

HRS Resilience Foundation

COUNTRY READINESS ASSESSMENT 12

Guyana: Institutional Readiness, Offshore Oil Security and Territorial Sovereignty

A 50-year readiness architecture for the hemisphere's newest petrostate

PUBLICATION TYPE

Independent country readiness assessment

SCOPE

Guyana

EDITION

September 2026

SERIES POSITION

Country Readiness Assessment 12

AUTHOR

André Vieira

INSTITUTION

HRS Resilience Foundation

Research integrity. Public research publication. Independent analysis. No U.S. Government endorsement or sponsorship. Not an intelligence estimate, a political rating, or a judgment on Guyanese policy choices.

Evidence discipline. This publication distinguishes documented facts, analytical judgments and scenario propositions.

CONTENTS

— Executive Summary	3
— Purpose and Scope	4
— Current Governance and Political Context	5
01 Guyana 2026 Baseline	6
02 The Essequibo Dispute as a National Readiness Test	7
03 HRS Method: Guyana as a System of Systems	8
04 The Stabroek Consortium and the Dependency Test	9
05 Guyana Strategic Dependency Map	10
06 SRA 01 — Telecommunications & Digital Infrastructure	11
07 SRA 02 — Data Centers, Cloud & AI Infrastructure	12
08 SRA 03 — Critical Minerals & Strategic Materials	13
09 SRA 04 — Rare Earths & Western Hemisphere Mineral Security	14
10 SRA 05 — Energy Security & Strategic Power Infrastructure	15
11 SRA 06 — Ports, Logistics & Maritime Infrastructure	16
12 SRA 07 — Food Security & Strategic Agricultural Resilience	17
13 SRA 08 — Pharmaceutical & Medical Supply Chains	18
14 SRA 09 — Advanced Manufacturing & Industrial Capacity	19
15 SRA 10 — Western Hemisphere Strategic Infrastructure & Resilience	20
16 Oil-Revenue-to-Institutional-Capacity Architecture	21
17 Human Capital & Demographic Absorption	22
18 Trade Diversification and External Economic Partners	23
19 U.S.-Guyana Cooperation Framework	24
20 2027–2030 Sovereignty and Revenue Governance	25
21 2031–2035 Institutional Consolidation	26
22 2036–2050 Diversification	27
23 2051–2065 Renewal	28
24 2066–2076 Intergenerational Resilience	29
25 Readiness Metrics and Governance	30
26 HRS Guyana Readiness Improvement Framework	31
27 Conclusion	32
— Methodology, Research Integrity and Limitations	33
— Selected Bibliography and Sources	34

About this series. The Western Hemisphere Readiness Series applies the HRS Readiness Cycle and Strategic Dependency Test to country, sector and regional systems. CRA 12 integrates SRA 01–10 into a Guyana-level system-of-systems assessment.

EXECUTIVE SUMMARY

Guyana: Institutional Readiness, Offshore Oil Security and Territorial Sovereignty

Guyana enters the final quarter of 2026 as the series' clearest case of institutional capacity racing to keep pace with resource wealth: since ExxonMobil's 2015 discovery in the offshore Stabroek Block, Guyana has become one of the world's fastest-growing economies by GDP and, per Rystad Energy's Head of Emerging Markets, one of the highest-growth petrostates globally, [3] with government data showing production averaging approximately 903,000 barrels per day in April 2026 and running at a similar pace through August, from a field estimated to hold approximately 11 billion barrels of oil-equivalent; a fifth FPSO, the Errea Wittu, arrived in August 2026 ahead of the Uaru development's expected fourth-quarter 2026 startup, which officials say should push national production above one million barrels per day. [1][2] President Irfaan Ali was reelected on 1 September 2025, with his People's Progressive Party/Civic winning 36 of 65 National Assembly seats and retaining its legislative majority; he has continued to pursue closer alignment with Washington, attending the founding Shield of the Americas summit at Trump National Doral in March 2026 and joining the 22 September 2026 Joint Statement on Defending Hemispheric Sovereignty. [3][4][5]

Guyana's readiness challenge is inseparable from an active territorial dispute: Venezuela continues to claim the Essequibo region, two-thirds of Guyana's territory and the location of its offshore oil wealth, a dispute now before the International Court of Justice. The ICJ affirmed its jurisdiction in 2020 and again in 2023; the Court held final oral hearings on the merits from 4–11 May 2026 at the Peace Palace in The Hague, and President Ali has said Guyana expects a ruling in early 2027. [6] Secretary of State Marco Rubio warned during a visit to Georgetown that an attack on Guyana or ExxonMobil would be a "bad day" for Venezuela, and Venezuelan naval vessels have repeatedly approached Exxon-operated production vessels in disputed waters. [7][8] The Stabroek Block consortium itself illustrates a further layer of complexity: it is jointly held by ExxonMobil (45%), Chevron (30%, following its 2025 acquisition of Hess Corporation), and China's state-owned CNOOC (25%), meaning American and Chinese commercial interests sit inside the same offshore venture even as Guyana and Venezuela contest sovereignty over the surrounding waters. [8][27]

CENTRAL HRS PROPOSITION

Guyana's readiness priority is not resolving the Essequibo dispute, which remains before international adjudication, but building the institutional, fiscal and security capacity to convert unprecedented, rapid oil wealth into durable governance — capacity that must develop as fast as the resource itself, in a small state whose administrative systems predate its transformation into a major hydrocarbon producer.

PURPOSE AND SCOPE

Purpose and Scope

Country Readiness Assessment 12 extends the Western Hemisphere Readiness Series from Brazil (CRA 01) through Panama (CRA 11) to Guyana. It applies the HRS Readiness Cycle to Guyana and integrates the ten Sector Readiness Assessments into a single system-of-systems framework, consistent with the methodology used throughout the series. This assessment should be read alongside CRA 02 — Venezuela, which examines the same Essequibo dispute from Venezuela's side of the border.

The assessment uses public information available through 30 September 2026. Statements about U.S., Guyanese, Venezuelan and Chinese government positions are identified as government positions; this assessment takes no position on the legal merits of the Essequibo dispute, which remains before the International Court of Justice. The assessment does not endorse a political party, candidate, or electoral outcome, and takes no position on Guyana's internal political disputes.

The intended audience includes U.S. institutions, international organizations, private-sector actors evaluating Guyana entry, and Guyanese public and private institutions. The document is a strategic research reference for offshore-energy investment, fiscal-governance capacity building, sovereign-to-sovereign engagement, and long-horizon institutional capacity building; project-level decisions require current technical, legal, environmental, financial and security diligence.

CURRENT GOVERNANCE AND POLITICAL CONTEXT

Current Governance and Political Context

Irfaan Ali, Guyana's first Muslim head of state, was reelected to a second five-year term in the 1 September 2025 general election, with his People's Progressive Party/Civic (PPP/C) winning 36 of 65 National Assembly seats — a gain of three from 2020 — amid record GDP growth driven by the oil boom; he was inaugurated for his second term on 7 September 2025. [3][9] His vice president, Bharrat Jagdeo, a former president himself, continues to exercise substantial influence over economic and oil policy. [3] Despite the ruling party's dominant electoral position, election observers and domestic commentators have noted a "strong groundswell of dissatisfaction" among segments of the population who feel the oil boom's benefits remain unevenly distributed. [3]

Material to readiness planning: This assessment treats Guyana's electoral outcomes, the distribution of oil-revenue benefits, and the Essequibo dispute's legal status as documented facts and government positions, not as HRS political judgments. The report does not take a position on Guyana's internal political disputes or on the legal merits of Venezuela's territorial claim.

01 • GUYANA 2026 BASELINE

Institutions Racing to Catch Up With a Petrostate

Guyana's baseline is defined by the speed of its transformation: a largely agrarian economy with a population approaching one million has become, within a decade of ExxonMobil's 2015 offshore discovery, among the fastest-growing economies in the world by GDP growth rate, with government data showing Stabroek Block production averaging approximately 903,000 barrels per day in April 2026 and continuing at a similar pace through August. [1][2] Guyana's first competitive offshore licensing round, launched in December 2022, offered 14 additional blocks and drew eight bids by its 2023 close, signaling continued international investment interest beyond the original Exxon-led consortium. [10] The pace of this transformation has outstripped the development of comparable fiscal, regulatory and security institutions, which remain those of a small, historically low-income state.

Guyana's economy remains geographically concentrated: the vast majority of population and economic activity sits along the Atlantic coast, while Essequibo — comprising roughly two-thirds of national territory and the site of the offshore oil wealth — remains sparsely populated and, per the ongoing dispute with Venezuela, contested. [6]

BASELINE CONCLUSION

Guyana's readiness priority is building fiscal-governance, regulatory and security institutions at a pace that matches its resource transformation, rather than allowing institutional capacity to lag years or decades behind the revenue and geopolitical attention the oil boom has already generated.

02 • THE ESSEQUIBO DISPUTE

The Essequibo Dispute as a National Readiness Test

Venezuela's claim to Essequibo predates the discovery of oil, rooted in a dispute over the 1899 Paris Arbitral Award that Caracas has periodically revived; the claim intensified sharply after ExxonMobil's 2015 discovery converted the disputed territory's offshore waters into one of the world's most closely watched oil frontiers. [6][11] Venezuela held a December 2023 referendum claiming popular support for annexing Essequibo as a new Venezuelan state, and the International Court of Justice, in a unanimous provisional-measures order, directed Venezuela to refrain from taking any action that would modify the situation currently prevailing in the disputed territory, pending a final decision. [12][6] Venezuelan naval vessels have on multiple occasions approached the FPSO One Guyana and other Exxon-operated production vessels in waters Guyana considers its own, prompting formal protests from Georgetown; Secretary of State Rubio, during a visit to Georgetown, stated that any attack on Guyana or ExxonMobil would be a "bad day" for Venezuela, and Washington has provided security assurances alongside a separate United Kingdom-Guyana military partnership. [7][8][13]

System	Primary Dependency	Cascading Effect	Readiness Response
Territorial sovereignty	Essequibo, two-thirds of national territory, subject to an active Venezuelan claim and pending ICJ adjudication	Continued military posturing and naval incidents create sustained security risk around offshore production	Sustained international legal engagement; continued U.S. and U.K. security cooperation
Offshore production security	FPSO vessels and platforms operating in contested waters near the Venezuelan-claimed maritime boundary	A single serious incident could disrupt a large share of national GDP-generating production	Maritime domain awareness and security-coordination capacity with U.S. and allied partners
Diplomatic engagement	ICJ proceedings represent the primary institutional channel for resolving the dispute	A ruling adverse to either party could reshape regional alignment and investment risk perception	Sustained institutional capacity to engage the ICJ process and communicate outcomes domestically

READINESS PRINCIPLE

Guyana's readiness in the face of the Essequibo dispute depends less on the dispute's ultimate resolution, which lies with the ICJ, than on sustained maritime-security and diplomatic-engagement capacity that allows offshore production and international investment to continue regardless of the dispute's pace or outcome.

03 • HRS METHOD

Guyana as a System of Systems

The HRS Readiness Cycle — Detect, Assess, Decide, Coordinate, Deploy, Sustain, Learn — is applied to Guyana across fiscal-governance, territorial-security, and offshore-energy-regulation domains simultaneously, reflecting the reality that Guyana's readiness gaps stem primarily from the speed of its transformation rather than from any single unresolved dispute.

HRS Function	Guyana Application
Detect	Identify fiscal-governance, regulatory and security gaps emerging as oil-revenue scale outpaces institutional capacity.
Assess	Fuse maritime-security, fiscal, and diplomatic information into a common operating picture.
Decide	Apply consistent, transparent revenue-management and investment-screening standards regardless of political cycle.
Coordinate	Connect Guyanese fiscal, energy-regulatory and security institutions with U.S., U.K. and multilateral partners.
Deploy	Move fiscal-governance, maritime-security and regulatory capacity to priority functions at the pace revenue growth demands.
Sustain	Build institutions designed to function for decades, not only during the current production and dispute cycle.
Learn	Apply lessons from other rapid-resource-transition states to avoid Guyana repeating avoidable governance gaps.

The HRS Strategic Dependency Test asks whether Guyana's institutional capacity is being built at a pace commensurate with the speed of its resource transformation, or whether governance risks falling further behind as production and revenue continue to scale through the 2030s and beyond.

04 • THE STABROEK CONSORTIUM

The Stabroek Consortium and the Dependency Test

The Stabroek Block, estimated to hold approximately 11 billion barrels of oil-equivalent, is operated by ExxonMobil (45% interest) alongside Chevron (30%, following its July 2025 acquisition of Hess Corporation and the 30% Stabroek interest Hess held) and China's state-owned CNOOC (25%) — meaning American and Chinese commercial interests hold stakes in the same offshore venture that sits at the center of Guyana's dispute with Venezuela. [8][27] This consortium structure distinguishes Guyana from cases elsewhere in this series where U.S. and Chinese commercial interests compete for control of a single strategic asset; here, they are co-investors in the same asset, while the surrounding maritime sovereignty question remains a separate, bilateral Guyana-Venezuela dispute in which Washington has taken Guyana's side. [7][8]

Test Dimension	Guyana Application	Readiness Question
Concentration	Nearly all current offshore production runs through a single consortium and a small number of FPSO vessels	What redundancy exists if a single vessel or facility is disrupted?
Substitutability	The 2022–2023 licensing round for 14 additional offshore blocks signals emerging diversification of operators	How quickly can new blocks reach production to reduce reliance on the original consortium?
Control	Guyana's regulatory capacity to oversee a multinational, multi-billion-dollar consortium remains a developing institutional function	What regulatory capacity-building would strengthen Guyana's oversight position?
Recovery	A significant disruption to Stabroek Block production would affect a large share of national GDP	What contingency and diversification capacity exists for a major production disruption?
Cascading impact	Fiscal revenue, currency stability, and national development planning all depend on continued, secure production	How does Guyana sequence institutional development so that fiscal planning does not assume uninterrupted production?

HRS PROPOSITION

The Stabroek consortium's mixed American–Chinese ownership demonstrates that commercial co-investment and sovereign territorial disputes are separate readiness questions; Guyana's priority is building regulatory capacity over the consortium itself, independent of how the surrounding maritime-sovereignty dispute develops.

05 • STRATEGIC DEPENDENCY MAP

Guyana's Critical Capability Network

Capability	Critical Inputs	Failure Consequence	Readiness Response
Offshore oil production	Stabroek Block (ExxonMobil/Chevron/CNOOC consortium); approximately 900,000 barrels per day as of August 2026, expected above 1 million once Uaru comes online	Disruption would affect the large majority of national GDP and government revenue	Regulatory oversight capacity; production-security cooperation with the U.S. and U.K.
Territorial security	Essequibo region, subject to active Venezuelan claim and pending ICJ adjudication	Escalation risk around offshore production and coastal security	Sustained diplomatic engagement; U.S. and U.K. security cooperation
Fiscal governance	Rapidly scaling oil revenue managed by institutions built for a pre-boom economy	Revenue mismanagement or uneven distribution risk, as already noted by domestic observers	Transparent, durable fiscal-governance and sovereign-wealth institutions
Human capital	A small national population (approaching one million) absorbing a rapidly scaling, technically demanding industry	Skills and workforce gaps limiting domestic value capture from the oil sector	Technical-training investment aligned with the offshore-energy and adjacent industrial base
Regional relationships	Sustained U.S. and U.K. security backing amid an unresolved dispute with Venezuela	Dependence on continued external security commitment	Institutionalized, durable security-cooperation frameworks independent of any single administration

06 • SRA 01

Telecommunications & Digital Infrastructure

Guyana implementation objective: build digital infrastructure capacity commensurate with the country's rapid economic transformation, applying transparent, nationality-neutral standards given the mixed-ownership dynamics already present in the energy sector.

Guyana implementation — priority actions

- Map current telecommunications infrastructure ownership and coverage, particularly outside the coastal corridor.
- Apply transparent, nationality-neutral trusted-supplier standards to new digital-infrastructure investment.
- Build domestic technical capacity for network operations and cybersecurity.
- Protect network infrastructure with resilient, diversified power supply linked to the growing energy sector.
- Sequence digital-infrastructure investment alongside broader fiscal-governance capacity building.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Coverage mapping → trusted-supplier standards → domestic technical capacity → protected infrastructure → resilient digital backbone.

07 · SRA 02

Data Centers, Cloud & AI Infrastructure

Guyana implementation objective: build data-fusion capacity connecting fiscal, maritime-security and energy-regulatory information into the common operating picture the HRS Method calls for.

Guyana implementation — priority actions

- Apply transparent, nationality-neutral standards to data-center and cloud-infrastructure investment.
- Build backup and disaster-recovery capacity for critical fiscal, energy-regulatory and security data.
- Develop domestic technical capacity for data governance and cybersecurity.
- Use data-fusion capacity to connect offshore-production, fiscal and maritime-security information.
- Coordinate digital-infrastructure investment with the broader energy-sector regulatory strategy.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Trusted-supplier standards → distributed backup → domestic technical capacity → cross-domain data fusion → resilient digital infrastructure.

08 · SRA 03

Critical Minerals & Strategic Materials

Guyana implementation objective: Guyana's mineral sector, including gold and bauxite, remains secondary to offshore oil; the readiness priority is applying the same transparency and screening discipline developed for the energy sector across all strategic-resource extraction.

Guyana implementation — priority actions

- Apply transparent, nationality-neutral investment screening to mining-sector transactions.
- Build independent geological-survey and regulatory capacity across the broader extractives sector.
- Avoid single-buyer or single-financier dependency for minerals beyond oil.
- Maintain Guyanese decision rights over long-term resource policy.
- Coordinate minerals-sector governance with the fiscal-governance institutions being built for oil revenue.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Regulatory capacity building → transparent screening → diversified offtake → sovereign long-term policy.

09 · SRA 04

Rare Earths & Western Hemisphere Mineral Security

Guyana implementation objective: apply the same validation and transparency discipline used elsewhere in this series to any future critical-mineral discoveries, without assuming Guyana has a rare-earth profile comparable to Chile, Bolivia or Argentina.

Guyana implementation — priority actions

- Validate any rare-earth or critical-mineral geological data through independent survey.
- Avoid premature investment promotion ahead of validated resource data.
- Maintain Guyanese decision rights over long-term mineral policy.
- Apply national-security review to any strategic-mineral asset transactions that do emerge.
- Sequence behind higher-priority oil-revenue governance and offshore-security investment.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Data validation → transparent screening → diversified offtake → sovereign long-term policy.

10 • SRA 05

Energy Security & Strategic Power Infrastructure

Guyana implementation objective: this is the central readiness domain of the assessment — building regulatory, fiscal and security capacity over an offshore-oil sector that has scaled faster than the institutions meant to govern it.

Guyana implementation — priority actions

- Build regulatory capacity to independently oversee the ExxonMobil/Chevron/CNOOC consortium and newly licensed blocks.
- Apply transparent, nationality-neutral standards to all future offshore-licensing rounds.
- Develop domestic energy infrastructure, including gas-to-energy projects, to convert offshore production into affordable domestic power.
- Build maritime-security and production-protection capacity in coordination with U.S. and U.K. partners.
- Establish transparent sovereign-wealth and revenue-management institutions ahead of further production scaling.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Regulatory capacity building → transparent licensing standards → domestic energy conversion → maritime-security cooperation → transparent revenue governance.

11 · SRA 06

Ports, Logistics & Maritime Infrastructure

Guyana implementation objective: build port and maritime-logistics capacity to support both offshore-energy supply chains and broader trade, given the country's small existing port infrastructure relative to its new economic scale.

Guyana implementation — priority actions

- Invest in port capacity supporting offshore-energy supply chains and broader import/export growth.
- Apply transparent, nationality-neutral standards to port-concession and infrastructure-investment decisions.
- Build maritime domain awareness capacity across Guyana's full coastal and offshore zone, including disputed waters.
- Digitize customs and cargo visibility to support rapidly growing trade volumes.
- Coordinate port-security investment with the broader maritime-security cooperation framework.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Port-capacity investment → transparent concession standards → maritime domain awareness → customs digitization → resilient logistics network.

12 · SRA 07

Food Security & Strategic Agricultural Resilience

Guyana implementation objective: protect the country's traditional agricultural base — historically a leading regional rice and sugar producer — from being crowded out or neglected as national attention and investment concentrate on the oil sector.

Guyana implementation — priority actions

- Sustain investment in traditional agricultural export sectors alongside oil-sector growth.
- Diversify agricultural export markets and processing capacity.
- Invest in cold-chain and storage infrastructure linking agricultural regions to export logistics.
- Apply transparent screening to foreign agricultural-sector investment.
- Coordinate food-security investment so oil-revenue growth strengthens, rather than displaces, the agricultural base.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Sustained agricultural investment → market diversification → cold-chain investment → transparent screening → balanced, diversified economy.

13 · SRA 08

Pharmaceutical & Medical Supply Chains

Guyana implementation objective: build health-system capacity commensurate with the country's rapid population and economic growth, ensuring oil-revenue gains translate into improved health infrastructure.

Guyana implementation — priority actions

- Invest oil-revenue gains into health infrastructure and workforce development.
- Maintain diversified medical-device and medicine supplier relationships.
- Build regional medical-logistics capacity linking coastal and interior communities.
- Strengthen local repair and maintenance capacity for medical equipment.
- Coordinate health-system investment with broader fiscal-governance and revenue-transparency institutions.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Revenue-linked investment → supplier diversification → regional logistics capacity → local repair capacity → resilient health system.

14 • SRA 09

Advanced Manufacturing & Industrial Capacity

Guyana implementation objective: build domestic technical and industrial capacity linked to the offshore-energy sector, capturing more value and employment from the oil boom than raw extraction alone provides.

Guyana implementation — priority actions

- Invest in technical training linked to offshore-energy operations and maintenance.
- Develop domestic industrial capacity for energy-sector equipment maintenance and support services.
- Evaluate downstream processing and manufacturing opportunities tied to the energy sector.
- Prioritize workforce development that allows Guyanese nationals to fill technical roles currently reliant on foreign expertise.
- Measure industrial resilience by domestic value and employment capture, not extraction volume alone.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: Technical training → domestic maintenance capacity → downstream-processing evaluation → workforce localization → diversified industrial base.

15 • SRA 10

Western Hemisphere Strategic Infrastructure & Resilience

SRA 10 is the integration layer, converting the ten sector assessments into a Guyana-level dependency architecture, with the Essequibo dispute and the pace of institutional development relative to oil-revenue growth as the defining test cases for the series' Strategic Dependency Test methodology applied to a rapidly transforming small state.

Guyana implementation — priority actions

- Maintain a national Fiscal, Security and Resource Dependency Register spanning all ten SRA domains.
- Run Scenario Stress Tests for compound territorial-security and production-disruption scenarios.
- Use Readiness-to-Investment Assessments applied consistently regardless of investor nationality.
- Specify decision rights, recovery time and alternate capacity for every critical energy and fiscal system.
- Coordinate with Shield of the Americas, the United States and the United Kingdom on shared readiness and security standards.

HRS TEST

For every major project, identify concentration, substitutability, control, recovery time and cascading impact. A second supplier or facility is effective redundancy only when both are not dependent on the same upstream failure point.

Implementation sequence: National dependency register → scenario stress testing → nationality-neutral readiness assessments → international coordination → integrated long-horizon resilience.

16 • OIL-REVENUE-TO-INSTITUTIONAL-CAPACITY

A National Conversion Architecture

The conversion model treats Guyana's oil revenue as a necessary but insufficient foundation, requiring fiscal-governance, regulatory and security institutions built as deliberately and quickly as the resource itself has scaled.

Stage	Core Action	Readiness Result
1. Measure	National fiscal, security and resource-dependency register; transparent revenue accounting	Public baseline and auditability
2. Stabilize	Durable sovereign-wealth and revenue-management institutions; maritime-security coordination	Reduced risk of revenue mismanagement or security disruption
3. Rebuild	Regulatory capacity over the offshore-energy consortium; expanded port and digital infrastructure	Strengthened oversight and reduced single-point dependency
4. Industrialize	Domestic technical capacity for offshore-energy operations and maintenance	Greater domestic value and employment capture
5. Diversify	Diversified offshore licensing, agricultural investment, and trade partnerships	Reduced concentration risk
6. Institutionalize	Administration-independent fiscal, regulatory and security institutions	Continuity across changes of government
7. Adapt	Institutional renewal as production, technology and the Essequibo dispute evolve	2076 resilience

HRS ALLOCATION PRINCIPLE

Oil-revenue investment should be structured to build institutional capacity that persists independent of any single production cycle, election, or stage of the Essequibo dispute, given the pace at which Guyana's resource wealth has already outstripped comparable governance development.

17 · HUMAN CAPITAL AND DEMOGRAPHIC ABSORPTION

Human Capital & Demographic Absorption

Guyana’s small population — approaching one million people — must absorb a technically demanding, rapidly scaling offshore-energy industry alongside continued growth in construction, services and public administration, creating a distinctive workforce-development readiness challenge relative to larger economies in this series. [1]

Priority	Readiness Action	Expected Capability
Technical workforce development	Training programs aligned with offshore-energy operations, maintenance and regulatory oversight	Reduced reliance on foreign technical expertise over time
Equitable revenue distribution	Transparent mechanisms addressing documented public concern over uneven benefit distribution	Reduced political volatility tied to perceived inequity
Institutional continuity	Fiscal and regulatory institutions independent of any single administration	Sustained expertise and policy continuity across political cycles
Coastal-interior balance	Development investment reaching populations beyond the coastal corridor	Reduced regional disparity as the economy scales

HRS READINESS METRIC

Whether workforce development and revenue-distribution mechanisms keep pace with the scale of oil-sector growth, reducing the documented public perception that benefits remain unevenly distributed.

18 • TRADE DIVERSIFICATION

Trade Diversification and External Economic Partners

Guyana's trade and investment posture is increasingly defined by its offshore-energy sector, where American (ExxonMobil, Chevron) and Chinese (CNOOC) commercial interests already co-invest in the same consortium, even as Guyana's security relationship with Washington and London responds to a separate territorial dispute with Venezuela. This assessment did not identify evidence of a significant Russian or Iranian strategic footprint in Guyana comparable to cases documented elsewhere in this series.

Partner	Relationship	Readiness Consideration
United States	Principal security partner; ExxonMobil and Chevron as U.S. Stabroek Block partners; Shield of the Americas participation	Deepening security and energy cooperation, applied transparently to all consortium members
China	CNOOC co-investment in the Stabroek Block consortium alongside U.S. operators	Continued transparent, nationality-neutral regulatory treatment of all consortium partners
United Kingdom	Military partnership supporting Guyana's territorial-security posture	Sustained, institutionalized security cooperation
Venezuela	Territorial disputant over Essequibo; dispute before the ICJ	Sustained diplomatic and legal engagement independent of security posture

HRS PROPOSITION

Guyana's central trade-readiness insight is that commercial co-investment between the United States and China within the same offshore consortium does not require Guyana to choose between them; the separate, more consequential choice is how transparently and consistently Guyana regulates that consortium and manages the surrounding territorial dispute.

19 • U.S.-GUYANA COOPERATION

A Readiness-Based Cooperation Framework

U.S.-Guyana security cooperation has included joint maritime and air patrols aimed at drug interdiction near the Venezuelan border dating to 2020, and has intensified further amid the Essequibo dispute, including direct security assurances from Secretary of State Rubio during his visit to Georgetown. [14][7] President Ali's participation in the March 2026 Shield of the Americas founding summit and Guyana's accession to the 22 September 2026 Joint Statement on Defending Hemispheric Sovereignty — built on economic, security and multilateral-coordination pillars — provide an institutional framework for extending this cooperation into energy-security and fiscal-governance domains. [4][5]

Domain	Illustrative Readiness Objective	Authority / Accountability
Maritime security	Sustained joint patrols and maritime domain awareness in contested waters	Guyanese and U.S. security authorities, with U.K. coordination
Energy-sector governance	Transparent, nationality-neutral regulatory capacity over the Stabroek consortium	Guyanese energy-regulatory authorities
Fiscal governance	Durable, transparent sovereign-wealth and revenue-management institutions	Guyanese fiscal authorities
Diplomatic engagement	Sustained support for the ICJ process as the primary channel for resolving the Essequibo dispute	Guyanese and international diplomatic and judicial authorities

COOPERATION PRINCIPLE

Build systems that remain useful if an administration changes, the ICJ process concludes, or global energy markets evolve — the same principle applied throughout this series.

20 · 2027–2030

Sovereignty and Revenue Governance

Objective: build durable fiscal-governance institutions and sustain maritime-security capacity while the Essequibo dispute continues through international adjudication.

Priority portfolio

- Transparent sovereign-wealth and revenue-management institutions
- Sustained U.S. and U.K. maritime-security cooperation
- Regulatory capacity building over the Stabroek consortium and newly licensed blocks
- Initial technical-workforce development programs
- Continued engagement with the ICJ process

HRS LONG-HORIZON TEST

Revenue and security investment should be traceable to measurable institutional outcomes — not only to the current pace of production growth.

21 · 2031–2035

Institutional Consolidation

Objective: move from rapid-growth-era institution-building to durable, administration-independent governance.

Priority portfolio

- Administration-independent fiscal and energy-regulatory institutions
- Expanded domestic technical workforce reducing reliance on foreign expertise
- Diversified offshore licensing beyond the original consortium
- Sustained, equitable revenue distribution mechanisms
- Continued maritime-security and diplomatic engagement

HRS LONG-HORIZON TEST

The central transition is from crisis-paced institution-building to governance capacity that outlasts any single production or political cycle.

22 · 2036–2050

Diversification

Objective: reduce structural dependence on any single energy consortium, export market, or security partner.

Priority portfolio

- Diversified offshore and onshore energy investment, applied on nationality-neutral terms
- Mature domestic industrial capacity supporting the energy sector
- Institutionalized regional and international security-coordination mechanisms
- Diversified agricultural and non-oil export sectors
- Durable fiscal buffers reducing exposure to energy-price volatility

HRS LONG-HORIZON TEST

A resilient Guyanese system should continue functioning if global energy markets shift, one security partner's priorities change, or the Essequibo dispute evolves.

23 · 2051–2065

Renewal

Objective: replace first-generation post-2027 energy, fiscal and security infrastructure before systemic failure, applying updated technology and institutional standards.

Priority portfolio

- Renewed offshore-energy and port infrastructure
- Updated fiscal-governance and revenue-management technology
- Continued institution professionalization
- Renewed maritime-security and diplomatic frameworks
- Sustained diversified trade and investment relationships

HRS LONG-HORIZON TEST

Long-horizon readiness means avoiding a second generation of institutional gaps that reproduces the pace mismatch of the first oil boom.

24 · 2066–2076

Intergenerational Resilience

Objective: establish a continuously renewing portfolio of Guyanese fiscal, energy and security capabilities extending beyond peak oil-era revenue.

Priority portfolio

- Effective redundancy across energy, fiscal and security systems
- Diversified international partnerships, applied consistently and transparently
- Recurring national fiscal and resource-dependency stress tests
- Sustained regional and international security-coordination investment
- Durable, administration-independent governance institutions capable of managing a post-oil-boom economy

HRS LONG-HORIZON TEST

Build systems that remain useful when governments change, global energy markets evolve past the current oil-price cycle, or the Essequibo dispute reaches final resolution.

25 • READINESS METRICS

Readiness Metrics and Governance

Country readiness should not be reduced to a single score. Metrics should be tracked by sector, geography and critical function.

Domain	Illustrative Metric
Fiscal governance	Transparency and independence of sovereign-wealth and revenue-management institutions
Energy-sector oversight	Regulatory capacity relative to consortium scale; licensing-round diversification
Territorial security	Maritime-incident frequency; ICJ-process engagement continuity
Human capital	Domestic workforce share in technical offshore-energy roles
Equity	Distribution of oil-revenue benefits across regions and population segments

26 • GOVERNANCE & IMPROVEMENT FRAMEWORK

HRS Guyana Readiness Improvement Framework

Cycle	Guyana Implementation
Detect	Maintain national fiscal, security and resource-dependency registers.
Assess	Stress-test compound territorial-security and production-disruption scenarios.
Decide	Apply consistent, documented regulatory and screening criteria regardless of investor nationality.
Coordinate	Align national, regional and international (U.S., U.K., Shield of the Americas) counterparts.
Deploy	Execute fiscal-governance, security and workforce-development packages with measurable outcomes.
Sustain	Fund institutions through Guyana's production, political and dispute-resolution cycles.
Learn	Conduct annual continuity exercises and update assumptions through 2076.

MANAGEMENT PRINCIPLE

The HRS improvement framework should be used as a management system rather than a one-time report — particularly important given the pace at which Guyana's resource transformation continues to outstrip comparable governance development.

27 • CONCLUSION

Conclusion

Guyana's September 2026 position is defined by a pace mismatch: the fastest resource transformation this series has documented, an active great-power co-investment arrangement inside a single offshore consortium, and a territorial dispute with Venezuela that predates the oil discovery but has intensified sharply because of it. Unlike Chile's or Argentina's cases in this series, where the central tension is choosing between competing foreign partners, Guyana's central tension is whether its own institutions can develop as quickly as its resource wealth already has.

The HRS opportunity is not to resolve the Essequibo dispute, which remains before the International Court of Justice, but to help Guyana build the fiscal-governance, regulatory and security capacity that converts unprecedented, rapid oil wealth into durable national development — capacity built to persist across production cycles, political administrations, and however the territorial dispute with Venezuela ultimately concludes.

FINAL HRS PROPOSITION

Guyana's resilience should be measured not by the pace of its production growth, but by whether its fiscal, regulatory and security institutions can keep pace with that growth — capable of enduring when governments change, energy markets shift, or the Essequibo dispute reaches its eventual resolution.

METHODOLOGY, RESEARCH INTEGRITY AND LIMITATIONS

Methodology, Research Integrity and Limitations

This assessment is an original HRS Resilience Foundation synthesis based on public-source evidence and the Foundation's Western Hemisphere Readiness Series. It integrates the HRS Readiness Cycle, Strategic Dependency Test, effective-versus-nominal redundancy distinction, sector readiness logic and 50-year planning principles.

The assessment does not claim access to classified intelligence, confidential commercial information or privileged government information. Conditions in Guyana, the Essequibo dispute's legal status, and global energy markets can change rapidly.

Statements attributed to the U.S., Guyanese, Venezuelan or Chinese governments are presented as their respective positions. This assessment takes no position on the legal merits of the Essequibo dispute, which remains before the International Court of Justice. Scenario propositions are analytical pathways, not forecasts.

The report is not a political judgment, electoral recommendation, intelligence product, procurement recommendation, legal opinion, engineering certification or investment solicitation. Country conditions are analytical categories, not rankings.

SELECTED BIBLIOGRAPHY AND SOURCES

Sources

-
- [1] Semafor. Guyana's incumbent president wins landslide election victory (world-record GDP growth; petrostate context). 4 September 2025.
 - [2] Grand Review. Essequibo 2026: Why Guyana's Oil Boom Is Redrawing Latin American Security Maps (Stabroek Block estimated at approximately 11 billion barrels of oil-equivalent, citing ExxonMobil 2026 data; ICJ jurisdiction reaffirmed 2023). 6 September 2026.
 - [3] Americas Quarterly. REACTION: Irfaan Ali Claims Reelection Victory in Guyana (1 September 2025 general election; PPP/C legislative majority; Vice President Bharrat Jagdeo's influence; public dissatisfaction over benefit distribution; comments from Rystad Energy's Head of Emerging Markets on Guyana's oil-driven GDP growth). 5 September 2025.
 - [4] Department of Public Information, Government of Guyana; Office of the Vice President (via Newsroom Guyana). President Ali greeted by President Trump at the Shield of the Americas Summit, Trump National Doral. March 2026.
 - [5] EIN Presswire. President Ali, regional leaders commit to stronger hemispheric security under Shield of the Americas (Joint Communiqué; economic, security and multilateral-coordination pillars). 24 September 2026.
 - [6] Associated Press (December 2023 Venezuelan referendum; ICJ order); Ministry of Foreign Affairs and International Cooperation, Guyana, press statement on ICJ public hearings, 4–11 May 2026; OilNOW, Ali expects World Court to rule in Essequibo case by year end (President Ali's statement that Guyana expects a ruling in early 2027, following the conclusion of merits hearings). 2023–2026.
 - [7] Yahoo News / wire reporting. Attack on Guyana or Exxon would be "bad day" for Venezuela, Rubio warns (Georgetown visit; ExxonMobil/Chevron/CNOOC consortium). 2026.
 - [8] Venezuelanalysis. Venezuela Denounces New Oil Vessel in Disputed Essequibo Waters, UK-Guyana Military Partnership (FPSO One Guyana; Stabroek Block approximately 11 billion barrels; Rubio's Georgetown warning). 2025.
 - [9] Wikipedia / Stabroek News. 2025 Guyanese general election and presidential inauguration (36 of 65 National Assembly seats; inaugurated 7 September 2025). September 2025.
 - [10] Department of Public Information, Guyana; Ministry of Natural Resources. Guyana Launches First Licensing Round for Offshore Oil and Gas Exploration and Production (14 blocks for tender, launched 9 December 2022; eight bids received by the round's 2023 close, per subsequent government statements). 9 December 2022.
 - [11] Modern Diplomacy. Venezuela's Oil Deal Has a Guyana Problem — and an OPEC One (2015 Stabroek Block discovery following Chávez-era Exxon expropriation; new U.S. commercial stake in Venezuelan oil affecting Essequibo dynamics). 2 September 2026.
 - [12] PBS NewsHour (Associated Press). ExxonMobil to explore for oil and gas in offshore area under dispute by Guyana and Venezuela. 7 February 2024.
 - [13] Drilled Media. The U.S.-Venezuela-Guyana Oil Triangle (Essequibo as two-thirds of Guyana's territory; Exxon-Guyana commercial history). Updated 18 September 2026.
 - [14] Wikipedia. Guyana–United States relations (2020 joint maritime and air patrols near the Venezuelan border, aimed at drug interdiction).
 - [15] HRS Resilience Foundation. Sector Readiness Assessment 01 — Telecommunications & Digital Infrastructure. 2026.
 - [16] HRS Resilience Foundation. Sector Readiness Assessment 02 — Data Centers, Cloud & AI Infrastructure. 2026.
 - [17] HRS Resilience Foundation. Sector Readiness Assessment 03 — Critical Minerals & Strategic Materials. 2026.
 - [18] HRS Resilience Foundation. Sector Readiness Assessment 04 — Rare Earths & Western Hemisphere Mineral Security. 2026.
 - [19] HRS Resilience Foundation. Sector Readiness Assessment 05 — Energy Security & Strategic Power Infrastructure. 2026.
 - [20] HRS Resilience Foundation. Sector Readiness Assessment 06 — Ports, Logistics & Maritime Infrastructure. 2026.
 - [21] HRS Resilience Foundation. Sector Readiness Assessment 07 — Food Security & Strategic Agricultural Resilience. 2026.
 - [22] HRS Resilience Foundation. Sector Readiness Assessment 08 — Pharmaceutical & Medical Supply Chains. 2026.
 - [23] HRS Resilience Foundation. Sector Readiness Assessment 09 — Advanced Manufacturing & Industrial Capacity. 2026.
 - [24] HRS Resilience Foundation. Sector Readiness Assessment 10 — Western Hemisphere Strategic Infrastructure & Resilience. 2026.
 - [25] HRS Resilience Foundation. Country Readiness Assessment 02 — Venezuela. September 2026.
 - [26] HRS Resilience Foundation. Country Readiness Assessment 09 — Chile: Institutional Readiness, Strategic Minerals and Hemispheric Realignment. September 2026.
 - [27] Maritime Executive; World Oil; OilNOW (Ministry of Natural Resources, Guyana). Chevron completes acquisition of Hess Corporation, including its 30% Stabroek Block interest (18 July 2025); Guyana government data showing Stabroek Block production averaging approximately 903,000 barrels per day in April 2026, reported at a similar level by the Ministry in August 2026 alongside the arrival of the fifth FPSO, Errea Wittu, ahead of the Uaru development's expected Q4 2026 startup.

Suggested citation: HRS Resilience Foundation. Country Readiness Assessment 12 — Guyana: Institutional Readiness, Offshore Oil Security and Territorial Sovereignty. Western Hemisphere Readiness Series. September 2026.

About the HRS Resilience Foundation: The HRS Resilience Foundation is an independent research organization advancing institutional readiness and health security across the Western Hemisphere.

WESTERN HEMISPHERE READINESS SERIES

HRS Resilience Foundation

Independent research for institutional readiness, continuity, and 50-year resilience planning across the Western Hemisphere. Research Outputs span Strategic Reports, Policy Briefs, Technical Papers, Sector Readiness Assessments and Country Assessments, translating public-source evidence into practical frameworks built to remain valid for governments, infrastructure operators, investors, and institutional decision-makers across changes in technology, suppliers, and political leadership.

RESEARCH OUTPUTS TO DATE

STRATEGIC REPORTS

Strategic Report 01 — Health Security and Institutional Resilience in the Americas

Strategic Report 02 — Resilient Infrastructure Investment in the Western Hemisphere

POLICY BRIEFS

Policy Brief 01 — Strengthening Regional Health Emergency Readiness in the Americas

Policy Brief 02 — Operationalizing the Economic Pillar of the Shield of the Americas

TECHNICAL PAPERS

Technical Paper 01 — Building Resilient Health Supply Chains

COUNTRY ASSESSMENTS

Country Readiness Assessment 01 — Brazil

Country Readiness Assessment 02 — Venezuela

Country Readiness Assessment 03 — Cuba

Country Readiness Assessment 04 — Colombia

Country Readiness Assessment 05 — Bolivia

Country Readiness Assessment 06 — Peru

Country Readiness Assessment 07 — Ecuador

Country Readiness Assessment 08 — Paraguay

Country Readiness Assessment 09 — Chile

Country Readiness Assessment 10 — Argentina

Country Readiness Assessment 11 — Panama

Country Readiness Assessment 12 — Guyana

SECTOR ASSESSMENTS

SRA 01 — Telecommunications & Digital Infrastructure

SRA 02 — Data Centers, Cloud & AI Infrastructure

SRA 03 — Critical Minerals & Strategic Materials

SRA 04 — Rare Earths & Western Hemisphere Mineral Security

SRA 05 — Energy Security & Strategic Power Infrastructure

SRA 06 — Ports, Logistics & Maritime Infrastructure

SRA 07 — Food Security & Strategic Agricultural Resilience

SRA 08 — Pharmaceutical & Medical Supply Chains

SRA 09 — Advanced Manufacturing & Industrial Capacity

SRA 10 — Western Hemisphere Strategic Infrastructure & Resilience

André Vieira, MD

FOUNDER & CHAIRMAN, HRS RESILIENCE FOUNDATION

© 2026 HRS Resilience Foundation. Western Hemisphere Readiness Series. All rights reserved. No U.S. Government or foreign-government endorsement is implied or claimed.