

The Quest for Regional Power

MOROCCO'S

CONTROLLED and

UNeVEN ASCENT



STRATEGIC ANALYSIS REPORT

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The Quest for Regional Power. Morocco's controlled
and uneven ascent.

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Cover: Morocco's flag [The Digital Artist]



Map of Morocco ([Morocco Guide](#), Africa Guide, modified with AI)

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EXECUTIVE SUMMARY

Morocco is no longer best understood as a peripheral North African state managing its environment defensively. It increasingly behaves as a country pursuing a deliberate and multidimensional regional strategy: consolidating sovereignty over contested space, widening its diplomatic and economic reach, and strengthening the capabilities needed to turn geography into influence. This report argues that Morocco's trajectory is neither one of imminent regional hegemony nor one of looming strategic overstretch. It is better understood as a process of controlled but uneven ascent: a sustained attempt to become a pivotal regional actor whose rise is real, but whose success remains conditioned by structural external and internal limits.

At the center of that strategy lies Western Sahara. More than any other issue, it defines the hierarchy of Moroccan national interests, shapes the country's external alignments, and conditions its rivalry with Algeria. In the short to medium term, the most plausible trajectory is not a definitive legal settlement, but a continued process of managed consolidation favorable to Rabat. International support for Morocco's autonomy framework is likely to keep widening gradually, even if not universally, and this will continue reducing the diplomatic space available to alternative outcomes. The conflict is therefore likely to remain formally unresolved, yet increasingly consolidated in practice, which already represents a major strategic gain for Morocco.

That sovereign logic also radiates outward into other arenas. The northern relationship with Spain, including Ceuta, Melilla, and the Atlantic maritime frontier, is unlikely to become a site of direct territorial revision, but it will probably remain an arena of pressure, signaling, and strategic bargaining. More broadly, Morocco's relations with Spain and the European Union are likely to remain structurally ambivalent: too interdependent for rupture, too politically charged for full normalization. The same broader pattern appears in Africa, where Morocco's activism is unlikely to produce an uncontested diplomatic victory on Western Sahara, but is likely to continue rebalancing the continental environment in Rabat's favor through investment, finance, diplomacy, and connectivity. In this sense, Morocco's influence is likely to become denser before it becomes broader.

The report also shows that Morocco's material ambitions are credible but differentiated. Its logistical projection is already substantial, while its energy and connectivity ambitions offer greater long-term promise than immediate certainty. More broadly, Morocco does possess real means to sustain further regional influence: geostrategic location, regime continuity, military modernization, infrastructure expansion, growing African business networks, and diversified external partnerships. These assets make Moroccan ambition plausible, but they do not remove the constraints that define its outer limits.

Those constraints remain substantial. The rivalry with Algeria is the sharpest external one. It is unlikely to lead to full interstate war in the medium term, but equally unlikely to soften into meaningful reconciliation. To the south, Mauritania is more likely to remain a buffer than a direct source of conflict, but this will not insulate Morocco from the Sahel. The more Rabat turns Western Sahara into an Atlantic platform for Sahelian access, the more it binds its own projection to a region marked by instability, fragmented alignments, and transnational insecurity. The domestic dimension is equally important. The monarchy is likely to remain the central pillar of Moroccan stability, but resilience should not be treated as unlimited if socioeconomic pressure, institutional rigidity, and rising expectations continue to accumulate faster than reform.

The final judgment of this report is therefore clear. Morocco is likely to continue advancing toward a stronger regional role because its strategic objective is coherent, its methods are diversified, and its capabilities are substantial enough to sustain further influence. Nevertheless, that rise will remain selective, uneven, and constrained by rivalry, instability, legal friction, implementation gaps, and domestic limits. Morocco is best understood not as an emerging hegemon, but as a mid-sized state successfully expanding its room for maneuver across multiple arenas while still operating within hard structural limits. Its future relevance will depend on whether it can continue converting sovereignty, geography, interdependence, and external partnerships into durable influence without incurring costs greater than its capacity to absorb.

INTRODUCTION

Morocco's current strategic position is the product of a long historical trajectory in which dynastic continuity, territorial consolidation and external balancing have remained closely intertwined. Since independence in 1956, the monarchy has provided unusual institutional continuity, combining political centralization with gradual economic and diplomatic adaptation, while also defining the state through the assertion of sovereignty over disputed territories and the ambition to project Morocco as more than a peripheral North African actor. This logic became especially clear from the mid-1970s, when the Green March and Spain's withdrawal from Western Sahara turned the Saharan question into the core sovereign issue of modern Moroccan strategy, shaping foreign policy, regional rivalry and part of domestic legitimacy. Yet Morocco did not remain confined to that dossier, and under Hassan II, and more clearly Mohammed VI, it steadily broadened its diplomatic and economic ambitions.

Re-engagement with Africa, closer security cooperation with Western partners, selective opening toward the Middle East, and investment in ports, logistics and energy projects all point to a wider ambition: not simply to defend inherited positions, but to become a more influential regional actor. This ambition has also drawn on older geopolitical imaginaries associated with the idea of a "Greater Morocco", understood less as a current blueprint than as a long-standing vision linking territorial integrity, historical depth and regional projection.

Within that broader historical and geopolitical horizon, Western Sahara occupies the central place, as it is the issue through which Moroccan sovereignty, external legitimacy and regional credibility most clearly intersect. The dispute is no longer framed only by its original decolonization logic, but by the interaction between Moroccan control on the ground, the United Nations framework, the autonomy proposal and the changing positions of external actors. It now appears less as a frozen territorial dispute awaiting final settlement than as a dynamic dossier in which Morocco seeks to turn de facto control into gradual diplomatic consolidation.

That sovereign logic also extends northward into the spaces linking Morocco with Spain. Ceuta and Melilla remain symbolically sensitive in Moroccan political discourse. At the same time, the Atlantic maritime frontier, especially around the waters adjacent to Western Sahara and the Canary Islands, adds a legal, economic and geostrategic dimension to the broader sovereignty

debate. These dossiers show that the territorial question is not exhausted by a single conflict, but forms part of a wider political geography.

Spain occupies a special place in this broader picture because it is at once neighbor, partner, former colonial power and recurrent point of friction. Moroccan-Spanish relations cannot be reduced to moments of crisis, since both countries are deeply connected through trade, migration, border management and security cooperation. Yet nor can they be understood as a stable partnership free of pressure. For Morocco, Spain is one of the main arenas where sovereignty claims, interdependence and strategic signaling converge.

The European Union constitutes a wider and more complex arena in which Moroccan strategic utility meets legal and political friction. On the one hand, the Union and its member states benefit from cooperation with Morocco in migration control, trade, neighborhood stability, infrastructure and potentially energy transition. On the other hand, the treatment of products and resources linked to Western Sahara, as well as scandals related to espionage or corruption, periodically expose the limits of this partnership. The relationship is therefore shaped by a constant tension between legal reservations and geopolitical pragmatism.

To the south, Morocco's activism in Africa has become one of the clearest expressions of its broader regional ambition. The kingdom's return to continental diplomacy has involved investment, banking expansion, diplomatic outreach and a deliberate effort to deepen its presence in sub-Saharan spaces. This projection expands Morocco's economic opportunities while it reshapes the political environment surrounding Western Sahara. African policy, therefore, is not an appendix to Morocco's external action but one of its main theatres.

The opening created by the Abraham Accords adds another layer to this wider repositioning. Morocco's relationship with Israel is strategically significant because it touches on security cooperation, technology, diplomatic visibility and lobbying capacity. At the same time, it places Morocco in a delicate position, since any deepening of that relationship must be balanced against regional sensitivities and domestic opinion. The Middle Eastern dimension of Moroccan strategy is thus a field of selective opening rather than unconditional alignment.

If Morocco's external ambition is to amount to more than diplomatic posture, it must rest on material capabilities, which is why infrastructure, logistics and energy are so central to its strategy. Major ports, transport corridors, renewable energy projects, and plans linked to gas and hydrogen are presented as foundations of Morocco's role as a connector state between

Europe and Africa. Economic projection into Africa follows the same logic: trade, investment, banking networks and business expansion are not only indicators of growth, but also instruments for embedding Morocco in regional circuits of dependence and partnership. In this sense, Morocco's strategic relevance depends on whether it can translate infrastructural ambition and economic expansion into lasting geopolitical influence through sectors, nodes and long-term relationships.

Another crucial dimension of Moroccan capability lies in the combination of lobbying, military modernization and strategic partnerships. Morocco has worked to cultivate the image of a stable and useful partner for Western powers, especially the United States, while also upgrading its armed forces and expanding defense cooperation. In strategic terms, credibility is not built by discourse alone. Yet these same efforts may generate suspicion if they are perceived as signs of excessive assertiveness.

No analysis of Morocco's future can ignore Algeria, since rivalry with Algiers remains the central structural fault line of the Maghreb. The two states are divided not only by diplomatic rupture, but by competing regional visions, diverging alliances and opposite positions on Western Sahara. In fact, Algeria is the main external actor capable of contesting Moroccan ambitions in a sustained way. Morocco's rise must therefore be assessed against the limits imposed by this enduring antagonism.

Southward, Mauritania and the Sahel introduce another layer of strategic uncertainty. Mauritania can function as a buffer, a bridge or a transmission belt between Morocco and the wider Sahelian zone. At the same time, Morocco's interest in projecting influence through Western Sahara toward Atlantic access routes for Sahelian states gives the southern flank increasing importance. The question is whether Morocco can engage with this space without becoming more vulnerable to the instability it hopes to bypass or mitigate.

An assessment of Morocco's future strategic trajectory would be incomplete without considering domestic resilience. Morocco's external strategy rests on the assumption that the kingdom can continue projecting continuity, governability and strategic usefulness. That assumption depends heavily on the monarchy, which remains the central pillar of state authority and political stability. The key issue is whether the Moroccan political order can keep absorbing tension while preserving enough legitimacy and cohesion to sustain a wider regional role.

Taken together, these dynamics reveal a broader strategic logic. Morocco's territorial priorities, diplomatic activism, material ambitions and internal and external vulnerabilities do not operate separately; they interact as part of a single effort to convert sovereignty, stability and geographic position into lasting regional influence. At the center of that effort lies Morocco's ambition to establish itself as a pivotal regional actor between Europe, Africa and the broader Middle East and North Africa. Yet that wider aspiration remains inseparable from a more immediate core interest: the consolidation of Moroccan sovereignty over Western Sahara.

This duality gives coherence to the analysis that follows. The report first examines the sovereign and territorial priorities that define what Morocco seeks to secure, before turning to the diplomatic and political channels through which Rabat tries to translate those priorities into recognition and leverage. It then considers the material and strategic capabilities that may sustain that ambition over time, as well as the regional and domestic constraints that may limit it. In this way, the report follows a continuous sequence moving from priorities to action, from action to capabilities, and from capabilities to constraints.

The report also incorporates a number of prospective tools in order to move beyond descriptive analysis. Western Sahara, as the central sovereign issue in Moroccan strategy, is examined through a full scenario-building exercise that moves from actors and variables to key drivers and a final scenario matrix for 2026–2035. A second and more concise scenario exercise is developed in the section on Spain, where the aim is to identify the most plausible trajectories of the bilateral relationship. The report then concludes with a synthetic strategic matrix organized around Morocco's end state, ways, means, and constraints, which serves to summarize the broader logic of the analysis.

Morocco enters the coming years with greater diplomatic visibility, stronger infrastructural ambition and more regional relevance than at many previous moments in its post-independence history. At the same time, it remains exposed to unresolved rivalries, legal ambiguities, unstable southern spaces and domestic limitations that complicate any simple reading of ascent. The pages that follow are therefore organized around a single broad question: how far Morocco can convert sovereignty, geography, stability and external partnerships into durable regional influence. The answer advanced in this report is neither one of imminent hegemony nor one of strategic paralysis, but one of controlled and uneven ascent.

1. STRATEGIC OBJECTIVE

THE PURSUIT OF EXPANDED SOVEREIGNTY

Morocco's broader regional ambition can only be properly understood by first looking at the territorial priorities that underpin it. These are not simply matters of geography, but issues of legitimacy, security and political projection. Western Sahara remains at the center of this picture, while Ceuta, Melilla and the Atlantic maritime frontier illustrate how Morocco's understanding of sovereignty also extends into questions of pressure, signaling and strategic positioning.

1.1. Western Sahara as the Core Territorial Objective

Western Sahara is the core territorial objective of Moroccan strategy because it sits at the intersection of sovereignty, regime legitimacy, and regional projection. In the literature, the conflict has long been understood not simply as a territorial dispute but as a struggle over recognition, legitimacy, and state authority in a protracted and partially normalized conflict environment. Consequently, for Rabat, the issue is not only about retaining a disputed territory; it is also the principal test of whether Morocco can shape the political terms of its regional environment. The more Morocco succeeds in normalizing its control over the territory diplomatically, administratively, and economically, the more it strengthens its broader claim to be a regional actor capable of turning geography into durable influence.

The historical and legal background is still relevant, but only up to a point. Formally, the UN framework continues to preserve the language of self-determination, and MINURSO remains as the United Nations mission originally established in 1991 to monitor the ceasefire and support a referendum of self-determination in Western Sahara. Yet the practical meaning of that framework has progressively narrowed. Recent UN reporting still describes the situation as one of “tensions and low-intensity hostilities”,¹ while successive renewals of MINURSO have preserved the mission without bringing the parties closer to a realistic referendum pathway.² In

¹ United Nations Security Council, *Situation concerning Western Sahara: Report of the Secretary-General*, UN Doc. S/2024/707 (October 1, 2024), 1.

² United Nations Security Council. *Resolution 2756 (2024)*, UN Doc. S/RES/2756. (October 31, 2024).

practice, the referendum survives institutionally, but increasingly as a residual legal principle rather than as an actionable political outcome.

At the same time, the diplomatic balance has shifted in Morocco's favor. Over the last years, Rabat has gradually moved the conflict away from a binary choice between integration and independence toward a framework centered on autonomy under Moroccan sovereignty. The turning point came with the United States' recognition of Moroccan sovereignty in 2020 and its endorsement of autonomy as the basis for settlement.³ That shift was later reinforced by Spain's 2022 repositioning,⁴ France's 2024 endorsement of autonomy under Moroccan sovereignty,⁵ and the United Kingdom's 2025 support for the plan.⁶ Additionally, recent resolution 2797, which again renewed the mission, also reflected this broader trend: while the language of self-determination was formally maintained, autonomy under Moroccan sovereignty increasingly appeared as the most workable basis for diplomatic progress.⁶ All this does not amount to universal recognition, since the legal dispute clearly stays alive. Even so, the diplomatic momentum has moved sufficiently for Morocco's formula to appear to many external actors as the most realistic framework for managing the conflict.

These developments do not point to a single automatic outcome. Rather, they suggest that the future of Western Sahara will depend on the interaction between several forces: the degree of international support for Morocco's autonomy proposal, the pace of Moroccan consolidation on the ground, the capacity of the Polisario–Algeria axis to preserve relevance through diplomatic or disruptive means, and the residual viability of the UN framework. In other words, the conflict is no longer structured by a simple binary between settlement and stalemate, but by a more complex struggle over which political framework becomes progressively dominant.

Scenario Building: Western Sahara (2026-2035)

At this point, a structured scenario-building exercise appears particularly suitable for clarifying how the conflict may evolve over the next decade. Given the centrality of Western Sahara to Moroccan strategy, the issue cannot be assessed only through current facts, but must also be examined through the interaction of its main actors, variables, drivers, and uncertainties. Rather

³ United States Department of State, *Agreement Between the United States of America, Morocco and Israel*, TIAS 20-1222, signed at Rabat December 22, 2020.

⁴ Reuters, "Spain supports W. Sahara plan in shift closer to Rabat," March 18, 2022.

⁵ Ahmed Eljechimi and John Irish, "France backs Moroccan sovereignty over Western Sahara," *Reuters*, July 30, 2024. ⁶ Foreign, Commonwealth & Development Office, "UK-Morocco Joint Communiqué: Strategic Dialogue 2025," *GOV.UK*, June 1, 2025.

⁶ United Nations Security Council, *Resolution 2797 (2025)*, UN Doc. S/RES/2797 (October 31, 2025).

than predicting a single future, the following scenario set maps the internal dynamics of the conflict and outlines the range of plausible trajectories for the period 2026–2035, moving progressively from actor structure and key variables to critical drivers and, finally, to the scenario matrix itself.

The first step is to identify the actors that matter most. This helps clarify who has the greatest stake in the conflict and who has the greatest capacity to shape its evolution. Morocco, the Polisario Front and Algeria remain the central actors, but they do not operate in isolation. The United Nations, Spain, France, the United States, the African Union and a number of African states also influence the diplomatic environment in which the conflict develops. Thus, the stakeholder map provides a first simplified picture of the system by showing which actors combine the highest degree of interest with the highest degree of impact.

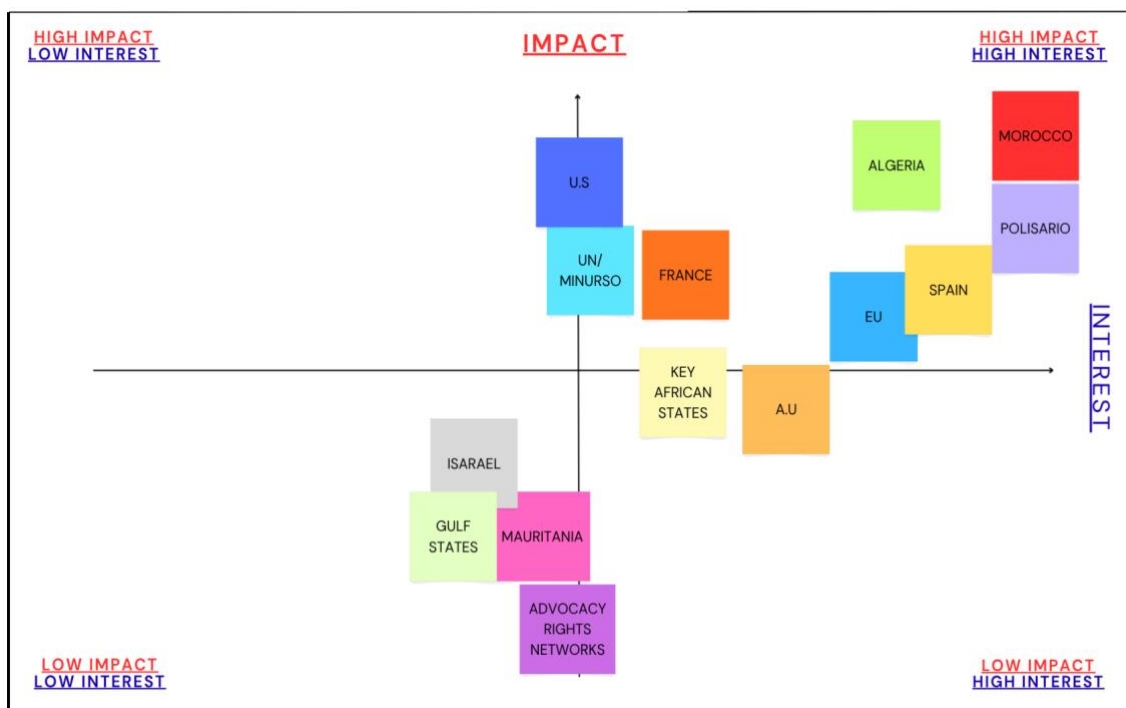


Figure 1: Stakeholder map (own elaboration)

Once the main actors have been identified, the next step is to move to the variables. The influence diagram does this by showing how the conflict is shaped by four broader clusters: international support for the autonomy framework, Moroccan consolidation on the ground, the resistance capacity of the Polisario–Algeria axis, and the viability of the UN framework. These clusters interact continuously. Diplomatic support and normalization tend to reinforce

Morocco’s position; territorial control, development and administrative consolidation strengthen that position internally; while resistance, confrontation and the residual UN framework work to slow or complicate that process. Thereby, the diagram graphically shows that the future of Western Sahara depends less on one single event than on the interaction of several reinforcing and constraining dynamics.

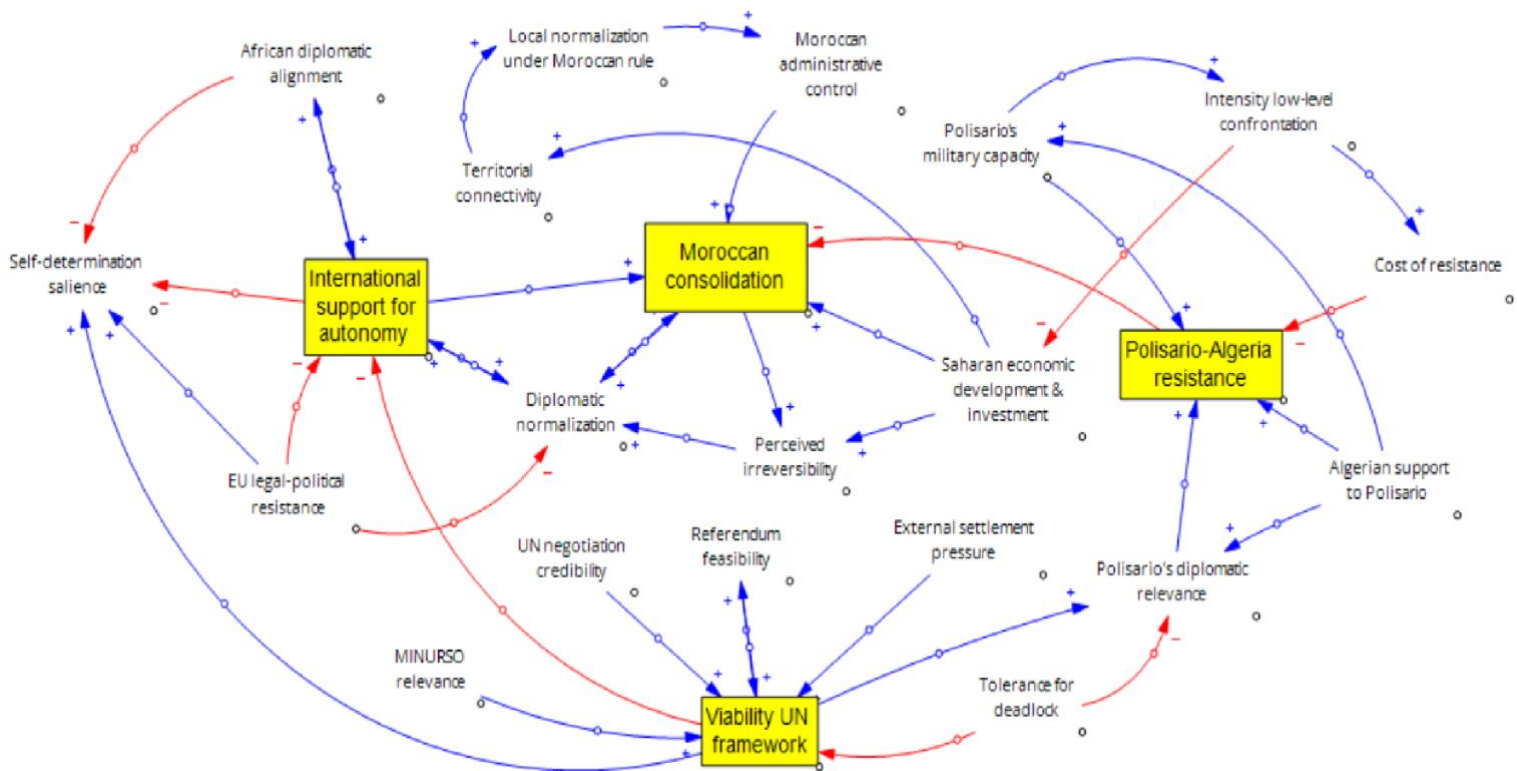


Figure 2: Influence diagram (own elaboration)

From there, the analysis shifts to the drivers of change. Not all variables matter in the same way: some are relatively stable, while others are more uncertain but also more decisive for the future. The impact and predictability chart helps distinguish between those two types. On the one hand, some trends appear relatively stable: Morocco’s de facto control over most of the territory, the declining feasibility of a referendum, the centrality of the Sahara issue to Moroccan legitimacy, and continued Algerian backing for the Polisario. On the other hand, some drivers are more uncertain and therefore more useful for scenario building, especially the future level of international support for autonomy and the disruptive capacity of the Polisario–Algeria axis. Those two critical uncertainties are the ones used to build the final scenario matrix.

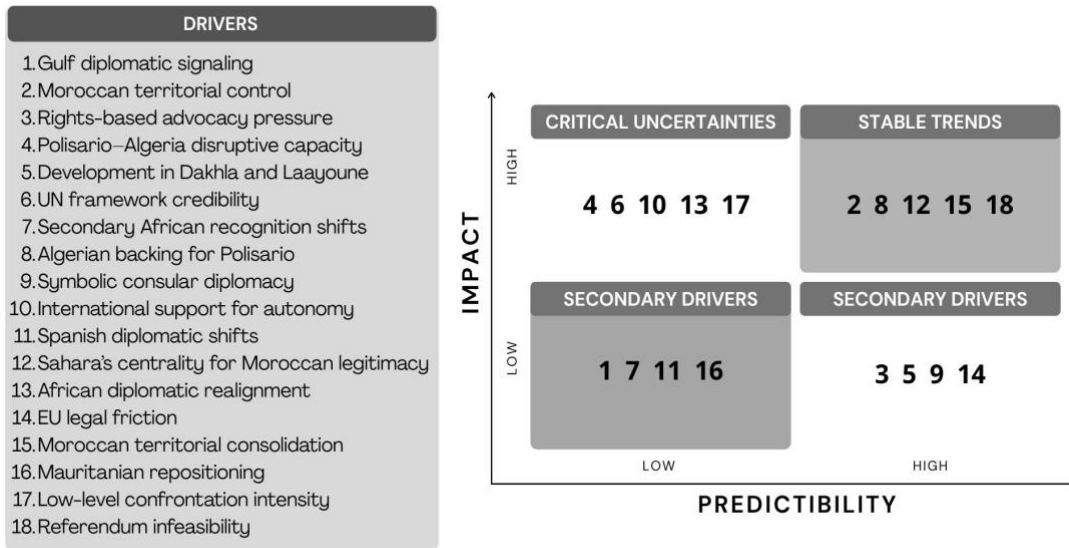


Figure 3: Impact Chart (own elaboration)

As a result, the scenario matrix combines those two core uncertainties. The first axis measures the level of international support for Morocco’s autonomy framework, while the second measures the strength of the Polisario–Algeria axis as a source of disruption. Their combination produces four possible trajectories for the period 2026–2035.



Figure 4: Scenario Matrix (own elaboration)

The first scenario, managed consolidation, combines strong external support for autonomy with weak disruptive resistance. In this case, Morocco would continue translating its control on the ground into wider diplomatic normalization. The conflict would remain formally unresolved, but increasingly stabilized in Rabat's favor. The second scenario, consolidation under pressure, also assumes growing support for Morocco's preferred framework, but under conditions of continued resistance and low-level confrontation. Morocco would still advance diplomatically, but not in a fully pacified environment.

The third scenario, frozen ambiguity, emerges when support for autonomy remains limited but resistance is also relatively weak. This would produce a prolonged grey-zone outcome: no decisive diplomatic breakthrough, no final settlement, and no major reversal of the balance on the ground. The fourth scenario, renewed escalation, combines weaker international support for Morocco's framework with stronger disruptive capacity from the Polisario–Algeria axis. In that case, the conflict would become more openly adversarial again, with higher diplomatic and security costs for all sides.

Taken together, these scenarios suggest that the future of Western Sahara is unlikely to be defined either by a rapid final settlement or by a complete reversal of Morocco's gains. The more plausible outlook lies between managed consolidation and consolidation under pressure. Morocco is likely to continue strengthening its position both on the ground and diplomatically, but not under conditions of full closure. In that sense, the support Rabat is receiving for its autonomy framework is likely to weaken the Polisario Front diplomatically. However, that same trend may also encourage limited forms of armed or disruptive resistance, precisely because the more the diplomatic space closes, the stronger the incentive for the Polisario–Algeria axis to preserve relevance through continued confrontation. In conclusion, the conflict is more likely to evolve toward asymmetric consolidation with residual volatility than toward definitive resolution.

This matters beyond the Saharan file itself. Western Sahara is not simply one issue among others, but the sovereign core around which much of Moroccan regional strategy is organized. Its future evolution will therefore shape not only the territory's political status, but also Morocco's wider diplomatic room for manoeuvre, its rivalry with Algeria, and the credibility of its claim to be a more consequential regional actor.

1.2. Ceuta, Melilla and Hybrid Pressure Mechanisms

If Western Sahara is the central territorial objective of Moroccan strategy, the northern frontier with Spain reveals how that sovereignty logic radiates beyond the Saharan file without necessarily reproducing its priorities. Ceuta, Melilla, and the Atlantic maritime space around the Canary Islands are not equivalent to Western Sahara in legal status, strategic value, or diplomatic salience, yet they remain part of the same wider grammar of sovereignty. They keep open the idea that Morocco's territorial question is not fully exhausted, and they provide Rabat with spaces in which pressure, signaling, and jurisdictional assertion can be exercised below the threshold of direct military revision.⁷⁸ The strategic issue is not whether Morocco is about to launch an immediate bid to recover Ceuta and Melilla or forcibly redraw maritime boundaries. It is, rather, whether these matters will continue to function as politically usable extensions of a broader strategy of expanded sovereignty. The most plausible answer is yes: they are likely to remain active fronts of pressure and affirmation, but not of imminent territorial revision.

The first reason is structural. Ceuta and Melilla do not occupy the same legal terrain as Western Sahara. They are not framed internationally as unresolved decolonization cases, nor do they sit within a UN process that creates ambiguity over their final status. That narrows the diplomatic space available to Morocco, as a frontal campaign for immediate revision would face high political costs and very low international receptivity.⁹ However, that very constraint helps explain why the enclaves remain strategically useful. Since their status is difficult to change directly, they can instead be mobilized as symbols of incomplete sovereignty and as sensitive border nodes through which Rabat can communicate dissatisfaction without openly crossing into military confrontation.¹⁰ In other words, their strategic value lies less in recoverability than in usability.

That logic has become increasingly visible over the last decade. Ceuta and Melilla are not just territorial remnants on Morocco's northern coast, but they are also highly exposed border systems whose normal functioning depends, to a significant degree, on Moroccan cooperation. Migration control, customs management, policing, and cross-border commercial circulation all

⁷ Josep Baqués-Quesada, "Is Morocco operating a grey zone in Ceuta and Melilla?," *Defence Studies* 23, no. 2 (2023):

⁸ –9.

⁹ Jamie Trinidad, "An Evaluation of Morocco's Claims to Spain's Remaining Territories in Africa," *International & Comparative Law Quarterly* 61, no. 4 (October 2012): 968–971, 974–5. ¹⁰ Baqués-Quesada, "Is Morocco operating a grey zone," 205–6.

create channels through which pressure can be increased or relaxed. The clearest example remains the May 2021 Ceuta crisis, when around 5,000 migrants entered from Morocco after a sharp bilateral dispute linked to Spain's treatment of Polisario leader Brahim Ghali.¹⁰ European institutions treated this crisis as a case of political instrumentalization, explicitly rejecting Morocco's use of border control and migration as political pressure against an EU member state.¹¹ That episode showed how temporary loosening of control at the border can generate disproportionate strategic effect.

The same logic extends beyond migration. Customs and commercial arrangements have also been used to reshape the practical environment of the enclaves, reducing the sense of normality in cross-border functioning. These measures do not alter sovereignty directly, but they remind Madrid that the operational stability of Ceuta and Melilla is not self-sustaining and depends, in part, on the political climate with Rabat. Their value to Morocco lies in ambiguity: they remain politically contested in narrative terms, while being operationally exploitable without requiring direct revisionism.¹²

Even so, this does not mean that Morocco treats these Spanish territories as immediate objectives comparable to Western Sahara. They are useful to keep rhetorically alive, but the costs of trying to alter their status by force would be prohibitive.¹⁴ For that reason, their function is to keep the status quo politically negotiable and psychologically unsettled.

Regarding the Atlantic maritime frontier, it introduces a different but related layer of the same problem. Here Morocco's sovereignty logic becomes more juridical and geoeconomic than symbolic. The issue extends in this case into waters where sovereignty on land interacts with jurisdiction at sea. Morocco's 2020 maritime laws sought to update its legal framework for territorial waters, the contiguous zone, and the exclusive economic zone, explicitly including the coastline of Western Sahara. As a result, Spain responded by insisting that any overlap with waters adjacent to the Canary Islands would have to be resolved through negotiation under the law of the sea.¹³

¹⁰ Miriam Hadjeres Montero, "The Coercive Use of Migration on the Southern Border of the European Union: A Case Study of the Melilla Crisis 2022" (master's thesis, Charles University, 2023), 50.

¹¹ European Parliament, *European Parliament Resolution of 10 June 2021 on the Breach of the UN Convention on the Rights of the Child and the Use of Minors by the Moroccan Authorities in the Migratory Crisis in Ceuta (2021/2747(RSP))*, P9_TA(2021)0289 (June 10, 2021).

¹² Baqués-Quesada, "Is Morocco operating a grey zone," 206–7. ¹⁴ Baqués-Quesada, "Is Morocco operating a grey zone," 199.

¹³ Reuters, "Morocco, Spain to hold talks about overlapping territorial waters," January 25, 2020.

This maritime dimension is strategically important for two reasons. First, it strengthens the practical meaning of Morocco's control over Western Sahara. Sovereignty on land generates claims at sea, and those claims in turn reinforce the geostrategic value of the territory by providing Atlantic frontage, extended jurisdictional reach, and possible access to fisheries and seabed resources.¹⁴ Second, the maritime arena offers Morocco a more viable route for sovereignty expansion by legal and diplomatic means. Whereas any direct challenge to the enclaves would be immediately explosive, these maritime claims can be advanced through legislation, mapping, negotiation, and administrative practice.¹⁵

The importance of Western Sahara's EEZ in this context is not simply cartographic. The waters between the Moroccan-Saharan coast and the Canaries carry strategic significance because they involve potential resource competition, control over maritime space, and future delimitation in sensitive areas such as the Tropic seamount.¹⁶ Hence, the EEZ question is part of a wider Moroccan effort to convert territorial consolidation into jurisdictional depth, economic leverage and long-term goeconomic projection.

Two main drivers make this combined pattern likely to persist. The first is that Morocco has strong incentives to prefer calibrated pressure and legal assertion over overt escalation, since migration management, customs restrictions, and administrative border control are cheap, reversible, and deniable compared with military options.¹⁷ Maritime legislation and cartographic claims work in a similar incremental way¹⁸. The second driver is Spain's own preference for managed coexistence. This is to defend its legal position while preserving cooperation with Rabat on migration, trade and security, which inevitably leads to a bilateral environment in which crises are frequent enough to matter but usually contained before they transform into strategic rupture.¹⁹

The plausible trajectory, then, is that of Ceuta and Melilla continuing to function as politically resonant but strategically indirect fronts, while the Atlantic facade issue remains a more substantive arena of legal and strategic competition. Taken together, these files suggest that

¹⁴ Daniel Abascal, "Maritime delimitation, Monte Tropic, and airspace management in the Moroccan Sahara," *Atalayar*, November 23, 2025.

¹⁵ Samir Bennis, *The Underlying Causes of Morocco-Spain Maritime Dispute off the Atlantic Coast*, policy paper, Institut Amadeus, January 27, 2020.

¹⁶ Francisco Helenio Hoyos Medina and Celeste Santaella García, "Conflict Over the Delimitation of Waters Between Spain and Morocco," *Journal of Maritime Research* 22, no. 1 (2025): 447–9.

¹⁷ Baqués-Quesada, "Is Morocco operating a grey zone," 201.

¹⁸ Bennis, *Underlying Causes of Morocco-Spain Maritime Dispute*, 1-5.

¹⁹ Reuters, "Timeline: Spain and Morocco's rocky diplomatic relations," June 25, 2022.

Morocco's northern frontier strategy will continue to blur the line between dispute and leverage. That, in turn, helps explain why the Spanish dossier cannot be understood only through the lens of territorial narrative. Ceuta, Melilla, and the Atlantic maritime frontier become fully intelligible only when placed inside the broader bilateral relationship with Spain, where cooperation, coercion, and interdependence coexist.²⁰ The next step, therefore, is to examine the wider strategic logic through which Rabat and Madrid manage them over time.

²⁰ Reuters, "[Timeline: Spain and Morocco's rocky diplomatic relations.](#)"

2. EXTERNAL LINES OF ACTION

DIPLOMACY, INTERDEPENDENCE AND ALIGNMENT

If the previous section focused on the territorial priorities that anchor Morocco's strategic posture, this one turns to the external arenas through which Rabat seeks to consolidate and advance them. Morocco's diplomacy is not limited to defending existing gains, it also aims to shape a regional and international environment more receptive to its interests. This dynamic can be seen in its management of relations with Spain and the European Union, in its growing activism across Africa, and in the opportunities opened by its Middle Eastern repositioning. Taken together, these arenas show that Morocco seeks not only recognition, but a broader form of strategic accommodation.

2.1. Spain as a Strategic Interlocutor and Friction Point

Morocco's relationship with Spain is unlikely to evolve toward either stable normalization or outright rupture. As previously mentioned, the more plausible trajectory is a continued pattern of managed interdependence, since the bilateral relationship is not structured by trust, but by asymmetrical mutual need. On the one side Spain needs Moroccan cooperation to help contain irregular migration, sustain counterterrorism coordination, and preserve relative stability on the EU's southwestern flank. Morocco, for its part, benefits from access to the Spanish market, political recognition from a key European neighbor, and a cooperative framework that reduces external resistance to its position on Western Sahara.

Since the Spanish shift of March 2022, Madrid and Rabat have tried to stabilize this logic through a "new stage" in relations,²¹ but the underlying structure remains transactional rather than reconciliatory. In short, Spain's support for Morocco's autonomy proposal opened a path to closer coordination, yet it did not remove the deeper sources of friction that make the relationship inherently unstable at the margins.²²

That helps explain why the bilateral relationship has improved without becoming strategically settled. The 2022 roadmap and the 2023 High-Level Meeting relaunched sectoral cooperation

²¹ La Moncloa, "Pedro Sánchez and Mohamed VI launch a new stage in relations between Spain and Morocco," April 7, 2022.

²² Reuters, "Spain supports W. Sahara Plan."

in migration, economics, infrastructure, and security,²³ and both governments presented the new framework as a reset after the 2021 crisis.²⁴ Yet this institutional recovery should not be confused with the disappearance of bilateral leverage. Spain's repositioning on Western Sahara reduced immediate diplomatic hostility, but it also reinforced in Rabat the perception that Spain can shift under pressure when the Saharan file is involved.²⁵ That lesson is crucial for the future because it encourages a pattern with long-term consequences in which Morocco sees calibrated coercion as part of the bargaining environment.

Consequently, the present state of the relationship is best understood as cooperative but conditional. On migration, in particular, cooperation has clearly deepened since the 2022 reset. As an example, in 2024, Moroccan authorities reported intercepting 78,685 attempted irregular crossings to Europe.²⁶ In fact, that same year, Moroccan forces actively blocked mass attempts to reach Ceuta.²⁷ Later route shifts toward Algeria indicated that smugglers were responding to tighter Moroccan controls. However, all those attempted group breaches have continued, which underscores an important point: cooperation reduces pressure, but it does not eliminate the border's structural volatility.

This duality is similarly reinforced by the economic and border-management dimension. Since 2022, both governments have also tried to restore more orderly customs and commercial arrangements around Ceuta and Melilla, and the reopening of customs has been treated as a symbol of this "new phase". Nevertheless, repeated delays, pilot tests, and technical obstructions reveal how politically sensitive these issues remain. Even when both sides publicly support normalization, progress is slow and reversible, which reflects the fact that border administration is not merely technical, but also a bargaining instrument.³⁰

Several drivers suggest that this combination of cooperation and limited coercion will persist. The first is structural interdependence: Spain depends on Morocco in migration, counterterrorism, and border stability, while Morocco benefits from Spain as both a commercial partner and a key European interlocutor. The second is asymmetry of instruments: Morocco can

²³ Belén Carreño and Ahmed Eljechtimi, "Spain, Morocco Seek Reset of Testy Relationship at Rabat Summit," *Reuters*, February 2, 2023.

²⁴ La Moncloa, "Pedro Sánchez and Mohamed VI launch a new stage."

²⁵ Andrew Lebovich and Hugh Lovatt, "Endless concessions: Spain's tilt to Morocco," *European Council on Foreign Relations*, March 23, 2022.

²⁶ Reuters, "Morocco foils 78,685 migrant attempts to reach Europe in 2024," February 6, 2025.

²⁷ Ahmed Eljechtimi, "Morocco blocks mass migration attempt into Spain's Ceuta enclave," *Reuters*, September 15, 2024. ³⁰ Raúl Redondo, "Morocco confirms the early reopening of customs crossings with Ceuta and Melilla," *Atalayar*, April 22, 2024.

impose immediate political costs whereas Spain's stronger alliance position is more effective in deterring overt escalation than in countering hybrid pressure.

Last one is domestic politics, since shifts in rhetoric or government on either side can quickly affect confidence in the relationship. Taken together, these drivers make periodic crises plausible, even if the overall framework of cooperation remains in place.

Scenario set: Spain – Morocco Relations (2026–2035)

A brief scenario-building exercise helps clarify the most plausible trajectories of the bilateral relationship over the next decade. Rather than predicting a single outcome, it distinguishes between three possible directions shaped by interdependence, limited coercion, and political sensitivity.

A. Managed interdependence: Cooperation remains dense in migration, trade, and security, while crises are limited and rapidly contained.

B. Recurring hybrid friction: Cooperation continues but is repeatedly disrupted by migration pressure, customs disputes, symbolic escalation, or maritime incidents.

C. Escalation by incident: Cumulative tensions produce a sharper crisis that briefly moves beyond controlled instability.

Of these three, the most plausible lies between managed interdependence and recurring hybrid friction, with the former remaining the stronger baseline. Spain and Morocco are likely to keep cooperating where both need each other most, but that cooperation will remain inseparable from periodic episodes of pressure and sovereignty-linked tension. A serious military escalation cannot be ruled out entirely, especially through miscalculation or incident-driven escalation, but it remains significantly less likely than a continued pattern of managed friction. The relationship is therefore best understood as a durable coexistence in which partnership and leverage continue to operate together.

2.2. The European Union: Law, Trade and Transactional Interdependence

Morocco's relationship with the European Union is likely to remain structurally cooperative but politically ambivalent. The key question is not whether tensions will disappear, because they will not, but whether legal and reputational frictions will outweigh the strategic incentives that bind both sides together. In the short to medium term, such a development seems improbable.

Brussels is likely to preserve pragmatic cooperation with Rabat even while legal disputes over Western Sahara and political controversies such as Pegasus and Qatargate continue to generate friction.²⁸ For the EU, Morocco remains both a difficult partner and a highly useful one. Difficult because the Western Sahara issue repeatedly collides with European legal norms and because influence scandals have damaged trust in parts of the relationship.²⁹ By contrast, it remains useful as Morocco sits at the intersection of several EU priorities at once, including migration management, counterterrorism, regional stability, economic exchange, and increasingly energy and green transition.³⁰

The legal dimension of this contradiction is clearest in the Western Sahara file. For years, EU institutions and courts have struggled to reconcile political cooperation with Morocco and the separate status of Western Sahara under EU law. That tension deepened in October 2024, when the Court of Justice of the European Union confirmed the annulment of Council decisions concerning EU-Morocco agreements insofar as they covered Western Sahara without the consent of the Sahrawis.³⁴ At the same time, the Court maintained the effects of the agricultural liberalization decision for twelve months because immediate annulment would have had serious consequences for the EU's external action. On the one hand, the Court reaffirmed that legal resistance to treating Western Sahara as simply part of Morocco remains real and institutionally powerful.³⁵ On the other hand, the political institutions keep searching for ways to preserve the wider relationship.

This tension is unlikely to disappear in the medium term, but neither is it likely to produce a decisive hardening of EU policy toward Morocco. The Commission's own description of the relationship underscores how broad the agenda has become, covering economic development, innovation, climate policy, justice, security, mobility, migration, and governance as shared fields of cooperation.³¹ For instance, between 2021-2024 the EU's bilateral allocation to

²⁸ Ursula Von der Leyen and Josep Borrell. ["Joint Statement on the ECJ Judgements Relating to Morocco,"](#) European Commission, October 4, 2024.

²⁹ Court of Justice of the European Union, ["Western Sahara: the 2019 EU-Morocco Trade Agreements Regarding Fisheries and Agricultural Products, to Which the People of Western Sahara Did Not Consent, Were Concluded in Breach of the Principles of Self-Determination and the Relative Effect of Treaties,"](#) Press Release No. 170/24, October 4, 2024.

³⁰ European Commission, ["EU Launches New Cooperation Programmes with Morocco,"](#) Press Corner, March 2, 2023. ³⁴ Court of Justice of the European Union. ["Western Sahara: the 2019 EU-Morocco Trade Agreements Regarding Fisheries and Agricultural Products, to Which the People of Western Sahara Did Not Consent, Were Concluded in Breach of the Principles of Self-Determination and the Relative Effect of Treaties,"](#) Press Release No. 170/24, October 4, 2024. ³⁵ Court of Justice of the European Union, ["Western Sahara: the 2019 EU-Morocco Trade Agreements Regarding Fisheries and Agricultural Products."](#)

³¹ Council of the European Union, ["Joint Communiqué by the High Representative, Kaja Kallas, and Morocco's Minister for Foreign Affairs, Nasser Bourita, Following the 15th EU-Morocco Association Council,"](#) Press Release No. 71/26, January 29, 2026,

Morocco amounted to €931 million,³² and in March 2023 the Commission announced €624 million in new cooperation programmes.³⁸ It appears then clear that these are not signs of a relationship preparing for strategic distancing.

All that helps explain why EU policy is likely to remain ambivalent rather than adversarial. On the Western Sahara issue, Brussels will probably continue to face pressure from courts, parliamentarians, and legal advocates in order to preserve a distinction between Morocco in the strict sense and the disputed territory. Nonetheless, the broader logic of the relationship works in the opposite direction. It is Morocco the one offering something the EU values in concrete terms, mainly cooperation in irregular migration, security, and growing relevance for the Union's diversification and green-transition agenda. Of course, this does not mean that the EU will fully accept Moroccan preferences, but it does make sustained punitive deterioration less probable.

Pointing to a different kind of friction is the Pegasus affair: reputational and trust-based rather than strictly legal. The spyware controversy mattered because it fed the perception in Europe that Morocco was not only a demanding partner but also a potentially intrusive and politically manipulative one. In this sense, the European Parliament's work through the PEGA inquiry framed Pegasus not just as a technological problem, but as an issue with external-relations implications, including the way foreign partners may leverage surveillance capabilities within Europe.³³ Here the problem for Morocco is not that Pegasus alone transforms EU policy, but that it adds to a broader narrative of opacity, pressure, and influence-seeking.

Qatargate, or Morocccogate in some European discussions, generated a similar but broader reputational problem. The scandal reinforced this image of Morocco as a state willing to operate aggressively inside European institutions to shape debate in its favor.^{34,35} It was linked to suspicions that Morocco, alongside Qatar, sought to influence parliamentary activity and soften criticism.³⁶ As expected, Rabat rejected that framing and argued that EU-Morocco ties were being unfairly targeted, while EU institutions publicly reaffirmed zero tolerance for corruption.⁴³ What matters analytically is less the final judicial disposition of every case than

³² European Commission, "Morocco," *Middle East, North Africa and the Gulf*, accessed March 17, 2026. ³⁸ European Commission, "EU Launches New Cooperation Programmes."

³³ Steven Feldstein and Richard Youngs, *Pegasus and the EU's external relations* (Brussels: European Parliament, Policy Department for Citizens' Rights and Constitutional Affairs, Directorate-General for Internal Policies, January 2023), 99.

³⁴ Reuters, "Morocco complains of European parliament 'harassment' after graft probe," January 5, 2023.

³⁵ Reuters, "The European Parliament's cash-for-influence scandal," December 21, 2022.

³⁶ Reuters, "Qatar should not be dragged into EU corruption scandal, minister tells CNBC," January 19, 2023. ⁴³ Reuters, "Morocco complains of European parliament 'harassment.'"

the political effect: the scandal raised the reputational cost of cooperation without fundamentally altering the incentives behind it.

That distinction between reputational cost and strategic effect is crucial to forecasting the relationship. Pegasus and Qatargate make Morocco more controversial in Brussels, but controversy is not the same as abandonment. The EU's institutional landscape is fragmented: courts, Parliament, Commission, Council, and member states do not weigh Morocco in the same way.³⁷⁴⁵⁴⁶ Legal institutions and some parliamentary actors are more likely to emphasize law, rights, transparency, and procedural legitimacy. On the contrary, executive institutions and several member states will probably prioritize functionality, migration control, and neighborhood stability. Because of that fragmentation, the most plausible future is not a single coherent EU "line" becoming sharply anti-Moroccan, but a continued coexistence of harder legal-parliamentary resistance and softer executive pragmatism.

In regards to the drives that support this forecast, the first is strategic necessity. Morocco's geographic position makes it central to the EU's southern neighborhood policy and to the management of migration routes affecting Spain and, indirectly, the wider Union. The second is issue linkage, in the sense that, the more migration, energy transition, and regional stability become intertwined, the more difficult it becomes for Brussels to isolate the Western Sahara file from the rest of the relationship. In third place is institutional differentiation within the EU, which prevents legal or political friction in one arena from automatically determining the whole relationship. Lastly, there is Morocco's own ability to present itself not only as a source of tension, but also as a provider of cooperation. At the same time, counterdrivers such as court rulings, parliamentary activism or scandal-driven mistrust will continue to constrain any deeper accommodation.

In light of the above, the most plausible short to medium-term outcome is a relationship marked by dual movement. On one hand, EU legal and political resistance to integrating Western Sahara seamlessly into the partnership will persist, and scandals such as Pegasus and Qatargate will continue to cast a shadow over trust in Morocco as a partner. On the other, the strategic value of Morocco for migration management, regional stability, economic cooperation, and energy transition will keep pushing Brussels toward preservation rather than rupture. The likely result is not full normalization of Morocco's preferences, but a durable pattern of pragmatic

³⁷ Court of Justice of the European Union, "[Western Sahara: The 2019 EU-Morocco Trade Agreements.](#)" ⁴⁵ Feldstein and Youngs, *Pegasus and the EU's external relations*. ⁴⁶ European Commission, "[Morocco.](#)"

accommodation under legal and political friction. That same pattern helps explain why Morocco has invested so heavily in broadening its diplomatic base beyond Europe: the more support it accumulates elsewhere, especially in Africa, the lower the political cost of European ambivalence.

2.3. The African Union and Continental Coalition-Building

Morocco's African policy is orientated to continue yielding diplomatic returns on Western Sahara, but not in the form of a clean or definitive continental victory. The more plausible trajectory is gradual and uneven normalization of Morocco's position across Africa: enough support to reduce the political cost of backing Rabat, enough economic and diplomatic presence to make neutrality more attractive for many African states, but not enough to eliminate resistance altogether. In that sense, Morocco's African activism works less as a search for unanimous endorsement than as a strategy to shift the balance of legitimacy. The key question does not revolve around whether Rabat will "win" Africa outright on Western Sahara, but whether it can keep turning continental engagement into a cumulative reduction of support for alternative outcomes. The answer, in the short to medium term, is probably yes.

That objective has become more central since Morocco's return to the African Union in 2017.³⁸ Re-entry mattered because it reflected the strategic judgment that Rabat had more to gain by contesting the Saharan issue from within African institutions than by remaining outside them.³⁹ Since then, Morocco has tried to combine diplomatic presence, economic projection, and political symbolism in order to widen its room for maneuver. The Western Sahara dispute has remained the core political driver of that activism, but Africa holds broader importance for Morocco as a space of economic expansion, strategic depth, and diplomatic diversification beyond Europe. As a consequence, the more present Morocco becomes in Africa, the easier it is to gain support for its Saharan position as part of a wider partnership rather than as a stand-alone geopolitical choice.

Actually, the current African landscape already reflects that strategy's partial success. One visible indicator has been the multiplication of African consulates opened in Laayoune and Dakhla, which Morocco presents as a clear sign of practical recognition of its administrative

³⁸ African Union Commission, *African Union Handbook 2023*, 10th ed. (Addis Ababa: African Union Commission and New Zealand Ministry of Foreign Affairs and Trade/Manatū Aorere, 2023), 6.

³⁹ Liesl Louw-Vaudran, *The meaning of Morocco's return to the African Union*, North Africa Report 1 (Pretoria: Institute for Security Studies, January 2018)

control over Western Sahara.⁴⁰ While these changes do not amount to uncontested recognition of Moroccan sovereignty, they reinforce a broader trend in which support for the Sahrawi cause is no longer the uncontested or default African posture it once was.

That diplomatic movement is not separable from Morocco's wider African footprint. Rabat's influence on the continent has increasingly rested on a practical offer: banking, telecoms, fertilizers, construction, insurance, transport, and diplomatic presence. Moroccan firms and financial institutions have built networks across West and Central Africa that create lasting channels of interdependence.⁴¹ Furthermore, Moroccan corporate actors are still kept among significant continental players, as is the case of Maroc Telecom, which continued to expand and finance its operations with an explicitly African profile.⁴² These trends matter politically because Morocco's diplomacy in Africa is not conducted only through embassies and summits. But it is also conducted through commercial ecosystems that make it a visible, useful, and recurring partner in everyday state and market relations.

This is where the Western Sahara question becomes strategically embedded. African support is more likely to grow when backing Morocco does not look like a pure geopolitical concession, but rather like one element of a broader relationship carrying economic, financial, and diplomatic benefits. Rabat has understood this well. Its activism in Africa has aimed less at forcing dramatic diplomatic flips than at creating an environment in which support for its autonomy formula, or at least reduced enthusiasm for the SADR, becomes progressively easier and less costly.⁴³ That is why Morocco's diplomacy often appears incremental rather than spectacular.

At the same time, this strategy has limits. To start, Africa is institutionally and politically heterogeneous, and Morocco operates in a continent where historical solidarities, anti-colonial narratives, and regional alignments still matter. Several states and political currents remain committed to the Sahrawi cause on principle, and Algeria continues to serve as the principal external sponsor of that counter-position.⁵³ In addition, support for Morocco is often pragmatic rather than deeply ideological, which can work in Rabat's favor, as well as making backing

⁴⁰ Fadoua Ammari and Rida Lyammouri, *The Atlantic Initiative and Morocco–Mauritania Relations: Strategic opportunities and shared challenges*, Research Paper No. 09/25 (Rabat: Policy Center for the New South, August 2025), 3.

⁴¹ OECD, *OECD Economic Surveys: Morocco 2024* (Paris: OECD Publishing, 2024), 83.

⁴² OECD, *OECD Economic Surveys: Morocco 2024*, 84.

⁴³ Peter Fabricius, "Western Sahara's quest for independence seems to be flagging," *ISS Today*, August 16, 2024. ⁵³ Representación del Frente POLISARIO en España, "Países que reconocen a la República Árabe Saharaui Democrática desde 1976," accessed March 24, 2026.

contingent on bilateral incentives and broader regional calculations. Finally, Morocco's economic projection, although significant, does not translate automatically into political obedience. For this reason, its African gains are likely to remain cumulative and reversible in parts, not irreversible and uniform.

Even so, the medium-term drivers remain broadly favorable to Rabat. One is diplomatic momentum, entailing that the more major external actors and UN dynamics move toward treating autonomy as the operative framework, the easier it becomes for African states to reposition themselves without appearing isolated. Another is Morocco's growing use of Atlantic and Sahel-oriented initiatives to present itself as a connector rather than merely a claimant. The Royal Atlantic Initiative, launched in late 2023 to offer landlocked Sahelian countries access to the Atlantic through Moroccan territory, is especially important here.⁴⁴ It is interpreted as a geopolitical instrument as much as an infrastructure concept: a way to reinforce Morocco's role in West Africa and the Sahel while also deepening the strategic relevance of Dakhla and, indirectly, Morocco's claims over Western Sahara.⁴⁵

Overall, the likely short to medium-term outcome is not an African Union transformed into a straightforward vehicle for Moroccan preferences, but an AU and wider African diplomatic environment in which Morocco's position becomes progressively harder to isolate and easier to accommodate. Rabat is likely to continue widening support through a combination of investment, diplomacy, symbolic statecraft, and strategic connectivity offers. That support will probably remain uneven, contested, and incomplete. However, it is worth noting that such support does not need to be total to be effective. Its main effect is likely to be cumulative, by lowering the political cost of siding with Morocco, reducing the diplomatic energy behind the SADR, and making autonomy under Moroccan sovereignty appear increasingly acceptable as a practical continental stance. That same logic also helps explain why Morocco invests so heavily in economic projection, because continental presence is not just a source of influence in itself, but a means of turning diplomatic activism into durable leverage.

⁴⁴ Ammari and Lyammouri, *Atlantic Initiative and Morocco–Mauritania Relations*.

⁴⁵ Rossella Marangio, "Shifting sands: Hedging strategies in Sahel-Maghreb relations," European Union Institute for Security Studies, May 23, 2025.

2.4. Abraham Accords and Middle Eastern Repositioning

Morocco's participation in the Abraham Accords is oriented to remain a strategic asset, but a politically constrained one. The relationship with Israel is unlikely to disappear or reverse in the short to medium term because it serves several concrete Moroccan interests at once: it strengthens ties with Washington, expands access to military and technological cooperation, and reinforces Rabat's broader effort to accumulate external support on Western Sahara. At the same time, normalization is unlikely to evolve into an unconstrained or fully public strategic alignment. Its future will depend on Morocco's ability to preserve the material benefits of the relationship while limiting the domestic and regional political costs that come with visible proximity to Israel. The most plausible trajectory is therefore one of continued cooperation, but with fluctuating levels of political exposure and public emphasis.

The first point to establish is that normalization was never only about bilateral diplomacy with Israel. From the beginning, it formed part of a wider strategic bargain in which Morocco improved its position with the United States and crucially secured stronger support for its sovereignty claims over Western Sahara. That linkage remains central to the logic of the accords. Israel's 2023 recognition of Moroccan sovereignty over Western Sahara directly reinforced Rabat's core territorial objective,⁴⁶ and it showed that the benefits of normalization were not merely symbolic or economic, but tied to Morocco's highest-priority foreign policy file. In that sense, the Abraham Accords fit squarely within Morocco's broader strategy of external recognition, being valuable by creating diplomatic, military, and political returns that strengthen Rabat's wider regional posture.

The present state of the relationship reflects this strategic logic. Since 2020, Morocco and Israel have deepened cooperation in areas that matter materially to Rabat, especially defense, intelligence, and technology. In 2021 the two countries signed a defense pact covering intelligence cooperation, arms procurement, and joint military activity.⁵⁷ This track has not only continued but deepened. Morocco was set to acquire a major Israeli satellite system reportedly worth around \$1 billion,⁴⁷ which would significantly enhance intelligence and surveillance capability and further embed Israeli defense technology into Moroccan strategic planning. In

⁴⁶ Le Monde with AP and AFP, "Israel recognizes Moroccan sovereignty over Western Sahara," *Le Monde*, July 18, 2023. ⁵⁷ Ahmed Eljechimi, "Israel signs defence pact with Morocco, as cooperation with new Arab partners builds," *Reuters*, November 24, 2021.

⁴⁷ Reuters, "Morocco to acquire Israeli spy satellite worth \$1 bln-media," July 10, 2024.

short, despite political sensitivity, the relationship is generating exactly the kind of hard-power benefits Morocco sought from it.

This defense and technology dimension is one of the main drivers behind the likely persistence of the partnership. For Morocco, Israel offers capabilities that are directly relevant to regional competition, especially with Algeria, and to the surveillance and security architecture surrounding Western Sahara.⁴⁸ This significant cooperation increases Morocco's operational advantage without requiring formal alliance commitments.⁴⁹ For Israel, Morocco provides political value as a stable Arab partner with historical ties to Jewish communities,⁵⁰ a strategic location at the Atlantic-Mediterranean hinge, and influence in African and Western diplomatic circles. As for the United States, the relationship remains useful as part of the broader Abraham Accords framework and as a way of anchoring a pro-Western security alignment in North Africa.

All of the above gives the partnership resilience, yet resilience does not mean frictionlessness. The main constraint on the relationship is, without a doubt, political exposure. Morocco has consistently sought to maintain a delicate balancing position: normalization with Israel on one side, while continued rhetorical support for the Palestinian cause on the other.⁵¹ That balancing act reflects both domestic sensitivities and the monarchy's broader legitimacy. Given King Mohammed VI's important religious role as Commander of the Faithful (Amir al-Mu'minin) and Morocco's long-standing positioning on Jerusalem and Palestinian issues, normalizing relations with Israel cannot be treated as a routine foreign-policy decision. It must be carefully managed to avoid backlash and preserve legitimacy both domestically and internationally.⁵² That is why the relationship tends to advance in concrete sectors, especially defense and business, while remaining more cautious in public political symbolism when the regional climate becomes more inflamed. The more conflict in Gaza or Jerusalem raises pressure across Arab public opinion, the more likely Morocco is to lower the visibility of its ties without dismantling them.

⁴⁸ Intissar Fakir, *Morocco and Israel: Economic Opportunities, Military Incentives, and Moral Hazards* (Washington, DC: Middle East Institute, December 2022), 14.

⁴⁹ Fakir, *Morocco and Israel: Economic Opportunities, Military Incentives, and Moral Hazards*, 14.

⁵⁰ Ángel Llorente, "Los judíos en Marruecos y los Acuerdos de Abraham," *Diario de Avisos*, June 27, 2023.

⁵¹ Alfonso Casani, Francesco Colin, and Irene Fernández-Molina, "Foreign Policy and Domestic Opposition Spaces under Authoritarianism: Moroccan Political Reconfigurations in Response to Israel's Wars on Gaza," *Government and Opposition* 60, no. 4 (2025): 1292–1312.

⁵² Khalil Al-Anani, "Moroccan Normalization with Israel: Temporary Deal or Permanent Peace?," Arab Center Washington DC, July 8, 2021.

This dynamic is central to understanding the short and medium-term outlook. The relationship with Israel is likely to endure because the underlying incentives remain strong, but it will probably continue to oscillate between consolidation and partial political concealment. When regional conditions are relatively permissive, Morocco will be able to present ties with Israel more openly as part of modernization, diplomacy, and strategic partnership. When those conditions deteriorate, especially around the Palestinian issue, Rabat will be prone to maintain the substance of cooperation while reducing its rhetorical exposure. In simpler terms, the foreseeable future is one of increased normalization and greater alignment under variable intensity.

Beyond its bilateral normalization, attention turns to whether Morocco can translate this positioning into a wider regional role, particularly in fostering rapprochement between Israel and Saudi Arabia or other Gulf monarchies. Here, however, expectations should remain more restrained. The regional importance of an Israeli-Saudi normalization process has been repeatedly emphasized in wider Abraham Accords discussions, with discussions in 2024 and 2025 treating Saudi normalization as the major missing piece in any broader regional expansion of the accords.^{53 54} In fact, Morocco does have attributes that make it a useful intermediary or facilitator, which may include monarchical legitimacy derived from the Alaouite dynasty, longstanding ties with Gulf regimes, a historical reputation for diplomatic flexibility, and enough distance from the core Gulf rivalries to be acceptable in discreet channels. Within that context, Morocco can plausibly play a supportive role by keeping communication channels open, lending political cover to incremental engagement, or demonstrating that normalization can coexist with a continued public commitment to Palestinian concerns.

Nevertheless, there are clear limits to that role. Morocco is unlikely to become a decisive mediator of Israeli-Saudi normalization because the core determinants of that process lie elsewhere: U.S.-Saudi security guarantees, Saudi domestic and regional calculations, the Palestinian issue, and the strategic priorities of Riyadh itself.⁵⁵ Those variables far exceed Morocco's ability to shape outcomes directly. Whereas Rabat can facilitate at the margins, it cannot drive the process. The same applies to other Gulf regimes that have not joined

⁵³ Aram Roston and Alexandra Ulmer, "Trump son-in-law Kushner has discussed US-Saudi diplomacy with Saudi crown prince," *Reuters*, October 4, 2024.

⁵⁴ Steve Holland, "Saudi Crown Prince bin Salman will visit Trump on Nov 18, White House official says," *Reuters*, November 4, 2025.

⁵⁵ Humeyra Pamuk, Simon Lewis, and Patricia Zengerle, "Blinken says US-Saudi pacts could be 'weeks away' from completion," *Reuters*, May 22, 2024.

normalization.⁵⁶ Morocco's value is more likely to be that of a discreet bridge or supportive precedent than that of a central diplomatic broker, making its role relevant but secondary.

Thus, the most plausible medium-term assessment is that the Abraham Accords will continue to serve Morocco as a useful but politically managed strategic instrument. The relationship with Israel is likely to persist because it delivers crucial tangible returns. However, it will remain constrained by domestic legitimacy concerns and by the volatility of the Palestinian issue, which will periodically limit how visibly Rabat is willing to showcase the partnership.

Morocco may help facilitate wider regional normalization at the margins, especially through its ties with Gulf monarchies, its religious legitimacy rooted in the Alaouite dynasty and its diplomatic flexibility, but it is less likely to become a decisive architect of that process. The accords should therefore be understood not as a free geopolitical gain, but as a high-value partnership whose utility depends on careful political calibration.

⁵⁶ Reuters, "Saudi Arabia will not recognise Israel without Palestinian state, says Crown Prince," September 18, 2024.

3. INSTRUMENTS OF POWER

ECONOMIC LEVERAGE AND MILITARY CAPABILITY

If Morocco seeks to shape its external environment through diplomacy, utility and selective pressure, the credibility of that effort ultimately depends on its material capability. Strategic ambition alone does not generate influence, rather, it must be supported by the ability to translate geography, infrastructure, economic projection, lobbying capacity and military modernization into durable leverage. Therefore, the material basis of Moroccan power is essential to understanding both the reach and the limits of its regional aspirations.

3.1. Energy and Logistics Hub Ambitions

Morocco is emerging as a more credible energy and logistics hub between Europe and Africa, but only in a qualified sense. The most plausible medium-term outcome is not that Rabat becomes a fully dominant hub across all dimensions, but that it consolidates a set of strategically relevant logistical and energy functions that enhance its regional centrality and strategic value. This conclusion rests on an important distinction: Morocco already has a proven logistics platform, while its energy-hub ambition remains more contingent on financing, infrastructure completion, and external demand.

The strongest foundation of Morocco's hub strategy already exists in logistics rather than energy. For instance, the Tanger Med complex provides the clearest evidence that Morocco can convert geography into operational leverage. Handling 162 million tons of goods and 9.6 million TEU containers, while its business parks hosted more than 1,300 companies generating MAD 155 billion in business volume.⁵⁷ They show that Morocco is already a major port-industrial hub, not just aspiring to become one. Moreover, Tanger Med is expected to exceed its nominal capacity and remain the leading port in the Mediterranean and Africa.⁵⁸

The question, however, is whether this model can be extended beyond Tanger Med. Here the state's strategy is ambitious and geographically deliberate. Morocco, therefore, is building a more diversified port architecture in which Nador West Med strengthens its eastern Mediterranean profile and Dakhla Atlantic is meant to anchor the Atlantic and Saharan

⁵⁷ Marsa Maroc, *Annual Report 2023* (Casablanca: Marsa Maroc, 2024), 19.

⁵⁸ Ahmed Eljehtimi, "Morocco's Tanger Med port expects to exceed nominal container capacity," *Reuters*, June 10, 2024,

dimension. Nador West Med is expected to start operations in the fourth quarter of 2026 with an initial annual capacity of 5 million containers, expandable to 12 million; both Nador and Dakhla are expected to foster the development of future green hydrogen export functions.⁵⁹ ⁶⁰Indeed, Morocco would no longer depend almost exclusively on the Strait of Gibraltar gateway. It would instead strengthen its claim to act as a Euro-African interface rather than as a single-port success story.

This diversification also has a political dimension. Dakhla Atlantic is not only an infrastructure project; it is part of Morocco's attempt to give the Atlantic façade of Western Sahara an irreversible economic and logistical role. In that sense, port development has a double function: it strengthens Morocco's commercial position while deepening the integration of contested territory into national and transregional networks. Therefore Moroccan ports can be embedded in an integrated value chain linking international shipping, local industry, and export markets, and that ports may play a "triple role" as energy export hubs, industrial hubs, and suppliers of marine fuel.⁷²

In addition, Morocco does possess several advantages that make the ambition plausible: renewable energy potential, proximity to Europe, strategic location on major maritime routes, and an explicit policy push to use ports as anchors of future hydrogen value chains.⁶¹ Morocco has "the potential to become a major player in green hydrogen-based fuels production and distribution," underpinned by its low-cost renewable electricity potential and its strategic geographical location close to major maritime routes and European demand centers.⁶² Moroccan ports can become critical facilitators of an emerging green hydrogen economy and that integrating different ports according to their comparative strengths can reduce national system costs.⁶³

Additional support for regional assessment, Morocco as a country whose industries, strategic infrastructure, and trade agreements position it as a regional economic hub, while also noting that its high dependence on imported energy is a major driver of support for domestic hydrogen, ammonia, and methanol development. That is important because it shows that

⁵⁹ Reuters, "Morocco to open Nador West Med port in Q4 2026," January 28, 2026.

⁶⁰ Ahmed Eljehtimi, "Morocco to open two deepwater ports in 2026–2028, minister says," *Reuters*, December 8, 2025, ⁷² World Bank, *Gateway to Green Energy: Moroccan Ports as Hubs for Hydrogen Fuel Development and Trade*, Mobility and Transport Connectivity Series (Washington, DC: World Bank, 2025), 13–15.

⁶¹ World Bank, *Gateway to Green Energy*, 7.

⁶² World Bank, *Gateway to Green Energy*, 27.

⁶³ World Bank, *Gateway to Green Energy*, 13.

Morocco's energy-hub ambition is not only export-oriented. It is also linked to domestic energy security, industrial policy, and import substitution, especially in sectors such as ammonia and industrial energy use.⁶⁴

The main limitation of Morocco's energy-hub ambition is implementation. Green hydrogen, LNG import capacity, port-to-industry gas networks, and future export infrastructure all require very large capital expenditure, regulatory coordination, and long-term demand certainty. The gas file illustrates this clearly. Morocco intended to tender for a floating LNG terminal at Nador West Med, while officials expected gas demand to rise from 1 bcm to 8 bcm by 2027.⁶⁵ But Morocco's energy ministry had put major gas infrastructure tenders on hold, including the LNG terminal and associated pipeline links, and that the finance ministry later vetoed the tender framed as a public-private partnership.^{66 67} Indeed, Morocco's energy narrative is strategically coherent; its execution remains vulnerable to fiscal and institutional bottlenecks.

That is why the most realistic assessment is that Morocco's hub transformation will be partial and layered rather than total and linear. Logistics already offers proof of concept. Energy offers strategic promise, but with different levels of maturity across segments. Gas infrastructure appears more immediately relevant to domestic diversification and industrial supply, yet it has already encountered delays. Green hydrogen is potentially more transformative, but also more dependent on future demand, technological learning, infrastructure readiness, and cost competitiveness. The affordability remains a concern and that significant measures will be needed to close the viability gap for green hydrogen, methanol, and ammonia in Morocco.⁸⁰

Financing is therefore one of the key drivers of the medium-term outlook. Morocco has demonstrated an ability to attract external support for large port projects, which strengthens the plausibility of continued expansion. The African Development Bank granted Morocco €240 million in loans, including support for the development of an industrial zone around Nador West Med, bringing total AfDB investment in the port's development close to €490 million.⁶⁸ This is a positive signal, but it also highlights a structural dependence: the scale of Morocco's infrastructure plans means that international development finance, private capital, and stable

⁶⁴ World Bank, *Gateway to Green Energy*, 24-26.

⁶⁵ Reuters, "Morocco to tender for floating LNG terminal, official says," May 31, 2024.

⁶⁶ Reuters, "Morocco's energy ministry puts gas projects on hold," February 2, 2026.

⁶⁷ Ahmed Eljehtimi, "Exclusive: Morocco's finance ministry vetoes pipeline tender," *Reuters*, February 3, 2026. ⁸⁰ Paul Gerard et al., "The Africa-Europe energy interconnection: Assessing green hydrogen suppliers for France," *Renewable and Sustainable Energy Reviews* 230 (2026): Article 116629, 3.

⁶⁸ Reuters, "AfDB offers Morocco \$260 million in loans for port project, governance," July 26, 2024.

fiscal backing remain essential. Hub-building is therefore not only a question of geography and ambition, but of sustained bankability.

A second decisive driver is execution capacity. Morocco has shown that it can deliver major infrastructure, and Tanger Med is the most important proof. But replicating one flagship model is not the same as building an integrated national hub architecture. Ports, industrial zones, rail links, energy terminals, pipelines, and export facilities must work together. Delays in one component reduce the strategic value of the whole. This is why Morocco's state capacity is both an asset and a risk variable. A third driver is external demand. Morocco can build ports, hydrogen projects, and gas import infrastructure, but it cannot fully determine whether European and global markets will absorb them at the scale required. There is an optimistic view about the role of Moroccan ports in future hydrogen and fuel trade, but its own conclusions also show that this role depends on international shipping decarbonization, European demand, regulation, and the economics of production and export.⁶⁹

The most plausible medium-term forecast is that Morocco will emerge as a stronger logistics hub and energy interface, though not yet as a fully integrated powerhouse. Its logistics position is already strong and should deepen with Nador West Med and southern Atlantic infrastructure, while its energy potential, especially in renewables and hydrogen, remains more dependent on financing, delivery, and external market conditions. Morocco therefore has real foundations to become a credible hub, though unevenly across sectors: strongest in maritime logistics, promising but incomplete in energy, and still uncertain in green hydrogen. Even this partial success would be geopolitically significant, increasing Morocco's leverage with Europe and Africa and reinforcing its Atlantic and Mediterranean strategic role.

3.2. Continental Projection

Morocco's economic projection into Africa is expected to keep expanding in the medium term, though more as a source of influence than as a path to uncontested leadership. The key question is not whether Moroccan firms will dominate the continent, but whether trade, finance, logistics, fertilizers, and corporate expansion can keep translating into political relevance and strategic depth.⁷⁰ Taking into account this question, the evidence is broadly favorable. Over the past two

⁶⁹ World Bank, *Gateway to Green Energy*, 14-15.

⁷⁰ Salma Rhilane, *Morocco's Place in a Fractured Global Order: Transatlantic Tensions, NATO's Future, and the New Geopolitical Reality* (Rabat: Friedrich Naumann Foundation for Freedom Morocco, January 20, 2026), 17.

decades, Morocco has consolidated a visible presence in parts of West and Central Africa, especially in sectors where it enjoys institutional backing, accumulated experience, and dense commercial networks.⁷¹ Yet that projection remains uneven across the continent, exposed to rival investors and vulnerable to instability in key surrounding regions.⁷² The most plausible outcome is not hegemony, but a continued widening of Moroccan leverage and visibility in African affairs.

This outward push is not simply a by-product of domestic economic growth. It has become one of the main instruments through which Rabat seeks to convert geography, connectivity, and relative political stability into regional influence.⁷³ Since Mohammed VI's sustained African turn, and especially since Morocco's return to the African Union in 2017, Africa has been framed not merely as a market, but as a strategic horizon. A space through which Morocco can diversify beyond Europe, internationalize its firms, and reinforce its diplomatic position. Economic expansion therefore serves a dual purpose: it generates commercial returns, but it also embeds Morocco in networks of interdependence that can produce diplomatic dividends over time. Trade and investment in Africa should therefore be seen not only as commercial activity, but as part of a broader state-backed strategy to expand Morocco's room for maneuver across the continent.⁷⁴

The current pattern of Moroccan expansion already shows where this strategy is strongest: Morocco's continental footprint is not driven primarily by heavy industry or extractive dominance. It is strongest in sectors that create durable relationships: banking, telecommunications, fertilizers, logistics, and construction-related services.⁷⁵ These sectors do more than move products; they generate recurring ties with governments, firms, and consumers. Moroccan banks, for instance, are not just exporters of capital; they help finance trade and support the expansion of Moroccan firms abroad.⁷⁶ OCP's fertilizer strategy links Morocco to agricultural production and fertilizer supply across African markets.⁹⁰

⁷¹ Reuters, "Moroccan lender Attijari bets on Africa for growth," February 20, 2012.

⁷² Ian O. Lesser, Geoffrey Kemp, Emiliano Alessandri, and S. Enders Wimbush, *Morocco's New Geopolitics: A Wider Atlantic Perspective*, Wider Atlantic Series (Washington, DC: The German Marshall Fund of the United States, February 2012), 61-63.

⁷³ Lesser et al., *Morocco's New Geopolitics*.

⁷⁴ Rhilane, *Morocco's Place in a Fractured Global Order*, 17-18.

⁷⁵ Rhilane, *Morocco's Place in a Fractured Global Order*, 17-18.

⁷⁶ Reuters, "Morocco's Bank of Africa posts 5% profit rise for 2019," March 30, 2020. ⁹⁰ World Bank, *Gateway to Green Energy*, 37-38.

That ecosystem logic is precisely why further expansion remains plausible. Morocco does not need to become the largest investor everywhere in order to matter strategically. It needs to remain strongly connected in the regions where it already has relationships, familiarity, and political capital. West Africa is especially important in this respect. It remains the natural first tier of Moroccan continental projection.⁷⁷ In that space, Moroccan influence is likely to deepen because firms already established in banking, telecoms, fertilizers, and services are better positioned to scale than late entrants starting from zero.⁷⁸⁷⁹

However, it is not automatic. Several drivers will determine if Morocco's economic weight in Africa continues to grow in a strategically meaningful way. The first is corporate network consolidation. The more Moroccan firms entrench themselves in sectors such as finance, telecoms, logistics, and fertilizers, the more likely their presence is to survive short-term political volatility.⁸⁰ Morocco's external economic strategy depends on continuity. The second driver is state-business coordination. Morocco's African projection has often been most effective when diplomatic activism and commercial expansion moved in parallel. If that coordination continues, Morocco's economic footprint is more likely to yield strategic returns than if private expansion becomes disconnected from political strategy.⁸¹

A third driver is connectivity. Morocco's economic influence in Africa is more likely to grow if Rabat succeeds in linking national infrastructure ambitions to continental routes through ports, logistics corridors, and Atlantic-facing initiatives.⁸² The more Morocco can position itself as a gateway rather than merely an investor, the greater its ability to anchor African relationships in practical interdependence.⁸³ This is where the country's logistics platform becomes central. Tanger Med has become one of the largest port and logistics hubs in the Mediterranean and Africa.⁹⁷ If these connectivity ambitions continue to develop, Moroccan firms will gain a structural advantage by operating within a broader national platform of access and circulation.

⁷⁷ Rhilane, *Morocco's Place in a Fractured Global Order*, 3–5.

⁷⁸ World Bank Group, *Country Partnership Framework for the Kingdom of Morocco for the Period FY19–FY24*, Report No.

⁷⁹ -MA (Washington, DC: World Bank Group, January 18, 2019), 8.

⁸⁰ International Finance Corporation, *Creating Markets in Morocco: A Second Generation of Reforms: Boosting Private Sector Growth, Job Creation and Skills Upgrading*, Country Private Sector Diagnostic (Washington, DC: IFC, June 2019), 109, 117–18.

⁸¹ Maha Regragui, "Morocco's Approach to South-South Cooperation: An Overview of the Moroccan Experience in the African Continent," *Development Cooperation Review* 6, no. 2 (2023).

⁸² World Bank Group, *Country Partnership Framework for the Kingdom of Morocco*, 1–7.

⁸³ International Monetary Fund, *Morocco: 2025 Article IV Consultation and Third Review Under the Arrangement Under the Resilience and Sustainability Facility—Press Release; Staff Report; and Statement by the Executive Director for Morocco*, IMF Country Report No. 25/87 (Washington, DC: International Monetary Fund, April 2025). ⁹⁷ Tanger Med Group, *Key Figures 2023* (Tanger Med Group, 2024), 5–6.

A fourth driver is diplomatic utility. Morocco's economic presence in Africa is likely to remain attractive because it is often presented in pragmatic terms of partnership and cooperation. Rabat tends to frame its role through South-South cooperation and partnership.⁸⁴ Politically the involvement is easier to accept for governments seeking investment, banking capacity, fertilizers, telecom infrastructure, or logistics support.

At the same time, the limits of this strategy are substantial and should shape any realistic forecast. The first limit is geography, economic reach is real, but it is not evenly continental. Its strongest position remains concentrated in particular subregions, above all West Africa, and there are clear obstacles to replicating that model across the whole continent.⁸⁵ The second limit is competition, Morocco does not operate in empty space. Even where Morocco grows, it often does so in contested environments rather than in zones of uncontested advantage.¹⁰⁰

The third limit is political and security risk.⁸⁶ Economic projection into Africa is also exposed to conflict, instability, and governance fragility, especially closer to the Sahelian belt.⁸⁷ This is particularly relevant because Morocco's southern and Atlantic ambitions increasingly intersect with spaces marked by fragility.⁸⁸ The same continental horizon that offers influence can also generate exposure. Economic projection strengthens influence, but it does not mechanically guarantee diplomatic victory.⁸⁹

These constraints suggest that Morocco's medium-term rise in Africa is projected to be real but differentiated.⁹⁰ The strongest probability is continued deepening in those sectors and countries where Moroccan firms already possess familiarity, networks, and scale.⁹¹ Morocco's continental role is likely to become denser before it becomes truly pan-African. Strategically, however, that is still highly significant. Influence does not require equal penetration

⁸⁴ Regragui, "Morocco's Approach to South-South Cooperation."

⁸⁵ Rim Berahab, *Relations between Morocco and Sub-Saharan Africa: What is the potential for trade and foreign direct investment?*, Policy Brief PB-17/04 (Rabat: OCP Policy Center, February 2017), 1, 7. ¹⁰⁰ World Bank Group, *Country Partnership Framework for the Kingdom of Morocco*.

⁸⁶ Sherilyn Raga, Alberto Lemma, and Jodie Keane, *The Sahel Conflict: economic & security spillovers on West Africa*, ODI Emerging Analysis (London: ODI, April 2023), 6–7.

⁸⁷ Raga, Lemma, and Keane, *Sahel Conflict*, 6–7.

⁸⁸ Mathilde Lebrand, *Corridors without Borders in West Africa*, Policy Research Working Paper 9855 (Washington, DC: World Bank, November 2021), 3.

⁸⁹ Raga, Lemma, and Keane, *Sahel Conflict*, 6–7.

⁹⁰ African Development Bank, European Bank for Reconstruction and Development, and European Investment Bank, *Private Sector Development in Morocco: Challenges & Opportunities in Times of Covid-19*, joint report (September 2021), 42–44.

⁹¹ World Bank Group, *Country Partnership Framework for the Kingdom of Morocco*, 7.

everywhere; it requires enough concentration in key nodes to ensure that Morocco becomes an actor that governments, firms, and external partners must take into account.⁹²

The medium-term outlook is therefore more favorable than not.⁹³ Morocco is likely to increase its economic weight in Africa because it already operates in sectors that generate cumulative presence, and because its logistics ambitions may deepen its usefulness as a gateway linking African markets outward.⁹⁴ But this growth will remain uneven, constrained by competition, political instability, and the limits of scale. Morocco is unlikely to become Africa's uncontested economic leader. It is far more likely to become a more influential and structurally embedded mid-sized continental actor whose economic networks reinforce its diplomatic reach.⁹⁵

3.3. Lobbying Capacity and Military Modernization

Morocco is prone to retain a significant capacity to support its regional ambitions through lobbying, military modernization, and carefully cultivated strategic partnerships.⁹⁶ What matters is less the existence of Moroccan instruments of influence abroad than the state's ability to preserve and employ them over time without triggering balancing reactions or stretching its strategic capacity too far. In the medium term, the most convincing assessment is cautiously affirmative. Morocco will probably continue to benefit from a comparatively strong lobbying footprint in Washington and parts of Europe,⁹⁷ from steady military modernization,⁹⁸ and from deepening security partnerships with the United States and Israel.⁹⁹ Yet the more assertive these instruments become, the greater the risk that they sharpen Algerian threat perceptions, intensify regional suspicion, and complicate Morocco's image as a stable and constructive partner.¹⁰⁰

Morocco's lobbying capacity is significant. because its strategic position has never depended on hard power alone. Western Sahara, relations with Europe, the Abraham Accords, and African diplomacy have all shown that Rabat's success often relies on its ability to shape how others

⁹² World Bank Group, *Country Partnership Framework for the Kingdom of Morocco*, 7.

⁹³ International Monetary Fund, *Morocco: 2025 Article IV Consultation*, 14.

⁹⁴ Tanger Med Group, *Key Figures 2023*, 5–6.

⁹⁵ International Monetary Fund, *Morocco: 2025 Article IV Consultation*, 14, 55.

⁹⁶ U.S. Department of State, "U.S. Security Cooperation with Morocco," fact sheet, Bureau of Political-Military Affairs, April 8, 2024.

⁹⁷ Louisa Brooke-Holland, *Western Sahara*, Research Briefing CBP-9906 (London: House of Commons Library, June 12, 2025), 23–25.

⁹⁸ Mathew George, Katarina Djokic, Zain Hussain, Pieter D. Wezeman, and Siemon T. Wezeman, *Trends in International Arms Transfers, 2025*, SIPRI Fact Sheet (Stockholm: sipri, March 2026), 6.

⁹⁹ Eljechtimi, "Israel signs defence pact."

¹⁰⁰ José Ignacio Torreblanca, "This time is different: Spain, Morocco, and weaponised migration," European Council on Foreign Relations, May 26, 2021.

interpret Moroccan priorities. That is where lobbying and political access become strategically valuable. Morocco has become especially skilled at presenting itself simultaneously as a stabilizing partner,¹⁰¹ a gateway between Europe and Africa, and a reliable interlocutor for Western security agendas. In Washington above all, where Moroccan diplomacy has long aimed to turn bilateral partnership into durable support on the Saharan question. The core logic is straightforward: if Morocco can entrench the perception that it is useful, stable, and strategically aligned, then support for its broader regional agenda becomes easier to sustain.

This form of influence can credibly remain effective in the medium term because it rests on more than public relations alone. Morocco benefits from several structural advantages in its external positioning. It offers geographical relevance at the junction of the Atlantic, the Western Mediterranean, and North Africa. It presents itself as a comparatively stable monarchy in a volatile region. It cooperates on counterterrorism, migration control, and intelligence. Since normalization with Israel, it has also become more valuable to those actors in Washington who see Moroccan-Israeli ties as part of a broader pro-Western regional architecture.¹⁰² These factors help explain why Morocco often punches above its material weight in diplomatic access. Its lobbying strength lies not just in hired representation or elite networking, but in the fact that it can plausibly market itself as strategically useful to several audiences at once.

At the same time, lobbying has limits, and those limits become more visible as Morocco's policy grows more assertive. Influence is easiest to sustain when it is attached to an image of reliability. It becomes harder when outside actors start to perceive a state as too manipulative, too coercive, or too openly revisionist. That is the core risk for Morocco. The same diplomacy that has secured support on Western Sahara and cultivated strong Western ties can also generate backlash if Rabat is seen as using pressure too aggressively, whether through migration leverage,¹²⁰ intelligence controversies, or hardening military posture. This does not mean that Morocco is expected to lose its lobbying capacity. It means that the credibility of that capacity will increasingly depend on balance.

Military modernization follows a similar logic. Morocco's armed forces are not being modernized for prestige alone. The process is tied to several strategic imperatives at once: deterrence vis-à-vis Algeria,¹⁰³ surveillance and control around Western Sahara, interoperability

¹⁰¹ U.S. Department of State, "U.S. Security Cooperation with Morocco."

¹⁰² Eljehtimi, "Israel signs defence pact." ¹²⁰ Torreblanca, "This time is different."

¹⁰³ George et al., *Trends in International Arms Transfers*, 6.

with Western partners,¹⁰⁴ and the strengthening of Morocco's broader claim to act as a serious regional security actor.¹⁰⁵ In recent years, Morocco has diversified procurement and deepened access to advanced military systems, especially from the United States and Israel.¹⁰⁶ It improves not only material capability but also political alignment. The more Morocco is embedded in Western and Israeli defense ecosystems,¹⁰⁷ the more it strengthens the perception that its security posture is compatible with the broader strategic preferences of its main external backers.

Yet military modernization should not be misread as evidence that Morocco is approaching uncontested hard-power superiority in its neighborhood. Its military effort remains shaped by comparison with Algeria, and in that comparison Morocco's gains are significant but not decisive.¹⁰⁸ Algeria still possesses substantial military weight, and the rivalry continues to generate a classic security dilemma: one side's modernization justifies the other's. Morocco's military strengthening is therefore best understood as a strategy of relative upgrading and deterrent credibility rather than one of clear regional dominance. It helps Rabat reinforce its external posture, but it also locks the country more deeply into a competitive cycle with Algiers.¹⁰⁹ That is the main strategic trade-off. The more Morocco improves its capabilities, the better positioned it is to defend its interests and reassure partners. But the stronger its posture becomes, the easier it is for Algeria to present Morocco as a growing threat.

This is one reason why the political framing of military modernization matters almost as much as the systems themselves. Morocco gains more from being seen as modernizing in order to stabilize and deter than from being seen as arming for revision. Its external partnerships are therefore crucial. Cooperation with the United States gives Morocco political cover, training, interoperability, and access to advanced equipment,¹¹⁰ while also anchoring Rabat within a broader security architecture that raises the cost of direct confrontation.¹²⁹ Cooperation with Israel adds a different but highly valuable layer: intelligence, drones, surveillance, missile-related capabilities, and defense technologies directly relevant to a theater defined by border

¹⁰⁴ U.S. Embassy in Morocco, "U.S. and Royal Moroccan Armed Forces Launch African Lion 25 in Morocco," May 14, 2025.

¹⁰⁵ U.S. Department of State, "U.S. Security Cooperation with Morocco."

¹⁰⁶ Zain Hussain and Alaa Tartir, "Recent trends in international arms transfers in the Middle East and North Africa," SIPRI Topical Background, April 10, 2025.

¹⁰⁷ Eljehtimi, "Israel signs defence pact."

¹⁰⁸ George et al., *Trends in International Arms Transfers*, 6.

¹⁰⁹ Khadija Tachfine, "Morocco adopts smart power in military spending, Algeria relies on mass and deterrence, says report," *Hespress EN*, October 31, 2025.

¹¹⁰ North Africa Post, "Morocco to Receive \$20 Million US Foreign Military Financing in 2026," February 3, 2026. ¹²⁹ U.S. Embassy in Morocco, "U.S. and Royal Moroccan Armed Forces Launch African Lion 25."

control, low-intensity conflict, and regional rivalry.¹¹¹ In practical terms, these partnerships multiply the strategic value of Morocco's procurement by embedding it in long-term relationships of trust and technical dependence.

This raises the question of whether the relationship with the United States could evolve into something significantly deeper, including the sort of dramatic military realignment sometimes speculated about in connection with Spain or AFRICOM. A deeper security partnership between Washington and Rabat is entirely plausible. Joint exercises, arms sales, training, intelligence cooperation, and political alignment are likely to continue growing because the underlying incentives remain strong on both sides. Morocco offers the United States a stable partner at a geostrategic hinge between Europe, Africa, and the Atlantic, while Washington offers Morocco deterrent value, prestige, and access to military technology.¹¹² But a spectacular relocation of major U.S. military structures from Spain to Morocco remains much less probable.¹¹³ The barriers are high: alliance politics, infrastructure, force posture logic, and the political costs of dramatically recasting the regional balance all work against such a move. For Washington, incremental deepening is easier and strategically cheaper than symbolic relocation. For Rabat, even without such a dramatic shift, the existing trend of closer military partnership already delivers substantial value.

This distinction is important because it clarifies what Morocco can reasonably expect from its partnerships. It is plausible that U.S.-Moroccan defense cooperation will intensify further and that Morocco will continue to be treated as a valuable non-NATO partner with growing strategic importance.¹³³ It is far less plausible that Washington will transform Morocco into the central hub of its regional military architecture in a way that openly displaces Spain or redefines the European flank. In other words, Morocco is expected to benefit from more cooperation, more visibility, and more interoperability, but not from a sudden geopolitical leap that would fundamentally reorder Western force posture in the region.

The first is utility. Morocco remains attractive to Western partners because it combines geographic relevance, relative stability, and willingness to cooperate.¹¹⁴ The second is

¹¹¹ Eljechtimi, "Israel signs defence pact."

¹¹² IssamToutate, "US, Morocco Strengthen Strategic Partnership Through High-Level Defense Cooperation," *Morocco World News*, November 20, 2025.

¹¹³ Óscar Ruiz, "¿Adiós a Rota? Trump plantea mover tropas de EE.UU. a Marruecos," *Escudo Digital*, April 17, 2025. ¹³³ U.S. Department of State, "U.S. Security Cooperation with Morocco."

¹¹⁴ U.S. Department of State, "U.S. Security Cooperation with Morocco," fact sheet, Bureau of Political-Military Affairs, January 20, 2025.

continuity. Defense partnerships are cumulative: once training, equipment, interoperability, and intelligence channels deepen, it becomes easier to expand them further.¹¹⁵ The third is regional competition. The persistence of rivalry with Algeria keeps military modernization politically salient for Rabat and helps justify continuing procurement and alliance-building. The fourth is diplomatic versatility. Morocco has shown an unusual ability to combine ties with the United States, Israel, Europe, and African partners without fully subordinating itself to any one external agenda. That flexibility increases the durability of its strategic partnerships.¹¹⁶

But there are also countervailing drivers. One is the risk of backlash. The more Morocco is perceived as excessively assertive, the more its lobbying efforts can generate suspicion and its military partnerships can deepen the image of a state seeking regional primacy rather than balance.¹¹⁷ Another is cost. Modernization is expensive, and sustaining procurement, readiness, and technological integration over time places fiscal pressure on the state.¹¹⁸ A third is reputational fragility. Morocco's external success depends partly on being viewed as a reliable partner rather than a destabilizing opportunist. If that image erodes, the same lobbying and partnership networks that have served Rabat well could lose some of their effectiveness.¹¹⁹

The most plausible medium-term assessment is that Morocco will retain sufficient lobbying capacity, military modernization, and strategic partnerships to support its regional ambitions, but not without constraint. Its lobbying should remain influential because it rests on real strategic utility, though it may face greater skepticism if its methods appear too coercive. Its military posture will likely keep improving, especially through U.S. and Israeli ties, but mainly as a tool of deterrence and regime-backed regional relevance rather than decisive superiority. Its partnership with Washington is expected to deepen gradually, but not to the point of a major relocation of U.S. military architecture. Morocco therefore has enough means to sustain a more ambitious regional role, but not enough to make that ambition costless or uncontested.

¹¹⁵ Chris Bradley, "African Lion 2024: Morocco hosts multinational planning meeting," *U.S. Africa Command*, October 6, 2023.

¹¹⁶ U.S. Department of State, *Integrated Country Strategy: Morocco* (Washington, DC: U.S. Department of State, 2024).

¹¹⁷ PSC Report, "Choppy waters ahead as states vie for African Union chairship," *PSC Insights*, January 25, 2024.

¹¹⁸ Xiao Liang, Nan Tian, Diego Lopes da Silva, Lorenzo Scarazzato, Zubaida Karim, and Jade Guiberteau Ricard, *Trends in World Military Expenditure, 2024*, SIPRI Fact Sheet (Stockholm: sipri, April 2025), 5.

¹¹⁹ Beatriz Mesa, "'Subaltern Realism' and the Atlantic Initiative: Morocco's Role in Global Geopolitics: Morocco's Atlantic Initiative: A Catalyst of Strategic Geopolitics in Africa," *Afrique(s) en mouvement* 9, no. 3 (2024): 54–62.

4. STRUCTURAL CONSTRAINTS

REGIONAL RIVALRY AND DOMESTIC RESILIENCE

Ambition can expand a state's room for maneuver, but it also sharpens its limits and makes them more visible. In Morocco's case, those constraints are shaped above all by rivalry with Algeria, instability along the southern frontier and domestic resilience. This means that the key issue is no longer only how Morocco seeks to expand its influence, but whether that expansion can be maintained over time.

4.1. The Morocco–Algeria Rivalry: Deterrence or Escalation?

The Morocco–Algeria relationship is a case of intense but contained rivalry rather than a clear path to open war. The two states are no longer simply competitors with periodic diplomatic crises; they now operate within a hardened strategic confrontation in which Western Sahara, military modernization, and external alignments all reinforce mutual distrust. Yet precisely because the rivalry has become structural, it also generates incentives for caution. The most plausible medium-term trajectory is therefore not reconciliation, but a prolonged pattern of deterrence without normalization: low chances of genuine political thaw, low-to-moderate risk of limited escalation, and still relatively low probability of full interstate war. That outcome follows from the same logic that has shaped the relationship since 2021: both sides treat the other as a strategic threat, but both also understand that a large-scale military confrontation would be costly, uncertain, and difficult to control.¹²⁰¹²¹

The rivalry cannot be understood outside the Western Sahara question, because that is the issue that turns bilateral mistrust into a zero-sum strategic contest. For Rabat, Algeria is not merely a neighboring rival; it is the principal state sponsor of the only external challenge capable of obstructing Moroccan consolidation in Western Sahara.¹²² For Algiers, Morocco's growing diplomatic success on the Saharan file, especially since 2020, has not just weakened the Polisario's external position; it has also altered the regional balance in ways Algeria reads as threatening. This is why Western Sahara has become more than a territorial dispute: it is now

¹²⁰ International Crisis Group, *Managing Tensions between Algeria and Morocco*, Middle East and North Africa Report no.

¹²¹ (Brussels: International Crisis Group, November 29, 2024), i–ii, 24–29.

¹²² Agence France-Presse, "Rabat, Algiers Differ on Western Sahara," *VOA Africa*, September 6, 2022. ¹⁴² International Crisis Group, *Managing Tensions between Algeria and Morocco*, ii.

the main arena through which both states interpret each other's intentions.¹⁴² The UN's 2025 reporting still described the territory as marked by tensions and low-intensity hostilities between Morocco and the Polisario Front, a reminder that the conflict remains active enough to keep Algeria and Morocco locked in a wider regional confrontation.¹²³

The present state of the bilateral relationship reflects that hardening. Diplomatic relations have remained severed since August 2021, when Algeria accused Morocco of hostile acts and formally cut ties.¹²⁴ That rupture was followed by broader punitive steps, including the closure of Algerian airspace to Moroccan aircraft¹²⁵ and the termination of gas flows through the Maghreb-Europe pipeline.¹²⁶ The point is not only that bilateral relations are bad; it is that the mechanisms that once absorbed tension have been weakened. In a rivalry of this kind, the absence of diplomatic normalization does not automatically mean war, but it does mean fewer political shock absorbers.

Military competition deepens that condition, but it does not automatically point to imminent war. The regional balance remains clearly asymmetrical in spending terms. In 2024 military expenditure data show Algeria spending about \$21.8 billion in 2024, compared with roughly \$5.5 billion for Morocco, while both countries together accounted for about 90 percent of North African military spending. Algeria's spending rose by 12 percent in 2024 and Morocco's by 2.6 percent.¹²⁷ Rivalry is materially real: both states continue to prioritize military capability. Then, the rivalry is not balanced in simple budgetary terms. Algeria still commands a much larger military budget, helped by hydrocarbon revenues, which means Morocco's strategy is less about outspending Algeria than about selectively upgrading, improving interoperability with external partners, and maximizing the political value of its procurement relationships.

That distinction is important for assessing future risk. Algeria's larger defense budget and long-standing military depth make it a powerful deterrent actor, but they do not automatically translate into a preference for offensive escalation.¹²⁸ Morocco's modernization, in turn, improves its deterrent posture and surveillance capabilities, especially around Western Sahara,

¹²³ United Nations Security Council, *Situation concerning Western Sahara: Report of the Secretary-General*, UN Doc. S/2025/612 (September 30, 2025), 1, 12.

¹²⁴ News Agencies, "Algeria cuts diplomatic ties with Morocco over 'hostile actions,'" *Al Jazeera*, August 24, 2021.

¹²⁵ News Agencies, "Algeria closes airspace to all Moroccan planes," *Al Jazeera*, September 22, 2021.

¹²⁶ Francis Ghilès, "Escalating rivalry between Algeria and Morocco closes the Maghreb-Europe pipeline," *CIDOB*, November, 2021.

¹²⁷ Liang et al., *Trends in World Military Expenditure, 2024*, 5.

¹²⁸ Djallel Khechib, "Why Algeria Should Choose Restraint Over War – The Deterrent Power of Prestige," *Manara Magazine*, August 24, 2025.

but does not make a decisive military breakthrough over Algeria plausible. The relationship therefore resembles a classic security dilemma more than a preparation for imminent interstate war: each side arms partly because the other is arming, and each side interprets the other's modernization as confirmation of hostile intent.

External alignments reinforce this dilemma. Algeria's military links with Russia and Morocco's deepening ties with the United States and Israel are not incidental; they shape how each side interprets the regional balance. Morocco's success in combining U.S. support on Western Sahara with defense cooperation involving both Washington and Israel sharpens Algerian fears of encirclement and diplomatic marginalization.¹²⁹ Algeria, for its part, uses its strategic autonomy, military scale, and traditional anti-colonial posture to present itself as the defender of Sahrawi self-determination and as a counterweight to Morocco's Western-backed rise. The rivalry thus becomes more than bilateral: it is embedded in wider networks of strategic affiliation. That raises the intensity of the confrontation, but it also broadens the costs of escalation, because any open war would implicate wider diplomatic and security calculations.¹³⁰

A continued rivalry is more probable than reconciliation. The first is regime logic. Both governments derive domestic and foreign-policy coherence from treating the other as a structural rival. In Morocco, the Algerian role in sustaining the Saharan challenge helps justify continued securitization of the issue. In Algeria, Moroccan diplomatic gains and military partnerships help validate the argument that Algiers faces a revisionist and externally backed challenger. The second is path dependence. Once diplomatic ties are severed, military expenditure is rising, and symbolic red lines have hardened, backing down becomes politically costly. The third is regional spillover. The rivalry no longer stops at the bilateral border; it increasingly affects African diplomacy, Sahelian alignments, and Western Sahara negotiations. The confrontation has spilled into wider North and sub-Saharan arenas and is becoming harder to compartmentalize.¹⁵¹

At the same time, several factors still militate against outright war. First, there is no decisive superiority: Algeria spends more, Morocco enjoys stronger Western backing, and neither can

¹²⁹ Pablo Villar Bolaños, "Morocco and Algeria: A Strategic Rivalry Shaping the Maghreb," *European Student Think Tank*, July 31, 2025.

¹³⁰ Hamza Meddeb, "Economic Statecraft: New Dimensions of Moroccan-Algerian Rivalry," *ICDI*, November 7, 2025. ¹⁵¹ Walid Blila, "Maghreb Power Struggle: An Offensive Realist Analysis of Moroccan-Algerian Rivalry," *International Journal of Social Science Research and Review*, vol. 8, no. 6 (2025): 264, 266. ¹⁵² Liang et al., *Trends in World Military Expenditure, 2024*, 4-5.

count on a short, manageable victory.¹⁵² Second, both regimes face enough domestic and regional uncertainty that major conflict could destabilize rather than strengthen them. Third, escalation would be difficult to control, especially over Western Sahara, border incidents, or airspace violations, given the lack of dense diplomatic communication. This helps explain why the rivalry can remain sharp without turning into war: the incentive to signal is high, but the incentive to enter a prolonged open conflict remains lower.

That said, the risk of limited or indirect escalation should not be underestimated. The most plausible danger is not deliberate full-scale war, but escalation through incidents, proxy dynamics, or cumulative militarization.¹³¹ Western Sahara remains the clearest trigger zone. Continued low-intensity hostilities between Morocco and the Polisario keep Algeria indirectly involved even without formal belligerence.¹³² Maritime incidents, drone-related confrontations, rhetorical escalation, or security spillovers from the Sahel could also push the rivalry into more dangerous territory. Even when such developments do not point directly to Morocco, they reinforce a regional climate in which threat perceptions are hardening and mobilization logics are becoming more institutionalized.¹³³

The most defensible forecast, then, is one of managed antagonism: no meaningful reconciliation, no stable normalization, but also no clear evidence of preparation for large-scale war.¹³⁴ Long-term estrangement, military competition, and indirect escalation remain more likely than direct confrontation. But this should not be mistaken for positive stability. It is a tense equilibrium shaped by deterrence, mutual suspicion, and Western Sahara as the central axis of contestation. The rivalry is, therefore, likely to remain intense but bounded: serious enough to shape every major strategic calculation in the Maghreb, yet still constrained by the high costs of war. Morocco's regional project will thus face its sharpest external limit not in sudden defeat, but in the persistent drag of a rival capable of obstructing, arming, and regionalizing its advances.¹³⁵

¹³¹ International Crisis Group, *Managing Tensions between Algeria and Morocco*, i–ii, 5, 24–29.

¹³² United Nations Security Council, *Situation concerning Western Sahara*, 1, 8.

¹³³ International Crisis Group, *Managing Tensions between Algeria and Morocco*, 21, 24–29.

¹³⁴ International Crisis Group, *Managing Tensions between Algeria and Morocco*, i–ii, 24–29.

¹³⁵ International Crisis Group, *Managing Tensions between Algeria and Morocco*, i–ii, 24–29.

4.2. Mauritania and the Sahel: Buffer, Bridge or Vector of Insecurity?

Mauritania will remain more of a strategic buffer than a direct source of bilateral conflict for Morocco, but that does not mean it insulates Rabat from the Sahel. A more nuanced medium-term scenario is believable to emerge: while Mauritania will continue to mitigate direct pressure on Morocco's southern flank, the deeper incorporation of Western Sahara into Rabat's economic and strategic agenda will increasingly expose Morocco to the instability radiating from the Sahel. Viewed in these terms, the southern frontier is unlikely to remain merely a static line of separation. It is becoming a space where projection and vulnerability increasingly overlap. Morocco's attempt to turn the Sahara into an Atlantic gateway for the Sahel is therefore plausible as a strategic ambition, but only conditionally so. Its success depends on security and political conditions that Morocco can influence, but not fully control.¹³⁶

The starting point is that Mauritania occupies a structurally ambiguous position in Moroccan strategy. It is neither a full strategic ally nor a principal adversary. Its value lies precisely in that intermediate role. Since the end of Mauritania's own direct involvement in the Western Sahara conflict, Nouakchott has generally preferred a cautious posture of relative balance, avoiding full alignment either with Rabat or with Algiers. Recent European analysis still describes Mauritania's stance as one of "positive neutrality" on Western Sahara, combined with practical cooperation with both sides.¹³⁷ It reduces the likelihood that a more fully consolidated Moroccan position in Western Sahara would automatically turn the Moroccan–Mauritanian border into a major interstate friction line. A long and sparsely populated border does create vulnerabilities, but it does not, by itself, generate the kind of dense territorial dispute seen elsewhere in the Maghreb. If anything, Mauritania's incentive is the opposite: to preserve room for maneuver, avoid entrapment in Algeria–Morocco rivalry, and keep the southern Saharan corridor functional enough to protect its own economic and security interests.¹³⁸

That buffering function is visible in the present configuration of the southern frontier. The Guerguerat crossing remains especially significant because it links Morocco-controlled Western Sahara to Mauritania and, beyond it, to West African routes. The UN's 2025 reporting

¹³⁶ Marangio, *Shifting sands*, 2–3.

¹³⁷ Marangio, *Shifting sands*, 3.

¹³⁸ Marangio, *Shifting sands*, 3.

on Western Sahara still treated developments around the territory and its access corridors as part of the broader security environment monitored by MINURSO, which underlines that this is not merely a commercial space but also a politically sensitive one.¹³⁹ Yet the broader pattern remains one of operational coexistence rather than interstate confrontation. Mauritania has little interest in turning its northern border into a second theater of regional polarization. Its preference has been to preserve enough cooperation with Morocco to keep trade and mobility functioning, while also maintaining independent ties with Algeria, as shown by the launch in 2024 of a road project linking Tindouf and Zouerate and plans for a duty-free zone between the two countries.¹⁴⁰ This dual-track behavior is not evidence of hostility toward Morocco so much as evidence that Mauritania values strategic hedging above alignment.

That is why the real issue is not whether Mauritania will itself become the main source of instability for Morocco. The more important question is whether Mauritania can continue to act as a buffer while the wider Sahel becomes more politically fragmented and more insecure. Here the answer is more uncertain. Mauritania may soften direct bilateral friction, but it also places Morocco in closer practical contact with the Sahelian security arc. The more Morocco projects itself southward through Western Sahara, Atlantic infrastructure, and diplomatic activism, the less distance there is between Moroccan strategy and Sahelian disorder. The southern flank thus changes function: it becomes less a line of separation and more a zone of transmission through which transnational risks can move northward, whether in the form of trafficking, irregular migration, smuggling, or indirect security spillover. The Mauritania–EU migration pact illustrates this clearly. As Mauritania tightened controls on routes toward the Canary Islands, police crackdowns, deportations, and route displacement intensified, revealing how Mauritania is increasingly becoming a frontline state in broader Euro-African border governance.¹⁴¹ For Morocco, the southern buffer is no longer simply geographical; it is embedded in the same transnational pressures that shape the wider Atlantic and Sahelian space.

This is the point at which the Sahel stops being a distant environment and becomes a strategic frontier for Morocco. Rabat has tried to turn that proximity into advantage by presenting itself as a force of stability, connectivity, and Atlantic access. The core of that effort is the Royal

¹³⁹ United Nations Security Council, *Situation concerning Western Sahara*.

¹⁴⁰ Marangio, *Shifting sands*, 3.

¹⁴¹ Juan Medina, “Migrants stuck in Mauritania after EU border pact brings crackdown,” *Reuters*, December 18, 2025. ¹⁶⁴ Rida Lyammouri and Amine Ghoulidi, *Morocco’s Atlantic Initiative: A Catalyst for Sahel-Saharan Integration*, Policy Brief no. 68/24 (Rabat: Policy Center for the New South, December 2024). ¹⁶⁵ Marangio, *Shifting sands*, 2–3.

Atlantic Initiative, which seeks to provide landlocked Sahelian states with access to global trade through Moroccan Atlantic infrastructure.¹⁶⁴ This initiative is interpreted as both a geopolitical maneuver and a connectivity project: it strengthens Moroccan ties across Western Africa, supports the development of Dakhla, and reinforces Morocco's claims over Western Sahara by tying them to regional utility.¹⁶⁵ Moreover, ECOWAS endorsed the pipeline dimension of this wider Atlantic approach in late 2024 and that construction on the northern segment between Morocco and Senegal was expected to begin.¹⁴² From April 2025 also showed Burkina Faso, Mali, and Niger backing Morocco's sea-access initiative, which suggests that the proposal has moved beyond rhetoric into a meaningful instrument of regional diplomacy.¹⁴³

This matters because it changes the strategic meaning of Western Sahara itself. The territory is no longer framed only as a sovereignty issue or a nationalist claim. It is increasingly presented as an Atlantic platform through which Morocco can offer something concrete to Sahelian states: trade routes, port access, logistical opening, and a degree of geopolitical diversification.¹⁴⁴ If that logic takes hold, Morocco strengthens its claim to regional leadership not only by controlling territory, but by making that territory functionally useful to others. This is the strongest argument for seeing the Atlantic gateway project as plausible. It aligns with Morocco's broader hub strategy, it speaks directly to the needs of landlocked Sahelian regimes, and it offers Rabat a way to convert geography into influence without relying solely on coercive means.¹⁴⁵

But plausibility does not mean inevitability. The project's vulnerability lies in the fact that Morocco does not control the political and security environment through which its southern ambitions must pass. The Sahel is now marked by fragmented regionalism, military-led regimes, weakened ECOWAS cohesion, and intensified competition among external actors. The Maghreb–Sahel relations in 2025 makes this point clearly: the Sahel and Maghreb are increasingly interconnected through hedging strategies, shifting alignments, and competing regional projects.¹⁴⁶ Morocco may be able to offer Atlantic access, but it cannot guarantee that the surrounding corridor will remain politically coherent or secure enough to sustain deep integration. The support expressed by Burkina Faso, Mali, and Niger is strategically valuable,

¹⁴² Marangio, *Shifting sands*, 3.

¹⁴³ Ahmed Eljehtimi, "Landlocked Burkina, Mali, Niger back sea access through Morocco," Reuters, April 29, 2025.

¹⁴⁴ Lyammouri and Ghoulidi, *Morocco's Atlantic Initiative*, 3–5.

¹⁴⁵ Lyammouri and Ghoulidi, *Morocco's Atlantic Initiative*, 4–7.

¹⁴⁶ Marangio, *Shifting sands*, 2–3.

but these are also regimes operating in volatile contexts and redefining their regional alignments in ways that are not fully predictable.¹⁴⁷ The same southern opening that offers Morocco geopolitical depth could therefore also increase its exposure to unstable partners, route disruption, and the spillover effects of wider Sahelian disorder.

Several drivers support this dual reading of the southern frontier as both opportunity and risk. First, Mauritania's relative stability matters: as long as Nouakchott prioritizes hedging and containment over confrontation, it is probable to remain more a buffer than a direct bilateral threat, which favors Morocco. Second, Sahelian fragmentation cuts both ways. The more fragmented the region becomes, the more attractive Morocco's Atlantic offer may be to landlocked states seeking alternatives, but also the harder it becomes to build durable connectivity across unstable political terrain. Third, infrastructure credibility is crucial. Morocco's southern strategy becomes more plausible when Atlantic ports, transport links, and energy projects move from concept to material reality. Fourth, the externalization of border governance adds further pressure. As Mauritania becomes more deeply involved in migration management for Europe, and as routes shift under pressure, the southern frontier becomes more security-dense and more exposed to humanitarian and political shocks.¹⁴⁸

The most plausible medium-term assessment is that Mauritania will remain more an amortizing frontier than a direct source of dispute, but this will not spare Morocco the strategic consequences of moving closer to the Sahel. The more Rabat integrates Western Sahara into Atlantic and African connectivity schemes, the more it ties itself to a region marked by instability, illicit flows, and shifting alignments. Morocco may become a positive force in the Sahel by offering access, investment, and diplomatic alternatives, but it is far less likely to emerge as a decisive stabilizer of the region as a whole. The southern frontier will therefore remain a zone of mixed strategic effects: a platform for projection, but also a source of insecurity Morocco cannot fully neutralize. This tension makes the domestic dimension of Moroccan strategy especially important. The more external risks and obligations Rabat assumes, the more its regional posture will depend on internal resilience, political control, and the state's capacity to absorb prolonged stress.

¹⁴⁷ Eljechimi, "Landlocked Burkina, Mali, Niger back sea access."

¹⁴⁸ Eljechimi, "Landlocked Burkina, Mali, Niger back sea access."

4.3. Internal Weaknesses and Regime Stability

In the medium term, Morocco's monarchy is expected to remain the main pillar of regime stability, and its transformation into a merely symbolic institution is unlikely. However, that continuity does not mean the absence of internal strain. The most credible domestic risk is not revolution or an Islamist takeover, but gradual erosion: social frustration, institutional rigidity, and uneven socioeconomic outcomes may slowly weaken the state's ability to sustain an ambitious regional role without deeper political adaptation. In this sense, the most plausible threat is not sudden collapse, but accumulated pressure. The regime is still strong enough to contain challengers, but not adaptable enough to assume that structural discontent will remain politically harmless.

That starting point is important because Morocco is not a fragile regime in the immediate sense. The monarchy retains broad formal authority, decisive informal influence, and a legitimacy architecture that combines dynastic continuity, religious symbolism, patronage networks, and control over the security apparatus.¹⁴⁹ Even after the 2011 constitutional reforms, effective power has remained heavily concentrated around the palace.¹⁵⁰ Parliament and parties function, but they do so within a system in which the king continues to dominate the strategic core of decision-making.¹⁵¹ This is one reason why scenarios of rapid constitutional monarchy in the European sense remain unlikely: the system has not evolved toward a model in which elected institutions could realistically absorb the crown's current role without a much deeper redistribution of authority than anything presently visible. Morocco's internal equilibrium still depends on a monarchy that governs, arbitrates, and stabilizes, rather than merely reigns.

The present domestic picture is therefore one of controlled stability under mounting socioeconomic pressure. The state retains enough coercive, administrative, and symbolic strength to avoid immediate regime crisis, but underlying structural tensions remain serious. Employment is one of the clearest examples. Morocco's unemployment rate rose to 13.3 percent in 2024, with youth unemployment at 36.7 percent, graduate unemployment at 19.6 percent, and women's unemployment at 19.4 percent.¹⁵² These are not marginal figures in a country

¹⁴⁹ Freedom House, "[Morocco: Freedom in the World 2025 Country Report](#)," accessed March 25, 2026.

¹⁵⁰ Freedom House, "[Morocco](#)."

¹⁵¹ Ahmed Eljehtimi and Angus McDowall, "[Looming Moroccan election reveals parliament's dimming sway](#)," *Reuters*, September 4, 2021.

¹⁵² Reuters, "[Morocco's unemployment rate rises to 13.3% in 2024 as drought hits farmers](#)," February 3, 2025. ¹⁷⁷ Bertelsmann Stiftung, *BTI 2024 Country Report: Morocco* (Gütersloh: Bertelsmann Stiftung, 2024), 17.

whose strategic narrative relies increasingly on modernization, growth, and international attractiveness. They point to a persistent gap between macro-strategic ambition and everyday socioeconomic absorption. When youth unemployment, regional inequality, and weak public services persist together, the regime can preserve order, but at the cost of accumulating dissatisfaction that is difficult to neutralize permanently through rhetoric or selective patronage.¹⁷⁷

That tension became more visible in 2025, when youth-led protests over health, education, corruption, and living conditions spread across several Moroccan cities.¹⁵³ These protests did not amount to a revolutionary moment, but they were the most serious and widespread unrest in years and revealed an important shift: discontent can still escalate nationally when socioeconomic frustration converges with a sense that the political system is unresponsive. The government responded with a mixture of dialogue offers, reform promises, and heavy security deployment, which is itself revealing.¹⁷⁹ It suggests that the state still has the tools to reimpose control, but also that it remains vulnerable to bursts of mobilization when basic social grievances become symbolically charged.¹⁵⁴ Analytically, it is not whether these protests immediately threatened the monarchy, because they did not, but that they exposed the limits of passive resilience. A system can remain stable while still becoming more brittle.

This is where the question of political adaptation becomes decisive. Morocco's external success has often relied on an internal image of stability, continuity, and reformist pragmatism. But that image becomes harder to sustain if public expectations rise faster than the system's willingness or ability to redistribute opportunity and improve services. The monarchy has often responded to pressure through selective reform rather than structural opening: enough adjustment to defuse tension, but not enough to produce a substantially more accountable political order. That approach has worked repeatedly, and it will probably continue to work in the short term. The problem is that selective adaptation can gradually lose efficiency if grievances become more socioeconomic, generational, and territorially diffuse. Demands about health, education, jobs, and corruption are harder to neutralize than narrower elite or ideological opposition because they cut across broader segments of society.

¹⁵³ Ahmed Eljehtimi, "Morocco squashes youth-led protesters over health, education," *Reuters*, September 30, 2025. ¹⁷⁹ Ahmed Eljehtimi, "Morocco's prime minister calls for dialogue as nightly protests grow more violent," *Reuters*, October 2, 2025.

¹⁵⁴ Eljehtimi, "Morocco squashes youth-led protesters."

This also helps clarify why an outright Islamist takeover remains improbable despite the persistence of conservative social currents. Morocco's Islamist spectrum is not absent, but it does not currently appear positioned to replace the monarchical center of the system. The main institutional Islamist force, the Justice and Development Party, suffered a dramatic collapse in the 2021 elections, while the monarchy retains both coercive and religious advantages that make direct Islamist displacement highly unlikely.¹⁵⁵ The king's role as Commander of the Faithful is especially important here. It gives the palace a source of religious legitimacy that sharply limits the space for an Islamist movement to claim superior moral-political authority over the system as a whole.¹⁵⁶ This does not mean Islamism disappears as a political or social current. It means that the most realistic medium-term risk is not an Islamist regime, but rather the periodic reactivation of Islamist or conservative sentiment within a broader field of social dissatisfaction that the monarchy still largely contains.¹⁵⁷

The stronger internal challenge, therefore, is erosion rather than replacement. Several drivers point in that direction. The first is socioeconomic strain, especially youth unemployment, inequality, and regional disparity. The second is institutional rigidity: the more effective power remains concentrated without corresponding channels for accountability and representation, the harder it becomes for the system to absorb frustration through ordinary politics. Morocco is seen as only and partly free and emphasizes that many civil liberties remain constrained in practice, even though elections are held and some pluralism exists. It is not simply as a rights indicator, but as a resilience indicator: systems with narrow channels of peaceful contestation often appear stable until grievances spill into less manageable forms. The third driver is a reputational mismatch. Morocco's ambition to project itself as a modernizing, globally connected, stable regional actor raises public expectations at home. If visible strategic and infrastructural success is not matched by improvements in employment, education, health, and governance, the gap between image and lived experience can itself become politically corrosive.

¹⁵⁵ Bernabé López García and Said Kirhlani, "The Moroccan elections of 2021: a new political architecture for a new development model," *Elcano Royal Institute*, October 1, 2021.

¹⁵⁶ Freedom House, "Morocco."

¹⁵⁷ Reuters, "Morocco's king urges speedy reforms to boost jobs, rural development," October 11, 2025. ¹⁸⁴ Eljehtimi and McDowall, "Looming Moroccan election reveals parliament's dimming sway."

At the same time, there are still strong counterweights working in the regime's favor. The palace remains the only institution capable of arbitrating between elites, containing partisan fragmentation, and restoring political order when the government loses credibility.¹⁸⁴ The weakness of parliament and parties reduces the likelihood of any institutional challenge to the monarchy. The security apparatus remains effective, and the state has repeatedly combined selective concessions with calibrated repression when pressure rises. At the same time, no unified opposition force is currently able to turn social discontent into a coherent alternative regime project. This is why revolution remains unlikely despite persistent grievances. Morocco's problem is not an imminent replacement order, but the gradual buildup of unresolved tensions within a system that still dominates the political field.

The most plausible medium-term outlook is continuity under strain. The monarchy will likely remain the core of stability, while a ceremonial crown, revolutionary rupture, or Islamist takeover all remain unlikely. Yet domestic resilience cannot be assumed. The more Morocco expands its external ambitions, the more it depends on internal legitimacy, social absorption, and state capacity to keep strategic overstretch from fueling discontent. The main internal risk is a gradual erosion of resilience: a system that endures, but at rising political and social cost if reform remains too limited and socioeconomic stress too persistent. Morocco can likely sustain its regional projection without immediate breakdown, but not indefinitely without deeper adaptation. The ultimate limit on its rise may lie less in dramatic collapse than in the gradual narrowing of the domestic base that sustains ambitious external action.

CONCLUSION

Morocco is best understood not as an emerging hegemon, but as a regional power in controlled and uneven ascent. The central argument of this report has been that Rabat has built a coherent strategy to expand its influence through territorial consolidation, diplomatic diversification, African projection, and infrastructure development, while using stability and strategic partnerships as sources of leverage. However, that rise remains conditioned by strong external and internal constraints. Morocco has gained more room for maneuver than many regional actors, yet its ascent remains selective rather than comprehensive, and cumulative rather than transformative.

Western Sahara continues to be the core of Morocco's external strategy. In the short and medium term, the most plausible outcome is not a definitive settlement, but a process of practical consolidation under Moroccan control, with growing support for the autonomy plan and a narrowing diplomatic space for the Polisario Front. This does not mean that the conflict will disappear, but rather that it is increasingly likely to remain unresolved in legal terms while becoming more consolidated in political and diplomatic practice. At the same time, Morocco's relations with Spain, the European Union, Algeria, and the African continent show a common pattern: Rabat is gaining room for maneuver, but not without friction, resistance, and limits. Its external progress is therefore real, but never cost-free.

Morocco's ambitions in Africa, the Atlantic-Sahel space, and the energy and logistics sectors are also real and partly credible. Its geographic position, relative stability, port infrastructure, diplomatic activism, and military modernization give the country important advantages. In parallel, its African outreach through investment, diplomacy, and coalition-building has strengthened its profile beyond North Africa and has increased its relevance in both Atlantic and continental frameworks. Yet these strengths do not eliminate the main constraints identified in this report: rivalry with Algeria, instability in the Sahel, legal and political friction with Europe, and domestic structural weaknesses linked to inequality, limited reform, and institutional concentration of power. These constraints do not block Moroccan projection altogether, but they do shape its pace, scope, and sustainability.

For that reason, the central question of this report can be answered directly:

√ Morocco can convert sovereignty, geography, stability and external partnerships into durable regional influence to a significant, but ultimately bounded, extent. It can go far enough to consolidate itself as a pivotal middle power between Europe, Africa, the Atlantic and the wider MENA region, and far enough to make its position on Western Sahara increasingly difficult to reverse in diplomatic and practical terms.

√ Its influence is likely to become deeper in selected arenas: Western Sahara, migration management, EU-Morocco interdependence, African coalition-building, Atlantic connectivity, logistics, and selective security partnerships.

√ However, it is unlikely to go so far as to become an uncontested regional hegemon or to impose a stable regional order on its own terms. Algeria remains the principal strategic counterweight while the Sahel exposes Morocco to instability rather than only opportunity.

√ Legal and political friction with Spain and the European Union will also continue to limit full normalization. And domestic socioeconomic pressures constrain the state's long-term capacity to sustain external activism.

√ The most plausible outcome is, therefore, not Moroccan domination, nor strategic paralysis, but bounded regional pivotality: a real, sustained and increasingly visible rise, whose durability depends on Rabat's ability to keep ambition, capability and resilience in balance.

The following end state (ways, means, constraints) framework summarizes this strategic logic and condenses the main conclusion of this report:

END STATE: Morocco as an Aspiring Regional Power		
WAYS	MEANS	CONSTRAINTS
Diplomatic consolidation of Moroccan claims over Western Sahara	Political continuity under the monarchy and relative regime stability	Rivalry with Algeria and the unresolved status of Western Sahara
Managed interdependence with Spain and the EU	Geostrategic location between Europe, Africa, the Atlantic and the Mediterranean	Sahelian instability and regional spillover
African and Atlantic projection through diplomacy, investment, and connectivity	Logistics, infrastructure, and growing regional economic networks	Friction with Spain and the EU on legal, political, and maritime issues
Selective strategic partnerships to expand diplomatic and security leverage	Diplomatic access, strategic lobbying, and military modernization	Uneven implementation capacity and dependence on external investment
Controlled external projection supported by internal stability	State centralization and relative regime resilience	Domestic socioeconomic pressure, limited reform, and institutional rigidity

Figure 5: Ends-ways-means-constraints table (own elaboration)

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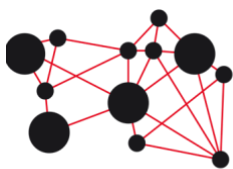
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