by many who support these civil rights, even while they recognize that these are tactics that have been used to derail political progress.

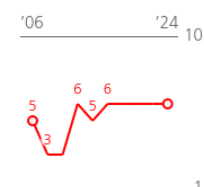
Guinea has been part of the world capitalist economy for 500 years, though the Atlantic slave trade has been replaced by the trade in bauxite and iron ore. Although Guineans are familiar with the rhythms and practices of the market economy, they also had a relatively long experience of socialism, which had a formative effect on economic life and people's expectations. This is evident in the street demonstrations that took place in 2022 when fuel prices rose as a result of the Russian invasion of Ukraine. Guineans still expect the government to subsidize fuel costs and are not swayed by arguments about efficient markets and their positive effects. Guineans are also quick to point out how much mining concessions have worsened the lives of those living near the mines, how there are no initiatives to add value to their ore, and how the vast majority of the profits from the country's mineral wealth go to foreign companies, not to Guineans. Consequently, there is only a partial consensus on the virtues of the market economy.

The CNRD is a law unto itself, and thus stands as the primary potential reformer and the primary potential anti-democratic actor. Since the junta rules by decree and holds the weapons, but also assures the population that it intends to move toward civilian democratic control, Guineans are consigned to hoping and watching.

Given the balance of forces, opposition parties are marginalized, and civil society can criticize the government only to a certain extent before facing the risk of imprisonment. The unknown factor is whether there are other factions within the security forces that might attempt a counter-coup, a scenario that has been observed in neighboring countries. This outcome becomes less probable as the current junta firmly establishes its political, administrative and economic influence.

Consensus on goals

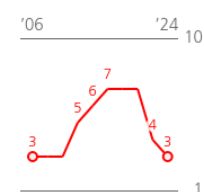
6



1

Anti-democratic actors

3



1

The CNRD has a major advantage in that most Guineans are skeptical that the existing political parties have much to offer in terms of political, ethnic or social cleavages. The parties have frequently exacerbated and instrumentalized these cleavages.

However, the CNRD has also inflamed some cleavages, such as those surrounding ethnicity. Ethnic Peuhl have noted the fact that the junta government is heavily weighted toward ethnic Maninkas, and people from the Forest Region have become increasingly disturbed by the “savage” stereotype emphasized throughout the September 28 massacre trial. The trial has focused less on the stadium massacre and more on the peculiarities of Dadis Camara’s recruitment of young men from the Forest Region into various militias supporting him.

The junta has set the agenda and only reluctantly incorporated other opinions and priorities. There have been consultations, such as the month-long “assises nationales” that took place in early 2022, in which the government privately consulted individuals from various regions of the country over the course of a month. A report was subsequently compiled, but this has not been made public.

There is a plan to write a new constitution, a process that is expected to take three months as part of the ambitious multipart two-year transitional timetable. However, in the planned schedule, only eight days have been provided for the public consultation that is supposed to contribute to the constitutional draft. Overall, it seems that the CNRD is regarding “consultation” as merely a requirement to fulfill, rather than as a potentially time-consuming and complex process that could lead to more favorable outcomes in the long run.

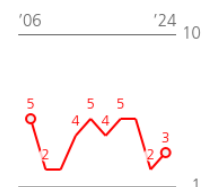
One of the most notable achievements of the CNRD has been its launch of the trial relating to the September 28 stadium massacre. Civil society actors, who had been pushing for such a trial for 13 years, were initially shocked that the court was assembled so quickly and with such evident political will to move forward in a robust way. This was most clearly demonstrated when government forces arrested Moussa Dadis Camara, the former junta leader, and placed him in the dock. Camara was clearly shocked and angry to have been one of the accused in a trial that he expected to watch as a spectator.

Some have felt that the trial risks accentuating ethnic tensions in Guinea, but the majority of people consulted for this review have been pleasantly surprised and even talk about the trial as a model for other countries whose former leaders assume they can circulate in impunity after committing grave crimes.

On the other side of the balance, the decision to name the airport after former President Sékou Touré, who is accused of ordering the arrest, torture and murder of tens of thousands of his own compatriots, has reopened a wound that had not yet healed in many families who lost loved ones to torture camps such as Camp Boiro. As a result, the present government has a mixed record on reconciliation.

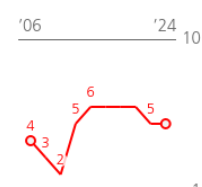
Cleavage / conflict management

3



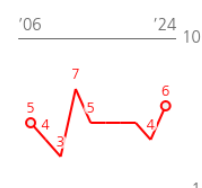
Public consultation

5



Reconciliation

6



## 17 | International Cooperation

Under Alpha Conde, the Guinean government attempted to court Chinese and Russian investors as a counterbalance to European and North American predominance. The CNRD junta has taken a more balanced approach. The Conde government worked hard to improve the provision of electricity and had begun a road renovation program for Conakry at the time it was ousted in the coup. The CNRD has continued the road projects, which Guineans welcome.

The long-term vision of the country's development is often undercut by personal or short-term interests. A good example is the country's contractual framework of mining contracts for bauxite and iron. In 2012, Guinea enacted a new mining code that is widely considered well-crafted, favoring Guinea's development interests. Yet many of the contracts that followed were negotiated through ad hoc concessions to individual companies that skirted the provisions of the mining code.

Because the CNRD junta government exists outside all legal frameworks, it cannot be considered credible in the normal sense. Still, it has attempted to engage with international actors, ranging from the subregional body ECOWAS, with which it reached an agreement in December 2022, to bilateral partners and international financial institutions. Many of these partners have stated that the CNRD government is pursuing better policies, such as those concerning macroeconomic policy, than did the preceding government. In general, the United States has taken a more critical and demanding tone toward the junta government than France or the United Nations have. This gives the government a mixed international profile.

The junta initially adopted a tough stance toward ECOWAS and the African Union, asserting that the coup was a necessary response to Alpha Conde's constitutional coup. While the coup was swiftly condemned by international actors, many of these actors also recognized its distinct nature, particularly in comparison to recent coups in Mali and Burkina Faso. As other bilateral actors and donors began engaging with the junta government, ECOWAS found itself marginalized. However, the agreement on a 24-month road map in December 2022 facilitated dialogue between the junta and all international actors, including ECOWAS.

During the latter part of 2022, the CNRD leadership also engaged in more frequent visits with members of the Malian and Burkinabe juntas.

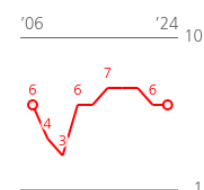
Effective use of support

6



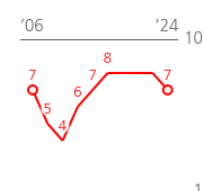
Credibility

6



Regional cooperation

7





## Strategic Outlook

Guinea faces numerous simultaneous challenges. The most significant one is that the junta faces almost no checks or balances and thus constitutes a law unto itself. It has replaced the National Assembly with a hand-picked National Transitional Council; it has replaced most regional, prefectorial and communal leadership with its own personnel; and it has established new judicial mechanisms, including an anti-corruption court and a criminal tribunal, to prosecute those accountable for the stadium massacres of September 28, 2009.

Many of these initiatives enjoy considerable public support, particularly the September 28 trial and the Court for the Repression of Economic and Financial Crimes (CRIEF). However, when it comes to the specifics of their operation as well as the junta's adherence (or lack thereof) to its promise of holding elections without any CNRD members running, Guineans are reliant on the junta's goodwill. In this context, donors and international partners are the only actors that may have significant influence in persuading the junta to fulfill its commitments. Thus far, international actors have taken a rather permissive approach, with many asserting that the junta represents 1) a considerable improvement over the previous Alpha Conde government and 2) a more professional and law-abiding junta than those in Mali and Burkina Faso. It must be acknowledged that these arguments are feeble at best, indicating that the international community has set remarkably low expectations.

The CNRD aims to complete its transition in 40 months, starting with a 24-month road map agreed upon in December 2022. Based on previous experience, this road map – which involves rewriting the constitution, holding a national census, creating new electoral lists, and conducting separate communal, regional, legislative and presidential elections – could potentially take more than 10 years to complete. However, the junta has affirmed its determination and ability to accomplish the program within the designated timeframe. Nevertheless, a consultative constitutional process planned to occur in three months is likely to lack meaningful consultation and is likely to exceed the anticipated duration.

The transition thus poses a double risk: first, the risk of the “perfect becoming the enemy of the good,” and second, the risk of the CNRD junta becoming increasingly ensconced in power and ultimately less willing to leave. These dynamics could become mutually reinforcing, and it is worth noting that Alpha Conde's justification for seeking a third mandate was that he had not yet completed his entire program of reforms and projects for Guinea.

International actors must maintain pressure on the junta to continue progressing and, most importantly, to relinquish power at the conclusion of the transitional period, regardless of whether all objectives outlined in the road map have been completed. There is a genuine risk of inadequate governance by the next democratically elected government, which remains regardless of the implementation of all the reforms proposed by the CNRD.

With an eye toward this goal, partners and funders must focus on both Colonel Doumbouya, who is said to be personally making almost all executive decisions of any importance, and the Ministry of Territorial Administration and Decentralization (MATD), which is tasked with leading most of these programs – from the census to organizing elections. Their actions or lack of action will determine much about the way the transition actually takes place.