Inclusive ‘Guinéisation’?:

The origins, design, and implementation of Local Content Policies in Guinea’s mining sector

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Für Katharina Schoiber.

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ABSTRACT

Low-income resource-dependent countries face several governance challenges. The opportunities for resource-rich countries to make the most of their resource wealth by overcoming negative impacts and catalysing resource revenues and investment into tangible socio-economic benefits for host communities are limited. One governance tool to generate inclusive socio-economic benefits from extractive activities that has become increasingly popular are Local Content Policies (LCPs). LCPs are a type of industrial policy that are developed to create 'linkages' and 'spillover' effects through the maximization of local employment and procurement within and beyond the value chain of industrial mining activities. Guinea, in West Africa, is a resource-dependent low-income country with the world's largest known deposits of bauxite, and where LCPs have become a popular mining sector reform tool embraced by the previous administration under President Alpha Condé (2010-2021). The Condé administration promoted LCPs to achieve 'Guinéisation', with the aim that the mining industry would evolve into a dynamic and diversified sector by Guineans for Guineans. This thesis is based on research between 2018-2023 in the field of resource governance. It engages with three papers that examine the design and implementation of mining sector reforms through the case study of local content policies in Guinea's bauxite industry. The aim of this thesis is to contribute to an understanding to what extent local content policies constitute a mining sector reform tool that generate inclusive resource-based development. The critical engagement with this body of work examines the key theories and concepts, embedded in extractivism theory, local content, and Corporate Social Responsibility (CSR). The findings and conceptual debates that are analysed in this thesis highlight contributions for academics and practitioners. This thesis shows that extractivism theory allows to understand why resource-rich low-income countries struggle with inclusive resource-based development, why mining reforms like LCPs are designed, and why the impacts of mining sector reforms like local content policies remain limited. This approach contributes to academic knowledge generation as it provides a unique and holistic approach to analyse LCPs and has pushed the boundaries of local content literature. This research also generates impact beyond the academic circle, with recommendations for practitioners among policy makers and industry stakeholders.

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1. INTRODUCTION: LOCAL CONTENT POLICIES - A VISION OF INCLUSIVE RESOURCE-BASED DEVELOPMENT FOR LOW-INCOME RESOURCE RICH COUNTRIES

1.1. Introduction

A key question that continues to challenge academics and policy makers is to understand why resource-rich countries often remain in the low-income category with a high degree of dependence on the extractive industries and a lack of diversification. In many cases, countries that are blessed with precious metals, minerals, oil, and gas, have a predominantly low-income population (Bebbington, 2011; Sachs & Warner, 2001). The Resource Curse is a widespread theory that explains this premise claiming that resource-rich countries are confronted with negative economic impacts, rather than wealth (Sachs & Warner, 2001) What drives the international and scientific communities is to not only find an answer to the fundamental question why resource-rich countries remain poor, but rather to find a solution. The puzzle that many researchers and policy makers have worked on is how low-income resource-rich countries achieve inclusive resource-based development. Hirschman's (1958) linkages theory is often presented as a plausible solution. Creating a domestic industry to supply extractive activities with local goods and services, as well as transforming the raw commodity and sound tax revenues for host countries could guarantee inclusive resource-based development. Hirschman (1958) believes that one way to overcome the Resource Curse is by ensuring that the presence of resources leads to the creation of linkages. Linkages are the idea that the exploitation of resources should and could unfold as many activities as possible to diversify the economy, provide employment, and create stable and inclusive well-being and spillover effects (Hirschman, 1958; Hirschman & Adelman, 2013). There are three principal linkages, namely backward, forward, and fiscal linkages. Backward linkages contain all activities to enable and support the industry in the supply chain and resourcing. Forward linkages refer to processing and manufacturing of the raw material. Fiscal linkages are taxes and royalties that are generated by the extractive activities that are then meant to be channelled to provide further benefits for the host country. By following the same model, in theory, resource-rich low-income countries could generate inclusive resource-based development. In practice, countries across the globe have attempted this route to achieve inclusive resource-based development by implementing reforms to generate linkages per Hirschman's model. The modern-day interpretation is often referred to as local content. Local content refers to the concept of creating 'linkages' and 'spillover' effects through the maximization of local employment and procurement within and beyond the value chain of industrial mining activities. To achieve this outcome, states introduce local content policies (LCPs), which constitute a type of state-mandated industrial policy with voluntary and mandatory regulations.

The aim of my thesis is to increase our understanding to what extent local content policies constitute a mining sector reform tool that can generate inclusive resource-based development. I use a case study approach focusing on local content policies (LCPs) in Guinea's bauxite sector. I present my findings in three chapters that have been published in academic journals as original research articles, which are outputs from research conducted between 2019 and 2023, based on fieldwork in Guinea in 2019, document analysis and digital fieldwork in 2020-2021. The table below provides an overview of the three publications, key research objectives and central arguments presented.

Table 1: Overview of Research Objectives and Key arguments per publication

	The origins of local content: 'Local content is Politics' (Wilhelm, 2022)	**Exploring local content in Guinea's bauxite sector: Obstacles, opportunities and future trajectories (Wilhelm & Maconachie, 2021)**	**'In Guinea, there are two types of mining companies' (Wilhelm, 2023)**
Objective	Examine the reasons behind the implementation of mining sector reforms through local content in Guinea, thereby revealing the dynamics, particularly of a political nature, that impact LCP design and implementation	Deepen understanding of recent local content mining sector reforms and explore their effectiveness in terms of inclusive resource-based development	Analyse the implementation of LCPs by mining companies and understand the different motivations that explain their differing responses to these practices
Argument	The origins of LCPs are political and tied to reasons related to extractivism. This means that local content policy design and implementation is entangled in political discourse, thereby	Despite significant opportunities to achieve inclusive-resourced based development through LCPs, a variety of obstacles ranging from economic to political and	Bauxite mining companies in Guinea respond differently to state-mandated LCPs as investment origin plays a major role and companies with international

	negatively impacting effectiveness.	institutional continue to frustrate progress meaning that in the case of Guinea the results have been limited.	investment origins embrace LCPs as part of their CSR and SLO, meaning that companies are left to 'autoregulate' their responses to LCPs.

This chapter introduces key literature and the theoretical framework that shaped all my publications. I firstly introduce the concept and literature on extractivism. Extractivism is the very structure that LCPs are placed in. Using extractivism theory to understand and unpack mining sector reforms like LCPs reveals dynamics that explain the opportunities and limitations of reforms. I achieve a novel contribution by considering the wider context of LCPs and linking it with (neo-) extractivism literature. After having analysed this context, I introduce LCPs by discussing LCP literature that defines and outlines the features of LCPs. I elaborate on the origins of LCPs and explain how LCPs are an ideal reflection of the evolution of extractivism. I continue by analysing why LCPs exist and link LCP literature with the notion of inclusive resource-based development, drawing on Bebbington (2011, 2013, 2018).

In the second section of the chapter, I examine the implementation problems of mining sector reforms like LCPs. I analyse the challenge of the implementation of LCPs and present LCP studies that have identified a variety of obstacles and an implementation challenge. I then examine the role of the private sector, as well as the role of the state and institutions. In this part, I raise the inherent questions on the role of the state and private sector in mining sector reforms such as LCPs, considering the history of extractivism and the impacts it had on state and private sector relations.

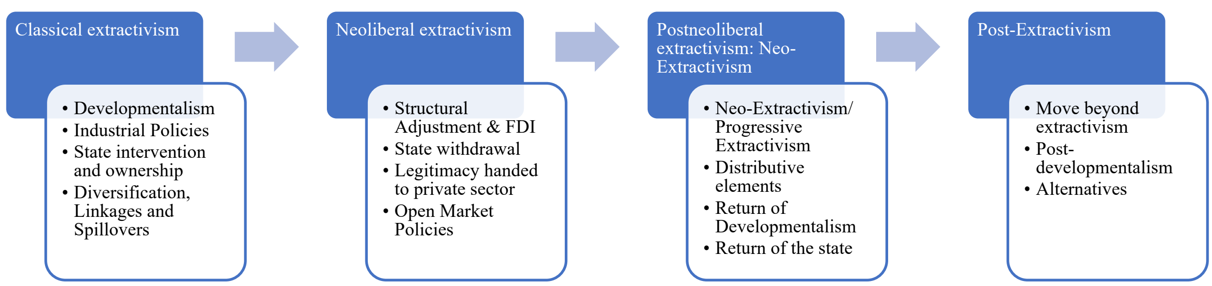
Lastly, I introduce and summarize the key messages and contributions of the empirical chapters of this thesis.

1.2. Extractivism and neo-extractivism

Figure 1 provides an overview of the evolution of extractivism. Extractivism literature typically draws on Acosta (2011, 2017); Gudynas, (2011, 2009, 2013) and Svampa (2012, 2015, 2019). They define extractivism as the process to exploit nature and turn it into commercial value for the accumulation of capital. The characteristics are high volume and intensity of extraction, no or low processing and at least 50% of the resources are exported. Extractivism changed over time, in its intensity, use of technology, and purpose (Gudynas, 2015). Classical Extractivism, before the 1970s was shaped by developmentalism, where the intervention of the state in economic and social institutions to achieve 'development' was integral. In a simple definition provided by Wong (2017; p. 1) developmentalism is the "intervention of the state in economic and social institutions in order to achieve 'development'." North and Grinspun (2016; p. 1483) add the promotion of economic diversification and investment in social programmes through directed public policies. Developmentalism has been widespread between the late 1940s until the early 1970s. Inspired by the East Asian development model implemented after the Second World War, these policies were particularly popular across Latin America where state directed import-substituting industrialization was dominant (North & Grinspun, 2016). Similarly, Wallerstein (2005) notes that developmentalism was implemented in various economic systems stretching from communism to capitalism under the banner of 'economic development'. Following the disruptions by stagflation in the 1970s and the 1980s debt crisis, developmentalist policies, such as import-substitution, were perceived as corrupt protectionism, contributing to an inefficient bureaucracy. According to Wallerstein (2005) developmentalism was replaced by a period of export-oriented productive globalization, whilst North and Grinspun (2016) rather categorize the period until the late 1990s as neoliberalism. Pieterse (1991) analyses the crisis of developmentalism more fundamentally and connects it to a crisis of modernism where the growth model was questioned and viewed as too exclusive. This followed a period of postmodernism, polycentrism, and a deconstruction of the West. North & Grinspun (2016), and authors such as Svampa (2012) continue to analyse how developmentalism has continued to play a role and constantly re-invents itself. Terms such as 'new', 'neo', or 'progressive' developmentalism re-occur. North & Grinspun (2016) briefly define this new type of developmentalism that re-emerged after the crisis of faith in the Washington Consensus and neoliberalism, as no longer following the original ideas of import substitution, but rather focusing on redistribution of the commodity boom income. Hence, they view this new developmentalism as closely connected with neo-extractivism. Developmentalism includes a Rostowian idea of 'catching up' and modernization. This period included high degrees of state intervention and ownership, as well as the goal to achieve diversification, linkages, and spillovers. Linkages and spillovers draw on the idea that extractive activities are phenomena where 'one thing leads to another' and the mere activity of extraction unfolds many more activities to enable resource extraction and process the resources further (linkages), so more impacts from extractive activities spill-over (Hirschman, 1958; Hirschman & Adelman, 2013; Prebisch, 1962; Singer, 1950).

Stagflation in the 1970s, and the 1980s debt crisis brought the end of developmentalism and according to Brand et al., (2016) a new World Market Oriented developmentalism emerged. A concept that is mostly used to characterize this era is neoliberalism. Harvey (2005, 2007) has done extensive work on this concept. Neoliberalism can be summarized as a theory of political economic practices that had its peak in the 1970s and 1980s and is associated with a widespread transition to increase market power, deregulation, and privatization (Harvey, 2005; Larner, 2003; Venugopal, 2015). During neoliberalism, the purpose of extractivism was to attract foreign direct investment combined with structural adjustment, to increase the quantitative benefits of extractivism. This included state withdrawal where legitimacy was handed over to the private sector, and open market policies (Campbell, 2009). I discuss Campbell's notion further in depth in the second part of this chapter.

Figure 1: An Overview of the evolution of extractivism



By the end of the 1990s, and the beginning of the 2000s, a crisis of neoliberalism and the Washington Consensus emerged. Poverty and Inequality prevailed, and the promises of neoliberalism did not seem to have materialized (Campbell, 2009). Seemingly new types of extractivism emerged across Latin

America and Sub-Saharan Africa. Burchardt & Dietz (2014) define the elements of neo-extractivism as (i) Regulation economies of extraction, (ii) revenue management and mediation different interests ; (iii) development through addressing social question and supporting development projects in the region; (iv) Political legitimacy creation. According to Acosta (2017), Gudynas (2015) and Svampa (2015), the main inherent novelty of neo-extractivism is that the surplus revenue from extractive activities is channeled to mitigate poverty by an effective use for well-being. This new kind of extractivism is associated with new progressive governments in Latin America that implement continuity in the sense that extractive activities and the essence of extractivism continue, but with more direct and indirect state involvement in extractive activities and redistributive social policies (Gudynas, 2009). The purpose is to reduce poverty, increase social participation, to diversify local economies and to guarantee political stability (Burchardt & Dietz, 2014). This contribution by Burchardt and Dietz (2014) brings up the political context and agency, which suggests that there is more to the mere redistribution of resource rents. I identify the following key features of neo-extractivism:

- (partial) Rejection neoliberal policies (i.e. break with privatization export raw materials (Gudynas, 2011a))
- (partial) nationalization extractive industries
- State control over extractive activities
- Immense scale: capital (investment) (Svampa, 2015)
- Increase in socio-political programs (Brand et al., 2016) and more socially inclusive form of development (Childs & Hearn, 2017)

The next step, a potential future of post-extractivism, would move beyond the narrative of extractivism and developmentalism as it points out to the inherent criticism of extractivism and developmentalism and the idea of resource-based development. I return to this inherent criticism of extractivism in the second part of this chapter.

Before moving on to discuss how LCPs can be seen as neo-extractivist reforms, another thing I note is that extractivism literature is heavily dominated by observations from Latin America. The identified and analysed features of the concepts, as well as the political, historical, and economic context was set from a Latin American perspective. Instead of asking the question why this is the case, I argue that it is rather important to make the point that the observed aspects in fact apply beyond Latin America and in other resource-rich countries, particularly in sub-Saharan Africa. I present the evidence for this argument and conclude this section by giving an exclusive overview of the history of extractivisms, which includes sub-Saharan Africa. This is a novel contribution, and hopefully this will inspire more researchers to include sub-Saharan Africa in this debate.

Most authors, although they present Latin American case studies, acknowledge that "there is empirical evidence for such paths outside of Latin America. Thanks to international demand for raw materials, a resource-dependent development path is gaining momentum in other regions in the global South" (Burchardt and Dietz 2014; p. 469). Similarly, Brand, Dietz, and Lang (2016; p. 127) observe that "similar implications of the resource boom can also be observed in other world regions such as Sub-Saharan Africa and South-East Asia." The authors do not expand further on this claim, but rather refer to general research on resource extraction in sub-Saharan Africa that do not exclusively debate extractivisms conceptually.

Bond (2017) with their publication carrying the promising title on *extractivism in Africa* offer more of a snapshot of the current socio-economic situation in sub-Saharan Africa than fundamental theoretical and conceptual debates about extractivism in Africa. However, although the author does not explicitly place sub-Saharan Africa into the conceptual features of extractivism outlined by the Latin American extractivism debate, the political economy of resource extraction in sub-Saharan Africa that Bond (2017) identifies seems to share many similarities to the debate I have discussed so far. The author discusses the period of structural adjustment and neoliberalism, which like in Latin America included liberalisation policies with pressure to extract further to prioritize GDP growth. This resulted in a failure leading to post-neoliberal policies. However, these also proved unsuccessful. Like in the case of Latin America, the negative impacts of extractivism remain, such as pollution, resource depletion, poverty, and precarious labour conditions.

The authors who focus on the concepts of (neo-) extractivism leave an unfilled gap that must be addressed in two ways. Firstly, the evolution of extractivism in sub-Saharan Africa needs to be analysed and placed into the context. It must be identified which types of extractivism have occurred in the past, and what the current situation of extractivism entails. Secondly, with this analysis, an overarching overview of the evolution of extractivism can be created that is finally universal and not exclusive to Latin America only. Ideally, the next step would be to invite research to contribute with their analysis and conclusions of extractivism in Asia and Oceania.

This procedure is important to enable a universal analysis of the evolutions of extractivisms. I argue that it is important to establish this framework to enable the recognition of patterns, similarities and differences across individual resource-rich countries and regions. As Roder (2019; p. 411) notes "Transferring the Latin American debate to (…) Africa as a whole provides a framework for analysing resource politics in the context of development narratives."

Resource policies are often designed universally. Frameworks should thus be inclusive to allow the necessary breadth and insight based on a variety of experiences. LCPs, as it will be discussed later on, are an example of such policies that rely on understanding the context of extractivism and the implications of extractivism. The literature has been dominated by Latin America, but experiences might differ across Asia and Sub-Saharan Africa.

To my knowledge, only few academic contributions address this gap. Childs and Hearn (2017; p. 847) recognize this "general absence of cases from outside Latin America. Across literature, neo-extractivism is parsed as a 'Latin American phenomenon' and is used as short-hand for the 'pink tide' of emerging leftist government on the continent in recent years." In their comparison of Ghana and Ecuador, they notice that in fact, Africa follows similar patterns as recognized in the Latin American debate. They conclude that the current African development agenda has followed the experiences of post-neoliberalism in Latin America and the structural transformations that this caused. Hence, a new type of extractivism was formed to address the inequalities caused by neoliberal extractivism.

The most in-depth contribution on analysing the evolution of extractivism in sub-Saharan Africa comes from Campbell. By analysing mining regulations across sub-Saharan Africa and the classification of the 'generations' of mining sector reforms across the continent, I can get a sense of the developments and the parallels to Latin America. Campbell's (2004) 'generations' of mining sector reforms in Sub-Saharan Africa are summarised below in Table 2.

Table 2: Generations of Mining Reforms in Sub-Saharan Africa since 1980s

Generation	Characteristics
1st	Liberalization
2nd	New regulatory frameworks (1990s), including state withdrawal and increasing responsibility to non-state actors (i.e. through CSR)
3rd	Re-regulation

Retrieved from Campbell (2004)

Campbell defends and analyses this thought further in a number of publications (Campbell, 2003, 2006b, 2012; Campbell & Laforce, 2010). In their analysis on extractive governance in sub-Saharan Africa, Szablowski and Campbell (2019) even utilize the term 'neo-extractivism' that is conventionally used exclusively for the Latin American context (with the exception of Childs and Hearn (2017) and Roder (2019)). The authors identify that the current extractivist agenda in sub-Saharan Africa qualifies as neo-extractivist or 'progressive extractivism'.

Bebbington's (2018) research on resource governance in Zambia and Ghana, presents features that confirm the identified patterns. In Zambia, extractive governance followed the pattern of nationalization under a 'mini developmental state', followed by privatization that was then subsequently reversed. In Ghana, a similar story can be observed where between 1957 and 1985 mines were nationalized, followed by a neoliberal period of structural adjustment (1986-2008), and a so-called return to resource nationalism (2009-2016).

Saunders and Caramento (2018) also analyse how Zambia and Zimbabwe can be identified as developmental states that were inspired by East Asian experiences. Generally, the authors observe a return of developmentalism across sub-Saharan Africa in the early 2000s triggered by the end of the commodities super cycle and the crisis of neoliberalism following the financial crisis. These developments, combined with rising demands for more equitable management of natural resources, have led policymakers and scholars in sub-Saharan Africa to explore alternative paths following the experiences of the East Asian developmental state.

Inspired and influenced by extractivism theory, I conclude that the current phase of mining sector reforms across sub-Saharan Africa is neo-extractivist. This includes LCPs. The chronology of LCPs matches with the evolution from classical extractivism shaped by developmentalism, to neoliberal extractivism, and then neo-extractivism that emerged in the same time period as the resurgence of LCPs. The literature does not discuss how LCPs are a direct response to the legacy of neoliberalism. The connection between LCPs as neo-extractivist tools to address the harmful legacy of neoliberalism becomes clearer in the next section where I explore why LCPs exist.

1.3. Local Content Policies: neo-extractivist reform tools

Kalyuzhnova et al. (2016) and Tordo et al (2013) contribute significantly to LCP literature by discussing the definition of this concept. Kalyuzhnova et al. (2016) stress that LCPs are context and country-specific and complex to define. Although there is no universal definition of local content and the perspectives vary depending on the stakeholder and the context and country, a basic definition is provided by the leading scholars in the field. Kalyuzhnova et al. underline that "LC policy in Oil and Gas development is, at its most basic, an industrial policy aimed at ensuring that development generates welfare effects beyond the fiscal arrangements that govern licenses and petroleum extraction (…) [with] two simple, but powerful appeals: namely to create jobs at home rather than abroad and to channel business to home firms rather than foreign firms."(Kalyuzhnova et al., 2016; p. 15-16). Although Kalyuzhnova et al.'s work and the definition are focused on the petroleum industry; this broad view can be applied in other industries. It generally must be noted that "each country and government defines this [LCP] in its own way- in accordance with domestic policy preferences and economic requirements" (Kalyuzhnova et al., 2016; p. 16). The tools of implementing LCPs are mainly state-directed tools in which the government requires the mining sector by law (binding or voluntary) to implement local participation and prioritization in their supply chain. This procedure can include fiscal incentives, training programs and specific quotas set, as well as "capacity building, creating small and medium sized enterprises (SMEs)" (Kalyuzhnova et al., 2016; p. 18). Import substitution can also be a component. Moreover, "local participation is defined as maximizing the depth and breadth of local ownership, control and financing, in order to increase local value capture from all parts of the value chain created from the resource, including those activities in which nationals, local business and capital are not currently engaged, at home and abroad" (Kalyuzhnova et al., 2016; p. 18).

In a broad definition, Tordo et al (2013; p. 18) describe LCPs as "government interventions that look to increase, in the long term, the share of employment or of sales to a sector that are locally supplied at each stage of the value chain. They are part of a broader category of policy interventions called productive development policies. These policies can be broadly defined as initiatives that aim to strengthen the productive structure of a particular national economy." Tordo et al. speak of the share of employment and sales that should be sourced locally across all steps along the value chain. It thus goes beyond the mere mining process and includes backward and forward linkages. This definition points to Hirschman's linkages concept.

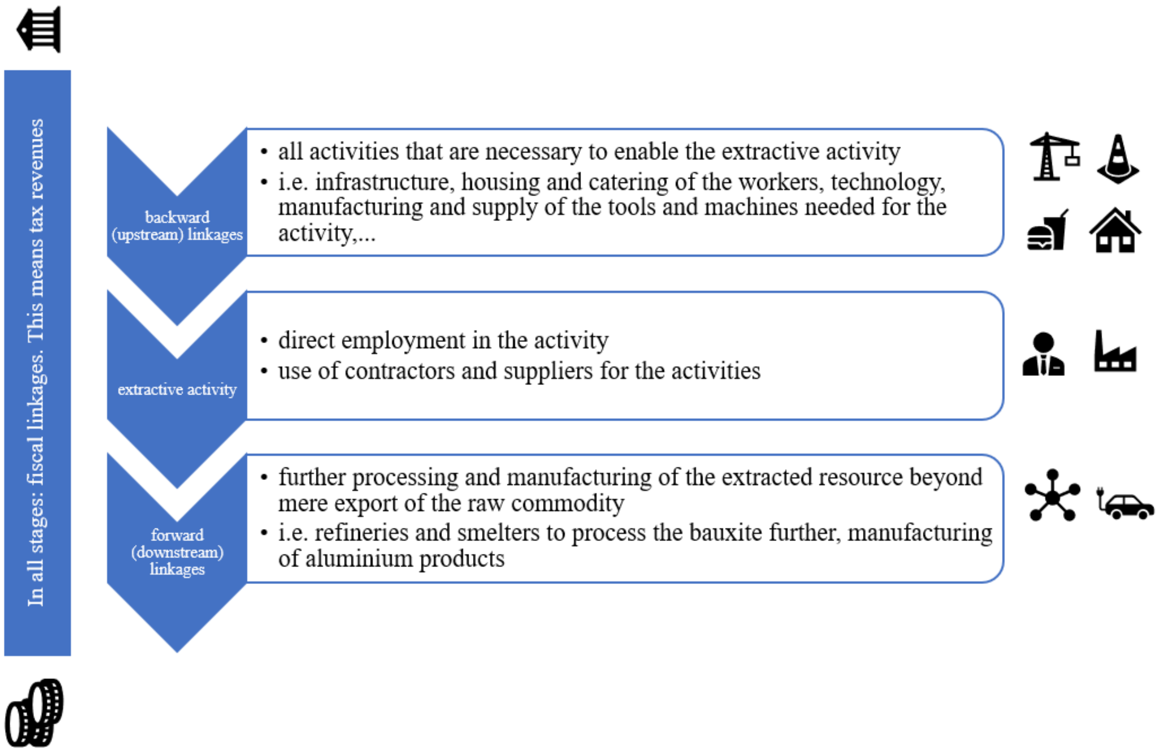
A video that is popular among LCP practitioners and that summarizes LCPs[1] begins with the words "linkages, linkages, linkages". Indeed, linkages, the concept I have already briefly discussed in the introduction, is an omnipresent term when discussing LCPs. Figure 2 below explains the term that was initially created by Hirschman, further and goes beyond the simplified definitions that I have provided earlier. It shows that backward linkages are all activities which enable the mining or processing activities of the commodity. This can be directly linked to the activity, or even be connected to it in the broader sense. For instance, infrastructure that is needed to enable mining, such as the creation of ports and roads. But also, the provision of tools and equipment, or even catering services or housing for the workers in the mines. Forward linkages entail the diversification of the mining process to make sure that the raw commodity is not merely exported, but that as much value as possible along the value chain is being obtained to achieve price stability, higher profit rates, and a more diversified industry with

[1] The RAW Talks Highgrade project conducts interviews and podcasts with experts from the extractive sector. This includes academics, practitioners, senior members of mining companies, and more. This video is a compilation of interviews with Olle Ostensson, Jon Samuel, Evelyn Dietsche, Kojo Busia, & Aaron Cosbey. (2019). Highgrade Essentials: Local Content [Highgrade Raw Talks]. http://www.highgrade.media/talks/local-content-highgrade-essentials/

increasing employment opportunities. In the case of bauxite mining, this includes the creation of refineries and smelters to produce alumina and aluminium oxide, or even further processing into aluminium wires. Hirschman (1958) underlines that all these linkages activities should be generated within the resource-rich developing country through direct and indirect ways, meaning either directly recruited activities organized by the mining company through individuals, or the creation and recruitment of local Small and Medium-Sized Enterprises. Additionally, throughout all these steps, fiscal linkages are vital, namely the idea that tax revenues from mining royalties need to be maximized to finance public services which should then contribute to economic development.

Since the emergence of Hirschman's linkages concept, linkages analysis has been carried out by numerous scholars (Hewings et al., 1992; Lyndall, 2009; Morris, 2012; Rahman, 1986; Ramdoo, 2015; Yotopoulus & Nugent, 1973). The World Bank and other development institutions are also increasingly utilizing linkages analysis as an assessment of resource-based development (Buur, 2014; Castel-Branco, 2014). The idea of linkages can be found in various forms through development programmes, such as the concept of Growth Poles (World Bank & EU, 2013). These contributions on linkages are rather focused on evaluating and assessing the linkages effects by analysing the impacts on GDP development, fiscal contributions, or value chain analysis.

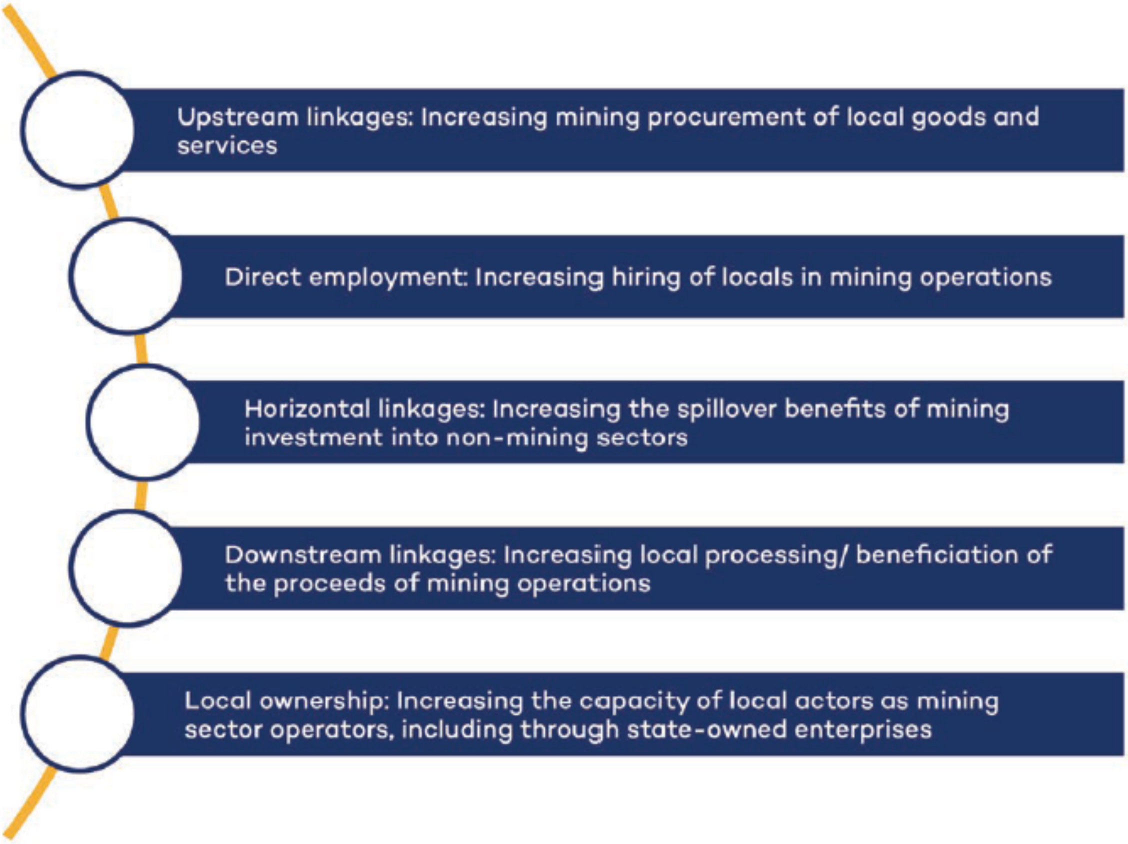
Figure 2: Simplified Illustration of Hirschman's Linkages Concept



Based on Hirschman (1958) and Hirschman & Adelman (2013)

Connecting the illustration of the linkages concept and the features of LCPs, many similarities can be recognized. Direct and indirect employment, diversification, increased processing, and use of activities along the value chain, as well as fiscal linkages are integral objectives of LCPs. This important integration of linkages into the LCP concept becomes even clearer in the LCP types that the Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development (IGF) identified. Upon request from resource-rich governments, IGF published an LCP Guidance for Governments in 2018. The image below is taken from the report and illustrates the LCP objectives:

Figure 3: The 5 Types of LCPs, defined by the IGF



Retrieved from IGF (2018)

The refined use of the linkages term in the figure above can be recognized. IGF, and most stakeholders, use the linkages terminology framed by the World Bank and IMF (Battat et al., 1996). Hirschman's backward linkages have become upstream linkages, forward linkages transformed into downstream linkages, and additional linkages emerged, namely horizontal linkages that actually connect to Singer's spillover concept (Singer, 1950). Hence, even though the idea of LCPs and linkages seem current and recently popular, the origins date back, and as Kragelund (2019; p. 267) reflects on LCPs "the linkage thesis, inspired by Albert Hirschman's ground-breaking work, was being revisited".

LCPs are not an inherently novel idea. Tordo et al. link LCPs to productive development policies. Hence, LCPs are part of a wider range of older policies. LCPs can be connected to protectionist industrial policies, resource nationalism and import substitution policies (Prebisch, 1962; Tordo & et al, 2013; Kalyuzhnova & Nygaard, 2009). This dates back to John Stuart Mill (1848) when reflections of special protection to promote domestic industries were made. And from the 1850s throughout the 1900s, protectionism and import substitution policies were widespread in the West (Fitzgerald, 2016). This idea to create local, diversified industries that should aim to keep as much value along the value chain was widespread, for instance in the early beginnings of the automotive industry (Covarrubias & Perez, 2019), or infrastructure and specialized manufacturing (Fitzgerald, 2016). The main tools were high tariffs and nationalization. Particularly in the pre-World War One era, economic policies of protectionism were strongly connected to political nationalism and a feeling of patriotism and superiority (Fitzgerald, 2016). Post-World War Two, developed and developing countries aimed to diversify and restructure their economies to promote growth of selected industries (Deringer et al., 2018). In Asia, this was targeted at the labor-intense sector, and generally it occurred in various industries, such as the automotive, information and communication technology, and later the energy sector. What is striking is that these policies seemed particularly widespread in the extractive sector, including early examples of LCPs. The 1953 Brazilian national Petrobras policy is a good example of proto LCPs, where the "use [of] workers, capital and technology with Brazilian origin" was supported and prioritized (Deringer et al., 2018; p. 7). The first use of LCPs occurred in Norway's oil and gas sector in the 1970s. In the 1980s, with the Washington Consensus and establishment of the World Trade Organization (WTO), these restrictive policies were reversed and replaced by trade liberalization policies. This explains why LCPs that are too strictly implemented fall into the category of protectionism and are prohibited by the WTO (Kalyuzhnova et al., 2016; Tordo & et al, 2013). LCPs, as they usually do not include tariffs and aggressive protectionist policies, are more 'obscure' and seem to operate in a grey area regarding WTO compatibility (Deringer et al., 2018) Although there is no evidence of any WTO disputes related to LCPs in the extractive industries, investors challenge states directly through investor-state arbitration under dispute mechanisms of bilateral investment treaties[2] (Ramdoo,

[2] LCP Disputes at the WTO level have occurred in other sectors, such as the automotive and energy industry. Deringer et al. (2018) name a few examples, such as the EU's complaint against Brazil's AUTO program in 2013. In the Dispute-Settlement Body of the WTO, Japan, Argentina, the USA, and others joined the EU's side. The dispute ruled in favour of the prosecutors, but Brazil appealed, and a lengthy process followed. According to the WTO's (2020) current update, Brazil has been cooperative since 2019 and the country declared in January 2020 that the measures which were ruled to be against WTO rules no longer applied and had expired.

2015). To my knowledge, arbitration cases of LCPs in the extractive industries have not yet become public. In June 2019, the WTO reported on concerns of some of its members of LCPs. These cases included LCPs in the cybersecurity, pharmaceutical, agriculture, and auto industry. LCPs in the extractive sector were not mentioned (WTO, 2019). Despite the commitment to WTO rules, and the embrace of global free trade shown in the ever growing numbers of bi-and multilateral free trade agreements, LCP have seen a boom in popularity since the 2008 financial crisis (Deringer et al., 2018).

One of the major objectives of extractive activities for the host country is to achieve inclusive resource-based development. As I discussed when analysing neo-extractivism above, the idea of making the most of extractive activities for the greater good of "development" has returned. This idea of extractive activities as a major development strategy is widespread.

Campbell (2009) states that extractive industrial growth is a major development strategy. With increasing investments, the goal is that the effects of extractive activities, such as mining, should provide inclusion and poverty reduction in resource-rich areas. However, these anticipated effects have been disappointing over decades, and instead social and political conflicts have increased. Katz-Lavigne (2017; p. 26) states that mining code revisions and mining contract renegotiation, two main tools of mining reforms, stem from "growing efforts to obtain a larger share of the proceeds from their natural resources and, in some cases, to limit negative social or environmental impacts of resource extraction."

Bebbington (2013) specifies what is meant by 'inclusion' and resource-based inclusive development. According to the author, "while inclusion is often taken to refer to access to the benefit flows associated with resource extraction, 'inclusion' can also refer to the incorporation of particular ideas and valuations in the planning and regulatory processes surrounding extraction. In addition, inclusion might also occur through involvement in decision-making processes – whether these are land use planning and zoning processes, or processes linked to the management of the actual extractive enterprise. Inclusion can have economic, socio-cultural and political components, and these are not necessarily co-present. (…) [We] focus on inclusion in the material opportunities generated through employment and taxation" (Bebbington 2013; p. 26). Bebbington identifies three mechanisms through which local development is catalysed from extraction. The idea how resource extraction should foster development can be seen in the figure below. According to the author, extraction and extractive activities can channel local multiplier effects and direct impacts on livelihoods via forward and backward linkages, in Hirschman's sense. CSR programs can also generate multiplier effects from the mine and generate positive socio-economic impacts. Lastly, taxes and royalty payments from mining activities can be channelled into social spending to redistribute these gains from the three channels.

Figure 4: Principal flow of extraction for inclusive resource-based development

Based on Bebbington (2011, 2013)

To specify this further, Bebbington (2013; p. 25) defines the eight channels of inclusion how resource extraction fosters inclusive development:

1. Employment

2. Supply chain management

3. CSR and transparency

3. Ownership

5. Public ownership

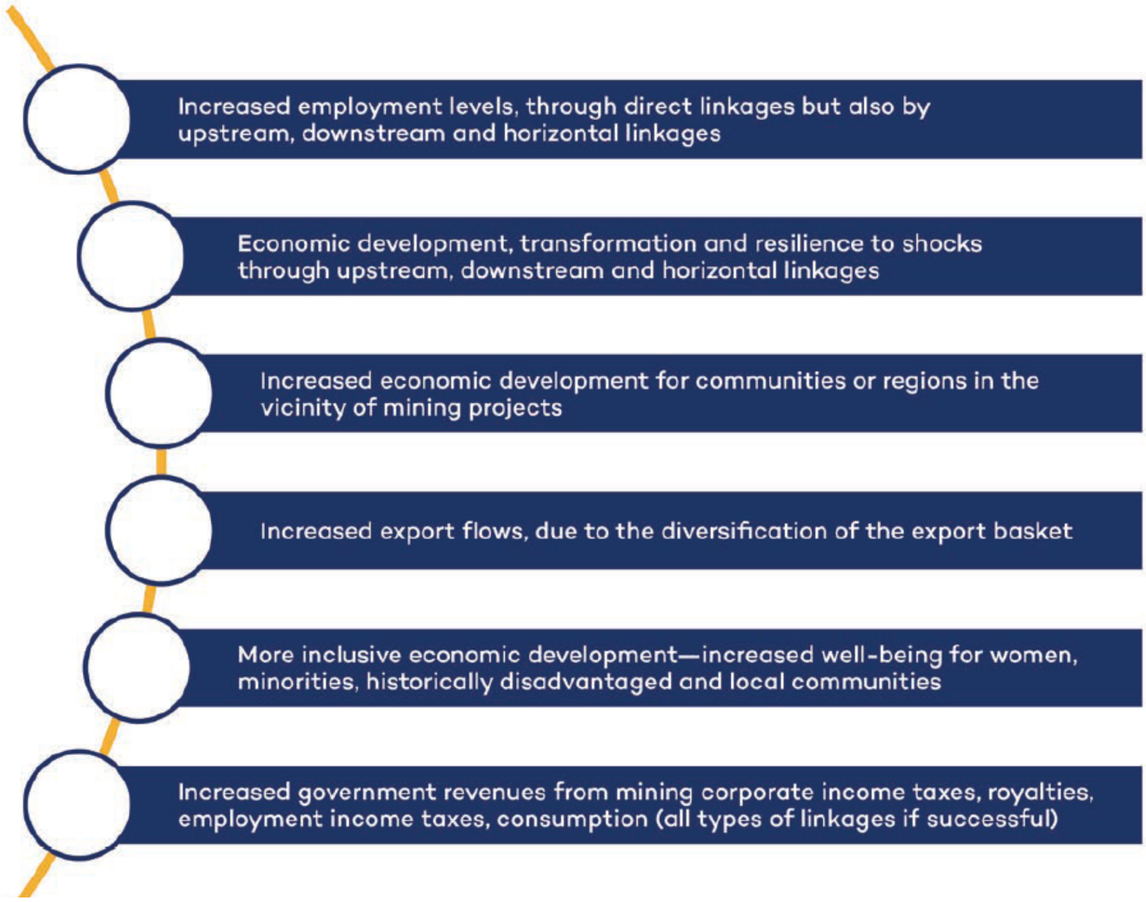
6. Planning and consultation

7. Taxation and social expenditure

8. Environment

It can already be noted here that all three channels (taxes and royalties, linkages and CSR) are included in the objectives of LCPs. The more specific list above clearly outlines the tools of LCPs that tackle employment, supply chain management, CSR, ownership, and public ownership, as well as taxation and social expenditure. The figure below shows the objectives of LCPs, drafted by the IGF.

Figure 5: The objectives of LCPs, defined by the IGF



Retrieved from IGF (2018; p. 9)

Figure 5 even includes 'inclusive development' as one of its objectives, as well as economic development and increased employment. The table below shows how clearly the IGF's LCP objectives match with the components of resource-based inclusive development drawing on Bebbington's analysis. However, all three catalysers (taxes and royalties, linkages and CSR) are controversial in terms of their implementation and effectiveness. There are inherent inequalities and risks that come from extraction, and these structural deficiencies seem to be attempted to be compensated through these transfers (CSR, public protection programmes, payments for losses, development funds, etc.). Hence in fact, these compensations do not offer any structural changes to the deficiencies of resource governance (Bebbington, 2018).

Table 3: Connecting IGF's LCP Objectives with Bebbington's inclusive development channels

IGF's LCP objective	Bebbington's inclusive development channel
Increased employment levels: linkages	Linkages (employment, supply chain management, CSR)
Economic development and transformation through linkages	Linkages
Economic development for communities	Linkages (employment), Social Spending and Taxation
Increased export flows	Linkages
More inclusive economic development	Social Spending
Increased government revenues from mining royalties	Taxes and royalties

I have shown that the central aim of LCPs is to contribute to inclusive resource-based development. A second argument seen in LCP literature that explains the existence of LCPs hints to political motivations.

A key momentum behind the move towards renewed interest in linkages and diversification that include local content policies is the Africa Mining Vision. Ackah-Baidoo (2020) and Hilson (2020) analyse this development. Hilson (2020) provides a thorough summary and analysis of the Africa Mining Vision. It is shown how the 2009 initiative by a collective of African states acknowledged the deficiencies of the previous types of extractive activities across the continent, and how those had led to enclavity and resource curse effects. To counter these tendencies in the future, the vision outlined that resource-based economic linkages and "resource-based African Industrialisation"[3] should fundamentally transform extractive activities across the continent to catalyse inclusive resource-based development with the aim to eradicate poverty. Similarly, Ackah-Baidoo (2020) outlines that the AMV with its linkages objective is central in stimulating local content across the African continent. According to Ambe-Uva (2017), the AMV is a tool in reversing neoliberal extractivism that had caused liberalised mining codes. The AMV seems to echo the zeitgeist to reshape extractive activities, arguably in the new era of neo-extractivism. Another example of a call to address the deficiencies of previous extractive periods can be seen in the 2003 World Bank Group Extractive Industries Review that acknowledges deficiencies and calls for more work on governance and good practices to achieve sustainable and inclusive resource-based development. On a practical level, the AMV should then, as explained by Hilson (2020) be implemented on the country level through the Country Mining Vision translating the AMV nationally through action plans and strategic implementation. Additionally, the African Minerals Development Centre should provide operational support. These multi-stakeholder initiatives, that in many cases (like in Guinea) also went hand in hand with an increasing demand of the public to their respective governments to act and ensure that their countries benefit adequately from extraction translated into many national efforts. In this time, many mining codes were revised, contracts revisited, and programmes launched to obtain more from the fruits of extractive activities.

Certainly, reinforced to some extent by the calls for action through initiatives such as the AMV and the World Bank review, the political agendas of many resource-rich countries across Sub-Saharan Africa towards reforms including LCPs have become considerable. Speaking of LCPs, Korinek & Ramdoo (2017; p.10) note that in terms of the central motivation for institutions to implement LCPs "in many cases, political considerations weigh significantly due to pressure to be seen to be distributing the gains from the exploitation of natural resources more widely."

[3] The African Mining Vision has its own website where all the relevant reports and action plans are openly available. This quote was taken from the African Mining Vision by the African Union in 2009, accessible online: http://www.africaminingvision.org/amv_resources/AMV/Africa_Mining_Vision_English.pdf

Katz-Lavigne (2017; p. 26) unpacks this political dimension behind mining reforms further. The author confirms the relevance of the AMV in “promoting and facilitating initiatives in the extractive industries, including contract negotiation.” Studying African countries that have implemented mining reforms between 2000 and 2013, interesting patterns are recognized.

Beyond the AMV, Katz-Lavigne (2017) shows how in Sierra Leone and Zimbabwe contract renegotiations were used as a political tool of political parties for their own interests. And the general political context of countries is decisive, as mainly post-conflict and post-crisis countries encounter a window of opportunity for mining sector reforms such as contract negotiations and mining code revisions. Additionally, strong civil society and transparency commitments further explain why African states were able to implement mining reforms.

These reflections are not specific for LCPs, yet they suggest that mining reforms, including contract negotiations and mining code revisions that are essential tools in including LCP requirements are often tied with political objectives. The reason they may be implemented in the first place is often political. Moreover, Hilson's (2020) assessment of the AMV more than ten years after it was launched is devastating. Hilson refers to the AMV as an ‘irony’ and ‘hypocrisy’ that was “overshadowed by the fanfare surrounding its launch” (Hilson, 2020; p. 419). The author claims that the AMV did not live up to its objectives, and there has been no successful implementation to date. One of the reasons is the remaining rent-seeking behaviour by the individual governments that hinder an effective restructure of the sector to provide inclusive resource-based development through linkages.

The political background, including the role of the AMV will be included in Chapter 2 (Wilhelm, 2022). To investigate the concerns on the obstacles and deficiencies in implementing the AMV, more concrete case studies are needed. Hence, the case of Guinean LCPs and mining sector reforms contributes to this gap. The analysis in Chapter 3 (Wilhelm & Maconachie, 2021) where I analyse the implementation of LCPs in Guinea also gives an idea to what extent the spirit of the AMV and mining reforms were successfully implemented through tools such as LCPs.

Another reason that explains the creation of LCPs are the consideration that extractive activities creates specific fundamental problems that need to be addressed. I have briefly touched upon the terms "enclave" and "resource curse". In LCP literature, the term 'enclave' constantly appears when looking at the objectives and reasons behind the existence of policies like LCPs. As Korinek & Ramdoo (2017; p.10) adequately summarize, "The resurfacing of local content policies (LCPs) has been particularly strong in countries where the capital intensive mining sector has developed as an enclave**,** with few links to the wider economy, and has not been successful in creating sustainable economic benefits. The benefits sought are potentially diverse and include employment generation, supply chain development and technological and knowledge spillovers**."**

The enclave concept is widespread in resource governance literature. Singer (1950) and Prebisch, (1962) were amongst the first scholars to identify that beneficial spillover effects occur in the 'developed' home country of foreign-owned mining companies, which operate in resource-rich developing countries. This informed the so-called enclave concept of extractivism (Emerson 1982; Ferguson 2006; Korten 1996). Ferguson (2005; p. 378) refers to enclave extractivism as "the extent to which this economic investment has been concentrated in secured enclaves, often with little or no economic benefit to the wider society." Following Singer's observation, referring to the case of Angola, Ferguson argues that "neither the oil nor most of the money it brings in ever touches Angolan soil" (Ferguson 2005; p. 378). Although Ferguson's initial concept focuses on oil, the enclave notion is used widely in all extractive settings, including the mining industry. Guinea for instance is constantly characterized by an enclave structure. Bah (2014) speaks of the 'Sangarédi mining enclaves' and that since its independence, the Guinean state existed thanks to enabling the establishment of enclaves for the export of resources by foreign firms, with large government ownership. Posthumus (2016, p. 10) concludes that "what Guinea has is an enclave economy that extracts a commodity; there is hardly any connection with the country's economy at large." Diallo (2019; p. 35) states that "in the case of bauxite mining in Guinea, enclave benefits are in some degree extended to the areas where bauxite mining activities take place or to areas that are impacted by mining activities." Campbell (1991; p. 42) further reinforces this stance by characterizing mining in Guinea in the 1980s as “mining activities, the country’s principal source of wealth, [were] totally enclave.”

The enclave notion is a reoccurring theme in the Resource Curse debate[4]. Countries that are rich in natural resources are arguably confronted with a curse. The resource curse is the theory that resource abundance leads to negative impacts (Auty, 1990). Auty (1990) and Sachs and Warner (1997, 2001) contribute extensively to identifying lower and negative economic growth among resource-rich countries. Stevens (2015) concludes that resource-rich countries are often discouraged from technological progress and face price volatility, which leads to slower economic growth. The discovery and impact of the Dutch gas fields led to the term ‘Dutch Disease’ that describes the phenomenon that in the wake of the discovery of natural resources, exchange rates appreciate, and deindustrialization occurs (Graham, 1995; Lederman & Maloney, 2006). Beyond levels of growth, Nankani (1979) concludes that more negative outcomes from resource extraction are poor agricultural growth, export diversification, inflation, unemployment, external indebtedness and high export earnings instability. Ross (1999) argues that poverty and a lower position on the Human Development Index are often identified as consequences of resource abundance.

There are debates supporting evidence for and against the existence of the resource curse (Lederman & Maloney, 2006). Bebbington summarizes the resource curse debate in a fascinating way and is known for bridging the debate from discussing the existence of a Resource Curse to the issue of institutions. By utilizing the analogy of Goethe’s Faust, Bebbington (2011; p. 29) identifies three positions in the resource curse debate. One perspective views extractivism in a pessimistic way and claims that a devilish Mephistophelian curse exists. On the other hand, the optimists believe in the good of extraction and the hidden potential (Faust). The third position, the institutionalists, “believe (albeit with different degrees of certainty) that Faust can be saved by the angels, [and] insist over and over on the centrality of institutions.” The centrality of institutions to overcome the resource curse is evident in Bebbington’s work. Drawing on Karl (1999, 2007) and Weber-Fahr (2002), the

[4] For a more comprehensive and in-depth summary of the Resource Curse debate see Bebbington (2011); Papyrakis (2017); Rosser (2006).

importance of institutions and governance to oversee and guide extraction and development is stressed. The key phrase is 'getting the institutions right' by recognizing that rather than an economic phenomenon, the issues surrounding the resource curse are rather of governance nature. Institutional failures are thus to blame for lack of diversification and inclusive resource-based development (Bebbington, 2011, 2013, 2018; Karl, 2007).

Contemporary mining sector reforms, including LCPs, fit into this category. By initiating a 'return of the state' and state-led regulations and industrial policies, state institutions become agents of overcoming the resource curse. LCPs are a tool to 'get the institutions right' in reversing the resource curse. McKinsey in its 2013 report for instance include LCPs as part of its action plan to reverse the resource curse (McKinsey; 2013). Korinek & Ramdoo (2017) also outline resource curse elements as motivations behind the implementation of LCPs, such as increasing the share of extractive gains beyond taxation to capture more value for the host economies. The IGF also adopts this language of LCPs as the solution to unsuccessful past structural transformation attempts of resource-rich countries. Resource dependence, lack of linkages, vulnerability due to commodity cycle dependence, inability to channel resource investment into benefits for host countries and their populations are the context of many resource-rich countries that turn to LCPs. And the IGF president, connecting LCPs to Bebbington's institutions, notes that "For resource-rich economies dependent on mining, 'getting it right' can mean economic diversification, skills upgrading and higher levels of employment. But getting it right is challenging" (Intergovernmental Forum Mining, Metals and Sustainable Development (IGF), 2018; Preface).

The ultimate motivation of LCPs is thus to achieve positive effects in line with inclusive resource-based development. LCPs have the potential to make the developing economy catch up, and the immense potential is even larger than tax royalties according to Kalyuzhnova et al. (2016) and Ovadia (2014). There are long-term benefits, not only for the host government, but also the affected companies (Ovadia, 2014). The main objective of LCP is not only the increase of employment, as the resource industry is rather capital intensive. However, LCPs lead to employment growth and industrial diversification which yield various positive effects (Kalyuzhnova et al., 2016). Ovadia

(2014; p. 139) notes that “despite the small numbers of jobs available in oil and gas, the large number of goods and services needed for oil exploration and production offer numerous possibilities for employment. The potential for local content lies in linking the oil and gas industry to other sectors of the economy.” The strength of LCPs are thus that they go beyond the imminent extractive industry itself. Greenwald & Stiglitz (2006) link this phenomenon to their idea of the infant economy in which spillovers shift linkages and benefits from the mining industry and its activities to traditional economic activities, such as agriculture for instance. Hence, innovation, Research and Development (R&D) and technology in one sector will impact other sectors and lead to even more opportunities. This is particularly interesting for the Guinean case, as it is consistently pointed out that the Guinean future will rely on other sectors beyond mining, especially agriculture. LCPs are thus connected to diversification even beyond the mining sector and they will allow the economy to grow overall, and more rapidly (Greenwald & Stiglitz, 2006). Bond & Fajgenbaum (2014; p. 141) observe that “West African oil producers such as Cameroon and Nigeria have seen the creation of internationally competitive support firms in oil logistics, maintenance, and other associated services, some of which started as subsidiaries of international firms and others as local start-ups. South Africa has a record in the mining industry of hosting the best providers of mining services, from geologists and mining engineers to specialized banks, which now operate internationally. (…) They are not significantly capital intensive and have been good at creating specialized human capacity, often of a world-class nature.” These examples show that affected companies might start off from their active involvement in the mining sector, but further develop their scope and their reach of activities. Beyond these cases, there are some more examples of sub-Saharan African countries, which are viewed as LCP success stories. Kaplan (2012) names South Africa as a globally competitive example, which managed to diversify. Nigeria was able to increase its created value in and beyond the oil industry (Adewuyi & Oyejide, 2012), Ghana created backward linkages and diversified its gold industry (Bloch & Owusu, 2012). Due to improved local copper production in Zambia, the industry has developed positively and provided improved living standards (Lippert, 2014).

LCP literature rarely considers extractivism literature, as well as the political context. According to my insight, the majority of LCP scholars are economists who acknowledge the economic context of LCPs (such as Kalyuzhnova et al., 2016), but the broader context and meaning is missing. To my knowledge to date, solely the political scientist Ackah-Baidoo (2020) considers the role of the history of extractive activities that has led to resource enclavity that sparked action through initiatives such as the AMV that were integral in reviving local content across the African continent. However, the author merely mentions this in the introduction without providing further analysis. By diving deeper into the origins of LCPs through unpacking the very idea of linkages and spillovers, as well as the resource curse, enclavity, and the role of institutions, I aim to provide insight into the concepts that are connected to understanding LCPs. The consideration of the extractivism literature deserves attention when analyzing LCPs. Bebbington's inclusive development concept provides valuable context. The very structure in which extractive activities occur needs to be considered when questioning the effectiveness of any reform implementation. This is important, as the structure itself may reproduce aspects that hinder policies like LCPs from reaching their objectives. I elaborate on this in the next part of the chapter. As I provided the understanding of the origins, features, objectives, as well as the broader context of LCPs, I am now able to dive deeper into the implementation problems of mining sector reforms like LCPs in the next section of this chapter.

1.4. Implementation challenges: Local content policies and continued extractivism

Regardless of the expected promising opportunities, LCP implementation is complex and contains numerous obstacles. Employment opportunities are limited (Macatangay, 2016), local companies lack necessary technical and competitive skills and SME performance is generally problematic (Calignano & Vaaland, 2018; Lebdioui, 2020). Local SMEs frequently experience unfavourable tax conditions (Lange & Kinyondo, 2016). Not only capacity is often an absent requirement, but also other technical and competitive capacities are missing among local companies. In Chile, a lack of public incentives for innovation, as well as insufficient human capital have slowed down the development of internationally competitive local suppliers (Lebdioui, 2020). According to

Calignano & Vaaland (2018), successful LCPs depend on the performance of the SMEs. In the case of Tanzania, "although some Tanzanian firms meet existing delivery requirements and are even capable of fully competing with foreign companies, the industrial base in the country is generally uncompetitive and will continue to be this way until local firms improve and professionalize their operations. Successful local content, therefore, is associated with intra- and inter-organizational improvements of local firms, which can be materialized through organized enterprise developing programmes" (Calignano & Vaaland, 2018; p. 105). Others recognize that despite the existence of various challenges and obstacles to successful LCP, "local content can never be realized unless the firm itself takes the responsibility of improving their business processes and structures" (Calignano & Vaaland, 2018; p. 106). This view is also shared by Macatangay (2016); Levett & Chandler (2012); Farole & Winkler (n.d.); Morris (2012); Hansen et al. (2014); Lange & Kinyondo (2016). Similarly, Tordo & et al (2013) stress the importance of local capabilities to respond to high safety and quality standards, as well as delivery times and a comfortable business climate. Hansen et al., (2014) label the Tanzanian business environment as 'toxic' due to complicated paperwork, long delivery times, and long times for payments and many more deficiencies. Hence, not only institutional frameworks are needed but also local industrial capabilities, as "if there is no local industry, local content does not make sense" (Hansen et al., 2014; p. 8). Due to these obstacles, Hansen et al. (2014; p. 8) based on Amendolagine et al. (2013) and Merlevede et al. (2014) note that "the weak local capacity implies that developing local content in the best of cases would be a very long-term process." There thus seems to be a clash among scholars. The authors outline that for LCPs to be successful, R&D and market creating policies, as well as SME capabilities boosts are fundamental. Others rather believe that the investment climate is a more beneficial driver of LCPs (Calignano & Vaaland, 2018; Kalyuzhnova et al., 2016; Lebdioui, 2020). Moreover, there are some scholars who believe that the success of LCPs and local SMEs is contingent on tax issues. Local SMEs are often disadvantaged compared to foreign or bigger companies, which benefit from favourable tax exonerations. Furthermore, companies are often indirectly discouraged from using local suppliers and producers as they might benefit from duty free importation of products (Lange & Kinyondo, 2016).

Transparency, human rights, high poverty levels and many more institutional and governance factors have been identified as obstacles for LCP implementation (Ovadia, 2014). According to Ovadia (2014) numerous factors, such as a lack of transparency, poverty levels, human rights and more are responsible for the limited LCP success in Angola and Nigeria. Similar experiences can be seen in Ghana, Uganda, Mozambique, Tanzania, Kenya and Liberia where LCP attempts remain limited due to a combination of factors (Ovadia, 2016). The political dimension in particular, including questions of power dynamics, corruption and patronage, help to understanding these barriers (Ayanoore, 2019; Geenen, 2019; Nwapi, 2015). Lange & Kinyondo (2016; p. 1100) point to corruption, as "national companies are often organized in a corrupt way," which causes issues, as mining companies are eager to protect their reputation and to work with legitimate SMEs. Nwapi (2015) has extensively dealt with corruption in LCPs. Ovadia (2014) refers to a 'dual nature,' as LCPs are potentially utilized as a mechanism for an established elite to enrich themselves. Childs (2016), Hansen et al. (2014), Lange & Kinyondo (2016) and others observe that LCPs are linked to patronage mechanisms where elite interests are exercised, and the local poor is excluded. Initiatives to avoid this phenomenon, such as in Angola and Nigeria are inefficient (Oguine, 2011; Ovadia, 2014; Wiig & Kolstad, 2010) and also in Tanzania, Uganda and Mozambique a "tendency for local content to be politicized" can be observed (Hansen et al., 2016; p. 223). Hansen et al. (2014) summarize that with the exception of Botswana and South Africa, the cases of Uganda, Tanzania and Mozambique, as well as other cases across Sub-Saharan Africa prove that LCPs have not contributed significantly to linkages effects. Their diagnosis blames "ill-conceived policies, institutional failures and lack of local industrial capability (…) [where] the reason is that the economic and institutional efficiency logic is intertwined with the political logic related to the political survival of the ruling elites." (Hansen et al., 2014; p.20). These considerations thus underline that LCPs do not occur in a political vacuum. That's why the implementation of LCPs needs to go hand in hand with strong institutional frameworks, as well as large degree of transparency, independent monitoring, and a vibrant and dynamic economic environment. Overall, numerous LCP cases show a variety of LCP obstacles and factors explaining these challenges (Ovadia, 2016).

Again, these implementation obstacles that are voiced in LCP literature come predominantly from voices by economists. What LCP literature does not address is the fact that despite the promises behind reforms like LCPs, extractive activities continue and remain structurally unchallenged. I am drawing on extractivism literature to show how extractive activities are inherently connected to negative societal impacts for the host countries. It is crucial to understand that LCPs, on their own, due to their design and implementation are questionable tools in achieving resource-based development. Moreover, they also operate in continued extractivist activities that reproduce the very environment that hinder successful LCP implementation and inclusive resource-based development. This is the case for the following reasons.

As I have already outlined earlier, regardless of any extractive reforms, extractivist activities are sustained (Arsel et al., 2016; Merino, 2020). This comes with consequences that hinder the successful implementation of reform policies like LCPs. The major narrative in extractivism literature is that extractive activities are inherently destructive, and 'predatory' (Arach & Rabinovich, 2018). This includes the environmental and social impacts of extractive activities (Acosta, 2017; Arach & Rabinovich, 2018), the reproduction of colonialism (Arach & Rabinovich, 2018), negative impacts for indigenous rights (Merino, 2020), as well as the ongoing exploitation of hidden wealth instead of promoting the creation of new wealth (Ye et al., 2020).

The Marxist analysis of extractivism also points to the inherently destructive manner of the process of transformation of nature into production, which extractivism entails. Plundering, accumulation, neo-colonialism and the reproduction of class inequalities are inevitable outcomes of extractive activities according to numerous scholars (Acosta, 2017; Composto & Navarro, 2014; Galafassi & Riffo, 2018; Gudynas, 2015; Ye et al., 2020). Common concepts that are referred to are accumulation by dispossession, including landgrabbing, These practices also go beyond land issues and even impact patriarchal relations and gender inequalities (Carrillo et al., 2017).

Some scholars specifically underline that this 'predatory' behaviour in terms of socio-economic and environmental impacts continues throughout neo-extractivism. Ultimately, despite the hope for new extractivism that would improve the livelihoods of many, this has not materialized (Cordoba et al., 2018). Even more directly connected to LCPs, Cordoba et al. (2018) point out that the ongoing extractivist activities, even during neo-extractivism, have yielded little impacts for employment, and rather contributed to increasing inequality. Burchardt & Dietz (2014) also show in their study how the social policy components of neo-extractivism have not used effective redistributive measures to hinder inequalities that are reinforced by an unfair distribution of resource rents.

Neo-extractivism does not change the structure of extractive activities in terms of how the extractive economy functions. Gudynas (2011) observes that the main features of commodity extraction continue with all their characteristics (global market conditions, foreign investments, and international prices with all their implications). The difference is now to use policies financed by this system to bring about changes in the welfare state. Arsel, Hogenboom, and Pellegrini (2016 ; p. 883) summarize this thought accordingly: “Thus the left turn in Latin America would leave economic structures unchallenged, but combine them with enhanced social policies.” These ‘economic structures’ mean that the global political economy with its dynamics continues to place resource-rich countries at a subordinate position (Svampa, 2015). Some new neo-extractive legislation and protective laws were in some cases revoked or never introduced in the first place, due to the fact that resource-rich countries did not want to harm their investment attractiveness (Brand, Dietz, and Lang (2016). This shows that the dynamics of the market remains a central motor in extractive governance. Extractive activities continue even in a seemingly post-neoliberal world order. This means that the dynamics of investment and the economic cycles remain. Extractive activities continue to be exposed to a boom and bust cycle, where prize volatilities and external shocks can bring sudden disruptions with large impacts (Burchardt & Dietz, 2014).

The integration of extractivism literature in considering the implementation of LCPs is useful. When conducting LCP implementation analyses, I argue that questioning if the effectiveness of the policies is hindered due to the dynamics of extractive activities offer a novel approach in analysing LCPs and related reforms. I stress that the inequalities that are attempted to be addressed through LCPs cannot be changed due to the very nature of extractive activities. And most importantly, how the dynamics of the extractive economy impact the implementation of LCPs provides some more answers and questions why LCPs face implementation obstacles. The role of investment, prices, and corporate structures that have impacted the design and implementation of LCPs feature in all my chapters. My analysis on LCPs in Guinea, by using the conceptual lens of extractivism literature illuminates this throughout all my publications.

An important issue is the question *how* LCPs should be implemented. According to Kalyuzhnova et al. (2016) and Ovadia (2014), it is important to find the right balance of regulations. The cases of Angola and Nigeria are labelled as quite aggressive with high targets. The case of Nigeria for instance shows a too aggressive approach and targets which were too high and which consequently were "not realistic due to the absence of capacity" (Kalyuzhnova et al., 2016; p. 42). This question of finding the right balance is briefly mentioned in most papers, whereas the one end of the scale, namely protectionism and resource nationalism are widely debated. As it was already noted, LCPs that are too strictly implemented fall into this category and are accused of harming competition and innovation, which under WTO rules is even prohibited (Kalyuzhnova et al., 2016; Ramdoo, 2015). Too many restrictions, targets, and legislation and incentives to boost SMEs constitutes resource nationalism, which leads some scholars to fear that these measures may spread to other sectors and harm the overall national and global economy (Kalyuzhnova & Nygaard, 2009). Countering these fears, a range of scholars believe that protectionist measures in the case of LCP are justified, as infant economies need to be protected. Economic History also shows that many economic success stories have their origins in protectionism, which enabled these developing countries to catch up (Chang, 2003; Greenwald & Stiglitz, 2006; Lebdioui, 2020). It is questionable if those fears of LCPs turning into resource nationalism and protectionism are justified. The LCP cases show that LCPs have shifted from a more rigid and tough implementation to rather soft and voluntary LCP in order to accommodate the needs and demands of MNCs and investors (Lange & Kinyondo, 2016; Ovadia, 2016). The question on the right balance of LCP in terms of restrictions, voluntary and binding measures is also connected to the consideration of compliance mechanisms and sanctions if the LCP targets are not implemented. Tordo et al (2013) believe that penalties or the withdrawal of privileges or subsidies in case of non-compliance will be inefficient and rather harmful. Ramdoo (2015) looks at cases where violations of LCP are subject to fines, or threats of contract renewals. Korinek & Ramdoo (2017), Ramdoo (2015), as well as the IGF, and other LCP involved stakeholders constantly point out that binding quotas and sanctions are not the right way, and it seems like the formulation of targets is demonized (Highgrade, n.d.; IGF Mining, 2020). Tordo et al (2013) however believe that even if sanctions should be implemented or privileges should be removed, this is proven to be difficult in terms of feasibility. Macatangay (2016) concludes that the cooperation between the government and investors or mining companies consists of a contract in which the investor is granted favourable conditions, such as tax exonerations, and in return is obligated to comply with LCP obligations. If this is not respected, it is adequate to implement sanctions. After having analysed general LCP implementation obstacles, I discuss the role of the private sector.

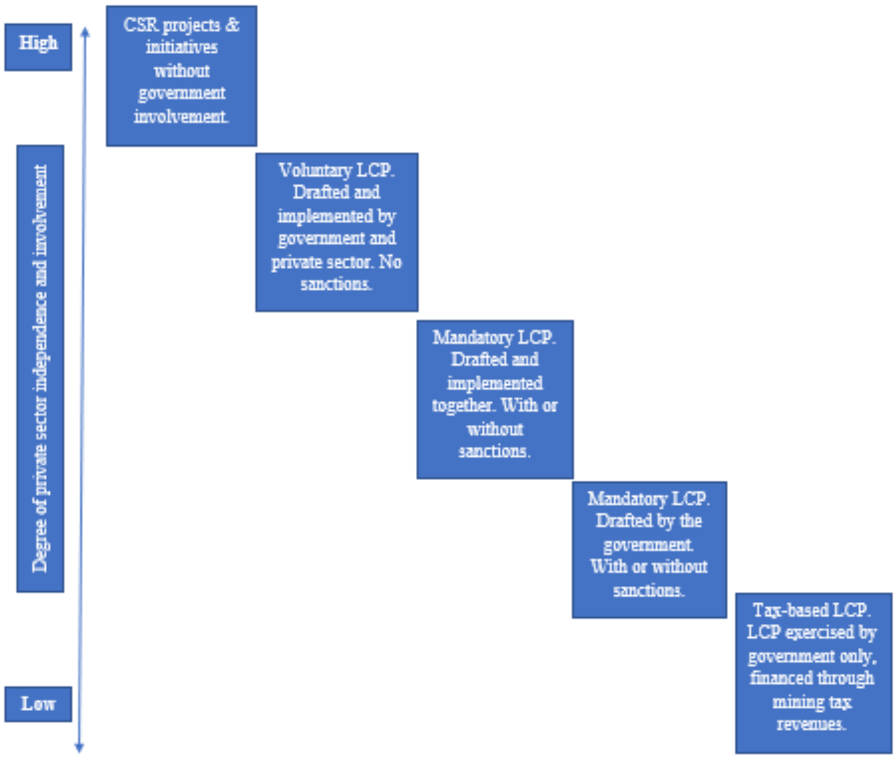
1.5. The role of the private sector- LCPs as part of Corporate Social Responsibility (CSR)

Companies increasingly feel obligated to contribute to development initiatives and to become involved in society in a philanthropic way (Giuliani, 2016; Goerg et al., 2016; Logsdon & Wood, 2002; Mbilima, 2019; Moon et al., 2005; Vertigans et al., 2016). There has been a widespread move of mining companies to improve social, environment and governance practices through commitment to national and international norms and standards, as well as voluntary commitments. These practices are referred to as Corporate Social Responsibility (CSR), which is the strategy companies develop and execute to obtain their Social License to Operate (SLO) with host governments and communities. According to CSR theory, mining companies strive to 'do good' as corporate citizens by investing in obligatory and voluntary social and environmental activities. They do this i) to respond to global norms, international standards and national and international regulation they are governed by; ii) to obtain and keep licenses and concessions from their host government as well as community support allowing them to continue extractive activities (License to Operate, usually referred to as their *Social* License to Operate) (Dashwood, 2007; Frederiksen, 2018; Rajak, 2011). Social Licence to Operate, as the publication in chapter four shows, is a key theme that participants use to explain why certain companies are committed to LCPs. In response to previous conflicts with communities and increasing demands directed at companies (particularly in the extractive industries), companies have begun to be more strategic when it comes to obtaining and maintaining good relationships and acceptance of the communities that are close to their operations. By establishing a type of social contract with communities, companies manage risks in a strategic way to ensure the acceptance of their operations, mitigating conflict risks that could negatively impact economic activities. Even though this social licence to operate implies a legally binding contract under certain jurisdiction, the demands and expectations from both the company and community that frame this acceptance of corporate activities remain informal (Humphreys, 2000; Moffat et al., 2016; Moffat & Zhang, 2014; Owen & Kemp, 2013; Thomson & Boutilier, n.d.). The publication analysed in chapter four dives deeper into this dynamic and analyse what social licence means for LCPs in the Guinean context.

When studying the evolution of CSR activities, what I notice is that in fact many of these CSR activities resemble LCPs (Giuliani, 2016; Goerg et al., 2016; Logsdon & Wood, 2002; Mbilima, 2019; Rajak, 2011; Wilhelm & Maconachie, 2021). The 'economic empowerment' activities that include local entrepreneurship and procurement outlined by Rajak (2011) resemble local content activities. Local content commitments are even named as an example of CSR activities in research by Frederiksen (2018). Previous CSR research has already shown how LCPs clearly resemble contemporary CSR initiatives that increasingly become more about 'economic empowerment' and supporting local entrepreneurship and procurement (e.g. Rajak, 2011). The notion of corporate citizenship and portraying extractive companies as 'humans' with their own culture resonates with how companies and participants explain companies' commitment to LCPs (Rajak, 2011; p. 36). The role of investment origin and the 'black box of shareholder value', as well as dynamics of the free enterprise and global capitalism that coexist with CSR resemble many of the issues that studying LCPs reveal (Ho, 2009; Rajak, 2011).

In turn, studying LCP literature, I notice that in some cases, when there is low state involvement and an absence of state-mandated LCPs, the private sector implements local content initiatives as part of their voluntary CSR activities without any government involvement. The figure below illustrates the types of private sector LCP involvement, and it includes the first type- namely local content initiatives as part of company-led CSR.

Figure 6: Types of private sector LCP involvement



Based on Calignano & Vaaland (2018); Issabayev & Rizvanoghlu (2019); Kalyuzhnova et al. (2016); Lange & Kinyondo (2016); Ngoasong (2014); White (2017)

How CSR relates to LCPs is a literature gap that I identify in my chapters, particularly in chapter 4 in Wilhelm (2023). I note that "how mining companies navigate state-mandated LCPs and their own CSR interests and targets remains unexplored in LCP literature." (Wilhelm, 2023; p. 2). Hilson & Ovadia (2020) call out the 'blurred lines' between LCPs and CSR and that they constantly overlap, making it unclear what is voluntary or not. The authors propose that both concepts should become more clearly distinguishable to ensure that LCPs are not merged into voluntary programmes and community development activities that are not tracked, reported, and in line with legal obligations.

Table 4: Overview of the types of private sector LCP involvement, including Guinea

Degree of private sector independence and involvement in terms of LCP creation and implementation	Characteristics of LCPs
High	LCPs as CSR projects and initiatives without government involvement
High	Voluntary LCPs, drafted and implemented by the government and private sector. No sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government and private sector. With sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government. Without sanctions
Low	Mandatory LCPs. Drafted and implemented by the government. With sanctions
Low	Tax-based LCPs. LCPs exercised by the government only, financed through mining tax revenues

Pre- 2013 & ongoing

State-directed LCPs

Retrieved from Wilhelm & Maconachie (2021; p.11)

The table above illustrates the various dimensions of how cooperation between the government and private sector in terms of LCPs can be implemented. I provide more detail in chapter 2. This varies from a degree of where the private sector implements LCPs independently through its own CSR initiatives, to joint LCPs either with or without compliance mechanisms. The other side of the spectrum contains LCPs without any private sector involvement in which the government implements LCPs on its own, financed with mining tax revenues. The relationship between LCPs and CSR remains ambiguous and under-studied. Hilson & Ovadia (2020) claim that CSR should be replaced by state-mandated LCPs. However, my work reveals that mining companies do not want to abandon their own CSR initiatives, that in many cases resemble the government's LCP initiatives (Wilhelm & Maconachie, 2020 - see chapter 2). In fact, the analysis in chapter 4 is guided by CSR theory. I argue that LCPs, for a certain type of mining companies, are part of their CSR strategy (Wilhelm, 2023- see chapter 4).

1.6. Guinea: a case study of neo-extractivist mining sector reforms entangled in a challenging "state-business alliance"

In order to make LCPs efficient and successful, and to avoid sanctions and other aspects of non-compliance, it is crucial to frame and implement LCP in a "state-business alliance, which might make LCPs quite an effective mechanism" (Kalyuzhnova et al., 2016; p. 24). Numerous scholars stress the dynamic relationship between the private and public sector regarding LCPs (Kalyuzhnova et al., 2016). However, the ideal design of this dynamic cooperation remains a challenge. Expanding further on the challenges of LCP implementation considering the question of actor collaboration, the role of the state is an important aspect. Campbell (1991, 2009) has done considerable work outlining how neoliberal extractivism has led to state withdrawal, which has a severe impact on any mining sector reforms. Campbell's main work focuses on the impacts of the neoliberal reforms by the Conté regime in Guinea. The author analyses that the Conté (1984-2008) regime's liberalization that included a reduction of tax rates brought about profound consequences. Campbell (2009; p. 93) is mainly concerned about the so-called *retraite* (withdrawal) of the state in terms of production and planning powers, as well as a "redefinition of its regulatory and distributive roles." This caused "constraints on revenue mobilisation and favour the perpetuation of enclaved activities which were to have little impact on more long-term economic and social development." The author identifies this *retraite* as an unprecedented definition of the role of the affected mineral-rich state, which reduced state sovereignty and undermined legitimacy. This is particularly problematic given that states like Guinea, after their liberalization experiences, have realized that they prefer regulation by the state that should play a more decisive role in the regulation and facilitation of investment. Campbell believes that the profound impacts are now that due to this historic development, external pressures and international production continue to be the driving force and undermine the state.

Szablowski in Campbell (2009) refers to this phenomenon as *absence selective* where the state moves back deliberately and selectively to leave power to external actors (mainly the private sector), even throughout reform attempts. Knierzinger shares similar observations. Knierzinger (2015, 2018) analyses the power of transnational corporate chains of command that govern multinational bauxite mining activities in Guinea. Knierzinger (2015, 2018) looks at how these international players that are governed by the dynamics of the bauxite mining industry have the power to dominate and interfere with social hierarchies and the entire state apparatus in Guinea. The focus are mining towns that are impacted by mine closures and how this changed the dynamics of social hierarchies. The conclusion is that worse than corruption, the real crime in Guinea is the fact that this 'production network' and capital relations legally decide over the fate of millions of local Guineans. Knierzinger argues that the bauxite mining companies have replaced the state and hence created absolute dependence. This goes as far as mine closures in Fria leaving an entire town without electricity and water. Research by Bolay and Knierzinger reinforces this stance where they analyse the notion of corporate gift giving (that originated within CSR theory), where mining companies provide services like electricity to the population as 'gifts' although the state pays for them (Bolay & Knierzinger, 2021). More updated observations reinforce this stance that the Guinean state is absent and that mining companies have in some instances taken over state roles as part of their CSR in response to community demands (Rey et al., 2020; Rey & Saint Simon, 2016).

Campbell analyses mining sector reforms in Guinea and concludes that in all three periods of Guinean mining and the implemented mining reforms, the economic returns from the mining sector have not been channelled effectively in a way to ensure benefits to the country. The blame has been mainly given to bad governance and corruption, hence fragile institutions. Even though these are certainly impactful factors, Campbell believes that the structural reasons lay elsewhere. Campbell (1986, 1991, 2009) argues that structural external factors are the main reason for the ineffectiveness of mining sector reforms. More precisely, how mineral prices and mining contracts are negotiated and implemented are crucial considerations. Campbell phrases this as the conditions of accumulation of this certain industry that need to be included when considering reforms. So far, only the actors and their interests were included (Campbell, 1991). However, the failure of the bauxite industry and reform attempts in Guinea does not only have internal origins, but the external structure, including taxation, mining contracts and exemptions, negotiated prices, are fundamental. So far, all reforms have merely been a continuity of these structural conditions. And although reform attempts might be qualified as 'neo-extractivist' or 'progressive extractivism,' an "unchanging core of extractivist influential arrangements" can be observed (Szablowski & Campbell, 2019; p. 2). The reasons for this continuity is that the relations of structural power are unchallenged and the extractive sector continues to have an outsized influence over governance. Knierzinger (2014) comes to a similar conclusion. Knierzinger argues that it is about the power of aluminium majors and that unequal relations of control in determining the context of the mining sector (prices, contracts, infrastructural power) are fundamental. Too much moral authority (leading to political legitimacy) and infrastructural power are voluntarily given to companies by the state, which decreases public accountability. These observations tie in adequately with the previous section where I discussed the issue of ongoing extractivism.

Both authors propose similar solutions. Campbell (2009) demands a stronger role of the Guinean state by taking on 'developmental capacities' and a 'developmental role for the state in mining.' Knierzinger (2014) proposes to break the dependency by increasing diversification of the sector. Moreover, public accountability needs to be sustainably increased, particularly in times of insecurity (i.e. in times of closure of mining activities).

These considerations by Knierzinger and Campbell are an important basis of my analysis, especially in Wilhelm (2023) where I analyse why mining companies respond in certain ways to state-directed LCPs considering structural elements such as investments and investment origin.

Szablowski & Campbell (2019) only very briefly address the mining sector reforms of the Condé administration (2010-2021), by focusing on the 2011/2013 mining code. Béland et al., (2021; p. 9) confirm Campbell's earlier observations that the reforms of the Guinean mining code have shown again the legacy of state withdrawal during neoliberal extractivism, which means that "the power to influence, advise or express interests and preoccupations regarding mining regulatory reforms is clearly not equally distributed among affected constituents, whether civil or private groups, and can lead to significant inconsistencies in policy instruments adopted." Consequently, the Guinean state in its regulatory capacity remains inferior compared to the role of mining companies. Béland et al. (2021; p. 10) argue that this stems from "the perpetuation of the perspectives, norms and policy instruments inherited from the former liberalised mining regimes." Béland et al. (2021) even extend their analysis to local content and note that relations between actors and the ongoing structures of power that place corporations and national elites on a superior level place obstacles to policy changes.

In a 2016 publication, Knierzinger (2016) analyses the 2013 mining code. The author outlines the main changes of the mining code and the application of the code. Although the code itself offers promising reforms, Knierzinger is pessimistic about its implementation. Knierzinger states three major conclusions:

1. Knierzinger observes a so-called end of the *supercycle chinois* (Chinese boom) that will negatively impact the bauxite sector and thus threaten successful reforms
2. The mining code implementation is not effective due to administrative obstacles. The introduction of legal application texts and precise instructions (*textes d'application, arrêtés, textes d'appui*) is taking too long, is too complex, and still offers a duality. The author observes that "in every region and *préfecture*, the administrative authority selectively applies the texts which correspond to their particular interests" (Knierzinger, 2016; p. 6)[5]
3. The implementation of the mining code lacks adequate monitoring and evaluation processes

All these obstacles are anticipated, due to the timing of the study. Since 2016, things have further evolved, and the implementation of the mining code and its reforms (including local content policies) have continued to be concretely implemented. The conditions of the industry have also changed, with numerous new players arriving caused by an increase of Chinese demand for Guinean bauxite. Knierzinger's end of the *sypercycle chinois* can thus be questioned. My analysis provides exclusive insight into the role of Chinese mining companies in Guinea and how the Chinese presence re-shapes state and mining company relationships in Guinea. Taking Campbell and Knierzinger further, my publication analysed in chapter 3 (Wilhelm & Maconachie, 2021) about the implementation of local content policies, as one main aspect of the mining code, have led to the following conclusions:

[5] Translated from French by CW: « Dans chaque région et préfecture, l'autorité administrative applique les textes qui correspondent à ses intérêts particuliers. »

1. There are numerous obstacles to successful implementation of LCPs. As expressed by Knierzinger (2016), administrative obstacles remain in 2019. But also, other factors, such as the economic and business environment, as well as corruption and power dynamics on multiple levels, seem to threaten the successful implementation of these reforms.
2. The implementation of the new mining code depends on the compliance of the mining companies. It seems like the willingness to implement reforms such as LCPs varies among the mining companies. Suspicion is widespread, and some mining companies express their motivation for their own, already existing CSR conventions. (Wilhelm & Maconachie, 2021)

Combining Campbell and Knierzinger, I conclude that the previous regimes have created a Guinean mining sector where the state has withdrawn, is selectively absent, and to some extent even entirely replaced by the private sector. This has caused severe issues surrounding state legitimacy that continue to have profound impacts even in the post 2010 mining sector reforms. Hence, the necessity to conduct further research to investigate to what extent this state withdrawal now influences the implementation of mining sector reforms, notably local content policies. The question is now if and how governments can overcome the structural negative impacts of extractivism (even in a new form of neo-extractivism) if they have been absent for decades and been replaced by the private sector.

Connecting my work to Campbell and Knierzinger is useful in understanding these dynamics, particularly considering the Guinean context. The *retraite* of the state may continue to play a role in the Condé administration and subsequent mining reforms. And the similar anticipated obstacles identified by Knierzinger and my previous work show that it is relevant to continue more updated research into the implementation of the new mining code through policies such as LCPs.

The study by Rey et al. (2020) provides a more updated analysis of the role of the state. The authors analyse Environmental and Social Impact Assessment regulations implemented by the Guinean state that outline certain obligations for mining companies throughout all stages of the mining project phases. They conclude that despite the seemingly strong role of the state in creating these regulations in the first place, the role of the state is not decisive. The standards are not specified, “the state has limited presence and insufficient capacity to control practices”, the state allows contractual and regulatory breaches, and there are many loopholes in the regulations (Rey et al., 2020; p. 3). Consequently, mining companies have a lot of autonomy in conducting these assessment regulations. In practice, each company has created their own “benchmark” and “there is a disparity in the quality of companies” (Rey et al., 2020; p. 2). This means that “mining promoters each develop their own compensation measures, without consultation between operators, and, above all, not governed by legislation and State representatives” (Rey et al., 2020; p. 5). The authors observe that this response of mining companies hence depends on where investment originates from. Whilst some companies that receive investment from funders like the World Bank’s IFC have to comply with strict requirements that include mandatory Environmental and Social Impact Assessments, this is not the case among mining companies that receive their investment from other sources. Rey et al. (2020; p.3) claim that “investments originating from Asia, with the massive presence of Chinese operators in the bauxite sector, have redefined the standards of implementation of social assessments, as the financiers do not or rarely refer to the standards promulgated by western financial institutions.” This fits with Rey & Saint Simon's (2016) earlier analysis, that sees the state as absent and where absent state regulation has been replaced by mining companies, and ultimately this is governed by the actor behind it, namely the investor with the most powerful one being the IFC. Rey and Saint Simon call this “autoregulation” by the enterprise. They conclude that it would be necessary to have more investment sources in order to have more diverse intervention that can then improve regulation. The publication I analyse in chapter 4 picks this consideration up, develops it further and adopts it to the case of local content policies in Guinea (Wilhelm, 2023).

1.7. Extractivism theory as a framework to understand mining sector reforms- a holistic approach

LCPs have not been looked at in a holistic way, considering the context of extractivism, the historical and socio-political dynamics, as well as the role of mining companies and CSR. Local content is more than just employment. Procurement relates to other aspects that are tied to the economic context and business environment. I argue that local content must be understood as a tool that sits within a broader framework. This framework is useful:

- It considers the specific issues that are omnipresent in resource governance. In other words, the context of LCPs in the extractive industries is considered.
- This framework goes beyond the economic and business considerations of LCP implementation that disregard the socio-political context, as well as the dynamic relationships between the actors that are meant to create and implement LCPs.
- The conceptual framework is unique as it considers the historical context of resource governance in countries like Guinea where especially the relationship between resource governance stakeholders, in particular the government and private sector, has undergone significant transitions.
- The notion of *state withdrawal* and *state return* will benefit from updated analysis to shed light into how the relationship and role of the state and private sector has developed considering LCPs. In theory, LCPs should have boosted the role of the state and decreased corporate authority. No research to date, except for my publications, has been conducted on the impacts of LCPs on company-state relations. Neither Campbell's work on state withdrawal, nor Knierzinger's and other contributions that I outlined in this chapter have looked at how extractivism is the main factor that undermines the role of the state.

1.8. Outline and contributions of this thesis

This chapter has contributed to my research aim, namely, to understand mining sector reforms and their ability to generate inclusive resource-based development. To understand the phenomenon of mining sector reforms, I began this chapter by examining the context of mining reforms, notably LCPs. The combination of LCP literature with extractivism literature has provided a novel way of understanding LCPs.

This chapter, by examining the context of mining reforms, notably LCPs, has provided the necessary background knowledge that allows to understand where LCPs are coming from, what they are meant to achieve, and what the challenges in LCP implementation are. All these concepts are used in the publications presented in chapters 2-4. To briefly summarize, I have shown how LCPs are part of a wider phenomenon. LCPs are a neo-extractivist tool that are used to reverse negative impacts brought about by decades of neoliberal extractivism and state withdrawal that have left low-income resource-based states without any tangible diversification and resource-based development.

The concepts and theoretical considerations analysed in this chapter are practically applied to analyse the data and central arguments presented in the next chapters where I zoom in to my case study, namely LCPs in Guinea's bauxite industry.

In Chapter 2, I investigate why bauxite-rich, low-income countries like Guinea are developing and adopting local content policies. By doing this, the political drivers for the implementation of local content policies are brought to light, as well as the reasons associated to extractivism. In turn, these reasons reveal realities that undermine effective LCP design and implementation. In this chapter, I dive into extractivism theory and showcase that in the case of Guinea, policy makers designed LCPs as a 'solution' and response to reverse the deficiencies of extractive activities. This is in line with research that links extractive reforms to deficiencies of extractivism (Bebbington, 2011, 2013; Campbell, 2006; Katz-Lavigne, 2017; Korinek & Ramdoo, 2017). By tying local content in with extractivism theory I showcase how the impacts of local content are limited given that it is merely compensating extractive deficiencies to a certain extent. Extractivism in itself remains unchallenged and static where enclavity, and Resource Curse impacts remain. Bebbington (2011, 2018) and Gudynas (2015) examine how extractive reforms merely lead to social spending that address deficiencies through mere compensation. Using the extractivism lens exposes limitations of local content. Those who design and implement mining sector policies as a solution for deficiencies linked to extractivism must understand the dynamics of extractivism itself and be conscious of the dynamics that reproduce these inequalities and obstacles to resource-based development. Tackling the issue at the source, rather than reproducing this issue and fixing some symptoms, limits any meaningful reform outcomes. In the introduction of the paper, I highlight the literature gap. Whilst literature on local content is centred on the design and execution of LCPs and their effectiveness, it remains unexplored why countries design and implement LCPs and how political realities impact reform and implementation. The implementation of local content and the relation to politics has been explored by Geenen (2019) and Hansen et al. (2016). However, policies are commissioned, designed, and promoted by people in power positions. In the case of Guinea, they were championed by the autocratic president at the time, Alpha Condé.

By looking at this unexplored perspective I am introducing a new way of analysing LCPs. Embedded in extractivism theory, the historical and political context, I shed lights to new findings. When assessing the effectiveness, advantages, and disadvantages of local content, disregarding the historical and political context leads to incomplete conclusions.

By using extractivism theory, I expose inherent weaknesses of local content policies. I show that one of the reasons why Guinea adopted LCPs was to reverse deficiencies caused by enclave extractivism. However, by selling local content as the solution, what is happening is that remedies that contain the disease are developed and implemented. The government of Guinea argues that more mining investment is required, hence more extractive activities. To counter the negative impacts of this - the lack of value creation and employment opportunities - companies must maximize local content. This is an inherent logical flaw. In the hope of resource-based development, investment and increase in extractive activities is invited. Yet, to compensate for a lack of value creation local content will be required. However, unless local content is effective and generates spillovers into other industries, the mining industries will remain tied to enclave extractivism and capital intensive rather than labour intensive sectors.

This approach has contributed to local content research and knowledge generation in the field of extractive industries and reforms as it shows that a holistic approach that considers political and historical context exposes further realities and considerations. In the chapter, I conclude with a clear message for practitioners in the public and private sector. I expose that in Guinea, local content has become politicized. This has implications and valuable lessons for policy makers, as well as private sector actors. These findings are relevant for policymakers that design local content policies. In the chapter, I show that in Guinea, local content policies are centralized political tools without localized structures. Not only did this make local content the subject of populist political campaigns during the time of President Alpha Condé. It also makes local content policy implementation and monitoring political in a sense where regional and local authorities that are not aligned with the central regime in the capital do not abide the rules. Due to a lack of collaborative design and implementation of the policy among technical experts, local, regional, national authorities, as well as the private sector, there is a lack of communal ownership, understanding and vision for this policy project that is meant to serve overall Guinean society. In the chapter, I propose a "collaborative approach, with bottom-up structures." Elaborating further on this, this includes removing local content from the prime minister's office authority in Guinea and instead either enshrining it into the Ministry of Mines department of Community Relations, or the Ministry of Decentralization are more sustainable options. Including the understanding, expectations, needs and capacities in affected local areas is also imperative in the design and implementation of this policy rather than imposing a centralized Conakry-designed policy.

In Chapter 3, I examine the efficacy of recent local content mining sector reforms in terms of providing inclusive resource-based development. The argument I present in the chapter is that the outcomes from local content policies in the instance of Guinea have been limited even though there is potential to achieve inclusive, resource-based development through LCPs. These impediments range from institutional to political to economic in nature. This chapter is guided by the notion of resource-based development in relation to enclave extractivism and the 'extractive imperative.' Despite mining sector reforms, Guinea remains dependent on extractive activities to achieve development goals. This relationship is framed by Arsel et al. (2016) as the 'extractive imperative.' On the other hand, Bebbington's (2011) theory of channels of inclusion outlines how extractive industries can lead to the generation of some resource-based development, including local content. This chapter contributes to academic knowledge generation, as well as relevance for policy makers. In terms of academic knowledge generation, this chapter provides the first detailed review of the implementation of local content policies in Guinea. Generally, Guinea is under-researched compared to other countries in sub-Saharan Africa like Ghana, Nigeria, Tanzania, and others. Guinea has experienced a mining boom since

2015 and has gone through major transformations, including mining sector reforms. This chapter was the first step to include Guinea in academic literature, in particular local content case studies.

My analysis completes earlier academic findings by key researchers such as Campbell and Knierzinger. I confirm earlier insights by Knierzinger when it comes to testing the effectiveness of mining reforms. Knierzinger looked at the 2013 Mining code in 2015 and 2016. My analysis in 2021 confirms and completes some of these findings by adding my case study on local content a few years later.

I provide suggestions for further research. I note that "historical factors must also be taken into account, where the relationship between the Guinean state and private sector has waxed and waned over the years" (Wilhelm & Maconachie, 2021; p. 10) . The importance of historical factors and context is only partially recognized in local content literature. I go further into detail in the paper presented in the previous chapter 4.

Another suggestion for further research that I provide is to further investigate the blurred lines between CSR and LCPs. I recommend that "more insight into this discussion is needed to explore how LCPs and CSR might coexist, given the clear willingness of mining companies to continue and protect their own initiatives" (Wilhelm & Maconachie, 2021; p. 11). This is exactly what I analyse in my subsequent publication (see Chapter 4). This insight has thus contributed to further research.

This chapter not only contributes to academic knowledge generation. It also creates impact and relevance for policy makers. I expose the limitations and obstacles of effective design and implementation of local content policies in Guinea. I showcase the corporate response to LCPs and exposes obstacles based on the interests of mining companies that are in some cases not compatible with LCP commitments. I recommend that "consideration must also be given to the realities and interests of the mining sector, which in some instances clash with LCP commitments. Policy changes must be more inclusive, but must also reflect diversity within each stakeholder group" (Wilhelm & Maconachie, 2021; p. 11).

The list of obstacles of governance and economic nature that I examine in the chapter are starting points for policy makers to consider in policy revision and elaboration.

In Chapter 4 I analyse the implementation of LCPs by mining companies and understand the different motivations that explain their response to these practices. The central argument I present in this chapter is that bauxite mining companies in Guinea respond differently to state-mandated LCPs as investment origin plays a major role and companies with international investment origins embrace LCPs as part of their CSR and SLO, meaning that companies are left to 'autoregulate' their responses to LCPs.

The perspective that is underlined in the literature review of chapter 4 is the role of the public sector – as the legislator – and the private sector- as the actor meant to implement local content policies. The contributions that analyse the roles of these actors within the key academic debates are highlighted, namely:

- Strong institutions are crucial, institutional failures are often the source of unsuccessful diversification (Bebbington, 2011, 2013, 2018; Karl, 1999, 2007).
- However, during neoliberal extractivism the state has been 'selectively absent' and the private sector has assumed authority, legitimacy and in some cases even the role of the state as a proxy state (Béland et al., 2022; Campbell, 2010; Szablowski & Campbell, 2019).
- During this shift towards neo-extractivism and developmentalism, LCPs now fit this zeitgeist of a return of the state in line with policy reforms, institutions, and improved resource governance (Kragelund, 2019; Ramdoo, 2015) – in the form of 'channels of inclusion' to regulate and enhance social spending (Bebbington, 2013).
- Local content policies in their design and implementation depend on a 'state-business alliance,' in which the state, investors and mining companies collaborate (Macatangay, 2016).

This particular focus allows the reader to understand that LCPs constitute a shift where the state, as an active regulator, aims to reverse its previously passive role and now imposes obligations to the private sector to reverse some of the negative trends caused by extractivism. This triggers the reader to ask themselves now how the private sector, that has been free and left unregulated during decades, responds to this seemingly 'return of the state' and how this 'state-business alliance' works in reality.

In this chapter I argue that in fact, regardless of the role of the state, mining companies have begun to improve their social and environmental practices in line with their CSR strategy. Some of the social activities carried out by mining companies, seemingly voluntarily and as part of their CSR even resemble local content efforts (Giuliani, 2016; Goerg et al., 2016; Logsdon & Wood, 2002; Mbilima, 2019; Rajak, 2011; Wilhelm & Maconachie, 2021). I note that "how mining companies navigate state-mandated LCPs and their own CSR interests and targets remains unexplored in LCP literature." (Wilhelm, 2023; p. 2). The exception is the publication I present in chapter 3 of this thesis, Wilhelm & Maconachie (2021) where the response of mining companies to LCPs in relation to their CSR practices has been shown in the case of three bauxite mining companies in Guinea. I note that for a deeper understanding of CSR practices and their relation to local content policies, a wider sample with more diverse investment background is required.

In this chapter, using CSR theory to analyse the response of mining companies shows that regardless of state-mandated efforts, mining companies strive to implement local content in line with their CSR strategy and social license to operate. This reflects global norms that increasingly push companies to implement progressive CSR (Dashwood, 2007; Frederiksen, 2018; Rajak, 2011). At the intersection of local content and CSR literature, Hilson & Ovadia (2020) note that this relationship between local content and CSR are in fact 'blurred lines' that are i) indistinguishable; ii) blurred between voluntary and mandatory targets; iii) disconnected from community needs and realities.

I use CSR theory to analyse local content practices to demonstrate:

- That local content is in practice often implemented as part of mining companies CSR efforts, regardless of state-mandated policies. This is in line with Hilson & Ovadia (2020);
- This means that following a trend towards stronger commitments to CSR through increasing global standards by investors, this also means that local content efforts are strengthened as part of this trend. This is in line with research into increasing social and environmental standards in line with global performance standards and increasing CSR commitment (Frederiksen, 2018; Gilberthorpe & Banks, 2012; Kemp et al., 2012; Kemp & Owen, 2017; Mzembe & Meaton, 2014; Szablowski, 2007).

- That there is a divergence of commitment to CSR where companies that do not have an international investment origin that demands rigorous ESG practices exercised through CSR score more poorly and show less commitment to local content – notably the Chinese and Russian mining companies in Guinea. This reflects findings by researchers in the field of China in Africa studies (Armony & Velásquez, 2015; Brautigam et al., 2015; Chen & Landry, 2018; Dollar, 2016; Geerts et al., 2014; Han & Webber, 2020; Li et al., 2013; Sum, 2018; Wegenast et al., 2019; Zeng, 2016; Zhang, 2018).

CSR theory is thus suitable to understand how mining companies fit in this 'state-business alliance' that is meant to implement local content policies and why their responses differ.

In this chapter, I contribute to the academic debate in three ways. Firstly, I identify a gap in the local content literature and hence contributed to this debate. By focusing on how mining companies respond to state-mandated LCPs and why their response differs, I contribute to a novel understanding and additional factors that showcase the limitations as well as the opportunities of local content. The type of mining company gives an indication how they are likely to practice local content in line with their CSR approach. Secondly, by using CSR theory, I push the boundaries of local content scholarship. Using CSR to analyse the implementation of LCPs allows to widen the analysis to shed light on wider phenomena in the extractive industries. It allows to look at local content as an example of mining sector reform that are meant to improve social performance of mining companies as part of a global change towards improved ESG/sustainability practices in the industry. By using CSR theory in this chapter, I unpack a divergence in mining companies, governed by their international investment background, that selectively responds to state-mandated efforts. Local content is no exception to this, regardless of seemingly stricter legislation. Inspired by Hilson & Ovadia's (2020) notion of 'blurred lines' between local content and CSR and my findings in this paper, I argue that local content scholarship would benefit from my analysis to understand the relationship between local content and CSR and how exactly it sits within corporate strategy and interests. Thirdly, I contribute to academic knowledge generation in this chapter by posing pertinent questions and offering novel avenues for research. In the chapter I conclude that "more research is required to understand if there are underlying power dynamics and dependencies that prevent the state from enforcement and sanctions in case of non-compliance, which may lead some mining companies to continue not to raise their local content standards" (Wilhelm, 2023; p. 9). Further research into the dynamics of the relationship between the regulator and the mining companies that must abide by the rules will provide further insight into the opportunities and limitations of local content policies.

I provide relevant recommendations for policy makers. In the chapter I elaborate that unless local content legislation is enforced and monitored, mining companies are left to autoregulate their approach to local content. Their response will differ based on their investment origin and CSR practices. This means that there are "two types of mining companies" in the case of various investment origins that will respond selectively. I recommend that "the state must set a standard, given that not all mining companies are bound to the same international social norms and investment requirements. State-mandated LCPs in Guinea are the starting point for a national minimum standard."(Wilhelm, 2023; p. 9). Strong institutions are hence required and the capacities and means for monitoring and enforcement must be included in policy design and implementation. Given that numerous countries are currently designing, implementing, and reforming local content policies and other social reforms in the extractive industries, these recommendations are relevant. Considering that the mining landscape has become dominated by investment from China, this is even more pertinent.

2. “LOCAL CONTENT IS POLITICS”: AN EXAMINATION OF THE ORIGINS OF LOCAL CONTENT POLICIES IN GUINEA’S MINING SECTOR[6]

2.1. Introduction

In recent years, resource-rich countries across sub-Saharan Africa have increasingly introduced reforms in their extractive industries, aimed at achieving inclusive resource-based development. Local Content Policies (LCPs) that intend to maximise local direct employment and local procurement in and beyond the extractive value chain are a popular tool to reverse the negative impacts of extractive activities and in particular, limited employment opportunities. Academics and practitioners tend to focus on the design and execution of LCPs (Kalyuzhnova et al., 2016; Lebdioui, 2020; Ovadia, 2014). What remains unexplored is the analysis of why countries opt for such reforms and what this motivation reveals about the potential dynamics that may impact reform design and implementation. Geenen (2019) and Hansen et al., (2016) have studied how the implementation of local content is embedded in political dynamics. The argument that I present in this paper is that the origins of LCPs are political and tied to reasons related to extractivism. My objective is to examine the reasons behind the implementation of mining sector reforms through local content in Guinea, thereby revealing the dynamics, particularly of a political nature, that may impact LCP design and implementation. The findings from Guinea are pertinent to the region’s resource-rich countries and beyond them to those that have initiated local content reforms. Guinea is an interesting case, having greater experience on local content compared to some of its regional counterparts like Niger and Burkina Faso but less experience than the more advanced cases like Ghana and Nigeria (Maponga & Musa, 2021).

After discussing key literature and presenting the methodology, I present my analysis in three parts. I will discuss how countries like Guinea chose LCPs to overcome the negative impacts of extractivism.

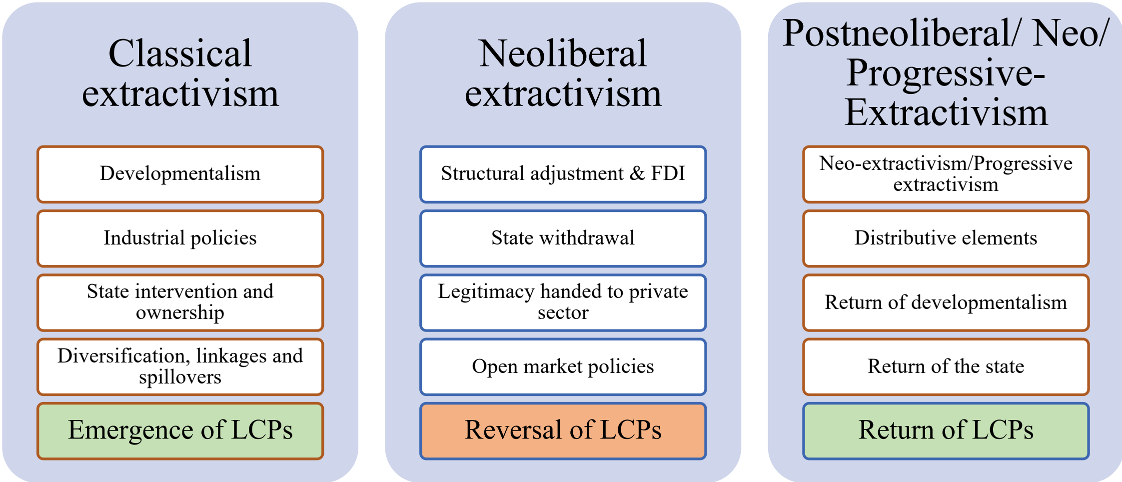
[6] This chapter was published as an original research article Wilhelm, C. (2022). “Local Content is politics”: An examination of the origins of local content policies in Guinea’s mining sector. *The Extractive Industries and Society,* 101158. https://doi.org/10.1016/j.exis.2022.101158 (Wilhelm, 2022)

I will then explain that there are political reasons for Guinea opting for LCPs, and these are intertwined with extractivism-related motivations. The implications of these findings will be discussed in the conclusion.

2.2. Contextualising LCPs: Extractivism and the role of politics

The LCP debate has only partially addressed the question about why countries opt for mining sector reforms, local content being a popular type thereof. Tordo & et al (2013; p. 18) broadly define LCPs as "government interventions that look to increase, in the long term, the share of employment or sales to a sector that are locally supplied at each stage of the value chain." The LCP literature partially acknowledges the historical development of LCPs and the socio-economic and political transitions that explain why countries opt for LCPs. Buckler (2021) briefly outlines the global historical, political, and economic context of local content policies. To fully grasp the context of LCPs, I combine LCP and extractivism literature. Figure 7 illustrates how mining sector reforms, notably LCPs, can be placed in context. Tordo & et al (2013) connect LCPs to productive development policies that are part of a wider range of older policies, namely protectionist industrial policies, resource nationalism and import substitution (Buckler, 2021; Kalyuzhnova & Nygaard, 2009; Prebisch, 1962; Tordo & et al, 2013). Reforms like LCPs were reversed when neoliberalism was the dominant global ideology. The ideas of inclusive resource-based development have returned more significantly following neoliberal extraction (Deringer et al., 2018; Kalyuzhnova et al., 2016; Ramdoo, 2015). After decades of liberalisation, structural deficiencies were revealed that accounted for continuing poverty, enclave and Resource Curse effects, impeding the development trajectory in resource-rich developing countries, particularly in sub-Saharan Africa (Campbell, 2009). New kinds of extractivism, the so-called 'neo' and 'progressive' extractivism, emerged at the beginning of the 2000s, aiming to mitigate poverty by channelling extractive activities into social spending (Acosta, 2017; Burchardt & Dietz, 2014; Gudynas, 2015; Svampa, 2015).

Figure 7: LCPs and evolution of extractivism



Bebbington's (2011, 2013) theory of how inclusive development can be achieved in resource-rich countries resembles the objectives of LCPs defined by the Intergovernmental Forum on Mining, Metals and Sustainable Development (IGF) (IGF, 2018). The main feature of this theory relates to Hirschman's linkages concept that argues that stimulating employment, supply chain management, social spending, and taxation through diversification of the extractive sector is vital (Hirschman, 1958). Linkages are key components of LCPs, as well as increased export, maximised government revenues from mining royalties and more economic development and transformation through inclusive economic development. LCPs are a way of not only creating resource-led development but also a tool to 'get the institutions right' in reversing the Resource Curse and enclave extractivism impacts (Korinek & Ramdoo, 2017; McKinsey Global Institute, 2013). LCP literature continues to be dominated by studies that analyse the implementation of LCPs through analysis of the reasons that hinder effective LCP implementation. Scholars focus on studying the lack of technical, financial, and competitive skills as well as company performance (Ackah-Baidoo, 2020; Calignano & Vaaland, 2018; Lebdioui, 2020; Macatangay, 2016). In terms of the more political and governance-related LCP literature, the role of transparency, human rights, and institutional and governance factors (Ovadia, 2014), as well as power dynamics, corruption and patronage (Ayanoore, 2019; Geenen, 2019; Nwapi, 2015) are studied. The political dynamics connected to LCP implementation is studied to some extent (Buckler, 2021; Geenen, 2019; Hansen et al., 2016; Wilhelm & Maconachie, 2021).

The questions of why resource-rich countries opt for reforms like LCPs and what these motivations reveal about potential obstacles to LCP design and implementation have not been adequately addressed yet. I propose a novel manner to analyse LCPs. By using extractivism theory and acknowledging the historical and political context, I demonstrate how LCPs' origins are embedded in political dynamics and ongoing extractivism. I call for considering the historical and political context when studying LCPs and related mining sector reforms.

2.3. Methodology

This research adopts the qualitative approach, combining fieldwork in Guinea in 2019 with subsequent remote data collection and document analysis. It includes 65 semi-structured interviews and considers, *inter alia*, 173 reports, 50 government publications, 26 internal government documents, 21 social media pages and 59 legal documents and laws. The semi-structured interviews were conducted with government officials, mining company representatives, civil society representatives, and experts like consultants and representatives from financial institutions. The government interviewees were from various departments of the Ministry of Mines, mainly the directors and vice-directors of the departments, as well as administrators. Selected informants and "elites" with expert knowledge of LCPs and the mining industry in Guinea were contacted through email and phone. These early connections allowed for the establishment of a contact network through snowball effect. Interviews and documents were transcribed or digitized, then thematically coded and analysed using NVivo software. For participant protection, data was anonymised. Prior to obtaining written consent, all participants were presented with an information sheet and consent form, and ethical approval was obtained. In terms of power dynamics, positionality played a role. In the context of Guinea's male-dominated mining sector, gender relations had to be carefully navigated to limit risks and manage expectations.

2.4. Motivations behind the design and implementation of LCPs in Guinea

Since the election of Guinea's President Alpha Condé in 2010, the Guinean mining sector has undergone several reforms. A fundamental pillar of these reforms is the idea of local content. According to Maponga & Musa (2021; p. 102), "Guinea has implemented one of the most elaborate local content policies for mining to date." Wilhelm & Maconachie (2021) present what LCPs in Guinea resemble. The authors distinguish between (i) direct LCPs (employment, local procurement, and training programmes), and (ii) indirect LCPs (the broader business enabling environment through interventions to boost individuals and local firms' capacities via state intervention or additional CSR activities by the private sector). Following this distinction, Guinea adopted a combination of mandatory and voluntary measures. In terms of direct LCPs, to boost direct employment and local procurement along and beyond the mining value chain, mining companies must respect quotas to contribute to a *Guinéisation* – the maximisation of direct and indirect employment of Guineans in the sector. Additionally, mining companies must organise training and capacity programmes for Guinean companies. The context of broader local content, indirect LCPs, includes measures that indirectly stimulate Guinean local content creation through capacity and skills programmes for Guinean companies and mining revenue funds. These funds not only provide the financial means to boost employment and company capacities but also create local content by financing community projects realised by local companies that can, in turn, provide the skill set and experiences to enable these companies to apply for tenders in and beyond the mining industry.[7] Other examples of indirect local content are programmes such as the Supplier and Partnership Marketplace platform to facilitate local procurement and boost the capacities of local firms, as well as entrepreneurship and employment initiatives by the Government of Guinea, technical and financial partners, and non-governmental organizations. CSR initiatives by companies to support small

[7] Two new mining revenue funds, the National Local Development Fund (FNDL) and the Local Economic Development Fund (FODEL) are indirect tools of Local Content, as Wilhelm & Maconachie (2021) analyse. Mining companies directly pay a set percentage of their revenues into these funds that are then redistributed and used for local development activities. These activities have the potential to improve the business enabling environment, thereby leveraging opportunities for local content. The budgets of these two funds are significant. As an example, in 2019, the FNDL led to 791 microprojects with a budget of $25million USD (ANAFIC, 2019).

and medium sized enterprises with access to finance, donations of equipment and infrastructure, and other types of assistance are further examples of indirect local content.

All these reforms occur whilst numerous new players continue to arrive in Guinea. The country has seen an exceptional boom in its bauxite production, and the licences and concessions that are awarded to bauxite mining companies continue to grow. Along with its quest to further stimulate investment in the bauxite industry, the Guinean government aims to combine this with its commitment to catalysing these investments into inclusive resource-based development through the following: (i) increasing the socio-economic impact of mining activities by maximising the share of Guinean direct and indirect employment (local content), (ii) diversifying and aiming to achieve more bauxite transformation domestically and (iii) improving mining revenue distribution.

Opting for LCPs: Extractivism-related reasons

Key documents on Guinean LCPs reveal to some extent why Guinea opted for LCPs in its extractive sector. Following Condé's election and his commitment to reforms, Guinea introduced a new and revised mining code in 2013. The broader vision and principles of how the mining sector should be transformed followed in the subsequent years (Ministère des Mines, 2018; Ministère du Plan et de la Coopération Internationale, 2012). These documents incorporate ideas of local content, specifying the goal to have a competitive, diversified economy that creates decent employment opportunities, economic hubs with a perfectly integrated mining sector and a private sector that is the motor for growth and progress.

LCPs were created to maximise the economic and social impacts generated from investments in the mining sector. The Guinean government emphasises that the mining industry will continue to play a major role in the Guinean economy and will be an imperative in promoting the country's socio-economic growth. Hence, it is necessary to ensure that the economy becomes diversified to generate spillovers. The government outlines, "These actions, which will include any necessary global and/or sectoral regulatory reform, will lead to concrete solutions to the current problems hampering the development of sectors connected to mining and the development of employment for the Guinean population" (Ministère des Mines et de la Géologie, 2017a). This implies that certain problems correlate with extractive activities in Guinea that reforms and initiatives, including LCPs, aim to address. These problems are not directly specified, but the importance of mining-induced employment opportunities that are meant to stimulate socio-economic development continues to be outlined. Another key document on LCPs explains further how the strategy of the Guinean government is an open economy that balances the partnership between investors and companies to achieve trickle-down impact by generating economic growth from resource extraction. The private sector that will generate employment and improve the currently precarious employment conditions is presented as a key asset. The document specifies that LCPs "have been elaborated to boost this dynamic of the creation of a local industrial framework that is productive and competitive where SMEs can generate employment and contribute significantly to the economic growth of the country" (Ministère de l'Industrie, des PME et de la promotion du secteur privé, 2017).

On closer scrutiny, elements of extractive activities, notably the Resource Curse and enclavity, are identified as threats to achieving inclusive resource-based development. The *Vision Guinée 2040* mentions how Dutch Disease, which is a Resource Curse effect, can harm development in the long term (Ministère du Plan et de la Coopération Internationale, 2012). Moreover, the 2040 Vision notes that the Guinean mining sector is not well integrated with the economy. The government-commissioned Boké regional development strategy refers to the mining sector in Guinea directly as an enclave that "has been operating in a self-contained manner. It has either directly produced or imported all the goods and services it needs to construct the mines and maintain production levels" (Ergo Strategy Group, 2018; p.6). One of the consequences of this enclave extractivism in Guinea is that the industry expanded "without relying on a pre-existing network of suppliers or infrastructure" (Ergo Strategy Group, 2018; p.6).

The main deficiency of extractive activities including Resource curse and enclavity impact that LCPs aim to address is the lack of employment opportunities and diversification. Literature on extractive reforms indicate that reforms are implemented to achieve the following: (i) mitigate negative social and environmental impacts caused by resource extraction (Katz-Lavigne, 2017) and (ii) provide inclusion and resource-based development to counter enclave extractivism (Bebbington, 2013; Campbell, 2009). (Bebbington, 2011, 2013) specifically points to employment, supply chain management, and other channels of inclusion. Korinek & Ramdoo (2017) point to the deficiency of extractivism as a central motivation for countries to opt for LCPs. They argue, "The resurfacing of LCPs has been particularly strong in countries where the capital-intensive mining sector has developed as an enclave, with few links to the wider economy, and has not been successful in creating sustainable economic benefits. The benefits sought are potentially diverse and include employment generation, supply chain development and technological and knowledge spillovers" (Korinek & Ramdoo, 2017; p. 10). The Guinean government documents do not specify this connection in detail. However, unemployment and the expectations for employment are major issues in the country, particularly in the mining areas. A 2017 Local Content Evaluation study commissioned by the Ministry of Mines reveals that the majority of the population (91% of the surveyed men and 61% of women) aspire to work for mining companies with an overall 68% voicing the wish to have employment in the mining supply chain (DAI, 2017). A 2019 Ministry report claims that extractive activities are a significant motor for growth for the Guinean economy that have the opportunity to create and develop local companies that "should effectively satisfy the needs for employment of the general population and their need to improve their living conditions" (Ministère de l'Industrie, des PME et de la promotion du secteur privé, 2019; p.9). A recent International Finance Corporation (IFC) report notes that despite the bauxite boom in Guinea in the past years, "this heavy concentration of investment creates risks, however, related to the lack of diversification of exports and the low employment generated from mining and hydropower" (IFC, 2020; p. 2). The report also points to Dutch Disease and Resource Curse risks that can be seen to some extent in Guinea. The hope that LCPs lead to employment growth and industrial diversification that will generate linkages that connect the mining sector with more labour-intensive opportunities that surmount these challenges is widespread in LCP literature (Kalyuzhnova et al., 2016; Ovadia, 2014). In countries like Zambia, Ghana, South Africa, Cameroon and Nigeria, LCPs have delivered some promising results (Adewuyi & Ademola Oyejide, 2012; Bloch & Owusu, 2012; Bond & Fajgenbaum, 2014; Kaplan, 2012; Lippert, 2014). This echoes the solution proposed to Guinea by the IFC to promote diversification and spillover effects where the creation and development of employment opportunities are key, notably through “local content sourcing” from mining sector growth (IFC, 2019) (IFC, 2020). The estimated revenues that local SMEs could capture seem significant. A 2017 government-commissioned report estimates that within the next 15–20 years, $1.75bn will be spent on workforce cost and $1.85bn on goods and services in the Guinean mining industry. This report estimates that 51% of the employment share and 40% of goods and services will be sourced locally (DAI, 2017; p. 50).

What the reports are silent about is the sense of urgency that the negative impacts of extraction created. In 2017, the year when many of the documents on local content were written, the so-called “year of local content,” tensions in the bauxite mining area, Boké, reached unprecedented levels (Ministère des Mines et de la Géologie, 2017b; Ergo Strategy Group, 2018). Violent protests emerged, fuelled by the frustration of the youth due to the failure to meet their expectations vis-à-vis mining activities. The railway line was blocked, and mining activities had to stop. Strikes and unrest regularly occur in the Boké region, and numerous studies have pointed to the lack of employment opportunities and precarious labour conditions in the mining sector as among the major factors causing tensions that can turn violent (Ergo Strategy Group, 2018; GIZ, 2017). As a representative of a Guinean NGO explained, “The obstacle is that many young people are impacted by unemployment. It’s unemployment that tires people here.” Another civil society interviewee described the situation in Boké as explosive, where the unemployed youth, in their frustration, can erupt into a violent protest at any moment. Even the little employment that is created in and beyond the mining value chain does not meet the expectations of the population.

LCP literature acknowledges that in extractive industries, employment opportunities are limited (Macatangay, 2016). Especially with increasing automation and a potential decline of extractive industries caused by the end of the current commodity supercycle, unskilled employment opportunities will become scarcer, limiting the potential benefits of LCPs (Bowman et al., 2021). Dauda (2020) has demonstrated how, even in countries that pursue LCP efforts, mining remains capital and not labour intensive. Even if local employment opportunities are created, these would not adequately respond to the needs. In Guinea, the economy has not been significantly diversified and spillover effects into more labour-intensive industries, such as agriculture, have long been neglected. The characteristics of the mining industry have also meant that not enough employment has been created, and if employment opportunities arose, these have often not been captured by Guineans. The Guinean government still believes in the potential of LCPs to overcome these challenges and has, hence, opted for them as a tool to overcome some of the negative impacts of extractive activities.

Political Motivations: "It is Political. Local Content is Politics."

LCP literature has studied how the implementation of LCPs is often entangled with political dynamics, as in the case of Tanzania, Uganda and Mozambique (Hansen et al., 2016), Angola and Nigeria (Oguine, 2011; Ovadia, 2014; Wiig & Kolstad, 2010), the Democratic Republic of Congo (Geenen, 2019), and other countries across sub-Saharan Africa (Hansen et al., 2014). However, to what extent the motivation to opt for LCPs in the first place is impacted by political circumstances, has not been fully studied. Research has shown that the AMV played a role in countries' motivations to adopt LCPs (Ackah-Baidoo, 2020; Dauda, 2020; Hilson, 2020).

Guinea, like its regional neighbours, implemented mining sector reforms in response to a major regional initiative, the 2009 AMV. The government's legal application documents clearly outline this connection and state that the AMV adopted by the African Union (AU) is a "framework of reference" for the subsequent mining sector reforms in Guinea that include local content (Ministère des Mines et de la Géologie, 2017c). The AMV is the framework for reforming African mining industries to achieve inclusive, resource-based development through sustainable and transparent mineral resource exploitation. The Guinean government states: "It is in this process of achieving the objectives of the AMV that the government has initiated a structural reform of the mining sector to promote a type of public regulations in favour of responsible and sustainable development" (Ministère des Mines et de la Géologie, 2017c). The government's voluntary Corporate Social Responsibility and local content guidelines for mining companies are instruments of this reform. The government emphasises that, as an active member of the AU, Guinea is obliged to implement the AMV (Ministère des Mines et de la Géologie, 2017d). The timing of the design and implementation of LCPs and other mining sector reforms in Guinea reinforce this connection further. In January 2017, the "year of local content," Guinea's President was elected as the Chairperson of the AU. It was also decided in 2018 that the

African Minerals Development Centre (AMDC), created to implement and monitor the AMV, would be based in Guinea's capital. Mining analysts conclude that Guinea won the bid due to its "recent efforts to improve the sector [that] made it an attractive choice for the AMDC headquarters" (Mining Technology, 2019). The Guinean Ministry of Mines celebrated this achievement widely and declared that Guinea was chosen "thanks to the lobbying of Professor Alpha Condé." The AU declared that Guinea was chosen as it was a "role model in terms of its mining experience" (Ministère des Mines et de la Géologie, 2019). This motivation of the Guinean government to use initiatives like the AMV to portray itself as a progressive and important regional actor has been communicated by various interviewees. An influential international NGO representative explained:

> "What we see in a very clear way is that the authorities are committed to preserving the reputation of Guinea, internally and externally. They are committed to passing on the message 'We are dynamic. We are successful. And we will become the 'bauxite leaders' of the world.' "

A consultant explained further that the Guinean administration is eager to demonstrate that it is an example of a progressive and democratic nation, a model state in a region surrounded by unstable states.

I have shown that regional political initiatives like the AMV are important in stimulating key mining reforms, including local content. This confirms earlier conclusions (Ackah-Baidoo, 2020; Dauda, 2020; Hilson, 2020). The arrival of Alpha Condé in the Guinean political sphere and his motivation for playing a role in regional incentives were integral to creating reforms. The interests are diverse ranging from a genuine interest to catalyse mining returns into inclusive resource-based development to political objectives linked to upholding a reputation of being a respected and progressive leader. A recent study by Buckler (2021) suggests further interests, namely (i) resource nationalism through identity politics; (ii) a populist rhetoric; (iii) a strengthening sense of national self-confidence in light of former neo-colonialist experiences; and overall an increasing longing for (iv) authority and control over managing national economies.

On closer scrutiny of the domestic political sphere in Guinea, I contend that opting for local content is a clear political decision that follows a top-down approach managed primarily at the President's level. This consciousness concerning local content in Guinea having political origins is clearly expressed. As one interviewee who has held senior management positions in a mining company in Guinea revealed:

> "It [local content] came out of a political sort of standpoint. The President and the administration… local businessmen were saying, 'why aren't we getting contracts?' It came from a political angle and therefore the structure that needs to be for implementation wasn't there. It was more political."

The interviewee explained that it was a push that came from the people in Guinea who were complaining to the government. The latter then decided to find 'solutions' to problems. A Guinean entrepreneur and member of the Guinean Local Content Association clearly stated:

> "It is political. Local content is politics."

The director of the local content department at the Ministry of Mines explained in a podcast that their department and the local content initiative come from the President himself and that there is a lot of hope in the President and communities that the mining sector will bring benefits (EITI Guinea podcast, 2019).

In numerous interviews, it was consistently outlined how local content is the favourite topic of President Condé and Prime Minister Fofana. A consultant expanded:

> "In Guinea, we have a very strong commitment at the top (…) the strategic nature of local content (…) is very well understood by the key people at the top of the mining policy value chain."

This top-down approach continues to be applied. It is currently discussed that the observatory on local content to be created soon will probably be under the tutelage of the Prime Minister's office. The commitment to local content was highlighted in Condé's 2020 Electoral programme and campaign. The programme featured local transformation and local employment, as well as the two new mining revenue development funds, as part of his local content section in the electoral programme. One of the promises of the programme was that throughout his next presidency, 50% of the total mining industry spending would be local (RPG, 2020). Just like direct LCPs, indirect LCPs, notably the funds, are also regarded as presidential projects. When mayors receive the cheques from the mining companies and the government-managed revenue institution, this affiliation becomes clear. The first person they thank for the payments is the President, who they believe is behind these initiatives (Evasion Guinée, 2020; Mediaguinée, 2019).

The aim to reverse the negative impacts of extractive activities and their political dimensions go hand in hand. This is in line with Korinek & Ramdoo (2017), who avert that, in some cases, LCPs are implemented following political considerations based on pressure to distribute the gains from extractive activities. This shows that the political motivation paired with maintaining extractive activities whilst overcoming the latter's negative impacts are the reasons that countries opt for LCPs.

A government representative, when queried about the reason behind the creation of the supplier marketplace platform that is a local content tool, responded thus:

> "When the President was elected in 2010, the investments kept coming in and doubled or tripled, we started to look at how do we ensure that our locals actually benefit from this investment."

Another government representative, when asked about the background and context of local content design, responded that the arrival of Alpha Condé was a key moment for structural mining sector reforms, including local content and that particularly in the aftermath of the Ebola epidemic, bauxite production really kicked off, and it became important for the government to transform this wealth and create employment.

What the motivations reveal about problematic LCP implementation

I argue that it is questionable whether LCPs can reverse the Resource Curse and enclavity impacts, the common features of extractivism. It is unclear to what extent local content can lead to inclusive resource-based development with tangible impacts whilst continuing extractive activities with the central aim of attracting further investment increasing production and export levels. Researchers such as Bebbington (2011, 2018) and Gudynas (2015) argue that the reforms that channel extractive activities into social spending to address deficiencies (like lack of employment and local procurement) are merely compensating extractive deficiencies to a certain extent. The very nature of extractive activities remains unchallenged, where investment attraction and the ongoing focus on extractive activities hinder any structural reforms that create tangible and sustainable impacts reproducing enclavity and Resource Curse impacts instead. Béland et al. (2021) and Coderre et al. (2019) who study mining reforms in line with the AMV contend that although the AMV triggers innovative changes, these are limited due to the "perpetuation of the perspectives, norms and policy instruments inherited from the former liberalised mining regimes" (Béland et al., 2021; p. 10). Hence, this message must be clear that reforms like local content bring limited benefits. What many of the interviewees recognise is the fact that the main mode of extractive activities will not change even with local content reforms. The mining sector remains capital intensive and not labour intensive, and it continues to be governed by prices, transnational actors and various external factors like "international trade regime practices, tariff import privileges and bilateral conventions" that "hinder the capacity of African states to implement their local content policies" (Béland et al., 2021; p. 12). When asked if local content can create inclusive resource-based development and effective *Guinéisation*, a consultant responded thus:

> "I have been told that in Guinea and I was very sad to hear that even some politicians have this message. It is totally misleading. It's going to create problems. The reality is that not everybody will get a job in the mining value chain. It is not going to solve any employment issue at the level of the country. To give these expectations to people is totally… it's not good. But I've been told in Guinea that some politicians have said that. Local content is just part of good governance in the mining sector. The *linkages* are part of the answer."

Some practitioners are pessimistic regarding local procurement. A consultant explained how maximising local procurement through LCPs in Guinea is like

> "shuffling deck chairs on the Titanic. The numbers they [the government and its technical and financial partners] talk about are in hundreds of thousands of dollars. I'm sorry, but

> this is a multi-billion dollar industry and achieving a couple of $100,000 or a couple of $1mn worth of spend is firstly incidental and secondly, frankly, will be likely to happen anyway because you can't buy everything internationally."

The Guinean government seems to be aware of this to some extent, continuously stressing the importance of diversification of the industry and spillovers into more labour-intensive industries. It is unclear what the realistic potential of local procurement in the Guinean mining industry is, given that procurement data provided by the Guinean government or mining companies are currently non-existent. Hence, it is not possible for observers to track the progress in terms of local procurement and where opportunities may be captured. Even the DAI study presented earlier in this paper which estimates Guinean local procurement spending of $240mn over the next 15–20 years in the mining industry, shows how little the impact may be. Morris (2012) have revealed how in numerous countries, effective linkages were not achieved as integration between sectors was not realised, and more structural policies to promote effective linkages were not successful. I thus find it questionable whether, in times of ongoing extractivism and the continuation of mining investment flowing into Guinea, direct local content will provide tangible opportunities in the mining supply chain, as well as beyond the mining industry through spillovers and linkages. I consider it doubtful whether indirect local content measures, mining revenue funds and supplier and employment projects and initiatives will create tangible benefits that would be sustainable even if the bauxite price falls or the bauxite demand in China becomes saturated. This end of the current supercycle, paired with automation, may seriously restrict LCP impacts.

The top-level politicians who shape local content are not adequately transparent about this reality, which may create serious problems. The messages by politicians on the opportunities of local content are often misleading and have the potential to create tensions. A mining company representative shared that they worry about the conflict potential stirred by the "Conakry elite" on local content and that it is the technocrats of the government who declared the need for local content, building up expectations for the local population that will not be fulfilled, and when the wrong people will unfairly benefit from the opportunities, the mining companies will be caught in the middle. When asked about what is meant by conflict potential and tensions, a government representative said that especially in the mining areas, people tend to revolt due to frustration when their expectations are not met. The conflict potential that can become violent at times in the mining area, mentioned earlier in the paper, should not be underestimated. Unsuccessful local content and a local content campaign that may be perceived as false promises may stir these conflicts further. Local content discourse is highly prevalent in Guinea, and as a journalist from the Boké region explained, local content is increasingly discussed and often becomes the source of conflicts. The local population has conveniently, and sometimes narrowly, interpreted the message spread by the President, and many believe that any project and opportunity created in the area must be captured by a local inhabitant of Boké. He was concerned that some people interpreted the local content message to the extreme and apprehensive that, fuelled by political promises, this would create unrealistic expectations:

> "It is true that the political discourse that is held is that it is about employment, that we are sending companies that will help us to get millions of jobs for the population. It is a political discourse, by the President himself. But there is a reality. A mine has a limited employment, which will be below the ambitions of the local population where 90% are unemployed."

Another source of potential conflict is the fact that local content in Guinea is a top-down political project. Some of the interviewees expressed that for them, local content campaigns by the President and senior administrators are used for political purposes only and remain mere rhetoric. This is in line with findings by Knierzinger (2016) and Wilhelm & Maconachie (2021) who have shown that recent reforms in Guinea, including LCPs, lack effective implementation beyond the mere announcement of legal principles and visions. A consultant said, in a conversation about local content, that the government is enjoying the "pat on the back and the platitudes that come with it" but that it was not "stepping up to its rhetoric" and that other than announcing principles, it was not doing the necessary work to implement local content, as those concerned in the government do not want to "get their hands dirty." An NGO representative expressed his concerns and made the connection to potential conflict clear:

> "Everyone says 'local content, local content!' But we don't even know what is meant by local content. Even the President of the Republic himself he says 'Yes, local content, we will employ all young people!' He says this while we don't even have any understanding and execution of local content. Imagine, when the President of the Republic goes to Boké, an area where people rise[8] every day. He says, publicly, that because of local content all mining companies will employ you. This is how local content is being interpreted here! (…) It is a false promotion of local content. It's just theories; you see nothing in practice, nothing at all. That's the false promotion of local content (…) this is the problem; it is the problem of the political will."

Another aspect the findings have revealed is the importance of initiatives like the AMV in stimulating local content. This may be problematic for numerous reasons. As Hilson (2020) posits, the AMV, despite the initial energy and enthusiasm, has lost its momentum. The long-awaited AMV implementation centre in Conakry is not operational yet, and it is unclear whether and how the AMV lives on. If new and ongoing reforms in countries depend on pan-African initiatives like the AMV, this may mean a halt to reform efforts once the momentum is lost. It is also uncertain to what extent such regional political initiatives are abused for political purposes and power games that will not lead to effective reform implementation. Katz-Lavigne (2017) indicates how mining reforms were used as tools by political parties for furthering their own interests in Sierra Leone and Zimbabwe. The author points to the political dimension behind the AMV, recognizing certain patterns across countries.

Another aspect fraught with political risks is the strong association of Guinea's LCP with its President. Guinea is in a time of transition since the removal of Alpha Condé in September 2021. How local content policies will continue in the current military regime and after the transition to democracy remains to be seen. The point is that if local content is a Presidential project that does not find a strong base in the ministries and among government administrators in Conakry and the regions beyond party lines, then local content may be exposed to political transitions and political power games. Wilhelm &

[8] In the French original he says "où les gens se lèvent tous les jours", which implies that they protest every day

Maconachie (2021) observe domestic political issues impacting local content implementation in Guinea, particularly due to the political transitions in and outside the capital and due to the conflict of interests between the national administration in Conakry and the local authorities. The authors also reveal that LCPs in Guinea remain theoretical, where the main principles are declared, but implementation and monitoring are lacking. The findings of this paper are in line with LCPs being to some extent political rhetoric, used for domestic and external political purposes, including populism and identity politics (Buckler, 2021). More research is needed to study the political dimensions of LCPs further to understand if and how LCPs are misused by certain actors for political purposes, thereby limiting successful and effective LCP implementation.

2.5. Conclusion

In this chapter, I have shown that in the case of Guinea, the government opted for LCPs to surmount the negative impacts of extractive activities (notably lack of employment), as well as due to political reasons. I have analysed the limitations of LCPs in meeting employment expectations whilst extractivism continues in a structurally unchanged manner. I showed how in Guinea local content was an opportunity to take a leading role in regional political developments, and how it continues to be a domestic top-down presidential political project. I have discussed how this can be problematic, for local content can become entangled in polarised political rhetoric without actually being implemented.

For policymakers, I recommend the depoliticalisation of local content. The Guinean policymakers and politicians, in particular, are advised to be rational and honest about what local content can and cannot do to avoid the disproportionate expectations that are abused for political purposes and, when unmet, can lead to unrest and even violence. Local content should be included in the inclusive resource-based development toolkit through a collaborative approach, with bottom-up structures outside the political arena.

Overall, the message is not to expect miracles from local content in the industrial mining sector. The industry is not labour intensive and is limited due to the lack of structural changes in extractivism. An innovative solution could be Artisanal and Small-Scale Mining (ASM) that has a long tradition in

Guinea. ASM is highly labour intensive and can also create linkages. Supporting this industry, making it safer and less precarious, offering opportunities and support for linkages and diversifying and transforming it could boost the potential of ASM for local content. Sectors beyond mining should not be overlooked either.

Academics are advised to question the intentions and interests of governments in opting for LCPs. This can reveal the dynamics that can, possibly, harm LCP design and implementation. “Local Content is politics” in both design and implementation of LCPs. This consideration opens up new avenues for LCP research.

3. EXPLORING LOCAL CONTENT IN GUINEA'S BAUXITE SECTOR: OBSTACLES, OPPORTUNITIES, AND FUTURE TRAJECTORIES[9]

3.1. Introduction

Driven by soaring mineral prices and heightened resource demands from the world's emerging economies, over the past three decades, the globalization of the extractive industries has led to dramatic technological, organizational, and regulatory changes in resource-rich West Africa. While mining sector reforms and a steady flow of international investment in mineral extraction has, in many cases, increased government revenue and helped some countries achieve phenomenal economic growth, the local-level development impacts of such investments, however, have often been less spectacular. In many West African countries, mining investments have failed to catalyse broad-based, inclusive local economic development, particularly at the site of extraction, and there has been very little "trickle down" accruing to local populations. In such situations, the mining economy can lead to "enclave" development with few forward, backward or lateral linkages, and without sustained prosperity of a wider region (African Economic Outlook, 2013). As Ferguson (2006) has warned, resource extraction that is concentrated in "exclusionary spatial enclaves" tends to benefit elite groups, has little impact on wider society, and reproduces the inequalities that can trigger resource-driven conflict.

To address this disconnect between mining investment and local development, voluntary community development programmes have for many years played a key role in mining companies' Corporate Social Responsibility (CSR) strategies, in the process helping them to acquire a 'social licence to operate'. However, many governments in resource-rich countries are now changing track, formally adopting laws that require mining companies to pay more attention to local content requirements. Since the end of the most recent commodity boom in 2014, local content policies (LCPs) have increasingly gained traction in resource-rich developing countries around the world, where extractive-led developing trajectories are

[9] This chapter is published as an original research article in Wilhelm, C., & Maconachie, R. (2021). Exploring local content in Guinea's bauxite sector: Obstacles, opportunities, and future trajectories. *Resources Policy*, 71, 101935. https://doi.org/10.1016/j.resourpol.2020.101935

being pursued. Such policies, which seek to stimulate development through the procurement of goods and services locally in mining areas, are now apparent in 49 countries globally, although in many cases they have been implemented with mixed results (Hilson & Ovadia, 2020).

Guinea – the focus of this paper – remains one of the poorest countries in the world, despite its vast deposits of high-quality bauxite. It possesses an estimated 30 percent of global bauxite reserves and in 2012, mining accounted for approximately one quarter of the country's gross domestic product and 85 percent of its export earnings. But at the same time, Guinea remains the quintessential example of a nation plagued by a ''resource curse''[10], where extractive activities do not seem to have translated into tangible positive impacts for society. The Guinean case also clearly illustrates that achieving inclusive resource-based development through mining sector reforms can be constrained by numerous challenges at different scales.

Firstly, policies designed to channel more benefits to host communities are often poorly designed and do not always map on to local-level realities on the ground. For example, LCPs, although now a common requirement in most agreements with mining companies, have been widely criticised for their difficult and ineffective implementation, as well as their limited capacity to address the structural limits of extractive impacts (Calignano & Vaaland, 2018; Geenen, 2019; Lange & Kinyondo, 2016; Lebdioui, 2020; Macatangay, 2016; Nwapi, 2015; Ovadia, 2014). Moreover, the effectiveness of the main catalysts which can potentially stimulate local-level development – for example, taxes and royalties, linkages and spillovers, and CSR – vary widely by context and are often controversial in terms of their implementation and effectiveness (Bebbington, 2013).

Secondly, even if redistributive policies are designed with local mining communities in mind, they often merely address the symptoms rather than the root causes of problems, reinforcing continuity rather than tackling structural change. Even when guided by seemingly progressive policy reforms, resource exploitation can thus remain predatory and destructive, generating little employment, leaving inherent inequalities unaddressed, and allowing uneven economic structures to be unchallenged (Arsel et al.

[10] For a comprehensive review of the Resource Curse debate, see Papyrakis (2017); Rosser (2006); or Stevens (2015).

2016; Cordoba et al. 2018; Gudynas 2011; Svampa 2015). A major obstacle, according to recent research by Ackah-Baidoo (2020), is that mining companies in sub-Saharan Africa tend to rely upon deeply rooted international partnerships and operate within previously established networks, both of which remain difficult for local businesses to penetrate. Recent evidence suggests that this may largely be the case in Guinea, despite attempts to break down these barriers by mining sector reforms which are often ineffective despite their apparent progressiveness (Knierzinger, 2016; Szablowski & Campbell, 2019).

Thirdly, the evolution of extractive activities under neo-liberalism has undermined the power of the state, stripping it of its responsibilities to its citizens, and placing high expectations on mining companies to fill this gap as new agents of development and service provision. While the state may provide some of the basic infrastructure required to enable extractive activities to take place, its function has become "peculiar" as power has been transferred to private actors in response to a neoliberal context (Ye et al., 2020) . While this shift in power dynamics has been apparent in the case of Guinea (Bolay & Knierzinger, 2021; Campbell, 2009; Diallo, 2019; Knierzinger, 2015; Rey et al., 2020; Szablowski & Campbell, 2019), whether or not LCPs can redress the development void left at the local level yet remains to be seen.

Against this backdrop, this paper aims to deepen understanding of recent local content mining sector reforms in sub-Saharan Africa, and to explore their effectiveness in terms of inclusive resource-based development provision. Focusing on the case of LCPs in Guinea's bauxite sector and drawing upon multi-sited qualitative fieldwork carried out in Guinea between May and July 2019 in Conakry and Boffa préfecture, we seek to investigate the effectiveness of LCP implementation, in the process examining both opportunities and obstacles to be surmounted. Inspired by Norman Long's actor-based approach[11], 31 semi-structured interviews were carried out with government officials, civil society

[11] Long's actor-oriented analysis provides a useful lens to unpack LCP implementation and to explore the interactions between various stakeholders, in order to understand and scrutinize their changing roles before, during and after mining sector reforms. According to Long and Long (1992), actors are active participants that shape the policy process and in this research the approach was employed to identify the dynamics of LCP implementation based on the interaction between different actors. For further elaboration on Long's actor based approach, see Long and Long (1992); Long (2001); or Arce and Long (1987).

actors and mining company representatives from three of Guinea's main extractive companies: Compagnie des Bauxites de Guinée (CBG), Alufer, and Guinea Alumina Corporation (GAC).[12]

The paper seeks to contribute to the literature on local content in developing countries by first providing an overview of LCPs in Guinea's bauxite industry, of which no analysis has been carried out to date. Here, we share and analyse some of the lessons revealed in LCP implementation in Guinea, which feed into wider debates that concern the relationship between the state and mining companies. Second, given decades of state withdrawal under the years of structural adjustment and Guinea's ensuing neo-liberal trajectory, we explore how mining companies, and the government are currently responding to their changing roles in terms of LCP implementation. More specifically, with respect to the latter, we explore how politics and power dynamics within the government are shaping the implementation of policies, an area which the literature on LCPs has not yet addressed in any detail. We conclude by locating the lessons from Guinea within wider discussions that concern LCPs and mining sector reforms, in the process offering some reflection on possible ways forward for minimising resource enclavity and fostering more inclusive forms of local economic development in sub-Saharan Africa.

3.2. Methodology

This research has been conducted qualitatively. Data was collected during fieldwork between May and July 2019 in Conakry and Boffa in Guinea. Two key methods for data collection were used, namely document analysis and semi-structured interviews. This combination is widely used among qualitative researchers who analyse LCP implementation, as well as resource governance in general (Ablo, 2019; Siakwah, 2018; Vaaland et al., 2012). Document analysis is important to obtain the necessary informative basis to learn about LCP legislations and their implementation. The documents also allow triangulation to not only understand the interviews better, but also to verify statements (Bowen, 2009).

[12] CBG is the oldest and most established mining company in Guinea. It has exported bauxite since 1973. CBG's ownership structures have changed over time, but a 49% government share has been maintained since its creation. CBG is a joint venture which includes shares held by Alcoa (22,95%), Rio Tinto (22.95%) and Dadco (5.1%). The mine is operated by Halco (Alcoa + Rio Tinto). Alufer's Bel Air Mining started in 2018 in Guinea, and the mine that is operated by Alufer Guinea Ltd is owned by Alufer Guinea Ltd (BVI) (65%), Alufer Base Metals Ltd Bn (20%), Soguipami (State of Guinea) (15%). The company is registered in Guernsey. Guinea Alumina Corporation (GAC) began production in 2019. The company is fully owned by Emirates Global Aluminium (EGA), which is equally owned by Mubadala Investment Company of Abu Dhabi and Investment Corporation of Dubai. The three companies are major players in Guinea's bauxite industry.

The interviews provide more in-depth insight. Key informants and 'elites' with expert knowledge on LCPs and the mining sector in Guinea were selected and approached via email and phone calls. Using these 'experts' is a common technique, as key informants and 'elites' tend to not share their personal opinions and views, but rather the stance of the institution, company or group that they represent (Richards, 1996). This gives valuable insight into the institution and is an effective and productive way to collect information. These initial contacts enabled the creation of a contact network through snowballing. An actor-based approach was followed, which included representatives from the three main actors, namely government, mining companies and civil society. The 31 interviews include the three mining companies and the mining chamber, 13 government representatives, 3 'hybrid' actors (government affiliated institutions, or intergovernmental organizations like the World Bank's IFC office in Guinea), and 11 representatives of civil society (national and international NGO representatives, journalists). The interviews were semi structured to allow a certain flexibility to pose broad and open ended questions to the experts (Bryman, 2012). Interviews became increasingly concrete and specific with the exploratory research to become narrower over time (Saunders et al., 2009). The interviews varied between 20 minutes and 2 hours in length. Interview questions included broad questions, such as how LCPs in Guinea came into being, what they entail, how monitoring and evaluation work, as well as what the opportunities and observed and anticipated obstacles are. Interviews were mainly conducted in French (without a translator), recorded, transcribed, and thematically coded and analysed using NVivo software. To protect participants, data was anonymized. Ethical approval was obtained beforehand, and all participants were briefed with an information sheet and consent form where written consent was obtained.

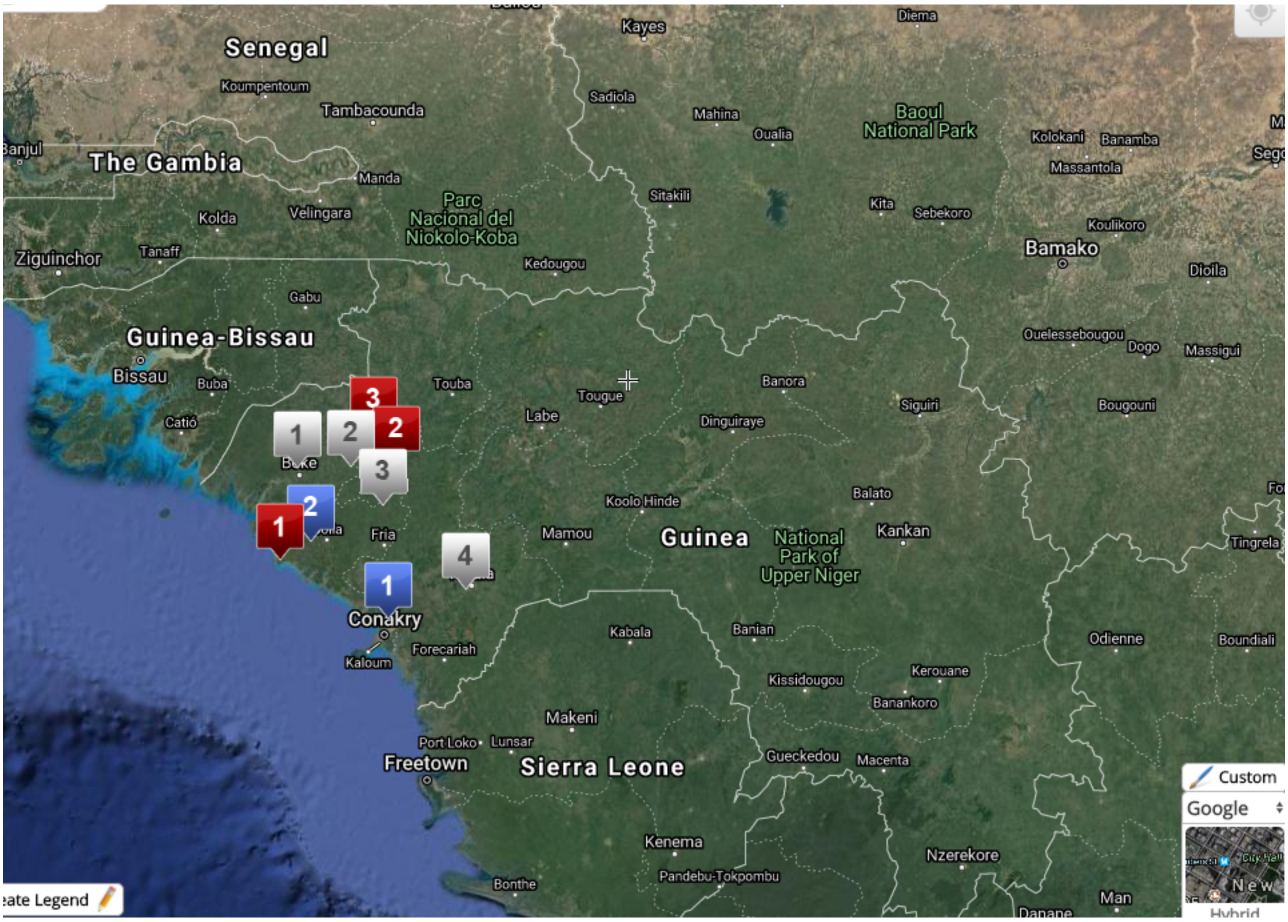
3.3. Guinea's mining sector and the transition to LCPs

Guinea qualifies as a resource-dependent country. In 2018, 43% of its total exports consisted of aluminium ore. The most recent numbers by the Ministry of Mines show that in the first trimester of 2020, 21mn tonnes of bauxite were exported, and 127,117 tonnes of alumina were exported from Guinea's only refinery, Friguia (Bulletin de Statistiques Minières 007, 2020). In recent years, various new players have arrived in Guinea. The biggest bauxite producer is now the Société Minière de Boké

(SMB)[13], followed by the oldest bauxite mining company in Guinea Compagnie de Bauxites de Guinée (CBG), Alufer, Guinea Alumina Corporation (GAC), Compagnie du Développement des Mines Internationales Henan Chine SA (CDM Chine)[14], Dian-Dian Bauxite Company (COBAD)[15], and Compagnie de Bauxite de Kindia (CBK)[16] (Bulletin de Statistiques Minières 007, 2020). Moreover, next to the companies in production various additional players have arrived and are currently in exploration phases or hold active concessions and research permits. Up to this date, we count 32 active bauxite mining companies present in Guinea, with this number highly likely to change quickly.[17] The map below shows the field site locations, the companies that were interviewed, as well as the mine sites of the other major bauxite producers in Guinea.

[13] SMB is a consortium consisting of Singapore's Winning Shipping Ltd, the French transportation and logistics company UMS, and the Chinese Shandong Weiqiao. The Guinean states holds 10%.
[14] CDM Chine is fully owned by the Compagnie du Développement des Mines Internationales Henan Chine, a Chinese-based company (Henan China).
[15] COBAD is owned by the United Company Rusal, which consists of 48% En+ Group, 13.7% Onexim Group, 15.80% SUAL, and 8.75% Amokenga Holdings.
[16] CBK is owned by Russky Alumny Ltd (Rusal) and the Guinean state holds 15%.
[17] Examples of these other companies are Dynamic Mining (Jaguar Gulf FZC), the Chinese TBEA Group, the Chinese Chalco Guinea Company, three projects by Anglo-African Minerals Plc, among others. The Guinea Mining Cadastre Portal provides updated information on all mining licences in the country with an interactive map: https://guinee.cadastreminier.org/en/

Map 1: Location of field sites, studied companies, and other major bauxite producers in Guinea



Legend:

Field Sites	Companies studied	Other major bauxite producers
1: Conakry 2: Alufer's Bel Air Mine in Boffa	1: Alufer's Bel Air Mining 2: Compagnie des Bauxites de Guinée (CBG) 3 : Guinea Alumina Corporation (GAC)	1 : SMB 2 : CDM Chine 3 : COBAD 4 : CBK

Source: Map created by authors with Scribblemaps & Google Maps. Open source for non-commercial purposes

Since its independence from France in 1958, bauxite mining has been at the heart of Guinea's post-colonial history. However, over the past six decades, the country's extractives sector has been continuously shaped by politics and gone through various stages under different government regimes. The first regime following independence under Ahmed Sekou Touré (1958-1984) was strongly influenced by Marxism, and a developmentalist approach was implemented with the goal of nationalizing foreign companies and transforming the mining sector. This strategy included a combination of state ownership and international cooperation. Following the death of Touré, power was assumed by Lansana Conté, who fiercely pursued liberalization policies (1984-1995) through structural adjustment, deregulation, revision of the mining code and renegotiation of mining contracts, with the aim of increasing revenues from mining activities. However, as noted by Campbell (1991), Conté's initial strategy had disappointing results and limited impacts on economic growth. Consequently, between 1995 and 2008, further liberalization policies were introduced, but this time they also included remedial measures to strengthen governance and pro-poor state interventions. This shift in strategy was largely driven by pressure from widespread social protests, where Guineans were demanding an end to unfavourable mining agreements and more positive impacts for local people. In 2010, a new mining era emerged under the administration of Guinea's first elected president, Alpha Condé. At this time, the mining code, mining contracts, royalty and duty payments were all significantly revised. A promise was made to tackle unemployment through new reforms, with the aim of making mining more impactful for local people and generating benefits for all Guineans in mining areas and beyond.

Throughout these various phases of extractivism, the challenge of achieving inclusive resource-based development in Guinea has remained. Guinea, like other extractivist states, depends on its mining revenues for achieving development goals. Arsel et al. (2016) refer to this relationship as the *extractive imperative*, where the continuity of extraction and the central role of mining revenues remain. They argue that extractive activities can be harnessed in three main ways to generate positive development impacts, namely: (i) through structural economic transformation in a Rostowian sense; (ii) by way of economic diversification and value creation through extractive activities; or (iii) by utilizing resource rents for achieving development through initiatives which prioritize poverty alleviation and inequality eradication (Arsel et al., 2016). Similarly, Bebbington (2011) posits that the local benefits of extractive industries are most often directed through three main channels – taxes and royalties, linkages, and spillovers[18] – as well as CSR programmes that focus on targeted and non-targeted social policy and social protection initiatives. Bebbington (2013) further identifies eight key factors that determine the degree, to which resource extraction can stimulate inclusive development including: employment, supply chain management, ownership, public ownership, planning and consultation, taxation and social expenditure.

All of these 'ingredients' for catalysing inclusive, resource-based development are essential elements in Local Content Policies (LCPs). Following precisely these ideas, LCPs are state-led policies that aim to increase the local share of employment and sales along the extractive value chain. LCPs are linked to productive development policies, as well as protectionist industrial policies, resource nationalism and import substitution policies, if they are implemented in a strict sense (Kalyuzhnova et al. 2016; Tordo et al. 2013). In practice, however, LCPs frequently introduce quotas for multinational extractive companies on domestic direct and indirect employment, as well as requirements to boost and support the capacities of local companies. Thus, LCPs have recently become a popular mechanism in resource-rich countries to build local linkages and improve the in-country benefits of their extractive sectors. There is now a growing LCP literature which outlines the opportunities and obstacles of LCPs, including LCP implementation studies and assessments (Calignano & Vaaland, 2018; Geenen, 2019; Kalyuzhnova et al., 2016).

Guinea's new mining code was introduced in 2011 and revised in 2013, and it prioritizes LCPs as its new centrepiece. Within the mining code, LCPs are specified through a series of quotas that mining companies must follow, both in terms of direct and indirect employment. Here, the focus is placed on so-called "*Guinéisation*", where there is maximum direct and indirect employment in mining catchment areas, and along the entire value chain, and where labour needs to be recruited domestically. Tables 5 and 6 depict the local quotas as specified in the mining code. These quotas indicate, for instance, that over its 1-5 year period of exploitation, an international mining company must recruit 15% of its

[18] Bebbington (2011) refers to so-called 'multiplier effects' from extractive activities. Following this idea, local development can be catalysed by local multiplier effects that include forward and backward linkages, as well as backwards multiplier effects of the mine through CSR programmes. This idea of maximizing the impacts of extractive activities along the value chain, but also of linking the activities to other sectors through widespread diversification, are also core elements of the concept of Hirschman's linkages (Hirschman 1958; Hirschman and Adelman 2013) and Singer's spillovers (Singer, 1950).

suppliers and contractors from local Guinean Small and Medium-sized Enterprises (SMEs). Moreover, at all stages of mine development, 100% of non-qualified employees working in the mines directly must be locally recruited.

Table 5: Minimum quotas reserved for Guinean SMEs per phase of mining activity

Research	Development	1-5 year period of exploitation	6-10 year period of exploitation	11-15 year period of exploitation
100%	20%	15%	25%	30%

Source: Created by authors, based on Guinean Mining Code (République de Guinée, 2011).

Table 6: Target of employed Guineans per development phase and employment category

Employee Category	Research	Development	1-5 year period of exploitation	6-10 year period of exploitation	11-15 year period of exploitation
Senior Executive	33%	20%	60%	80%	90%
Management	50%	30%	80%	90%	100%
Qualified employees	66%	40%	80%	95%	100%
Non-qualified employees	100%	100%	100%	100%	100%

Source: Created by authors, based on Guinean Mining Code (République de Guinée, 2011).

To provide further insight into how these quotas are intended to be executed, the Guinean Ministry of Mines has created numerous initiatives and laws in a self-proclaimed, multi-stakeholder process. Legal specifications on implementation and monitoring continue to be developed. However, the 2017 legal application document on LCPs (Lettre de Politique Nationale du Contenu Local, 2017), declared the main responsibilities and objectives of the government in the implementation of LCPs as follows:

- To deliver a favourable macroeconomic, social, legal and political framework to enable the creation of adequate employment and commercial perspectives;
- To eliminate political and judicial obstacles which may confront and hinder local suppliers;
- To work on programs for the education and support of companies;
- To work on special structures which will improve the productivity and competitiveness of the private sector.

In the same document, the LCP responsibilities of the mining companies are also outlined:

- To determine a representative for the implementation and monitoring of LCPs;
- To publish the information of the company's employment policies, supply of goods and services, and contribution to local development;
- To communicate the social strategy of the company to the government;
- To participate in the *Bourse de Sous-Traitance et de Partenariat* (The Supplier and Partnership Marketplace, BSTP).

The *Bourse de Sous-Traitance et de Partenariat* (BSTP) is one of the initiatives that the Ministry of Mines created to facilitate the implementation of LCPs. It is a platform where mining companies post their tenders and recruit Guinean SMEs directly. The goal here is to increase transparency and fair competition in recruiting Guinean SMEs, as well as to enable the creation of a reliable database. However, as we shall see, the newly established BSTP has to date had a limited impact in addressing the unequal advantages that some SMEs have over others, particularly with respect to the differences between local businesses and those that are located in the country capital, Conakry. In fact, since its creation in 2019, the BSTP has only posted tenders by two mining companies (GAC and Alufer) (BSTP Website, 2020).

In addition, although LCPs have become the centrepiece of Guinea's 2013 mining code, the question of whether or not LCP requirements are binding, or voluntary, has not always been clear and has sparked considerable debate. For example, a 2017 Ministry of Mines document outlined that, "its [LCP] implementation, on a voluntary basis by the mining companies operating in Guinea, is strongly encouraged by the government" (République de Guinée 2017a). This would imply that LCPs are a voluntary requirement. Similarly, in an interview, a senior government official pointed out that in the case of non-compliance, sanctions would be possible steps in the future, but for the time being, the main goal was to work with ranking systems for mining companies. He noted: "for them [mining companies], it is also a huge PR move. We also do want to crown a local content…champion that helped the most companies."[19] This should then work as an incentive. However, when speaking of the voluntary nature of LCPs, government interviewees also referred to the mining code, and stated that it was a binding requirement to follow the mining code. They further confirmed that LCP implementations were monitored and evaluated, and companies were expected to comply.

'Indirect LCPs'

When questioned about LCPs, key informants not only referred to the quotas and initiatives to support local employment and Guinean SMEs, but they also frequently spoke of two new mining revenue funds – the Local Economic Development Fund (FODEL) and the National Fund of Economic Development (FNDL). Indeed, this would seem understandable since the two funds are closely connected to LCPs. As Figure 8 illustrates, one of the main purposes of the new funds is to support employment activities, as well as other forms of "local development". A senior representative of the mining company, GAC, for instance, explained how he expected a more dynamic local economy to transpire because of the funds and the infrastructural projects they support. Referring specifically to the FODEL and the FNDL, he stated:

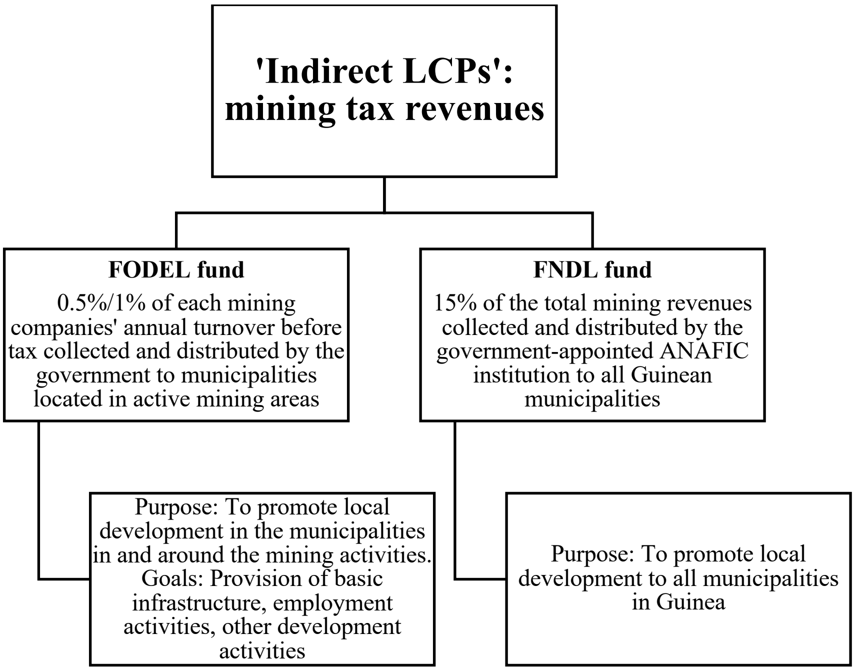
> "… I still feel like because the choice of projects is handled by the communities, the communal authorities, there is going to be a lot of projects surrounding school buildings, mosque building, and youth centres. These are going be the biggest things that we will be seeing in the next year or so. And, while that is great, just doing the building doesn't help to move the community (forward)…Once we get passed that, then you're going to have projects surrounding infrastructure, big infrastructure, electricity, roads, water, things like that. I don't think right now they are the main focus of those things. But we will see."[20]

Similarly, in a news report aired on the Guinean television channel, *Evasion Guinée,* which focused on the first payments of the company Alufer to the FODEL, there appeared to be widespread community support. In an interview with the vice-mayor of the village Doupourou in the Boffa préfecture who was

[19] Interview with BSTP representative, Conakry, July 01, 2019.
[20] Interview conducted in English with a GAC representative, Conakry, 02 July 2019.

present at the ceremony to receive the cheque, he explained that, "…the FODEL is a programme that will help us to create employment, infrastructure for the youth, for women, and for the whole community."[21] Such sentiments support the belief that the impact of the FODEL and FNDL will go beyond their immediate objectives of financing *ad hoc* development initiatives such as building wells and schools. Ultimately, projects supported by the two funds should contribute to increased employment, which is one of the central objectives of LCPs. In doing so, programmes to create employment and infrastructure would also contribute to a better SME climate, which, in the long term, could lay the necessary conditions for enabling the successful implementation of LCPs. As noted by Ackah-Baidoo (2020), SMEs presently account for some 90 percent of all businesses in sub-Saharan Africa and generate 60 percent of employment, so their potential to catalyse linkages at mines and stimulate local development should not be overlooked.

Figure 8: The two mechanisms of mining sector tax revenue distribution in Guinea

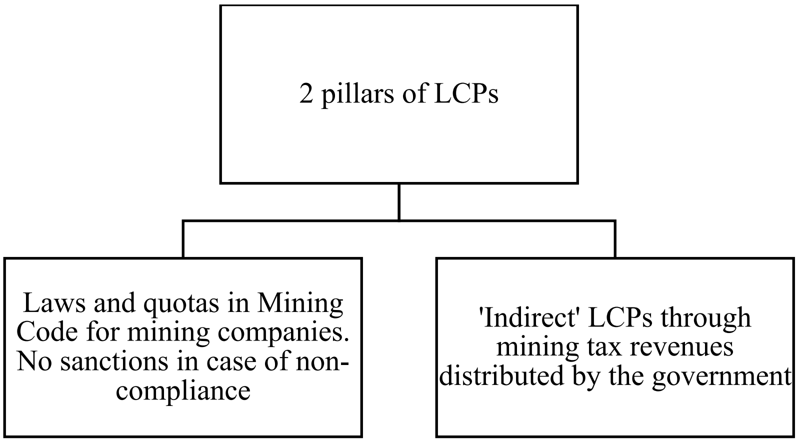


Source: Created by authors based on interviews and Government documents (République de Guinée 2019a; 2019b; République de Guinée 2017c).

[21] News Item Evasion Guinée TV Programme, 16 January 2020. Video provided by Alufer through their social media channel https://www.facebook.com/belairmining/videos/2461840667277569/.

Consequently, it can be argued that LCPs in Guinea consist of two main pillars (Figure 9). The first, direct pillar contains laws and quotas for mining companies to increase their recruitment of direct and indirect local employment. This also entails certain duties and responsibilities of the government and the private sector to provide the adequate infrastructure to enable a dynamic environment in Guinea that can respond to these goals. Although LCPs may be seen as voluntary and without a mechanism to enforce sanctions in case of non-compliance, their implementation is clarified through fixed quotas in the mining code. Companies are thus expected to comply, as their compliance is monitored and evaluated. The second pillar consists of 'indirect LCPs', namely mining tax revenue distribution. The expectation here is that these revenues will finance LCP projects in the long-term.

Figure 9: The two pillars of LCPs in Guinea



Source: Created by authors based on interviews and government documents.

Guinea's LCP path draws upon a variety of different types of LCPs that have been adopted in different contexts across sub-Saharan Africa. Table 7 illustrates some of the different kinds of private sector LCP involvement in resource-rich countries. On the one hand, this can involve a high degree of private sector independence where LCPs can be entirely followed by companies voluntarily through their CSR measures. On the other end, LCPs can also be drafted by the government and imposed with sanctions. Tax-based LCPs are a further option, where LCPs are financed through mining tax revenues. The case of Guinea seems to be a situation where mining companies have had a high degree of involvement in the establishment and implementation of LCPs, as they were involved in the creation of the mining code. However, although the implementation of LCP requirements in Guinea is highly expected and encouraged, they remain without sanctions. Indirect LCPs in the form of the new tax funds allow for greater government agency, where the government independently organizes the tax revenues that are obtained from mandatory tax income.

Table 7: Types of private sector LCP involvement, including Guinea (GN)

Degree of private sector independence and involvement in terms of LCP creation and implementation	Characteristics of LCPs
High	LCPs as CSR projects and initiatives without government involvement
High	Voluntary LCPs, drafted and implemented by the government and private sector. No sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government and private sector. With sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government. Without sanctions
Low	Mandatory LCPs. Drafted and implemented by the government. With sanctions
Low	Tax-based LCPs. LCPs exercised by the government only, financed through mining tax revenues

GN

Source: Created by authors, based on LCP literature review (Bridge, 2004; Calignano & Vaaland, 2018; Issabayev & Rizvanoghlu, 2019; Kalyuzhnova et al., 2016; Lange & Kinyondo, 2016; Macatangay, 2016; Ngoasong, 2014; Vaaland et al., 2012; White, 2017).

In summary, the implementation of recent mining sector reforms in Guinea clearly illustrates that adopting the right type of LCPs is a complex and challenging process. Those policies that are too strictly implemented and government-controlled fall into the category of protectionism and resource nationalism, and are often even banned under World Trade Organization rules (Kalyuzhnova et al., 2016; Ramdoo, 2015). To bypass this situation, many countries have adopted LCPs that have shifted to a softer and more voluntary approach, in order to better accommodate the needs and demands of the private sector and investors (Lange & Kinyondo, 2016; Ovadia, 2016). There is much debate in the LCP literature about the use of restrictions, sanctions, and binding measures (Ramdoo, 2015; Tordo & et al, 2013). Although Guinea has tried to adopt a mixed approach, numerous obstacles remain, as will become apparent in the discussion to follow in the next two sections of the paper.

3.4. Opportunities, Limits and Obstacles to the LCP initiative: Government and civil society perspectives

During interviews carried out between May and July 2019, government and civil society representatives shared considerable insights into the opportunities, limits and obstacles to the implementation of the LCP project in Guinea. Initially, many interviewees expressed great optimism for recent policy reforms, celebrating LCPs as a "revolutionary" achievement, particularly when compared to the legal frameworks of past administrations. At the heart of most discussions, was acknowledgement of the potential for LCPs to address unemployment, which was noted as a major concern by government and civil society representatives. Many interviewees saw LCPs as a mechanism for generating new employment opportunities along the bauxite mining value chain, particularly for young Guineans. For example, a senior government official clearly expressed his admiration for LCPs, pointing out that "…it is rare to see such a commitment to local content in a mining code…it was a very courageous reform, that first of all we need to welcome."[22] Another senior government official reinforced this stance, describing LCPs as,

> "…revolutionary, between parenthesis. This [mining] code tries to achieve an equilibrium, between the interests of the mining companies on the one hand [beats on the table], the interests of the government [beats on the table], and also, and foremost, the interest of the population [beats on the table]."[23]

However, despite this optimism, a variety of obstacles were also referred to. These challenges could broadly be characterised as being: a) technical or capacity related; or b) stemming from governance issues and unequal power relationships.

a) Technical and capacity challenges

From a technical/capacity perspective, the mining industry is capital-intensive and overwhelmingly requires skilled labour. It therefore can only offer limited opportunities in terms of local employment.

[22] Interview with Mining Ministry official, Conakry, 02 July 2019.
[23] Interview with Mining Ministry official, Conakry, 10 June 2019.

This reality clashes with disproportionate demands and the high expectations of Guineans, which often causes tension and disillusion among local populations. Consequently, some interviewees noted that LCPs had not generated the amount of meaningful employment they had anticipated, blaming this on the general economic conditions in Guinea. For example, when asked about the current employment situation in Guinea, one government official noted:

> "…it is complex…it is a real problem…the economy has to be dynamic…it is the economy that creates employment. By not having a dynamic, inclusive economy that pushes the growth rate, it is very difficult."[24]

In a related vein, other interviewees also suggested that the Guinean business environment was difficult terrain to negotiate for LCP implementation. It was reported that the labour force and local SMEs not only lacked the required technical skills and capacities, but they also could not meet the high demands, standards and qualifications that were requirements of the mining sector. Guinean businesses, it was noted, lacked the technical and financial means to meet international standards, and their infrastructure was often inadequate, where a lack of electricity and internet access had become a major concern across the country. This challenge was compounded by the fact that local SMEs often suffer from tax disadvantages that can make their services and products more expensive, particularly when compared to higher quality imported goods and services. More structurally, the business culture in Guinea was described as being problematic, where quality, norms, and delivery times were of a low standard.

Many interview respondents further spoke of Guinea's lack of adequate education as a major contributing factor to the country's failure to meet the demands of the labour market. This issue is of course not limited to Guinea but is rather a challenge that many countries in sub-Saharan Africa are faced with. Education statistics across the continent paint a stark picture, with one in three children failing to complete primary school, less than 50 percent of children completing secondary school, and less than 10 percent going on to enrol in higher education (Ackah-Baidoo, 2020). The African continent

[24] Interview with a representative from the Youth Ministry. Conakry, 28 June 2019.

is often described as having the world's least-skilled workforce. In Guinea, this problem remains acute, as one government official explained:

> "The level of education and knowledge is a problem. The (school) curricula need to be modified to respond to the needs of the market…The small and medium-sized enterprises in the Boké region[25] do not have the adequate means to work for the mining sector. Access to financial capital is also missing, so they [the local companies] cannot grow."[26]

Such a dearth of local skills and technical knowledge has created an unequal playing field, where small businesses in mining areas cannot compete with their more well-resourced counterparts located in the capital city, or indeed with international suppliers that can ensure efficiency and minimize costs. The situation was well described by one civil society representative in Conakry:

> "…certain SMEs do not have the capacity, the financial, technical, and even material capacity to respond to the contracts. When we have a tender, it is the big companies from Conakry [that succeed] because they have everything. They have the qualified human resources, the required equipment and the facilities to get the financial means from the banks. That's why I say, we need to organize this sector really well in Boké."[27]

In order for LCPs to be effectively implemented, there must be a commitment to developing capacity and creating a skilled workforce that is capable of meeting the needs of international mining companies. However, interviewees also noted that capacity issues further extended to the government's inability to effectively enforce and sanction violations of LCPs. In particular, respondents raised questions about the process of monitoring and evaluation, including problems arising from logistics and the lack of capacity amongst local administrators, who were meant to be implementing LCPs and conducting monitoring. A civil society representative explained this further:

[25] The Boké region in the North-West of Guinea is the area with the largest bauxite deposits and the most active bauxite exploitation zone. All three interviewed companies operate there, with GAC and CBG directly based in the central Boké préfecture, whilst Alufer's Bel Air Mine is in the Boffa préfecture.
[26] Interview with government official, via Skype, Conakry, 04 June 2019.
[27] Interview with civil society representative, Conakry, 30 May 2019.

> "…in the zones, there are préfectures where a person [an official] does not even have a motorbike. How will this person verify the implementation? They have no means, communication, or education. They can't even read…there are mayors that cannot read or write. But we will give them billions to handle. Those who are not familiar with accounting, need education…It is a problem. The FODEL is a good initiative, but no Guinean can tell you if it will work or not."[28]

Related to both the deficiency in local skills and technical difficulties associated with LCP development, delivery, and enforcement, many government officials also expressed capacity-related concerns about the legal and institutional aspects of LCPs. The process of drafting LCP instruments, it was explained, continued to be a cumbersome and drawn out ordeal. In fact, it was reported that the finalization of the legal application documents meant to explain LCP implementation had been ongoing since 2013 and was still incomplete. In the words of one influential international NGO representative:

> "We have the Mining Code. But 60 new regulations should have implemented. As of now, we only have 10 or 11. There is some catching-up to do…there is a lack of binding deadlines, and the hierarchical structure and consequences in the case of non-compliance are missing. For instance, the FODEL came five years too late. The parliament should have monitored this."[29]

A government legal expert interviewed in Conakry underscored this concern and further added:

> "For an application of the law, the law needs to be complete. We have the part of the announcement of the principles, but the implementation, the texts and details are not there. We want to implement the law, but we don't know how. These are problems."[30]

[28] Interview with civil society representative, Conakry, 07 June, 2019.
[29] Interview with international NGO representative, Conakry, 29 May 2019.
[30] Interview with government legal expert, Conakry, 03 June, 2019.

Further related to this issue, an additional problem was noted that stemmed from the perceived dual character of LCPs, as the legislations were not retroactive. As such, the same government legal expert noted that LCPs were often only selectively implemented and enforced. He explained:

> "…it [the new mining code] will continue to suffer from duality. There are companies which have been here since 1965. We had a Mining Code in 1986. There are new companies which have arrived, there are numerous regimes, there are some generations of mining companies. How will we get out of this? This is a difficulty. We will need to get past this. Either in a renegotiation with mining companies, or we will wait until the expiration with the goal of renewing mining contracts."[31]

b) Governance challenges

Further interactions with representatives from the government and civil society suggested that at the heart of many legal challenges associated with LCPs were governance issues and power relationships that were constraining their effective implementation on a variety of levels. Effective governance is an important pre-condition for the implementation of LCPs, and above all, interviewees registered widespread concern for the entrenched nature of national level corruption in Guinea. One international NGO representative, who was highly regarded by the government, went as far as to suggest that, "Guinea is a ghost state. The administrators only serve their own interests. They have lost their feeling to serve their population."[32] Other civil society representatives were particularly vocal about fears of entrenched power hierarchies and structures that they believed were hindering the successful implementation of LCP requirements, as well as the 'indirect LCPs', most notably the unequal distribution of mining tax revenues. This challenge, it was reported, was being further compounded by a lack of monitoring for anti-corruption laws, and a chain of corruption was identified, stretching from local mayors, to the governors, to *préfets*, and up to the ministers. The systemic nature of this problem was further elaborated upon by one local NGO representative:

[31] Interview with government legal expert, Conakry, 03 June, 2019.
[32] Interview with representative of an international NGO, Conakry, 29 May 2019.

> "With good follow-up, and without corruption, it [local content] could work. But the other problem in Guinea is corruption. People can be educated, but it is the corruption in the municipalities, in the mayor's offices where money is received from the Ministry of Mines, that is a big problem. Because here, it is a chain. It is not just the mayor who takes money. It is the mayor, the national director, the minister. And who will go after the mayor? Because the mayor, he 'eats' his money with the governor, the *préfet*, and the minister. Who will go after the mayor? And this is the problem here. That's why everyone will tell you it is difficult. How can we fight effectively against corruption?[33]

Interestingly, government representatives were also concerned about challenges created by unequal power dynamics. One national government representative who worked directly on tax revenue distribution complained about a lack of cooperation from the local municipalities, where local administrators refused to follow the orders of the national ministries and institutions. He explained that some local administrators refused to comply with LCP legislations, and they did not recognize the new funds and mechanisms. In fact, the interviewee went as far as to describe local administrators as rebellious children who did not want to listen to their "Papa" in the capital Conakry.[34] This power struggle between the capital and local municipalities was also noted previously in terms of competition between companies in the mining areas and those in Conakry. Interviews carried out in the mining areas suggested that SMEs in Boké were disadvantaged when compared to the big SMEs in Conakry, which had better access to finance and technology.

As is the case in other resource-rich African countries (e.g. see Ayanoore, 2019; Geenen, 2019; or Nwapi, 2015), our respondents further noted that in Guinea, corruption and favouritism were major factors in shaping the LCP process. In the words of one representative from a local NGO: "When there is a lack of opportunities, and employment is rare, it is favouritism at play. It is the cousins, the friends, the brothers who are recruited without looking at the skills."[35] However, even the Guinean government

[33] Interview with local NGO representative, Conakry, 07 June 2019.
[34] Interview with government official, Conakry, 05 July 2019.
[35] Interview with representative of a local NGO, Conakry, 23 May 2019.

was acutely aware of these issues and acknowledged the dangers they posed to the successful implementation of LCPs. When asked about the monitoring and control of authorities involved in LCP implementation, a company official from GAC noted:

> "… I remember that there was a big conference when they announced those two funds back in April. And the president was like, any mayor that marries another wife with this and this fund is going to be fired. [laughs] Everyone just laughed. But hey, it's true! …they are scared that they will misuse this money. That they will build their own houses. Buy cars, send their kids to study abroad, you know. So yeah, those fears are real. They are real."[36]

In the past, corruption and inequality have been major sources of frustration among ordinary Guineans, at times fuelling violent unrest in the country. The political shift towards mining sector reforms has in many ways been a direct result of such protests and the pressure to make the mining industry more inclusive for all Guineans (Knierzinger, 2015; Posthumus, 2016). Corruption and favouritism in LCP implementation mean that large amounts of money are often misused and fail to provide the much-needed social spending that country needs. They are also major factors in strengthening resource enclavity, which can reproduce the inequalities that stoke social tension and trigger conflict.

Without addressing such inequality, numerous national and international NGOs have warned of the potential for local-level conflict to arise, especially among the youth. For example, the Guinean NGO, *Leadership Jeune pour la paix et le développement en Afrique-Guinée* (LEJEPAD),[37] carried out a study in 2018 which warned of the ongoing conflict potential in the Boké region. One of the mitigation techniques proposed was to make new livelihood opportunities available to young people outside of the bauxite mining industry, as the main focus of the youth had long been on employment from the mines. Representatives from LEJEPAD noted that the youth of the Boké region had a tendency to "abandon"

[36] Interview conducted in English with a GAC representative, Conakry, 02 July 2019.
[37] LEJEPAD (Leadership Jeune pour la paix et le développement en Afrique-Guinée) is based in Conakry but operates all over Guinea to support the Guinean youth in order to contribute to peace and stability.

all their activities, in the hope of solely profiting from the mines. In most cases, such opportunities were not available and played a role in fuelling conflicts (LEJEPAD, 2018).

3.5. The corporate response to LCPs: Between curiosity, optimism, and suspicion

The perspectives of the third actor group, mining companies, offer further insight into how the private sector has responded to state-directed LCPs, following decades of state withdrawal. Despite demonstrating considerable optimism and openness for this new path, corporate interviews revealed that there are some clear reasons why mining companies also seem to be suspicious of LCPs, creating a situation which makes cooperation with the government challenging at times.

While the mining company officials we interviewed were concerned about many of the same obstacles that were discussed in the previous section, they were particularly vocal about the dilemma of reaching target profit margins while at the same time meeting LCP requirements. Officials at GAC, for instance, stated that although they would like to maximize the use of local suppliers, often the quality did not correspond to their standards and requirements. This challenge of a poorly developed SME environment in sub-Saharan Africa has often been attributed to the issue of the "missing middle", where there is a lack of an entrepreneurial class who have been able to progress successfully from being recipients of microfinance to accessing the conventional bank finance needed to develop their businesses further (Alibhai et al., 2017). In some cases, it was reported, not only was the quality of domestic goods and services being supplied locally poor, but they were also more expensive. Similar sentiments were confirmed by interviewees who detailed a number of negative experiences with local suppliers, all of which had significant impacts on profits. A representative of the World Bank's International Finance Corporation (IFC) in Conakry further spoke of "bad memories" that some mining companies had of the unreliable delivery of local goods and services, and a lack of expertise.[38] The representative from GAC elaborated on this concern:

[38] Interview with representative of the World Bank's IFC, 28 June 2019, in Conakry.

> "…another issue is that sometimes you find (local) SMEs that have the capacity to do the work. But they don't have the professionalism to be consistent on how they deliver on the promises on their contract. Let's say we have a chicken farm and we say we need a hundred chickens per week. For personal reasons they'll come up to you and say, I lost a cousin, I had a wedding. I wasn't able to produce all the chickens you needed. Those are the things that are very recurrent. It's one of the reasons as well why the mining companies tend not to work with SMEs. Another reason is they are more expensive. For the same level of service, the cost might be two or three times as much as an international vendor."[39]

Interestingly, in contrast to their doubts about LCPs, representatives from all three mining companies expressed a strong commitment to their own CSR initiatives. In the case of the oldest and most established mining company, CBG, CSR programmes have been developed over decades and many of these initiatives have strong links to LCPs. For example, CBG, has created its own programme to train and employ both local individuals and small companies. In the process, CBG created 14 small companies in 2010, and provided them with training and ongoing assistance so that they could be used as contractors in its mining operations. In recent years, the objective has been expanded to make these companies more autonomous and provide the capacity for them to seek employment in other markets. However, when asked about how the company would embrace state-directed local content policies and on its view of the new funds, the respondent merely replied that CBG would continue its "own conventions" and voluntary payments. To date, CBG has not been involved in the BSTP and our interviews suggest that the company plans to continue to primarily address employment issues through its CSR strategies.

Alternatively, our interviews with representatives at Alufer revealed that the company has created its own database of local companies near its mining operations, providing an inventory of the capacities and skills that are available on the ground. Like CBG, both Alufer and GAC have provided training and employment programmes for individuals and local SMEs. In interviews with officials at all three

[39] Interview with GAC representative, Conakry, 02 July 2019.

companies, respondents expressed a strong commitment to these activities, describing them as important tools for responding directly to the enormous demands of the individuals in local municipalities. As one GAC official explained when asked about how the company plans to balance its CSR commitments with LCPs requirements:

> "I think that going into the future in the long term, we will still be doing a little bit of both. We will still have programs that we will run, because as part of our financing, I think that we have certain commitments about how we help communities around us."[40]

In interviews with mining company representatives, it was again revealed that political dynamics in local administrative areas were having a significant impact on LCP implementation. For example, interviews with officials at Alufer suggested that a political transition was taking place, where the older generation of administrators was being challenged by a younger cohort. Although Alufer representatives viewed this in a pragmatic way, they also expressed concern that this might impact LCP implementation. This position was reinforced by one government official from the ANAFIC office that is responsible for the distribution of the FNDL, who raised concerns about political transitions and the disruptions it causes to LCP implementation. He gave the following example:

> "As you know, the mayor of Ratoma, has passed away. Now, for his succession, there is a conflict between two political parties. And we have to send them the remaining 30 percent of their subsidy from 2019 to their bank account, and there is nobody to sign!... so these are difficulties, the political situation, as now it is about the public funds. The 15 percent of the mining revenue, this is not the money of a funder anymore. This is a public fund."[41]

Thus far, it remains to be seen how, specifically, such political transitions will impact LCP implementation. However, in terms of direct interactions between the local political administration and the mining company, CBG has also criticized local authorities for trying to take control of its individual

[40] Interview conducted with GAC representative, Conakry, 02 July 2019.
[41] Interview with ANAFIC government official, Conakry, 05 July 2019.

CSR commitments in terms of budget and finances. For example, one interviewee pointed out that local authorities wanted to manage the budget of some of CBG's infrastructure projects, and "some authorities wanted to do everything."[42]

In short, the focus on the mining companies' views and responses to LCPs revealed a number of crucial obstacles. Most notably, it became clear that mining companies had their own agendas, which were largely driven by the need to make profits. This, to some extent, was not compatible with LCP commitments, and even though mining companies may, in theory, be supportive of LCPs, some fundamental difficulties were noted. For example, it was apparent that the mining companies, especially CBG, were concerned about the increasing state presence that undermined their autonomy that had been created through their own CSR initiatives and arrangements in their mining localities. Consequently, the response of mining companies has been to create their own 'proto-LCPs' through CSR initiatives.

Overall, there remains considerable criticism and a lack of trust for the national and local government's new involvement in LCPs. Returning to the classification of LCPs in Guinea (Table 8), conversations with mining company officials confirmed that prior to state-directed LCPs, companies were committed to their own CSR initiatives that in many projects included LCP elements. However, whether or not the duality of LCPs can endure on a long-term basis is open to considerable debate.

[42] Interview with CBG representative, Conakry, 15 June 2019.

Table 8: Types of private sector LCP involvement, including Guinea

Degree of private sector independence and involvement in terms of LCP creation and implementation	Characteristics of LCPs
High	LCPs as CSR projects and initiatives without government involvement
High	Voluntary LCPs, drafted and implemented by the government and private sector. No sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government and private sector. With sanctions
Medium	Mandatory LCPs. Drafted and implemented by the government. Without sanctions
Low	Mandatory LCPs. Drafted and implemented by the government. With sanctions
Low	Tax-based LCPs. LCPs exercised by the government only, financed through mining tax revenues

Pre- 2013 & ongoing

State-directed LCPs

Source: Created by the authors, based on LCP literature review (Bridge, 2004; Calignano & Vaaland, 2018; Issabayev & Rizvanoghlu, 2019; Kalyuzhnova et al., 2016; Lange & Kinyondo, 2016; Macatangay, 2016; Ngoasong, 2014; Vaaland et al., 2012; White, 2017).

Above all, the government needs to demonstrate transparency and mitigate corruption, in order to confirm itself as a credible new dominant actor that can provide viable LCP programmes. However, it remains to be seen how much autonomy mining companies will be willing to give up if LCPs remain state-directed, or if the government will live up to its own expectations to take charge. Ultimately, mining companies will be responsible for implementing any mining reform policy changes. If this can be combined with their own agendas, and if the government plays an adequate part, successful LCP implementation will be more likely.

3.6. Conclusion: Towards a more holistic LCP strategy?

In recent years, resource-rich countries across sub-Saharan Africa have entered a new era of post-neoliberal extractivism. Such moves towards so-called ‘neo-extractivism’ or ‘progressive extractivism’ contain re-distributive elements which aim to overcome the negative impacts of extraction and to provide inclusive resource-based development. Following this trend, mining sector reforms continue to be implemented, many of which prioritise LCPs as their centrepiece.

In the context of Guinea, this paper has aimed to deepen understanding of LCP mining sector reforms and their implementation. In critically exploring the country's current LCP trajectory, it has become apparent that both direct and indirect LCPs potentially offer significant opportunities to achieve more inclusive resource-based development. However, a variety of obstacles – ranging from economic to political to institutional – continue to frustrate progress and ensure that the benefits of LCPs do not reach their intended targets.

Adopting a range of strategies from the LCP experiences of other resource-rich countries, Guinea's LCP model has to date therefore yielded disappointing results. Following a 'mixed LCP path' that seeks to generate both direct and indirect impacts while allowing companies to maintain their CSR commitments alongside local content requirements, the government's message to mining companies has not always been clear. Although the Ministry of Mines claims its LCP requirements are mandatory, the guidelines in the mining code are not enforced with sanctions, allowing LCPs to be interpreted as voluntary. While this same situation has also been observed in other developing countries, it may also be indicative of a trend towards more flexible approaches where LCPs are 'softer' (Lange & Kinyondo, 2016; Ovadia, 2016). Other research has convincingly demonstrated that when LCP regulations are too strict, they can lead to negative impacts and criticism (Kalyuzhnova et al., 2016; Ramdoo, 2015). However, the danger remains that a lack of strict enforcement and sanctions may also slow and hinder LCP requirements from being implemented at all.

The findings from this study reflect earlier observations by Knierzinger (2016) who analysed Guinea's 2013 mining code. The main message from this research was that there were serious concerns about the successful implementation of mining sector reforms, primarily because of administrative obstacles and a lack of effective monitoring and evaluation. Perhaps more seriously, however, Knierzinger argued that "in every region and préfecture, the administrative authority selectively applies the texts which correspond to their particular interests" (Knierzinger, 2016; p. 6). This dynamic of clashing interests, power and fundamental differences among administrators, illustrates how government actors are active agents that shape policies by way of their own views, agendas, and capacities. These dynamics must be considered when implementing any policy change, but this is particularly the case with LCPs, as a top-down national project that relies on local implementation. Individual administrators and stakeholders need to be considered and included in the LCP process to ensure successful implementation. If LCPs are viewed as an elitist, national project imposed centrally from Conakry, and the needs and capacities of local administrators, municipalities, and mining companies are not taken into account, the future of LCPs will be problematic, and their impacts will likely be disappointing.

In considering the response of the mining sector to LCPs, historical factors must also be taken into account, where the relationship between the Guinean state and private sector has waxed and waned over the years. Most recently, neoliberal extractivism has led to a minimization of state involvement, which Campbell (2009) has dubbed the *retraite de l'état* (state withdrawal) or *absence selective* (selective absence).[43] They identify this *retraite* as an unprecedented definition of the role of the affected mineral-rich state, which reduced state sovereignty and undermined legitimacy. This is particularly problematic in states such as Guinea, where only after liberalization has been implemented has there been a realization that there is a preference for a *re-réglementation* of the state, to play a more decisive role in the regulation and facilitation of investment. Recent mining sector reforms, including LCPs, suggest that the government is attempting to play a more decisive and regulatory role now. The new tax funds and quotas in the mining code, as well as the newly created institutions, show an unprecedented level of commitment by the Guinean government to be involved in the mining sector. This is the situation in theory. However, it remains to be seen how decisive and regulatory the Guinean state will be in practice.

Coinciding with the retreat of the state, evidence also suggests that the autonomy and rights that were given to mining companies during this period have strengthened the role that CSR-based initiatives have assumed in filling the 'development gap' in mining localities. Hence, there are mixed feelings about the return of the state, where in particular, the oldest mining company, CBG, seems suspicious to some degree. Likewise, Alufer and GAC, despite their openness and optimism for the new initiatives, have outlined their concerns about corruption. Trust will need to be established, but also more evidence

[43] Also see Campbell and Laforce (2010); and Szablowski and Campbell (2019).

is needed to ensure that the government is in the long-term committed and capable of successfully implementing LCPs.

Consideration must also therefore be given to the realities and interests of the mining sector, which in some instances clash with LCP commitments. Policy changes must be more inclusive, but must also reflect diversity within each stakeholder group. But as was clearly expressed by all three mining companies that we interviewed, they have no plans to let their CSR initiatives be replaced by state-directed LCPs. Hilson and Ovadia (2020) reinforce this position, acknowledging the 'blurred lines' between CSR and LCPs, concluding that LCPs "must be clearly distinguishable from CSR programmes." More insight into this discussion is needed to explore how LCPs and CSR might coexist, given the clear willingness of mining companies to continue and protect their own initiatives.

In short, achieving inclusive resource-based development is a long and complex path for extremely poor countries like Guinea. Specifically, the goal of implementing LCPs and transforming the country's immense natural resource wealth into viable opportunities and employment for its predominantly young population, remains a significant challenge ahead. As the bauxite boom in Guinea continues, and despite promising reform efforts, the inherent structure of extractivism and its unequal nature remain. LCPs are not implemented in a vacuum; they operate in complex environments with diverse and ongoing challenges, that need to be implemented hand in hand with further structural reforms.

4. “IN GUINEA, THERE ARE TWO TYPES OF MINING COMPANIES”: AN ANALYSIS OF THE DIVERSE LOCAL CONTENT APPROACHES OF THE BAUXITE MINING COMPANIES IN GUINEA[44]

4.1. Introduction

Countries around the world, including the resource-rich low-income countries of sub-Saharan Africa, are increasingly turning to local content policies (LCPs) to achieve inclusive resource-based development (Kalyuzhnova et al., 2016; Ramdoo, 2015). LCPs are a type of industrial policy that leverage linkages (Hirschman, 1958) and spillovers (Singer, 1950) through the maximisation of local direct employment and local procurement within and beyond the value chain of industrial mining activities. According to Geipel (Geipel, 2017; p. 434) “local procurement refers to the purchase of goods and services used in the mining process from suppliers within the host-country of operation.” In Guinea, a resource-dependent low-income country that possesses the world’s largest bauxite reserves with a long history of industrial mining activities, natural resources have not created visible socio-economic benefits for its host communities (Campbell, 2009; Knierzinger, 2014, 2018). To overcome resource curse (Auty, 1990; Sachs & Warner, 2001) and enclave extractivism (Ferguson, 2005, 2006), the previous administration under Alpha Condé (2010–2021) launched state-directed LCPs as a mining sector reform tool (Maponga & Musa, 2021; Wilhelm & Maconachie, 2021). In Guinea, the 2013 revised Mining Code, legal application documents and decrees demand from mining companies to maximise national direct and indirect employment, as well as local procurement in their activities from exploration, construction to operation. Specific targets and reporting requirements are defined that mining companies must follow. For instance, during exploration of a mining project in Guinea, 10% of all contractor and supplier companies must be owned or controlled by Guinean nationals. During the

[44] This chapter is published as an original research article in Wilhelm, C. (2023). ‘In Guinea, there are two types of mining companies’: An analysis of the diverse local content approaches of the bauxite mining companies in Guinea. *Resources Policy*, 83, 103581. https://doi.org/10.1016/j.resourpol.2023.103581

11th and 15th year of the operating period, this share increases to 30%.[45] Similarly, in terms of employment quotas, the quotas evolve during the phases of the mining companies' phase. During all phases, unskilled workers must be 100% Guinean nationals. During the first year of the operating period, 60% of all senior managers must be Guinean nationals, increasing to a share of 90% from the 11th year of operation onwards.[46] Next to these direct tools (quotas and requirements on local employment and procurement), training must be provided by mining companies to further boost the capacities of national employees, contractors, and Small and Medium Sized enterprises that are owned or controlled by Guinean nationals. There are also a range of indirect tools, such as the participation of mining companies in the state-initiated Supplier and Partnership Platform (the *Bourse de Sous-Traitance* [BSTP]), and broader reforms to strengthen the business and entrepreneurial environment. Local content in Guinea has become a topic of wide interest, especially during the 'year of local content' in 2017 when most of the legal application documents and decrees were introduced and has since then been a prominent topic particularly during political campaigns (Wilhelm, 2022).

With the increasing number of international mining companies in Guinea, well-implemented LCPs could harness their large potential. Since the local procurement spending by mining companies is larger than the spending related to governments, salaries and community investments combined (Publish What You Pay, 2021), local suppliers might benefit significantly here. On top of that, the other two local content components – direct employment and access to training and skills development for individuals and local companies – are promising. The literature has analysed the benefits of local content in-depth. It must be acknowledged that LCP implementation is complex and has various obstacles (Calignano & Vaaland, 2018; Hansen et al., 2014; Lebdioui, 2020; Macatangay, 2016; Tordo & et al, 2013). To what extent LCPs are an effective tool to achieve inclusive resource-based development by overcoming the Resource Curse and enclave extractivism is questionable. In many case studies, including in Guinea, LCPs have not yielded the expected results (Hilson & Ovadia, 2020; Maponga & Musa, 2021; Wilhelm & Maconachie, 2021). A major concern is finding the right balance and scope of LCP regulations.

[45] Article 107 of the Guinean Mining Code
[46] Article 108 of the Guinean Mining Code

LCPs, if too strictly implemented, can be seen as protectionism and resource nationalism. Scholars believe that this may harm the overall national and global economy, reduce foreign direct investment and create an unfavourable business climate (Kalyuzhnova et al., 2016; Kalyuzhnova & Nygaard, 2009; Ramdoo, 2015; Tordo & et al, 2013). Hence, a 'state-business alliance' (Kalyuzhnova et al., 2016; p. 24) where the state, investors and mining companies agree on the conditions and context of LCPs is crucial for its successful implementation (Macatangay, 2016). Since mining companies have increasingly begun to improve their social and environmental practices in line with their Corporate Social Responsibility (CSR) strategy to obtain their Social Licence to Operate (SLO) with the host communities, some of these CSR activities in fact resemble LCPs (Giuliani, 2016; Goerg et al., 2016; Logsdon & Wood, 2002; Mbilima, 2019; Rajak, 2011; Wilhelm & Maconachie, 2021). However, the LCP and CSR literature has not yet addressed these dynamics.

This paper aims to analyse the implementation of LCPs by mining companies and understand the different motivations that explain their response to these practices. More specifically, through the case study of Guinea's bauxite sector, the study investigates how the major bauxite mining companies in Guinea respond to state-mandated LCPs and why their response differs. This paper begins with a presentation of the key literature and concepts, as well as the methods. Section four examines the performance of the major bauxite mining companies in Guinea in terms of LCPs. Section five compares their performance and commitment and analyses why these differences exist. The implications of this analysis are discussed in section six and concluded in section seven.

4.2. Key literature and concepts

Resource-abundant countries implement LCPs to increase the local benefits of extractive activities (Kalyuzhnova et al., 2016). Historically, countries that are rich in natural resources have been confronted with the resource curse. This concept stipulates that resource-abundant countries are more likely to experience negative economic growth, conflict, poverty and poor human development (Auty, 1990; Nankani, 1979; Ross, 2019; Sachs & Warner, 2001; Stevens, 2015). In resource-rich countries like Guinea, extractive activities have been historically shaped by an enclave character, where foreign extractive activities are geographically excluded, lack connection with the country's economy at large and are dominated by the mere export of raw commodities (Bah, 2014; Campbell, 1991; Diallo, 2019; Emerson, 1982; Ferguson, 2005, 2006). The tools to overcome these negative impacts are linkages and spillovers. The idea is to expand and diversify the local sourcing of activities within and beyond the extractive value chain where ‘one thing leads to the other.’ Consequently, these activities spillover to other industries, hence diversifying and reducing the dependence on extractive activities that are temporally restricted and shaped by a boom and bust characteristic (Hirschman, 1958; Morris, 2012; Pijpers & Eriksen, 2018; Singer, 1950). Another crucial tool to overcome the resource curse is strong institutions. In many cases, institutional failures are to blame for the lack of diversification and inclusive resource-based development (Bebbington, 2011, 2013, 2018; Karl, 1999, 2007).

It is in this context that resource-rich countries have recently embarked on reforms to strengthen resource governance and state involvement. This follows decades of neoliberal extractivism where the state had been selectively absent and where authority, legitimacy and services were shifted to being managed by the private sector (Béland et al., 2021; Campbell, 2010; Szablowski & Campbell, 2019). Through regional initiatives such as the Africa Mining Vision and other national reforms, a return to developmentalism (the state’s intervention in economic and social institutions to achieve development and maximise social benefits) can be observed (North & Grinspun, 2016). Such reforms are often referred to as neo-extractivism. Although extractive activities continue, the state facilitates the redistribution of benefits from extractive activities through social spending (Childs, 2016; Childs & Hearn, 2017). LCPs fit this zeitgeist. Extractive activities are regarded as a catalyst for diverse local economic activities and employment opportunities. LCPs are also an example of improved resource governance and strong institutions (IGF, 2018; Kragelund, 2019; Ramdoo, 2015).

According to Bebbington (2013; p. 25), another component of effective resource governance to achieve inclusive resource-based development is for the state to channel extractive activities. This is done through ‘channels of inclusion’ to enhance social spending. This means that (i) employment, (ii) supply chain management, (iii) CSR and transparency, (iv) (public) ownership, (v) planning and consultation, (vi) taxation and social expenditure (vii) and environmental policies can improve the social spending, policies, and protection.

Indeed, as it was mentioned in the introduction, the oil, gas, and mining industries have recently begun to increase their social spending in host communities through their CSR approaches to strengthen their SLO. In many cases, this has followed previous community conflicts (Giuliani, 2016; Goerg et al., 2016; Ho, 2009; Logsdon & Wood, 2002; Mbilima, 2019; Moon et al., 2005; Rajak, 2011; Vertigans et al., 2016).

It is within this context that LCPs operate. State-mandated regulations, sometimes in the form of quotas, with the aim of achieving inclusive resource-based development are created, implemented, and enforced. This process is contingent on the role of the state and relevant institutions, as well as on those who must implement these rules – in this case, mining companies. In theory, such LCPs, assuming that all companies embrace CSR, should be an attractive tool for companies to obtain and strengthen their SLO.

LCP studies have been dominated by analysing economic reasons for why certain companies are hesitant or struggle with LCPs (Ayanoore, 2019; Calignano & Vaaland, 2018; Hansen et al., 2014; Lange & Kinyondo, 2016; Lebdioui, 2020; Macatangay, 2016). How mining companies navigate state-mandated LCPs and their own CSR interests and targets remains unexplored in LCP literature. An exception is Wilhelm & Maconachie (2021) who explored the response of three Guinea-based mining companies to LCPs They showed how these companies have been implementing LCPs due to their CSR and SLO strategies. However, this study was limited to only three companies with a similar international investment background.

There are mining companies with diverse investment backgrounds and countries of origin in Guinea (Knierzinger, 2018; Rey & Mazalto, 2020; Rey & Saint Simon, 2016). Rey & Mazalto (2020) claim that in Guinea, it is the investments from Asian and the Chinese operators in the bauxite sector that have lower social standards, compared to their counterparts.

Whether the case of LCPs confirms these observations, the response of different mining companies to social reforms and regulations and their adherence to CSR conceptions remains a gap. In the sections that follow, it is precisely this differing corporate response to state-mandated LCPs that is examined.

4.3. Methods

The present study adopted a qualitative case study design. Guinea was used as a case of a low-income resource-rich country that opts for LCPs as a type of mining sector reform. To analyse the differing responses to state-mandated LCPs by mining companies in Guinea, a comparative analysis was adopted. Seven bauxite mining companies and their responses to LCPs were selected. This decision was guided by the production figures provided by the Guinean Ministry of Mines, which presents the production output of bauxite mining companies for each trimester. The companies that are in their production phase as well as the biggest producers of bauxite were chosen. This allowed for a diverse sample that is within the scope of the study's design.

The data collection was done through primary and secondary sources. This included fieldwork in Guinea in 2019 and online interviews throughout 2020 and 2021. In total, 67 semi-structured interviews with the government, civil society, and mining company representatives, as well as consultants, World Bank staff and former mining company managers were conducted. The interviews were held in French and English and translated by the author. To complement and triangulate this data, a document analysis using various sources was used. Company reports, websites, social media publications and data, as well as the documents and data provided by the Guinean Ministry of Mines were consulted. In total, 436 documents were used, as well as 23 social media pages, 19 websites and 82 relevant newspaper articles.

Based on this data, compliance and commitments by mining companies are assessed on the basis of (i) evaluations and assessments carried out with internal data from mining companies, and (ii) visibility in terms of further reporting, (social) media references, as well as perceptions and observations by Key Informants.

The collected data includes local content on the local micro level (local-local) as well as national level (national employment and procurement contrary to foreign sources).

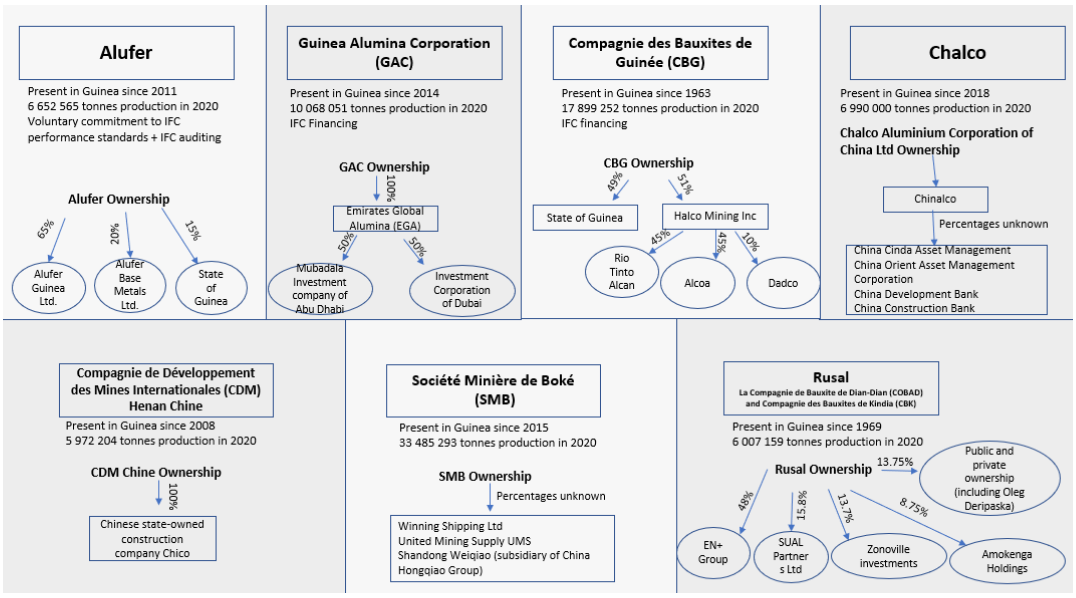
It should be acknowledged that a comparative study analysis has limitations due to the data unavailability. While Guinea Alumina Corporation (GAC), Alufer and Compagnie des Bauxites de Guinée (CBG) are more transparent and provide more publicly available data, as well as were open to interviews and email communication, Rusal, Société Minière de Boké (SMB), Chalco, CDM Chine were (i) not willing and/or responsive to participate in the study and (ii) their openly available data was limited. However, these companies are still included in the local content evaluations commissioned by the Ministry of Mines, as well as in other official government reports and data.

Despite these limitations, the overall findings are relevant and give useful insights into the differing response to LCPs by mining companies in Guinea, following a wide range of LCP reforms since 2013. This Guinean case study is useful for informing debates on LCPs in West Africa and other low-income resource-rich countries across sub-Saharan Africa that opt for LCPs or are currently designing and implementing them.

4.4. Overview of local content implementation by the major bauxite mining companies in Guinea

Figure 10 below summarizes the studied companies and provides insight into their ownership and investment structure.

Figure 10: Overview of the Mining Companies included in this study



Note. Production data retrieved from Ministry of Mines Bulletin de Statistiques Minières Annual Report for 2020

Alufer, GAC and CBG

The document analysis and interview data show that the seven bauxite mining companies have a different level of LCP engagement in Guinea. Overall, none of the companies deliver excellent results when it comes to the implementation of state-mandated LCPs. They do not have a clearly defined local content strategy. Moreover, they do not provide complete data on direct and indirect employment and training opportunities, despite being stipulated by Guinea's local content legislation. However, it can be observed that some companies perform considerably better than others. Tables 9–10 summarise their performance and compliance with the state-mandated LCPs, as well as their indications of LCP commitment. Both tables take into account overall local procurement and employment performances, as well as -if available- performances broken down by the applicable category, as defined in the quotas of the mining code. In line with the local content regulation in Guinea, 'local' is defined as 'national' employment and procurement. National companies are those with registration in Guinea that are managed by Guineans. Some companies lead in this ranking. Alufer and GAC provide some more detailed information and comply to some extent with the quotas set by local content regulations. Alufer exceeds the direct employment quotas for the employment categories and is known for its many efforts to support local procurement and training. GAC publicly publishes detailed local procurement data and is known for significant local content efforts. CBG has a high total amount of local employment, although it lacks detailed data. Some of the local content initiatives that existed prior to official state LCPs seem promising. Overall, these three companies were perceived more positively in the interviews and document analysis. Alufer is referred to as 'a good reference', a 'top performer' and 'an example'. GAC was called 'one of the very few local content champions.' CBG's effort to be 'the most Guinean of all mining companies in Guinea' is recognized to a certain extent. This finding is in line with Wilhelm & Maconachie (2021).

The other type of companies: Rusal, SMB, CDM Henan Chine and Chalco

SMB, Chalco, CDM Henan Chine and Rusal – the bauxite mining companies with Chinese and Russian investment origin – show a different response to local content. They scored poorer rankings in the 2017 Ministry-commissioned LCP evaluations (see Tables 9 and 10). Moreover, they are not transparent about LCP practices and the available information (i.e. BSTP membership, communication on their websites, reports and information of investors and parent companies) does not indicate a significant LCP commitment. Despite the high rate of local direct employment (except for Chalco, which scored poorly), the companies do not provide more detailed employment information and local procurement data. The general impression in Guinea is that these ‘Chinese’ and ‘Russian’ companies are not known to be good examples of LCPs. An analysis of their CSR practices via (social) media also reveals that they are rather known for traditional CSR activities (donations, community investments, infrastructure programmes, education, among others), whilst LCPs are absent. The only exception is SMB, where some local content references and commitments can be seen, but where the overall impression in terms of local content remains unsatisfactory.

> “When you take SMB, they [employees and contractors] are all Chinese.’ said an NGO representative. Another interviewee explained that ‘SMB, the Chinese,[47] they have their own methods. They don’t do local content.”

CDM Henan Chine and Chalco have not shown any visible commitment to LCPs either. Chalco’s share of local employment is particularly low (see Table 9). Similarly, there are no visible LCPs from Rusal. Its local content approach and overall social practices were described as ‘very closed’, ‘invisible’ and not positive overall.

The next section analyses why there is a difference between the approach of Alufer, GAC and CBG compared to Chalco, CDM Henan Chine and the Rusal subsidiaries, in Guinea. This will also enable further comparison into the local content approaches by the different companies.

[47] SMB, despite the mixed ownership structure, is considered to be a Chinese company in Guinea

Table 9: Overview of companies' LCP approaches and performances in Guinea

Name of the Company	Is local content, or the priority for Guinean employment expressed in their website, reports and investor requirements?	Does the company have a local content strategy?	Local employment (compared to quotas)	Local procurement (compared to quotas)	Training opportunities	BSTP[48] membership	Performance in the 2017 Local Content Ministry Evaluation
Alufer	Yes	No	Exceeded	No data; but some evidence of efforts	Yes	Yes	Top performer with good practices and mediocre performances
Guinea Alumina Corporation (GAC)	Yes	No	No disaggregate data, total 82.47% of workforce Guinean in 2020	Exceeded (37% local procurement spent)	Yes	Yes	Second best performer with mixed practices and performances
Compagnie des Bauxites de Guinée (CBG)	Yes	No	No disaggregate data, total 99%	No data; but some evidence of efforts	Yes	No	A mix of mediocre and weak practices and performances
Chalco	No	No	No disaggregate data, total 59%	No/Not known	No/Not known	No	n/a
CDM Henan Chine	No	No	No disaggregate data, total 93%	No/Not known	No/Not known	No	n/a
Société Minière de Boké (SMB)	No	No	No disaggregate data, total 88%	No data	Some evidence of efforts	No	Poor
Rusal (COBAD and CBK)	No	No	No disaggregate data, total 96 % & 97% respectively	No data	No/Not known	No	Poor

Created by author, based on Kaiser EDP, 2017 *Evaluation du Contenu Local dans le secteur minier en Guinée, Rapport final : Résultats et recommandations* Report Commissioned by the Ministry of Mines; DAI, 2017 *Evaluation du Niveau de Promotion du Contenu Local et de son Potentiel de Croissance dans le secteur des Mines* and *Assessing Sector Capacity for foreign direct investment linkages in*

[48] The BSTP is a supplier and marketplace platform that was created as an initiative of the Guinean state. The 2017 National Local Content Policy document and 2019 Decree 263 on Local Content demand mining companies to join the BSTP

Guinea: Rapport de Revue de la literature et d'analyse des données pour le groupe de la Banque Mondiale Reports for the Ministry of Mines; Ministry of Mines, 2021 *Bulletin de Statistiques Minières n*010 Année 2020 Janvier-Décembre ;* extensive review of documents, archival materials, interviews, company websites and investor reports, as well as social media publications

Table 10: Results of the Kaiser EDP Local Content Evaluation from 2017, commissioned by the Guinean Ministry of Mines

	Local Employment			Training			Local Procurement		
	Local Content Strategy/Plan	Quality of Practices	Performance	Local Content Strategy/Plan	Quality of Practices	Performance	Local Content Strategy/Plan	Quality of Practices	Performance
Alufer	Yes	Good	Mediocre	Yes	Good	To be seen	Yes	Good	Mediocre
CBG	Yes/No*	Weak	Mediocre	Yes	Good	Mediocre	No	Weak	Weak
GAC	Yes	Good	Good	Yes	Mediocre	Mediocre	No	Mediocre	Mediocre
Rusal: CBK	No	Weak	Weak	Yes	Mediocre	Mediocre	No	Weak	Weak
Rusal: COBAD	No	Weak	To be seen	No	Weak	To be seen	No	Weak	Weak
SMB	No	Weak	Weak	Yes	Weak	Weak	No	Mediocre	Mediocre

Created by the author, retrieved and translated from French from Kaiser EDP (2017) *Evaluation du Contenu Local dans le secteur minier en Guinée, Rapport final: Résultats et recommandations*, p. 11 Report commissioned by Ministry of Mines

* strategy available only for CBG's Mine Extension

4.5. "The IFC is good for local content" – Motivation behind companies' commitment to LCPs

This section explores why Alufer, GAC and CBG show more commitments to LCPs than their counterparts. The reasons presented here are not exclusive; they merely echo the themes that were the most visible in the data. Further research is needed to identify and explore any other possible reasons.

LCP commitment as a response to social pressures and expectations

When asked why they were keen to implement LCP activities, GAC, CBG and Alufer referred to past experiences with their host communities. These communities began to demand a modified CSR approach that would include special attention to employment through local content.

In an interview, the head of environmental and social performance of Alufer explained that local content was needed to manage 'social expectations.' In an interview with an Alufer representative, this was further clarified. For instance, when the host community understood that transportation was needed at the sites, they requested this to be provided locally. Local company support, in the words of a local community member who had benefitted from one of Alufer's activities, summarized that this commitment *'helps to avoid social troubles. It helps to avoid frustrations.'*

A GAC representative referred to the same reasoning when he explained that the company had opted for local content due to previous problems with the local population where the youth, especially, demanded work and ended up blocking the mine site. To manage these problems, the company decided to enhance its commitment to local employment programmes. A primary reason for GAC valuing local content and ensure good relationships with the communities was to secure its SLO.

CBG, as expressed by a CBG Representative in an interview, also ensured *'social peace'* with the local communities through local content activities. A document termed CBG's commitment to the support of local entrepreneurship as a *'double objective'*; its prevention of conflicts with the local communities enabled the promotion of its micro enterprises programme (Diallo et al., 2011).

The notion of mining companies investing in social and environmental activities to 'do good' as corporate citizens is not new. They have been responding to the changing global norms regarding CSR (Dashwood, 2007). 'Economic empowerment' and the support of local entrepreneurship and procurement (activities that resemble LCPs within CSR) have increasingly been used by mining companies (Rajak, 2011). Frederiksen (2018) specifically names local content commitments as an example of CSR activities by mining companies. Hilson & Ovadia (2020) briefly address the relationship between the LCPs and CSR. The fact that there are currently 'blurred lines' between LCPs and CSR is contentious, and LCPs should become clearly distinguishable from CSR programmes to move away from soft and voluntary targets that are disconnected from realities and the needs of local populations. The companies mentioned here show that LCPs coexist with CSR; these companies selectively implement state-mandated LCPs, while benefiting from CSR-implemented LCP activities to strengthen their SLO.

Role of investment origin

It is not just the attitude of each mining company that determines their commitment to social activities or commitment to national and international standards. The role of investment origin and the ownership structure of mining companies should not be underestimated. In Guinea's case, Knierzinger (2015, 2018) has shown how the transnational corporate chains of command, governed by the dynamics of the mining industry, impact the socio-economic development of host communities. The possibility and type of employment, the accessibility of basic services and the people's future with regards to mining operations are shaped by decisions and external factors that are beyond the state and even the senior leadership of the mining companies.

Considering these aspects, a major issue that explains company commitment to LCPs is the investment origin. It was clearly stated that companies which receive funding from international sources that ensure strict social standards show a higher commitment to local content. The interviews confirmed that a main source of local content commitment is the World Bank's IFC. *'The IFC is good for local content.'* said an NGO representative, implying that companies with an IFC background tend to be more committed to local content, notably GAC, Alufer and CBG.

In 2019, the IFC provided a $4.4 million advisory programme with GAC for social and economic activities, including local content. The programme was partially funded by GAC itself (65%), as well as by the Canada fund (35%). In 2021, it also launched a local content programme with GAC to support their LCPs. Moreover, through a five-year partnership, the IFC has also been involved in CBG's community level Small and Medium-Sized Enterprise (SME) programme, facilitating the engagement between the latter and other local companies. An NGO representative noted a significant improvement in CBG's LCPs following their involvement. Alufer voluntarily commits to the IFC performance standards and has been undergoing IFC auditing. For the IFC, according to one of their in-country representatives in Conakry, *'local content is non-negotiable.'*

The IFC Performance Standards (minimum level of requirements for an investment) do not directly include any obligations on local content. There are some indirect references that promote local content. Performance standard 2 on labor and working conditions for instance demand compliance with national employment and labor laws, which in the case of Guinea would include the Mining Code and local content regulation. Standard 7 relating to Indigenous People emphasize that private sector initiatives may provide chances for Indigenous peoples to engage in and profit from project-related activities, which may assist them in achieving their economic and social development goals. In 2011, the IFC published a 'Guide to Getting Started in Local Procurement' to assist project site operators in the extractive sectors in developing a local procurement policy and strategy. The guide provides the context and definitions for the private sector to understand the basics, as well as tools such as self-assessment tools, identification and prioritization of local business opportunities, local procurement programme design, key performance indicators, among others. The IFC also created Supplier Development Programmes to promote and support supplier linkages and maximize the share of local and women-owned businesses in supply chains. In partnership with government ministries and other partners, such programmes were either implemented nationally or by individual companies. In 2015, the IFC launched a $30 Million investment programme in Guinea to support SMEs and create jobs including for the formulation of a national local content policy and the provision of procurement-related technical help to mining businesses.

It is not just the IFC that funds and supports the local content commitments of the mining companies it partners with. Lenders and investors increasingly demand social and environmental standards. This can be seen in companies like Alufer, GAC and CBG who rely on a variety of international lenders for their mining operations in Guinea. Lenders, including the IFC and others, have higher expectations and standards when it comes to local content and social issues Hence, these companies must comply with the high international standards; these investors do not want their reputation to be harmed or associated with any social problems in the country.

Mining companies have acknowledged the role that their lenders play in their local content commitment. For instance, when asked why GAC was committed to local content, the response of a GAC representative was:

> "That's the advantage with the lenders, we're always under scrutiny (…) at GAC, we try to emulate what the investors and EGA are doing. For companies with investors that are varied like ours or CBG, for example, we tend to follow the guidelines from the IFC, which push us into being good citizens and [make us] improve the living standards everywhere we are. That's the difference that I see in how companies approach local content (…) The investors play a big part in how local content takes place."

This quote reinforces the important role lenders play in helping mining companies implement LCPs. The GAC representative also names this as a reason why companies without this background approach local content differently.

This shows that it is not just community pressure or strengthening the SLO that convinces mining companies to commit to CSR. The state policy and regulatory pressures as well as global standards also play a role. While states have often retreated from social and environmental impact management, Szablowski (2007) argues that the World Bank continues to emphasise programmes that can reduce the negative impact of extractive activities. Financial markets and institutions that fund mining operations have increasingly begun to demand these companies to do the same (Mzembe & Meaton, 2014). In fact, pressure from the investment community demands a considerable engagement to CSR and social standards to reduce various types of mining risks and protect its reputation (including the company's) (Frederiksen, 2018). It is this 'business model of CSR' and the commitment to global 'performance standards' that explains this increasing CSR commitment (Gilberthorpe & Banks, 2012). Kemp et al., (2012) show how self-regulation and an 'audit culture' can legitimize the reputation of mining companies and their investors by reducing risks. Even here, the IFC is considered as one of the central standards for ensuring both these aspects. In fact, as Kemp & Owen (2017; p. 164) outline, 'the IFC Standards have become the 'default' benchmark for social performance in mining.'

Esteves et al. (2013) studied local procurement practices of 23 companies and analysed the LCP trends in the extractive industries. One factor that played a role was the development of strategic partnerships and agreements- notably with the IFC as a partner. The IFC Ahafo Linkages Program at the Ahafo Mine of Newmont Ghana Gold Ltd and the ExxonMobil-owned Esso in Chad through the IFC local supplier development programme are notable examples of good LCPs. In Zambia, the Copperbelt SME Supplier Development Programme was launched by the IFC in 2007, indicating its role in implementing good LCPs in the country (Caramento, 2019). In Chile and Peru, supplier programmes created in partnership with the IFC were the central local content activities run by mining companies (Ramdoo, 2015). Esteves et al. (2013 p. 22) conclude that 'partnerships among various stakeholders are critical for local content development.' The IFC is one of the major multilateral agencies that promotes 'soft' – business-friendly and voluntary – local content measures by helping businesses to create backward linkages and shared value addition, thereby, assisting extractive companies to obtain their SLO (Caramento, 2019; Ovadia, 2016). However, Caramento (2019) observes that in this advocacy for LCPs, a technocratic and depoliticised notion of local content is employed. In the case of Zambia, the programme constituted a private sector initiative, managed by IFC and the mining companies, without further legislative and regulatory support or reforms.

Although the private sector's self-regulation offers opportunities, it comes with considerable challenges. The next section analyses what happens when companies from a different background enter the mining industry, notably those without any partnerships with agents like the IFC and without commitments to international social and environmental standards.

4.6. Mining companies with Russian and Chinese origins: A different approach to LCPs

Section 4 has shown that Russian and Chinese mining companies in Guinea show less visible commitment to local content. The literature on the presence of Russian mining companies in sub-Saharan Africa and their approaches to CSR and social commitments, including LCPs, is limited. In the case of Chinese companies, the literature analysed their limited use of local employment and suppliers on the African continent. It is widely perceived that these companies provide restricted job opportunities, leading to a widespread anti-Chinese resentment (Wegenast et al., 2019). This is in part because they import their own workforce instead of using local employment and procurement (Adisu et al., 2010; Alden, 2005; Smith, 2013; Zhao, 2014). Rui et al. (2017) estimate that approximately only half of the workforce employed by Chinese multinational companies comprise locals. This also includes suppliers for Chinese infrastructure projects in Africa where everything – from simple materials to heavy equipment – is imported (Mohan, 2013). This points to their low readiness to train and boost local employment (Jackson, 2014) and explains a low commitment to training, despite the stipulation of the Guinean LCP regulation. Through the case of the Chinese copper mining companies in Zambia, Fessehaie & Morris (2013) showed how the operators did not build any relationships and offer much support for local suppliers, compared to their Western counterparts. Overall, it has widely been noted that Chinese mining companies on the African continent operate like enclaves (Gadzala, 2010; Lee, 2009; Mohan, 2013). Tang's research (2010, 2016) further showed that the number of Chinese employees in these companies reduce by half as the years progress, compared to the staff strength at the time of establishment. Wegenast et al. (2019) identify two reasons for this: (i) the competitive advantage of the wide availability of low-cost labour and (ii) the language barriers and cultural aspects. However, they hint to more potential reasons that remain yet to be studied.

Once it was clear that mining companies with Chinese and Russian background had a less satisfactory local content commitment and performance, the question was why this was the case. A central enquiry was why these companies were less motivated to embrace LCPs in their performance and CSR communication. The responses gave more insights on the interests and backgrounds of these companies.

Lack of international investors, state interests and the China Belt and Road Initiative

Section 5 outlined how companies with a seemingly strong commitment to LCPs are motivated due to their investment origins. In this regard, there is evidence that shows that mining companies that have a lower level of local content commitments in Guinea are less motivated to commit to LCPs due to their lack of international investment and commitment to international social standards. This explanation was widely shared by many interviewees. In some cases, frustration was even voiced, particularly by the current and former mining company managers, that certain companies are bound by strong performance standards that demand local content which can be costly, while the competitor is not bound to the same scrutiny and demands.

An NGO representative explained:

> "In Guinea, there are two types of mining companies. There are those who correspond to the standards they have signed up for. For instance, OECD standards, the World Bank, or the IFC. The second category, they are those who don't receive any international funding, neither from the World Bank or the IFC. Those are the Asian companies, including the Russians. So not just the Chinese. They have their own standards. Invisible standards. Inaccessible. These companies have their own policies. They don't do the same effort as other companies."

None of the studied Russian and Chinese companies commit to IFC standards or have any known shareholders that demand a commitment to these standards. Instead, the company structure relies on state involvement (see Figure 10).

As for the Chinese mining companies, the connection to the state and Chinese state interests was made very clear. This confirms the research by Li et al. (2013) who showed how both state-owned and private Chinese natural resource multinationals have strong ties with the Chinese government. In fact, negotiations usually took place between the Chinese government and host governments, with little negotiation involving the Chinese resource multinational enterprises. China Hongqiao, the parent company of Shandong Weiqiao and a shareholder of SMB, commits openly to the Chinese Belt and Road Initiative. The group states on their website that *'China Hongqiao aligns its corporate policy closely with China's Belt and Road initiative.'* The same can be observed in the statements by the investors of SMB Winning (notably CITIC Ltd) and Chinalco (China Cinda Asset Management, China Orient Asset Management Corporation, the state-owned China Development Bank and China Construction Bank). The China Development Bank, in its mission and vision statement, shows that the priority for the bank is to commit to national strategies that facilitate the economic growth and social progress of China. The China Construction Bank Company also reinforced its commitment to 'strongly' support the Belt and Road construction.

The Belt and Road initiative by the Chinese government is a global infrastructure project that was created in 2013. According to this project, newly created financial institutions and foreign infrastructure projects are meant to revive the ancient Silk Road and go even beyond. Scholars have studied this project and there is a significant debate about the positive aspects of this project in fostering connectivity, trade, finance and people-to-people relations through inclusive globalisation and poverty reduction (Zeng, 2016; Zhang, 2018). On the other hand, it is often seen as Sinocentric and receives widespread criticism for generating economic growth solely in China, causing a type of spatial fix (Sum, 2018). The African continent has been involved in the Belt and Road initiative, particularly by receiving Chinese investments for infrastructure projects. Examples include the Chinese-involved dam projects in Ghana, Sudan, the Republic of Congo, Ethiopia, Cameroon (Brautigam et al., 2015; Chen & Landry, 2018; Han & Webber, 2020).

Chen & Landry (2018) compared a World-Bank financed hydropower plant with a Chinese-financed plant in Cameroon. They noted that the latter only complied with Cameroonian social and environmental regulations, while the former applied more rigorous evaluations and practices. Dollar (2016; p.s 65-73) showed that the absence of World Bank and international funding makes China-based companies free from the same level of detailed environmental and social policies. Instead, Chinese overseas projects commit to national rules and regulations. However, in countries with weak institutions, regulations are often not implemented and monitored. In terms of local content, the Chinese project in Cameroon did employ many local workers, but even then, its construction was done by a Chinese firm that followed Chinese standards. The machinery and construction equipment, as well as all the resources, were imported from China. There were some skill and expertise transfers to local populations during both projects (Chen & Landry, 2018). In terms of environmental standards, it has been noted that Chinese companies in the past were not under much scrutiny in their investments and operations abroad. The Chinese state had also been lenient, releasing the guidelines to regulate mining investments from a social and environmental standpoint only recently (Shinn, 2016). Based on several accounts and widespread media coverage and sentiment, Chinese mining companies in sub-Saharan

Africa create more negative social and environmental impacts in the local communities than their Western counterparts (Armony & Velásquez, 2015; Geerts et al., 2014; Wegenast et al., 2019). It has been noted that CSR is not yet deeply embedded in the Chinese business culture, despite the Chinese corporate, labour and contract law bringing it into effect since 2008. Even though there is a gradual improvement, most of the CSR commitments remain voluntary and lack regulatory monitoring and reporting (Larson, 2013; Renwick et al., 2018).

The perception that Chinese-financed projects use limited local procurement in their operations was widely seen in the case of Guinea. It is believed that these companies are instructed to use China Rail for shipping and involve Chinese contractors in various activities. A former mining company director explained that *'the economic rationale is that they are in Guinea, bringing services, people and value from China'* where Chinese goods and services are imported and the product is then exported back to China, hence consisting of a *'closed loop'* in the sense of *'a very virtuous sort of investment proposition.'* A consultant echoed this by stating *'I've operated around the world and the Chinese will bring in anything they possibly, possibly can'*, including equipment, contractors, and personnel.

Cultural aspect

When asked why the Chinese and Russian companies show less commitment to local content as well as social and environmental standards, a common explanation was attributed to their 'different' culture. In many interviews, it was stated that the perception in Guinea is that these companies have a different 'culture', 'mentality', 'philosophy' and 'vision.' It was also believed that the political behaviour and socio-economic strategy of their home countries shaped their behaviour. Profit maximisation for their own benefits, combined with low commitment to human rights and adequate social and environmental standards shows a low motivation to uphold social peace with the local communities. A consultant stated that the Chinese and Russian mining companies' *'modus operandi is much like the states from which they originate (...) You know what you get with the Chinese and the Russians and the Iranians and the like! They will not do local content.'* A Guinean entrepreneur, who is part of the Local Content Association, gave another explanation for this:

> "It is the cultural aspect. The British, Australian and all those companies, they have a certain notion of humanism, of human rights. But if you take the Chinese companies, and I don't want to support this cliché, I don't like this China-bashing, but it is a different culture. Their approach to a human kind of development is different, as you can see in their own country."

This quote shows the perception that the 'Western' mining companies in Guinea are a different type of corporate citizens, compared to their counterparts. An explanation for how 'Western' companies have adapted to their previous conflicts with the local communities is also given, with regards to their adoption of the local content. However, as a consultant explained:

> "If you're Chinese or Russian or Iranian or the like, your defence against community conflict is not employing more locally or buying more locally, your defence is that you bring in the military and police, you sack the troublemakers. But if you're signed up to international standards on security and human rights and those sorts of things, you need a different mitigation measure against community conflict, and that is enhanced local employment and local procurement."

The narrative of a lack of social standards, including employment and mistreatment of workers by Chinese mining companies operating on the African continent, is widespread in areas like Zambia and Niger (Jamasmie, 2013; Smith, 2011). In Guinea, mining companies are regularly under scrutiny due to social conflicts. Currently, Chalco, CDM Chine, the SMB-shareholder UMS and SMB are dealing with the strikes and protests due the conditions of workers and the absence of local content. CDM Chine even requested military protection in October 2021 from the state to manage the conflict.

The Chinese and Russian companies have a different, albeit 'more straightforward', approach to CSR. Instead of complex and long-term transformative projects like using local content to strengthen their SLO, these companies committed to one-time payments or simple CSR interventions, as discussed in section 4. Instead, as a mining company representative explained, *'they make big payments and then let the community develop themselves.'* An NGO representative went as far as to accuse the Chinese and Russian companies of *'distracting from local content'* through their preference for simple CSR activities, like building schools and roads as well as distributing rice and cash. He said that this was not local content in response to these companies labelling them as such like in the recent case of the rice agriculture programmes.

In terms of collaborative CSR approaches initiated by the Chamber of Mines or other mining companies, Chinese and Russian companies do not show any participation.

Preferential treatment 'favours by the government' and 'special status'

Overall, in some of the interviews, it was expressed that the Chinese mining companies do not get the same level of treatment by the Guinean government and are, hence, not monitored and judged as strictly. A GAC representative voiced frustration about this perceived absence of the same standards and an equal level playing field:

> "You will never hear an authority saying that they are not up to standard about the Chinese companies because they have incredible access to the president's office, you know, and that separates them from us. You know, if we do something wrong, we will hear from the Ministry of Mines or from another ministry. But I don't think the same is true for the Chinese companies."

There is a widespread belief that the Guinean government is less demanding when it comes to Chinese and Russian companies. This is even seen as favourable treatment by the government. An NGO representative even claimed that *'the Russians have a special status in Guinea that explains the advantages given to their mining companies'* pointing to an alleged secret agreement between Guinea and Russia (Maclean, 2019).

An Alufer representative voiced their frustration in a recent email:

> "With the political change that happened in Guinea, communities are more and more alert with mining companies, particularly with the Chinese ones. They believe that the Chinese

> companies are getting favours from the government by not having to apply local content and they are demanding more local employment and responsibility."

However, these 'favours' could, in fact, just be the nature of exchange and relationship between the Chinese state and the Guinean state. Guinea is a recipient of Chinese resource-backed loans, constituting $20 billion in 2017 which are equivalent to 200% of the country's GDP. These loans are often opaque with unknown conditions, weak governance, little to no competition between lenders, and minimal public information on repayment procedures (Mihalyi et al., 2020). On top of this, in the case of resource-backed loans, the terms of credit may be less open and predictable, as well as complicated when debt is collateralized or when commodity prices fluctuate (Usman, 2021). World Bank lending terms on the other hand are publicly available, and more concessional with lower interest rates, longer maturities, and prolonged grace periods (Morris et al., 2020). Sino-Guinean economic exchanges have existed for decades through a long history of donations, infrastructure deals and other types of development support from China (Diallo Bah, 2017). Guinea also shares a long history of economic and social exchanges with Russia, and in the past the Soviet Union. It was especially in the aftermath of its independence where Guinea heavily relied on economic support from the Soviet Union in exchange for access to its natural resources (Knierzinger, 2018; Posthumus, 2016).

4.7. Discussion

This case study of LCPs in Guinea shows larger dynamics at play. The manner in which various mining companies respond to a new set of policies showcases the complex interaction of actors in the global extractive industries. Mining companies not only respond to the institutional requirements of the states they operate in, but also global norms and standards. Investors and investment origins shape these companies' interests and, hence, their commitment to social and environmental standards.

However, the present research also shows that there is another reality. In the case of Guinea, none of the bauxite mining companies that were included in this study fulfil their state-mandated local content obligations fully. Alufer, GAC, and CBG show some more efforts to employ and procure from Guinean nationals, as well as provide training to Guinean SMEs. Rusal, SMB, CDM Chine, and Chalco not only score more poorly in local content evaluations assessing their compliance with employment and procurement targets and practices. These companies also do not show any visible commitment or effort to local content, rather focusing on traditional community development CSR activities, namely sponsorships and donations.

One group of companies embraces social commitments (local content) to ensure CSR and obtain their SLO. The other group, however, does not do the same. Rey et al. (2020; p. 2-3), by studying the Environmental and Social Impact Assessments (ESIAs) of mining companies in Guinea, observe 'a disparity in the quality of companies' where 'investments originating from Asia, with the massive presence of Chinese operators in the bauxite sector, have redefined the standards of implementation of social assessments, as the financiers do not or rarely refer to the standards promulgated by Western financial institutions.'

In the case of Guinea, a country that had endured decades of neoliberal extractivism which weakened state authority and legitimacy through selective absence and state withdrawal (Béland et al., 2021; Szablowski & Campbell, 2019), weak state regulation persists where mining companies and their investors 'autoregulate' their practices. In terms of social and environmental practices, the IFC is the most decisive actor (Rey & Saint Simon, 2016). Local content is no exception to this as well.

Even when states opt for neo-extractive reforms, like LCPs, the challenges are enormous. The present research has shown that it is imperative to have strong institutions, as auto-regulation by the private sector and their investors do not yield the same results.

Writing the laws and quotas on local content is not enough if the implementation is not monitored, evaluated, and followed by admonishment in case of non-compliance. There is currently no enforcement, compliance mechanism, or sanctions in case of non-compliance (Wilhelm, 2022; Wilhelm & Maconachie, 2021). Even though the Guinean LCP regulation commits to transparency – where detailed local employment and procurement data should be presented in an annual report published by the Ministry of Mines – this has not happened to date. This research has shown how and why companies do not publish such data at all. Even if they do, they do it very selectively. This is disappointing, given the years of discussions and promises to make the mining industry more transparent through initiatives like the Extractive Industries and Transparency Initiative (EITI). The EITI aims to improve revenue transparency in extractive industries by disclosing payments. In many cases, this institution played a role in improving resource governance through transparency (Sovacool, 2020; Sovacool et al., 2016). Some EITI-compliant countries, such as Senegal, have begun to include local employment and procurement data in their reports (ITIE Senegal, 2021). Guinea, despite being listed as an EITI-compliant country with its own office, has not followed this example yet. The scope of this research could be extended to include more complete data if the transparency is enhanced.

Another question that emerges from this analysis is why the Guinean government, as well as other governments in sub-Saharan Africa, tolerate the diverging social and environmental standards by companies of Chinese and Russian investment origin. In the case of Guinea under the Alpha Condé regime, the state has been dependent on Chinese resource-backed loans, and there were close political connections that explain dependencies and power imbalances. During the current regime under Colonel Doumbouya, there has been increased scrutiny on all companies to respect local content, yet there are still no applied sanctions in case of non-compliance. Further research is required to analyse this relationship between the state as the legislator, and foreign investors and companies to understand what drives this apparent tolerance of non-compliance. Ultimately, this may be the reason that leads some mining companies not to improve their local content approaches. Legislation itself, as it is not enforced, is hence not sufficient.

4.8. Conclusion

This research has shown that bauxite mining companies in Guinea respond differently to state-mandated LCPs. Investment origin plays a major role and companies with international investment origins, notably a partnership with the IFC, embrace LCPs as part of their CSR and SLO. Companies without this background do not seem to visibly commit to LCPs.

The present research is relevant, as many countries are currently designing or executing LCPs. At the same time, extractive activities with diverse companies from various investment backgrounds are becoming increasingly active. Their commitment to social and environmental standards, including local content, must be considered as well. In this regard, the internal processes how mining companies elaborate their local content strategies are an interesting topic for further research. Another pertinent question and avenue for further research is how and at what level the IFC's efforts matter in support of increasing local content regulation, implementation, and monitoring in Guinea.

If companies continue to autoregulate their social commitments, there will be companies that do not meet the minimum expectations. The case of Guinea has shown how host communities take notice of the companies that fail to do so. Host communities raise grievances, people develop theories and observations to explain why some companies do not comply and, ultimately, this can fuel social conflicts. The state must set a standard, given that not all mining companies are bound to the same international social norms and investment requirements. State-mandated LCPs in Guinea are the starting point for a national minimum standard. However, the state is not involved in its regulatory capacity to execute and monitor the implementation of its own regulation. The state is also not enforcing its own legislation and in turn tolerating that "there are two types of mining companies" with diverging local content responses. More than ever, it is becoming vital that states develop strong institutions to fill this gap and rectify the underlying issues. More research is required to understand if there are underlying power dynamics and dependencies that prevent the state from enforcement and sanctions in case of non-compliance, which may lead some mining companies to continue not to raise their local content standards.

5. CONCLUSION

The aim of my thesis is to increase our understanding to what extent local content constitutes a mining sector reform tool that can generate inclusive resource-based development. The case of Guinea's bauxite sector provides a case study to examine this aim.

In the introduction, I present the theoretical framework that underpins the empirical chapters. I show how literature on inclusive resourced-based development includes the idea of linkages as a potential channel to redistribute wealth generated from extractive activities through diversification and spillover effects. I introduce extractivism theory, which is the lens I use throughout all chapters to critically understand the opportunities and limitations of mining sector reforms and redistribution mechanisms, such as local content policies.

In my first empirical chapter (Chapter 2) I explore the origins of local content. The objective is to analyse the motivations behind Guinea's mining sector reforms through local content to uncover the dynamics—particularly political ones—that affect the creation and execution of LCPs. The argument I present is that LCPs have political roots that are associated with extractivism and that "local content is politics". This implies that the formulation and application of local content policies are entwined with political debate, which adversely affects their efficacy.

In my second empirical chapter (Chapter 3) I analyse the obstacles, opportunities, and future trajectories of local content in Guinea. The objective is to gain a deeper grasp of the most recent changes to the local content mining industry and investigate their efficacy for inclusive resource-based development. The central argument is that although there is potential to accomplish inclusive resource-based development through LCPs, progress is hampered by a number of institutional, political, and economic barriers, as shown in Guinea's situation. As a result, the outcomes have been modest.

Lastly, in the third empirical chapter (Chapter 4), the objective is to examine how mining businesses are implementing LCPs and comprehend the many reasons for the variations in how they are reacting to these practices. The argument I present is that in Guinea, businesses with foreign investment origins embrace LCPs as part of their Corporate Social Responsibility and Social License to Operate objectives and strategies, whilst bauxite mining businesses in Guinea react to state-mandated LCPs differently since investment origin plays a significant impact. This means that corporations are left to "autoregulate" their reactions to LCPs, meaning that there are mixed results where some mining companies show more commitments than others as “in Guinea there are two types of mining companies.”

Connecting the findings from the three chapters, I contribute to a clearer understanding to what extent local content constitutes a mining sector reform tool that can generate inclusive resource-based development. In Guinea, local content policies did not bring transformational *Guinéisation.* There are a number of obstacles and in fact structural deficiencies that undermine tangible transformation from local content policies. Using an extractivism lens has helped to uncover that it is the mode of extractivism, governed by the international norms and standards that shape the industry, the role of investment, a legacy of neoliberal extractivism that has left state institutions weak and allowed the private sector to autoregulate itself. This has created an environment that is not conducive for structural changes and tangible impacts through a single set of mining reforms. I can hence conclude that local content policies, as an example of a progressive type of mining reforms following the spirit of Hirschman’s (1958) linkages, are not *the* answer to bring about inclusive resource-based development.

This research was inspired by a desire to contribute to the progress of knowledge and discussion regarding mining sector reforms—in this case, LCPs in Guinea’s bauxite industry—and their ability to contribute to inclusive resource-based development. More broadly, the question of how the paradox of resource-rich countries remaining in the low-income development category can be overcome drove this research. I was motivated to conduct this research from two main perspectives. The first is to inform and improve policy, and the second is to contribute to academic research.

I have two main policy recommendations based on the findings of my thesis.

Firstly, policymakers must decide how far they are willing to go in their design and implementation of LCPs, as the seemingly progressive commitment in theory is clearly not translated into practice. My research has shown that various company interests account for diversity in responses to LCPs. Policymakers must be aware of these differences and have a strong minimum standard for all mining companies to allow companies to use LCPs for their CSR in their own ways while guaranteeing that there will be a minimum expectation that must be fulfilled by all mining companies. Integrating clearly defined quotas with functioning mechanisms to implement and monitor LCPs, as well as LCP performance as a prerequisite for obtaining and renewing permits and mining licences, are recommended.

Secondly, this research has clearly shown that LCPs alone are insufficient. Throughout ongoing extractivism, LCPs mean that the sector remains capital-intensive and not labour-intensive. Linkages and spillovers are required *beyond* mining. Even in mining, artisanal and small-scale mining have a much larger potential for employment (Grant & Wilhelm, 2022). However, agriculture, infrastructure, services, technology, and many other sectors have significantly more employment opportunities if they were adequately developed and invested in. Furthermore, this would also be more sustainable, given that mining is temporarily restricted and shaped by a boom-and-bust cycle, which makes the industry risky. The government of Guinea is advised to utilize mining revenues for thorough regional economic development programs that transform the national economy and invest in diverse sectors beyond the mining industry. Sovereign wealth funds have historically been tools for diversification and industrialization through impactful investments channelled from mining revenues. Ideally, this could go in tandem with mining companies that support this with their skills and financial means.

I contribute to academic research by analysing local content policies using extractivism theory. Using extractivism theory has been the key that helped i) to understand why resource-rich low-income countries struggle with inclusive resource-based development ii) to understand why mining reforms are designed; iii) to understand why the impacts of mining sector reforms like local content policies will remain limited. Extractivism is the red thread that governs the sector. If extractivism continues in its original form, mining sector reforms like local content can merely compensate for some of the lacking benefits and shared value or redistribute social spending. My work and publications are the only ones that make this connection by linking local content literature with extractivism theory. This is a contribution to academic knowledge generation that I hope will inspire peers.

I have two recommendations for further research. First, the question of beneficial ownership has been underexplored in LCP studies. Even if there are some LCP impacts by seemingly 'local' companies that are used as contractors and suppliers, the question of ownership and investment origin of these companies is often not known. I mentioned some transportation companies in Chapter 4 in the case of the Chinese mining company Chalco, and there are some other examples where local Guinean companies used as contractors are operated by certain personalities that are connected to political actors. The issue of beneficial ownership remains underexplored and provides further research avenues.

Second, in a similar fashion, further research on the type of employment created by LCPs is needed. It is unexplored what kind of employment is generated, what type of labour standards and salaries exist and how they vary amongst the different mining companies and their contractors. There are regular protests in which local workers demand better standards and salaries. However, insight into the data and different labour practices is not yet available.

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