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POLICY BRIEF



MOROCCO'S ATLANTIC INITIATIVE: A CATALYST FOR SAHEL-SAHARAN INTEGRATION



RIDA LYAMMOURI & AMINE GHOULIDI



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Morocco, leveraging its strategic position and proven expertise in infrastructure development, has proposed an ambitious framework to reconnect the Sahel to global supply chains via its Atlantic coastline. The Sahel's vast distances and dispersed population have historically deterred significant infrastructure investments, perpetuating a cycle of underdevelopment. Morocco's strategic initiatives in infrastructure stand out as potentially transformative, adopting a comprehensive approach to regional integration that addresses both physical infrastructure needs and broader economic development requirements in the Sahel.

RIDA LYAMMOURI & AMINE GHOUIDI

INTRODUCTION

The Sahel region's¹ persistent economic isolation represents one of Africa's most pressing development challenges. This vast expanse of landlocked nations, including Mali, Niger, Burkina Faso, and Chad, faces significant barriers to global market integration. Geographic isolation, with distances spanning hundreds of kilometers from the nearest seaports, drives logistics costs to 30-40% of import values, severely undermining economic competitiveness and stifling development prospects.²

However, this challenge also presents an opportunity for transformative regional integration. Building on a broader vision for the Atlantic space, which Morocco is seeking to shape through the Royal Atlantic Initiative, Morocco, capitalizing on its strategic position and proven expertise in infrastructure development, is spearheading efforts to reconnect the Sahel to global supply chains through its Atlantic coastline. This vision, formalized in the *Atlantic Initiative* announced on November 6, 2023, builds upon Morocco's significant expansion of economic engagement with Africa, where exports have surged from \$300 million to over \$3 billion between 2004 and 2024.³ The approach seeks not only to alleviate logistical burdens but also to foster co-development and shared prosperity, in line with the Initiative's emphasis on solidarity and cooperation among Atlantic and African partners. Central to this vision, spearheaded by Royal initiatives, are two interconnected pillars: an evolving maritime infrastructure network along the Atlantic and integrated energy systems.

STRATEGIC CONTEXT

The Sahel's development trajectory has long been constrained by a complex interplay of geographic, infrastructural, and political challenges. Landlocked nations such as Mali, Niger, Burkina Faso, and Chad contend with prohibitively high transport costs that significantly undermine their economic competitiveness. Inadequate road infrastructure, particularly in rural areas, exacerbates these challenges, while limited energy access remains a critical barrier to industrial development and economic diversification. The region's vast distances and sparse population distribution have historically deterred significant infrastructure investments, perpetuating a cycle of underdevelopment.

Recent geopolitical shifts have added new dimensions to these challenges while simultaneously creating opportunities for transformative change. The formation of the Alliance of Sahel States (AES) by Mali, Niger, and Burkina Faso, followed by their withdrawal from the Economic Community of West African States (ECOWAS) in early 2024, signifies a major realignment of regional political forces.⁴ This restructuring, along with the increasing influence of Russia, Turkey, and China in the region, presents both obstacles and avenues for new strategies. Within this complex landscape, Morocco's initiative reflects a strategic understanding that transcends purely security-oriented solutions to the Sahel's challenges, emphasizing instead an integrated approach that combines infrastructure development with economic opportunities. Furthermore, the withdrawal of traditional Western partners,

1. For the purposes of this paper, the Sahel region refers to the countries of Mauritania, Mali, Niger, Burkina Faso, and Chad.

2. Andrew Mold, "The Economic Significance of Intra-African Trade: Getting the Narrative Right," August 2022, https://www.brookings.edu/wp-content/uploads/2022/08/Economic-significance_of_intra-African_trade.pdf

3. Abderrafie Zaanoun, "Morocco's Atlantic Initiative and Potential Challenges to Regional Leadership," October 10, 2024. <https://carnegieendowment.org/sada/2024/10/moroccos-atlantic-initiative-and-potential-challenges-to-regional-leadership>

4. Abdelhak Bassou, "From the Alliance of Sahel States to the Confederation of Sahel States: The Road is Clear, But Full of Traps," 24 April 2024, <https://www.policycenter.ma/publications/alliance-sahel-states-confederation-sahel-states-road-clear-full-traps>

particularly France, has accelerated the search for innovative regional solutions and partnerships.⁵

Morocco's rise as a leading investor in the region, with revenues from African investments exceeding US\$2.5 billion and dominant positions in sectors such as telecommunications, banking, and infrastructure development, uniquely positions it to tackle these challenges.⁶ Traditional development approaches in the Sahel have often relied on single-sector solutions or bilateral arrangements, which fall short of addressing the region's interconnected nature. In contrast, Morocco's strategic infrastructure initiatives present a transformative model, offering a holistic approach to regional integration that addresses physical infrastructure needs while aligning with the broader economic development goals of the Sahel.

MOROCCO'S INTEGRATED INFRASTRUCTURE VISION

Maritime Infrastructure and the Atlantic Initiative

At the heart of Morocco's regional strategy lies the Atlantic Initiative, launched in November 2023, aimed at creating a robust trade and transport network connecting Morocco's Atlantic coastline with the Sahel.^{7,8} A key component of this initiative is the ambitious Dakhla Atlantic Port project, a US\$1.2 billion deep-water facility designed to handle large cargo volumes and serve as a vital gateway for Sahelian countries to access global markets. With operations set to begin by 2029, the port exemplifies Morocco's long-term commitment to reshaping regional trade frameworks and promoting new models of economic integration.⁹

The success of this maritime infrastructure network hinges on the synergy between Morocco's emerging facilities and Mauritania's established infrastructure at Nouakchott and Nouadhibou.¹⁰ While Mauritania carefully navigates regional dynamics, particularly those involving Morocco-Algeria relations, the potential for complementary port specialization offers compelling economic incentives for collaboration. Rather than competing, these ports could create a cohesive network of maritime infrastructure along the Atlantic coast. Through close coordination in port development and management, Morocco and Mauritania could create an efficient maritime gateway system tailored to serve different market segments and trade routes.

The port network's design incorporates advanced logistics capabilities and multimodal transport connections, facilitating seamless alignment with land-based transport networks. This integration is vital for landlocked Sahelian countries, providing them with dependable

5. Chinedu Asadu, "France completes military withdrawal from Niger, leaving a gap in the terror fight in the Sahel," 22 December 2023, <https://apnews.com/article/niger-france-sahel-coup-troops-security-macron-97c8ccfe880169832965c33e96d7befe>

6. Abderrafie Zaanoun, "Morocco's Atlantic Initiative and Potential Challenges to Regional Leadership," October 10, 2024. <https://carnegieendowment.org/sada/2024/10/moroccos-atlantic-initiative-and-potential-challenges-to-regional-leadership>

7. MAP, "Royal Atlantic Initiative Is Visionary Approach Mobilizing New Potential for Cooperation, Co-development (Amb.)," May 10, 2024. <https://www.mapnews.ma/en/actualites/politics/royal-atlantic-initiative-visionary-approach-mobilizing-new-potential>

8. "Jassim Ahdani, "Mohammed VI, le Sahel et l'« Afrique atlantique »: le nouveau schéma stratégique du Maroc," May 28, 2024. <https://www.jeuneafrique.com/1571711/politique/jamal-machrouh-vouloir-construire-ensemble-est-le-seul-gage-pour-un-espace-africain-atlantique-fiable-et-durable/>

9. Assahifa, "Politika: Dakhla Atlantic Port, Africa's New Gateway to the Ocean," September 24, 2024. <https://www.assahifa.com/english/morocco/politika-dakhla-atlantic-port-africas-new-gateway-to-the-ocean/>

10. Business Focus, "Interview with Sidi Mohamed Ould Maham, General Manager Autonomous Port of Nouakchott (Port of friendship – PANPA)," November 23, 2023. <https://businessfocus.org.uk/interview-with-sidi-mohamed-ould-maham-general-manager-autonomous-port-of-nouakchott-port-of-friendship-panpa/>

access to maritime trade routes and significantly reducing transport costs. Additionally, the planned green hydrogen infrastructure at the Dakhla port positions the network as a potential hub for future clean energy exports, aligning with global trends in energy transition trends and sustainability.

Energy Infrastructure Development

The African-Atlantic Gas Pipeline (AAGP) is another cornerstone of Morocco's regional vision.¹¹ This ambitious US\$25 billion energy project aims to link Nigeria to Morocco through an extensive pipeline network traversing multiple West African countries, including Mauritania.¹² The pipeline's strategic importance is amplified by Europe's increasing interest in diversifying its gas supply sources from Africa, especially amid uncertainties surrounding traditional transit networks. Beyond its role in gas transmission, the AAGP holds broader significance, offering opportunities for industrial development along its route. This includes the potential to catalyze the establishment of new manufacturing and processing zones.¹³

The pipeline project is complemented by Morocco's expertise in renewable energy development, particularly in solar power. This dual focus underscores Morocco's broader strategy of asserting leadership in both traditional and renewable energy sectors, leveraging its successful domestic implementations while expanding its investments across Africa. The Sahel's vast solar potential makes it an ideal candidate for renewable energy projects inspired by Morocco's successful initiatives. By combining natural gas infrastructure with renewable energy development, this dual approach could deliver a reliable and sustainable energy supply, essential for driving industrial growth and improving living standards across the region.

COUNTRY-SPECIFIC IMPACT AND OPPORTUNITIES

Mauritania: Strategic Partner and Beneficiary

Mauritania plays a dual role in these infrastructure initiatives, serving both as a key partner and a major beneficiary. Its strategic location between Morocco and the Sahel is critical to realizing the Atlantic Initiative's vision of regional connectivity. However, Mauritania's diplomatic posture reflects the intricate regional dynamics at play. While maintaining neutrality amid Maghreb tensions, particularly between Morocco and Algeria, Mauritania must carefully navigate the competitive implications for its ports at Nouakchott and Nouadhibou. These ports, which reportedly handled over 5.22 million tons of cargo in 2022 and serve as a vital commercial artery for several Sahelian countries, are central to the country's economic landscape. Nevertheless, the Atlantic Initiative's framework for regional integration offers significant potential to enhance maritime cooperation, building

11. Solomon Ekanem, "NNPCL, ONHYM announce progress on the 6,800KM Nigeria-Morocco gas pipeline project," November 2, 2024. <https://africa.businessinsider.com/local/markets/nnpcl-onhym-announce-progress-on-the-6800km-nigeria-morocco-gas-pipeline-project/c6q3dt7>

12. John Ofikhenua and Vincent Ikuomola, "\$25b Nigeria – Morocco gas project at land acquisition, resettlement," November 2, 2024. <https://thenationonline.net/25b-nigeria-morocco-gas-project-at-land-acquisition-resettlement/>

13. S&P Global, "CERAWEEK: FID expected on Nigeria-Morocco gas pipeline by year-end, NNPC head says," March 20, 2024. <https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/natural-gas/032024-ceraweek-fid-expected-on-nigeria-morocco-gas-pipeline-by-year-end-nnpc-head-says>

on this strong foundation.¹⁴ The AAGP's routing through Mauritania presents significant opportunities for industrial development and enhanced energy access. Mauritania could leverage its strategic position to develop industrial zones and processing facilities along the pipeline route while benefiting from improved energy security. This potential for industrial growth aligns with Morocco's proven success in sectoral investments across Africa, particularly in telecommunications, banking, and infrastructure, where Moroccan companies have established leadership positions.

Benefits for Landlocked Sahel States

For Mali, whose economy relies heavily on gold, cotton, and livestock exports, the benefits lie in reducing transport costs.¹⁵ Enhanced port access through the Atlantic Initiative's economic framework could strengthen the competitiveness of Mali's mining and agriculture sectors, building on Morocco's vision of transcontinental connectivity. As Morocco's third-largest investment destination in Africa, Mali exemplifies the potential for deepening economic integration through infrastructure development.¹⁶ The energy infrastructure developments would not only support the expansion of Mali's mining and agriculture operations but could also stimulate the growth of value-added processing industries, creating new employment opportunities and fostering economic diversification.

Niger's uranium and crude oil sectors stand to gain significantly from improved export routes and reduced transport costs.¹⁷ The current limitations on port access, compounded by the country's withdrawal from ECOWAS, have severely hindered its ability to fully capitalize on its natural resources.¹⁸ Morocco's initiatives offer not only alternative trade routes but also the potential for developing new industrial capabilities along these corridors. Additionally, the AAGP could provide reliable energy access to support industrial development.

Similar to Mali, Burkina Faso's gold and cotton sectors would benefit from streamlined access to global markets through the maritime and transport networks envisioned in the Atlantic Initiative.¹⁹ Enhanced energy access would foster the development of value-added activities within the agricultural sector, potentially transforming Burkina Faso's position in both regional and global value chains. The improved infrastructure network could also help formalize trade flows and reduce transaction costs.

Chad, despite its geographic isolation, stands to leverage these initiatives, potentially reshaping its economic geography. Improved connectivity to global markets would reduce the country's dependence on limited regional trade routes, while enhanced energy access could stimulate the growth of local processing industries.

14. Business Focus, "Interview with Sidi Mohamed Ould Maham, General Manager Autonomous Port of Nouakchott (Port of friendship – PANPA)," November 23, 2023. <https://businessfocus.org.uk/interview-with-sidi-mohamed-ould-maham-general-manager-autonomous-port-of-nouakchott-port-of-friendship-panpa/>

15. U.S. International Trade Administration, "Mali - Country Commercial Guide," June 6, 2024. <https://www.trade.gov/country-commercial-guides/mali-mining>

16. Omar Ben Larbi, "Maroc-Mali : Une relation historique profonde et un destin partenarial gagnant," October 11, 2021. <https://archive.challenge.ma/maroc-mali-une-relation-historique-profonde-et-un-destin-partenarial-gagnant-avec-223304>

17. Alex Kimani, "Niger Aims to Become Major Oil Exporter," 19 August 2024, <https://oilprice.com/Energy/Crude-Oil/Niger-Aims-to-Become-Major-Oil-Exporter.html#:~:text=Niger%20has%20restarted%20oil%20exports,shipments%20to%20repay%20the%20loan.>

18. Azerbaijan 24, "Niger negotiates port access after regional bloc exit move," February 15, 2024. <https://www.azerbaycan24.com/en/niger-negotiates-port-access-after-regional-bloc-exit-move/>

19. AFP, "Burkina Faso Halts Export of Gold from Artisanal Mining," February 21, 2024. <https://www.barrons.com/news/burkina-faso-halts-export-of-gold-from-artisanal-mining-11bf303d>

STRATEGIC BENEFITS AND REGIONAL INTEGRATION

Economic Impact and Trade Enhancement

The potential impact of Morocco's infrastructure initiatives goes far beyond immediate transport and energy benefits. These projects could serve as a catalyst for broader regional integration by creating new economic corridors and facilitating increased trade flows between North and West Africa. The formalization of trade routes, alongside implementation of digital infrastructure, could help shift a significant portion of regional trade from informal to formal channels, enhancing economic governance and improving tax revenue collection. In doing so, the Initiative aligns with a larger vision of a harmonized Atlantic space under the Partnership for Atlantic Cooperation, fostering a common Atlantic identity and shared prosperity.

Security and Stability

Furthermore, these initiatives could strengthen regional security by generating economic opportunities in border regions and establishing more regulated trade corridors. The development of formal trade routes could reduce illegal trafficking and improve border control, contributing to greater regional stability. The economic opportunities generated along these corridors could provide viable alternatives to informal and illicit activities that currently thrive in border regions.

Knowledge Transfer and Capacity Building

The initiatives also present significant opportunities for knowledge transfer and capacity building. Morocco's expertise in port management, renewable energy development, and infrastructure operation can be shared with partner countries, ensuring the long-term sustainability of these investments. This is especially relevant for Mauritania, which stands to enhance its maritime and logistics capabilities through close cooperation with Morocco.

IMPLEMENTATION APPROACHES AND PRACTICAL CONSIDERATIONS

Successful implementation of these projects requires coordinated action across several key areas, with Morocco-Mauritania cooperation serving as a cornerstone for broader regional integration. The complexity of implementing the US\$25 billion gas pipeline project, alongside major port and transport infrastructure, requires sophisticated coordination mechanisms and sustained political commitment. Critical factors for success include establishing effective project coordination and management mechanisms, developing technical capacity, ensuring financial sustainability, and maintaining security along transport corridors.

The initiative's success will hinge on effectively navigating the complex interplay of regional rivalries and strategic interests. Morocco's position as a key Western partner enhances its ability to secure international financial backing, but implementation must delicately balance competing regional priorities, particularly given the significant geopolitical rivalries and the complexities introduced by Great Power involvement in the region. Complementary infrastructure development in participating countries will also be crucial, including benefit

from streamlined access to global markets through the maritime and transport networks envisioned in the Atlantic Initiative and last-mile infrastructure distribution systems. Additionally, prioritizing technical capacity building for infrastructure management and maintenance will require substantial investment in human capital development and institutional strengthening.

CONCLUSION

Morocco's infrastructure initiatives, developed in close collaboration with regional partners, particularly Mauritania, offer a transformative opportunity to enhance the Sahel's development prospects. The Atlantic Initiative arrives at a pivotal moment in the region's evolution, as traditional economic and political structures experience significant shifts. Morocco's proven success in expanding its economic footprint across Africa—from \$300 million to over \$3 billion in exports over two decades—underscores the potential for new models of regional integration. These projects exemplify how coordinated regional action can address shared challenges while unlocking new opportunities for economic growth and integration. Their success, however, will hinge on sustained political commitment and practical cooperation among all stakeholders, with the Morocco-Mauritania partnership acting as a pivotal catalyst for broader regional development. As the Sahel navigates complex geopolitical shifts, this approach to infrastructure development provides a pragmatic pathway for enhancing regional integration and economic prosperity, potentially transforming the region's economic geography and development trajectory for decades to come.

ABOUT THE AUTHORS



RIDA LYAMMOURI

Rida Lyammouri is a Senior Fellow at the Policy Center for the New South (PCNS). He is also a senior researcher and advisor on West Africa and the LCB, with expertise in regional conflicts, violent extremism, climate change, migration, and trafficking. Mr. Lyammouri specializes in analyzing the interactions between climate and conflict in the LCB, West Africa, and the Sahel. He studies resource scarcity, adaptive strategies, and socio-economic impacts, using a multidisciplinary approach that combines climate science and conflict analysis to explore the region's climate-security nexus.



AMINE GHOULIDI

Amine Ghouliidi is the Convenor of the MENA Research Group at King's College London, where he is completing a PhD in geopolitics and security. He currently serves as a Visiting Fellow on North African affairs at the Davis Institute for National Security and Foreign Policy in Washington, DC. Previously, Mr. Ghouliidi worked in the political risk practice of a global consulting firm and advised leading international organizations on illicit transnational networks. A Fulbright Scholar, Mr. Ghouliidi holds postgraduate degrees from King's College London and the American University in Washington, DC.

ABOUT THE POLICY CENTER FOR THE NEW SOUTH

The Policy Center for the New South (PCNS) is a Moroccan think tank aiming to contribute to the improvement of economic and social public policies that challenge Morocco and the rest of Africa as integral parts of the global South.

The PCNS pleads for an open, accountable and enterprising "new South" that defines its own narratives and mental maps around the Mediterranean and South Atlantic basins, as part of a forward-looking relationship with the rest of the world. Through its analytical endeavours, the think tank aims to support the development of public policies in Africa and to give the floor to experts from the South. This stance is focused on dialogue and partnership, and aims to cultivate African expertise and excellence needed for the accurate analysis of African and global challenges and the suggestion of appropriate solutions.

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Policy Center for the New South

Rabat Campus of Mohammed VI Polytechnic University,
Rocade Rabat Salé - 11103
Email : contact@policycenter.ma
Phone : +212 (0) 537 54 04 04
Fax : +212 (0) 537 71 31 54

www.policycenter.ma

