

Morocco's New Geopolitics

A Wider Atlantic Perspective

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Emiliano Alessandri,
and S. Enders Wimbush*

Wider Atlantic Series

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STRENGTHENING TRANSATLANTIC COOPERATION

FOUNDATION



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About the Wider Atlantic Program

This report was prepared for GMF's Wider Atlantic program, a research and convening partnership of GMF and Morocco's OCP Foundation. The program explores the north-south and south-south dimensions of transatlantic relations, including the role of Africa and Latin America, and issues affecting the Atlantic basin as a whole.

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Preface

This study was undertaken in the context of a multi-year partnership for research and dialogue of the German Marshall Fund of the United States and Morocco's OCP Foundation, launched in 2010. The report conveys findings from one of three first-year studies. Companion pieces address energy and environment, and food security, both from an Atlantic basin perspective.

Revolutions and turmoil in the Middle East and North Africa, together with wider, longer-term trends in transatlantic relations, underscore the importance of Atlanticism, and especially “wider” Atlanticism, as a key dimension of Morocco's new geopolitics. This analysis springs from a shared interest in rethinking transatlantic relations, with a greater emphasis on emerging north-south and south-south dynamics, and the role of emerging powers such as Brazil. Regionalism is another force at work in the strategic environment in and around Africa. Morocco's future policy challenges and opportunities are likely to be strongly shaped by developments and initiatives in all these spheres.

The authors wish to thank the OCP Foundation for their generous partnership in this effort, and for their valuable assistance in Morocco and elsewhere. This study was greatly enhanced by the debate at the first *Atlantic Forum in Morocco*, held by GMF in partnership with OCP, in Rabat, June 17-19, 2011. We are most grateful to the numerous officials and experts on both sides of the Atlantic who shared their perspectives on the issues addressed in this analysis. Of course, the authors are solely responsible for any errors or omissions. Comments on this report are welcome, and may be addressed to the authors at GMF.

Executive Summary

Recent events underscore the reality that stability in Morocco's neighborhood cannot be taken for granted. The implications of protracted instability in Morocco's near abroad — the Maghreb and West Africa — would be substantial, adding to the opportunity costs of poor integration in the region, and strengthening the logic of an Atlantic vision. While continuing to pursue Maghreb integration, Morocco will also explore larger geometries in its international policy and economic development.

Some of these new geometries will emerge within the neighborhood, above all in West Africa, where new infrastructure could open opportunities for economic development, with Morocco as a hub for integration and commerce in the region. Looking beyond the immediate neighborhood, the area with the greatest future potential for Morocco as an international actor will be the wider Atlantic, including the southern Atlantic *per se*. For various historical reasons, the southern basin of the Atlantic has featured less prominently in modern transatlantic relations and international affairs.

This may be changing. From the rise of Brazil, South Africa, Nigeria, and even Angola as emerging economies, to developments in offshore energy production and trade, the notion of southern, or more properly, *wider* Atlanticism may finally come to the fore. Many of the key trends affecting global economics and security are being played out to the south of the prevailing Washington-Brussels axis. At a minimum, this prospect will give greater weight to north-south and south-south relations, and Morocco is well placed to serve as a hub in this wider Atlantic world — in logistical terms, but also in terms of the evolving mental maps of policymakers.

This study argues that while it is in the interest of Morocco to consolidate relations with the EU and capture the potential gains from a reshaped European approach to its southern neighborhood, Rabat should also encourage policymakers in the United States and Europe to think more imaginatively about Morocco's role in the Atlantic and elsewhere. A first focus should be infrastructure,

especially in the maritime and air realms, where the regional political obstacles are minimal. Existing projects, such as the intercontinental trans-shipment Tanger Med port, already highlight Morocco's ability to serve as a hub for the region and the wider Atlantic. Ideally, national investments in road and rail infrastructure can also eventually contribute to wider regional integration in the Maghreb and West Africa. The completion of the much-discussed Trans-Maghreb Highway should be a key objective.

A second focus should be energy. Trends in energy trade and investment, offshore and shale gas production, and environmental policy may or may not add up to the emergence of an Atlantic energy "system," but they will be consequential for global energy security and Morocco's own development. There will be multiple opportunities for Morocco to participate in this increasingly significant Atlantic energy picture, and these will contribute directly to Morocco's Atlantic vocation. Morocco's large-scale investment in renewable energy production, and potential regional cooperation in this area, will be one key initiative.

On the security side, Morocco should work with partners in West Africa and Latin America to address the growing problem of trans-regional criminality in the Atlantic space. In the absence of an effective regional — actually trans-regional — strategy to contain this problem, Morocco will face the prospect of an increasingly unstable hinterland in West Africa and the Sahel, a more difficult relationship with European neighbors, and the threat of violent spillovers on Moroccan territory. As an exposed state with a stake in Atlantic cooperation, Rabat can take the lead in pressing for a multi-continent approach to this problem.

In a related fashion, a successful regional strategy for Morocco will be influenced by the nature and effectiveness of civil-military relations and security establishments across the Maghreb-West Africa space, especially in light of the revolutions and crises affecting the region. NATO is likely to make security sector reform in the southern Mediterranean a new focus for its Mediterranean Dialogue. Rabat can and should play an active role in this initiative, giving it a wider scope encompassing Morocco's multiple neighborhoods. Human security, the control of borders, and air

and maritime sovereignty and security should be priorities for cooperation and seem to be natural items of an emerging Wider security agenda.

Finally, internal reform can underscore the durability of Morocco's distinctiveness, regionally and in the perception of Atlantic partners. This analysis does not focus on Moroccan domestic policy. But in a period of rapid and revolutionary change in the neighborhood, it is obvious that officials and observers will judge Morocco's potential to play new external roles in large measure on the basis of internal conditions. The success of Morocco's own reform efforts will be a key enabler in strengthening and diversifying Rabat's international position.

Ultimately, pursuing a "portfolio approach" to Morocco's international engagement may prove to be the necessary strategy for success for Rabat. Geopolitical scenarios highlights the extraordinary flux in the strategic environment across multiple regions. These uncertainties can affect the viability of regional infrastructure as well as geopolitical relationships (consider the effect of a closure of the Suez Canal on transits through the Tanger-Med port). Morocco will need to balance its European, Maghrebi, Mediterranean, West African, and Atlantic relations to hedge against risks from any of these quarters. Diversification should be the order of the day.

To the extent that Morocco aims to reinforce its Atlantic strategy, closer ties with Brazil and key African states will be an essential component — and a hedge against potential U.S. and European reluctance.

Introduction

No country addresses international questions from a blank slate. History, culture, and geography all play critical roles. In this sense, Morocco's international policy context is old and complex. The kingdom's identity is at once African and Maghrebi, Muslim and Jewish, Arab and Berber, with numerous other ethnic and regional influences. Morocco is also tied in important ways, both historical and contemporary, to Europe and the Mediterranean world. This analysis acknowledges these inheritances, but focuses on the dynamic elements in the strategic environment affecting Morocco, and new directions in the country's external engagement. Above all, this study addresses Morocco's Atlantic ambition.

We consider Morocco's new geopolitics, not in the determinative sense of "geography as destiny," central to geopolitical thinking in past epochs. Here, geopolitics is understood in a broader sense, simply to underscore the fact that, even in a globalized environment, space — regions, land, and sea lines of communication — matter in shaping foreign, security, and economic relationships. We might just as well use the term "geo-economics," given the weight of economic and development issues in Morocco's external policies. But geopolitics is a useful shorthand.

Geography may be fixed, but countries often have multiple geographic identities and potential areas of engagement, and the mental maps of observers and policymakers evolve over time. This is just as true when seen from abroad. Societies can and do project a certain idea of their identity and regional interests, and these, too, can change over time. Usually, the evolution is gradual. Sometimes, events compel a more rapid shift. Debate on this question has occupied much of the foreign policy literature in Europe and North America. Changes in national power and potential — the phenomenon of rising and declining powers — can also lead to new assumptions about the geographic orientation of states.

Today, Morocco's geopolitical orientation is in flux as a result of developments on the regional scene in North and West Africa,

evolving relations with leading partners in Europe and the United States, and not least, the emergence of new partners and new opportunities in the Atlantic space, north and south. A number of issues stand out.

First, the pace of change is accelerating. Morocco has long confronted troubled societies and insecurity on its borders. The complicated relationship with Algeria, which has highlighted differences including over the question of the Western Sahara, has blocked opportunities for bilateral cooperation and for economic integration in the Maghreb as a whole. The absence of regional cooperation in the Maghreb has imposed substantial economic and political costs on the region and its local actors.¹ This, in turn, has impeded a common regional approach and complicated North Africa's relations with the European Union.

Against this untidy yet familiar background, 2011 was an extraordinary year. The revolutions in Tunisia and Egypt and the rebellion, counter-revolt, and ultimate end of Muammar Gaddafi's rule in Libya have created extraordinary uncertainty across a region better known for its resistance to change. To be sure, these revolutionary developments offer some potentially important opportunities for the future of the region, and for Moroccan interests. But there is great uncertainty about the future direction of the countries currently in transition, and the risks to stability are clear, especially if the future of Libya and Egypt remain unsettled and the governments fail to deliver the desired stability. And how will neighboring Algeria fare? Morocco cannot isolate itself from regional developments, and the kingdom itself has entered a period of change on many fronts. At the same time, instability to Morocco's east, with no immediate prospect of a regional breakthrough, only underscores the logic of reinforcing Morocco's Atlantic ties as a hedge against potential negative developments in the neighborhood — and also as a way to open the region, once stabilized, to new venues of cooperation and development. In King Mohammed VI's major June 17, 2011 speech, outlining the features of a new constitution, Morocco's Atlantic identity was noted explicitly.

¹ The economic opportunity costs have been explored in depth by researchers at the Peterson Institute and elsewhere. See Gary Clyde Hufbauer and Claire Brunel, eds., *Maghreb Regional and Global Integration: A Dream to Be Fulfilled* (Washington: Peterson Institute for International Economics, 2008).

Domestic reform and greater interest in the Atlantic world seem to be going hand-in-hand in contemporary Morocco.

Second, maritime and airspace dimensions are becoming more central to Morocco's development and security, broadly defined. Maritime commerce and modern maritime infrastructure are creating opportunities for development, in Morocco and across a wider area. The Tanger-Med container port and other facilities are well placed to benefit from Morocco's position astride the commercial commons of the Mediterranean and the Atlantic. Less positively, the kingdom is increasingly exposed to transnational (really trans-regional) crime, including the trafficking of drugs, arms, and people, emanating from Latin America and en route to Europe via West Africa. This Atlantic circuit is now just as important an influence on Moroccan security as the threat of religious extremism and terrorism originating in the Middle East and North Africa. The terrorist bombing in Marrakesh in April 2011, with its apparent links to Al Qaeda in the Islamic Maghreb (AQIM), highlight the continuing risk of nonstate violence. At the same time, growing demand for air travel to and within Africa is helping to make Casablanca an important hub for air traffic linking Africa and the European and Atlantic worlds.

Third, regions and regionalism are becoming more central to the calculus in Morocco and its various neighborhoods. In part, this is a matter of internal development and governance. But there is also a wider context beyond Morocco's borders. The potential for regional integration in the Maghreb is unrealized, but remains potentially significant. In West Africa, and in Africa as a whole, future development is likely to be oriented along corridors, key commercial lines of communication, with the accompanying hard and soft infrastructure. Morocco will be at the center of this phenomenon, especially down the West African coast and hinterland. Looking north, it is also possible to envision more effective ties to Portugal and Spain, and around the Western Mediterranean. Conventional and alternative energy will be key areas of change and opportunity in this space. Here, the future will feature solar energy and telecommunications as well as new oil and gas pipelines linking north and south. All of these elements, alongside Morocco's position as a leading phosphate producer

and thus a leading player in global food security, can reinforce Morocco's potential as a multidimensional Atlantic hub.

Fourth, Western partners are in flux. Europe — in key respects Morocco's leading international partner — is changing under the pressure of an unprecedented financial crisis, and the European Union's troubled strategy toward the southern "neighborhood" is being recast in the wake of the recent Mediterranean revolutions.² Trade, aid, and investment policies will be revised against a backdrop of economic stringency, a reordering of Europe's priorities and relationships, and, possibly, political instability. With the European-led intervention in Libya, NATO and EU strategies looking south have acquired a more direct security dimension. On these and other fronts, Morocco will have a growing interest in and greater ability to influence the future direction of Europe and its Mediterranean policies.

Across the Atlantic, U.S. engagement with Morocco and others will be shaped by many competing factors, some economic, some strategic. But here, too, strategies toward North Africa and the Mediterranean cannot remain divorced from the impact of recent events. To the extent that Morocco emerges as a more visible Atlantic actor, it enhances the likelihood that Morocco will become a more salient part of a larger recalibration of U.S. foreign policy in which emerging Atlantic countries like Brazil, Nigeria, and South Africa will need to be accommodated. Indeed, we should anticipate that the rise of a wider Atlantic perspective will be defined and led by southern Atlantic actors.

Finally, the number of new actors (and some returning old actors) with the power to affect Morocco's strategic choices and strategies is increasing. Their objectives and behavior need to be better understood. China, India, Turkey, and the Gulf are part of this equation, especially with regard to investments in energy, land, and raw materials. Morocco will need to weigh the advantages and disadvantages of joining the Gulf Cooperation Council (GCC), as recently discussed. In light of the Libyan crisis, political and security matters assume a new importance. To the extent that

² See European Commission, High Representative of the Union for Foreign Affairs and Security Policy, *A Partnership for Democracy and Shared Prosperity with the Southern Mediterranean*, Joint Communication to the European Council, the European Parliament et al., Brussels, March 3, 2011, COM(2011)200 Final.

Morocco's Atlantic engagement grows, the rise of Brazil as a commercial and political actor bears special attention as an element in the geopolitical equation.

Structure of the Analysis

Taken together, these changes hold the potential to reshape Morocco's geopolitics in significant ways, with strategic implications for Moroccan policy, and the policies of Morocco's leading international partners. This report explores these dynamics and offers pointers for future strategy. Chapter II assesses the changing strategic environment in detail. Chapter III explores the evolving nature of Atlanticism and its meaning for Morocco. Chapter IV explores key infrastructure developments — current and potential — and their regional implications. Chapter V discusses alternative scenarios and potentially transforming events affecting Morocco's geopolitics. Finally, Chapter VI offers overall conclusions and policy implications for Morocco and transatlantic partners.

This study is intended to spur new debate about Morocco's future international role and the emergence of a “southern,” or more properly “wider,” Atlantic dimension in transatlantic relations. Our analysis highlights the potential for Morocco to serve as a hub in this evolving Atlantic world, and raises many open questions for further research. We look forward to exploring these questions in future GMF work.

1. Morocco's Strategic Environment

The Old Geopolitics

Consideration of Morocco's "new geopolitics" raises an inevitable question about Morocco's "old" geopolitics. If this analysis were being conducted 15 or 20 years ago — just after the end of the Cold War — several elements would have predominated. A widening and deepening European Union would have been at or near the top of the agenda. With the progressive Europeanization of Morocco's neighbors in southern Europe, particularly Spain and Portugal, and the start of a debate over the EU's Mediterranean strategy (anticipating the first Barcelona Process, launched in November 1995), Europe appeared set for a period of more intensive attention to the south, to complement if not precisely match the mounting energy devoted to integrating Europe's newly liberated East. With the end of the Cold War, it also seemed logical that NATO and European security policy would pay new attention to challenges and partnerships across the Mediterranean.³

Tensions with Spain over the enclaves of Ceuta and Melilla were another persistent irritant. The two countries have come close to open conflict over these disputes, and for some years, contingencies related to the enclaves have featured prominently in the defense plans of Madrid and Rabat. Disputes over fishing rights and, in more recent years, the control of migrants from Africa, have taken center stage in relations with Spain. But on the whole, Moroccan-Spanish relations have acquired a greater measure of stability over the past decade.

Closer to home, Morocco faced the start of a decade of terrorism and political violence across the border in Algeria, and the constant threat of spillovers. In retrospect, it is perhaps remarkable that Morocco was not more heavily affected by the post-1992 violence in Algeria, which claimed the lives of at least 100,000 people.

³ NATO launched its own Mediterranean Dialogue in 1994, with Morocco, Mauritania, Tunisia, Egypt, Israel, and Jordan as initial members, with Algeria joining a few years later. See Ian O. Lesser, Jerrold Green, F. Stephen Larrabee, and Michele Zanini, *The Future of NATO's Mediterranean Initiative: Evolution and Next Steps* (Santa Monica: RAND, 2000).

Over time, the Algerian civil war evolved from an armed struggle between Islamist extremists and a military-led government to a more diverse and murky conflict in which economic stakes, vendettas, and regional cleavages played a part.

In the process, Algeria became a more isolated society in which normal relations with international partners became virtually impossible aside from the relatively unscathed energy and natural resource sectors. Algeria's decade of isolation has left a lasting legacy in terms of Algerian internal and external policies, and the prospects for regional cooperation. On this score, little has happened over the past decades, even with Algeria's emergence from civil strife. But whereas in the past, Moroccan-Algerian dynamics, and their regional echoes, have been at the center of Rabat's geopolitical concerns, today they are just one significant facet of an increasingly diverse strategic landscape.

Looking south, Morocco had longstanding cultural and commercial ties with West African neighbors, but these hardly loomed large in the country's economic and political priorities. If anything, Moroccan policy looked to distance itself from the unstable and underdeveloped states to the south, in favor of reinforced ties to leading partners in Europe, the Gulf, and across the Atlantic. In the wider Middle Eastern neighborhood, the 1990s were a time of relative optimism in the Middle East peace process, and Morocco was an active player in the multilateral track, and in track-two diplomacy, much of it aimed at broadening the economic constituency for peace between Israel and the Arab world (successive meetings in Morocco were devoted to this theme in the 1990s). Morocco's reputation for moderation in a Middle Eastern context also became a leading feature in Western perceptions, and a persistent element in European and U.S. thinking about North Africa.

Across the Atlantic, Morocco enjoyed a positive reputation on peace process matters, but much energy was (and is) spent on building U.S. support for Morocco's position on the Western Sahara. Drawing U.S. attention to Morocco and the Maghreb as places of strategic importance beyond the Cold War context has been a more difficult task. The United States has been an important partner in terms of economic and security assistance, but has not

exhibited sustained or systematic interest in economic cooperation, a sphere in which Europe has been the key actor. The “Eizenstat Initiative” of the Clinton years and the Middle East Partnership Initiative (MEPI) and Millennium Challenge programs of the George W. Bush years were significant but hardly transforming in terms of U.S. engagement in Morocco or North Africa as a whole. Europe remained the core political and economic partner. After September 11, 2001, counter-terrorism cooperation took center stage as the leading driver of U.S. strategic interest in the region. Even in this context, however, regional partners have been wary of highly visible cooperation with the United States African Command, preferring close cooperation behind the scenes across the Maghreb and the Sahel.

Twenty, even ten years ago, global developments occupied a secondary place in Morocco’s geopolitical perceptions. The local and the regional predominated, accompanied by close attention to the economic relationship with Europe, and political relations with Washington. The rise of China, India, and Brazil, the return of Russia as a commercial and political actor, much less a global economic crisis, were not yet part of the geopolitical calculus in Morocco, or elsewhere. In today’s more complex strategic environment, these elements have acquired tremendous importance, alongside more traditional concerns nearer to home.

New Features of the Strategic Environment

Against this background, it is possible to assess some of the new and potentially transforming factors shaping Morocco’s new geopolitics. These include the emergence of the Middle East and North Africa as a region of change rather than *stasis*, the rise of new cross-border and trans-regional challenges in the Atlantic space, the growing prominence of “geo-economics” and the accompanying hard and soft infrastructure, and the increasing role of global or extra-regional factors in the strategic environment writ large. The role of Europe and the United States remains critical, but here, too, new dynamics are at play. Years of economic stringency and the current crisis in the euro zone have raised new questions about the future of the European Union, and the degree of European openness to societies on the periphery of the continent. The United States faces its own looming questions of power, competitiveness,

and engagement. The United States has always been a key political and security actor on Europe's Mediterranean periphery, but its economic role remains relatively weak. With the rise of strategic priorities in Asia and elsewhere, the extent of U.S. involvement to Europe's south cannot be taken for granted.

Revolutions and Turmoil in the Middle East and North Africa

The revolutions in Tunisia and Egypt, unrest in Yemen, Bahrain, and Syria, and the civil war in Libya, have overturned longstanding assumptions about the likelihood and pace of change across the Middle East and North Africa. Regimes around the region are under stress, and the relationship of rulers to those they rule is being widely redefined. Morocco will likely feel the effects of these successive crises even if the political reform process in the kingdom is successful in its own terms.

The potential for change on Morocco's borders is also a cause of uncertainty. Algeria is hardly immune from the social and political pressures being felt across the region, and the lack of transparency with regard to Algerian affairs can create an illusion of stability. Algeria's decade of terrorism, political violence, and isolation has left a lasting legacy within the society. Can Algeria remain unaffected by sweeping political changes in Tunisia, Libya, Egypt, and elsewhere? Morocco is a leading stakeholder in this question. A return to violence in Algeria would have serious consequences for Moroccan security interests, from the country's eastern border to the Western Sahara. By contrast, an Algerian opening and the emergence of a more pluralistic political order in Algeria might also transform the country's approach to Morocco, and erode longstanding Algerian opposition to an open border and regional economic integration. The outlook is highly uncertain, but the scope for change — both positive and negative — is arguably greater under current conditions. In light of changes in Tunisia and Libya, and the international interest in reshaping economic assistance to encourage regional cooperation, the prospects for some long delayed projects, including the trans-Maghreb highway, could be strongly affected by the revolutions in North Africa.

The revolutions and crises around the region are also likely to have a pronounced effect on the perceptions and policies of external actors. The EU's Euro-Mediterranean strategy, already troubled, faces a wholesale overhaul in light of the developments in Europe's southern neighborhood. The new EU neighborhood strategy document envisions a strong commitment to assistance in North Africa, but also a far more conditional and individualized approach.⁴ Egypt, Tunisia, and Morocco are the likely beneficiaries of this new approach, although for rather different reasons in each case. Within the EU, there will be a continued debate over strategic priorities in the south and unfinished business in the east. At a minimum, recent events make clear that the southern dimension of the neighborhood policy is not optional for the EU, and a strategy looking south will make continued demands on Europe's limited resources and political attention.

Over the next decade, the key prizes in this regard will be free trade with southern Mediterranean partners, large-scale investment in regional infrastructure projects, and perhaps a comprehensive deal on migration. These elements, and the political obstacles to them, will remind U.S. observers of the continued attempts to build a comprehensive approach to U.S.-Mexican relations — the elusive “whole enchilada” referred to by successive administrations on both sides of the border. At a minimum, the revolutions of 2011 confront Morocco with the prospect of greater scrutiny, but also potentially greater assistance and engagement on the part of more developed partners on both sides of the Atlantic. All of this will pose special challenges given the inevitable constraints on EU funding. The notion of Europe offering Mediterranean partners “more for more,” may hardly be realistic in an era of sharply limited resources. Europe will indeed be pressed to put more on the table — perhaps including free agricultural trade with southern neighbors — but the climate for sweeping changes of this kind is dim, at least in the medium term. Moreover, some of Morocco's most important commercial and political partners in Europe — Spain, Italy, Greece — are Europe's most troubled countries. The optic looking northward from Morocco's side of the Mediterranean is not positive.

⁴ These elements have also been widely debated in the policy community. See, for example, Charles Grant, “A New Neighborhood Policy for the EU,” Centre for European Reform, 2011.

Unresolved Conflicts in Morocco's Wider Atlantic Neighborhood

Despite the impressive economic growth and political cooperation among emerging Atlantic basin countries, it is very premature to think in terms of a coherent region that follows the same ground rules as, say, North America or Western Europe. The Atlantic basin, like its counterparts in the Pacific and Indian Ocean regions, comprises a highly complex and very diverse group of countries. Between them they face many challenges, aside from the normal struggles of economic modernization. In the South Atlantic and the Caribbean, there are many unresolved conflicts that range from territorial disputes, conflicts over resources, including fishing and energy development, and wildly different and sometimes competitive political systems. Enduring frictions as far afield as the Falklands and Antarctica can affect the outlook for new, multilateral strategies in the Atlantic, with implications for Morocco.

A tour d'horizon of some of the leading flashpoints around the Atlantic, looking south, reveals a number of active disputes and unresolved conflicts. None of them have the global geopolitical significance of unresolved conflicts in the Indian and Pacific Oceans, but some of them have the capacity to become more violent and polarizing. Collectively, they can have an inhibiting effect on the emergence of a more cohesive system in the wider Atlantic, with implications for Moroccan interests and strategy.

Moroccan Security Challenges

Morocco's own security planning has long been dominated by the need to hedge against conflict (including proxy conflict) or instability flowing from Algeria. The Western Sahara and Algerian support for the Polisario has been one concern. Algeria's recent purchase of first-line fighter aircraft and other equipment from Russia is another. The international politics of the Western Sahara issue have complicated Morocco's relations with Africa, most notably in relations with the African Union, of which Morocco is no longer a member. But the issue also extends to Latin America, where Venezuela is inclined to support the Polisario and the Algerian position. At the same time, U.S. support for Rabat's autonomy plan for the Western Sahara has strengthened the

Atlantic dimension of Morocco's policy. Overall, the legacy of mistrust between Morocco and Algeria, and the reality of a closed border, continues to impede regional cooperation in political, economic, and security terms. It is also an obstacle to post-revolutionary European and U.S. strategies toward the Maghreb; strategies that would ideally encourage a greater degree of regional integration along south-south lines.

Morocco has had to contend with longstanding problems of trafficking and criminality in northern Morocco, and the evolving risk of Islamic extremism and terrorism along the lines posed by Al-Qaeda in the Islamic Maghreb (AQIM). These violent networks have been closely monitored in recent years, but a reservoir of risk remains. The ongoing political unrest in North Africa and the Middle East could interact with the terrorism issue in unpredictable ways. One concern will be the effect on regional terrorism as "fighters" in Afghanistan and Iraq, and possibly Libya, return to their home countries in North Africa. This dynamic is likely to be increasingly central to counter-terrorism cooperation between Rabat and Euro-Atlantic partners in the next few years.

Unresolved tensions with Spain over Ceuta and Melilla and associated border control issues also pose security dilemmas. In addition to the question of the enclaves, Morocco and Spain differ over questions of resources and sovereignty around the Canary Islands. Morocco asserts that Spanish offshore drilling near the Canary Islands is a violation of its own territorial waters. These issues have not disappeared, but they have been accompanied in recent years by new problems emanating from the maritime environment, from West Africa and the Sahel, and from across the Atlantic.

New Patterns of Trafficking and Criminality

West Africa's weak or corruptible state institutions and lack of efficient border management systems make it an ideal hub for drug trafficking. Recent years have seen a significant increase in drugs entering West Africa from Latin America. Europe's drug market is now as big as North America's, making West Africa the ideal location for smuggling drugs into Europe via the continent's more

porous southern borders (there are also reports of drugs smuggled into North America through West Africa). Most of these drugs are destined for Spain or the United Kingdom, followed by France and Portugal. It has been estimated that the illegal drug trade out of West Africa is now a \$2 billion a year industry.⁵ From 2005 to 2008, 46 tons of cocaine was seized in transit from West Africa to Europe. Prior to 2005, all of Africa rarely seized a ton annually. The volumes continue to grow. Most drugs are transported as sea or air shipments into Guinea Bissau or Ghana. The drugs are then spread throughout West Africa where they are transported into Europe through Spain. In terms of air smuggling, 62 percent of cocaine seized comes from Senegal, Nigeria, Guinea, or Mali; however these countries also have the most commercial air traffic in the region.⁶ Private submersibles have also been employed, and parts for their manufacture have reportedly been found inland in Mauritania and elsewhere.

As West Africa becomes a key player in the drug trade, some Latin American cocaine traders are moving themselves and their businesses to Africa, in particular Guinea, which experienced a coup in 2008. Latin American drug cartels prey on weak countries like Guinea and Guinea Bissau that are at the bottom of the development index because they are vulnerable and cannot adequately protect their airspace or coastline. Smuggling is tolerated in these weak nations because law enforcement is ineffective, and authorities are easily bribed. The emerging pattern of drug smuggling via the Atlantic and West Africa has also brought an increase in arms trafficking and people smuggling (the same networks can be employed for these activities). Moroccan security officials have been surprised to find Latin American traffickers in their backyard, even operating quite far from the coast. The increase in criminality in a region with limited capacity for surveillance and border control may also facilitate terrorism and political violence in and around the Sahel. All of these elements influence Moroccan security in significant ways, and give rise to new requirements for security cooperation in Africa and with transatlantic partners.

⁵ <http://www.africapartnershipforum.org/dataoecd/32/43/42949251.pdf>

⁶ <http://www.unodc.org/documents/data-and-analysis/Studies/Drug-Trafficking-WestAfrica-English.pdf>; <http://www.fas.org/sgp/crs/row/R40838.pdf>

Piracy and Maritime Insecurity

Piracy in the Indian Ocean and Southeast Asia has attracted global attention. But the Gulf of Guinea, particularly Nigeria, is also an area of concern. Indeed the incidence of piracy, maritime crime, and crew kidnapping in the Gulf of Guinea is only exceeded by incidents off the coast of Somalia. In 2009 alone, 28 serious incidents were reported off the Nigerian coast.⁷ In addition, attacks have occurred off Guinea, Côte d'Ivoire, Ghana, Togo, Benin, Cameroon, and the Democratic Republic of the Congo. Much like the drug trade, a lack of funding for navies and coast guards, and a lack of training and discipline among law enforcement officials, hinder the ability to prevent piracy. Oil and gas exploration and production in the Gulf of Guinea provide rich targets for criminals afloat and ashore. Across the Atlantic, Colombia and Brazil have also experienced a rise in piracy, and this problem could well grow with the looming increase in offshore energy production in Latin America. Maritime piracy is very much an Atlantic as well as an Indian and Pacific Ocean concern.

Maritime security challenges further afield may also affect Moroccan and Atlantic interests. To the extent that piracy in the Indian Ocean and the Red Sea drives commercial shipping away from the Suez route, Mediterranean trans-shipment via the Tanger-Med port will be affected. A crisis driven closure of the Suez Canal would have similar effects, with a corresponding increase in traffic via the Cape route. Both scenarios, alongside the physical limitations of Suez-max shipping reinforce the logic of growing Atlantic transits. Looking ahead, the evolution of the maritime security environment far beyond the immediate Mediterranean and Atlantic coasts can encourage — or limit — the potential for ports and maritime commerce as a component of Morocco's economic development.

Another aspect of Morocco's maritime security challenge involves continued undocumented migration from the Mauritanian coast to the Canary Islands, raising questions of maritime surveillance and interdiction for Rabat as well as Spain and the EU (the area is already a focus of activity for the EU's FRONTEX operation). With shifting patterns of migration from Africa, and political flux along

⁷ http://www.asiglobalresponse.com/downloads/piracy_report.pdf

the North Africa-Mediterranean route, this path could become a durable focus of Morocco-EU cooperation or friction in the years ahead.

The Cabinda Enclave and Unrest in West Africa

When Angola won its independence from Portugal in 1975, it included the semiautonomous state of Cabinda as part of its territory. However, the FLEC (Front for the Liberation of the Enclave of Cabinda), which is the main independence party in Cabinda, was not included in the independence negotiations and declared its own provisional government in 1977. The Angolan government sees Cabinda as an integral part of Angolan territory, and a very valuable one given its importance to Angolan oil production. The separatist movement has been a constant threat to Angolan stability along with the Angolan Civil War. Although the Civil War ended in 2002, a violent, armed struggle in the province of Cabinda continues to pit separatist guerillas against the army. In 2006, a faction of the FLEC signed a peace deal with the Angolan government, but substantial separatist elements remain outside the agreement, and sporadic violence persists in the enclave. In Angola (and Nigeria), the mix of ethnic, religious, and regional tensions, valuable energy resources, and corruption are likely to pose a continuing threat to stability in West Africa — and the region's potential as an economic and political partner for Morocco and others. The recent upsurge in violence by Islamic extremists in Nigeria underscores the looming challenges in this area.

The Falklands and the South Atlantic

The most divisive unresolved conflict in the South Atlantic concerns the U.K.-Argentina dispute over the Falkland/Malvinas Islands. The issue of sovereignty of the Falkland Islands has been a contentious one between the two countries for the last 200 years. The Falkland Islands are about 300 miles off the coast of Argentina and possess a small number of inhabitants. The Argentinean invasion in 1982 provoked a brief but violent war with over 1,000 casualties. In the wake of the conflict, Britain has maintained a significant military presence on the islands. The Falklands have been “self governing” since 1985, with most islanders strongly attached to their status as U.K. citizens. Diplomatic relations

between the U.K. and Argentina were renewed in 1989, but Argentina has never given up its claim on the islands.

Today, the Falklands issue might be more accurately regarded as a political rather than an outright security dispute. Yet, as late as 2009, Argentine President Cristina Kirchner again laid claim to the Falkland Islands, and their recovery remains an unwavering feature of official Argentine discourse. The EU as well as the Commonwealth of Nations has supported the British claim, while the OAS and China have backed Argentina. The United States continues to remain neutral regarding Falkland sovereignty, as does the United Nations.⁸

The likelihood of renewed conflict over the Falklands is small, and very distant from Morocco, but political frictions here can inhibit a new approach to southern Atlanticism, especially among NATO members. Looking even further south, overlapping claims, especially between Chile and Argentina, in the Antarctic, could emerge as an additional impediment to — but also perhaps an incentive for — a more explicit approach to cooperation in the southern basin. These cannot remain purely regional issues, given the longstanding research presence of global actors in Antarctica, and the question of access to resources in nearby waters.

Ideological Frictions in the Caribbean and Atlantic

Friction between the United States and Cuba has been a feature of the strategic environment in the Western Hemisphere since 1959, and was a mainstay of Cold War concerns. Cuba's activist foreign policy and its alliance with the Soviet Union led to Cuban involvement in both insurgency and counter-insurgency operations on both sides of the Atlantic basin, most notably in West Africa in the 1970s and early 1980s. The breakup of the Soviet Union meant the end of Soviet subsidies to Cuba, and the end of Cuba's role as a Soviet proxy in regional conflicts. But the confrontation with Washington (and sometimes Europe) over ideology and human rights has persisted. In the wake of the transition to Raul Castro's leadership, the Cuban government has embarked on some significant economic reforms. But the political climate

⁸ http://hillary.foreignpolicy.com/posts/2010/03/02/clinton_urges_argentina_and_britain_to_talk_it_out_on_the_falkland_islands

remains repressive, and Cuba remains largely isolated from global participation and investment.

Although the United States continues to maintain sanctions against Cuba, it is also a provider of food and aid for the country.⁹ Successive U.S. administrations have tried to reshape relations with Havana, but the political climate on both sides has remained an impediment. The attitude of the substantial Cuban-American exile community in the United States continues to be a key variable. Over the last decade, and with generational change and the probable departure of socialist Cuba's original leadership, there have been signs of growing interest in an opening that would allow expanded travel and investment. Among strategic observers, the sanctions regime is often seen as an anachronism, and change in U.S.-Cuban relations is a possibility over the next decade. A normalization of relations could prove transforming for the wider Atlantic scene, and could encourage U.S. interest in a broader strategy toward the Caribbean and further afield. This interest would be especially strong in the U.S. south and southeast. But a marked shift in U.S. policy will not be easy in the absence of clear and visible change in Havana. A less positive transition scenario could see protracted chaos in Cuba, and demands for U.S. intervention of a different sort, with all that this might imply for relations in the Hemisphere. In either case, the future of Cuba will be a variable in the evolution of the strategic environment in the Atlantic looking south.

Linked to the question of Cuba is the political conflict between the United States and Venezuela. Under the government of Hugo Chavez, and with greater impetus since his re-election in 2006, relations with the United States have deteriorated and the political friction between the two countries has moved from Latin America and the Caribbean to a larger stage. Chavez's approach to governance and foreign policy, which he terms a "Bolivarian Revolution," promotes Venezuela as a role model for regional development, and aims at a reduction of U.S. influence on a global basis. These are hardly new ideological currents in Latin America. But the persistent friction with Washington shows that competitions of this kind have a life beyond the era of "anti-

⁹ State Department Country Background Note: <http://www.state.gov/r/pa/ei/bgn/2886.htm>

imperialism” and the Cold War. Venezuela’s arms purchases and defense cooperation with Russia, and friendly ties with North Korea, Iran, and Syria, have kept the Chavez government on bad terms with both the Bush and Obama administrations. From the perspective of wider Atlanticism, political frictions of this kind can reinforce the wariness of other actors, including Brazil, Mexico, Argentina, and South Africa, with regard to a more overt system of north-south relations in the Atlantic. Against all of this must be reckoned the considerable interdependence among Venezuela, the United States, and other Atlantic actors when it comes to energy trade and other economic interests. Looking ahead, change in Cuba may ultimately influence domestic developments in Venezuela and *vice versa*, and as in the Middle East, change in the Western Hemisphere could be more rapid than we sometimes assume.

Atlantic Fisheries

Atlantic fisheries reached their production peak between the late 1970s and early 1980s. The catch has declined steadily since. Disputes over fishing abound, especially in near-offshore waters, and have acquired new meaning under pressures of scarcity and wider food security concerns.

Krill, a critical resource, is especially abundant in Antarctic waters. Due to declining sea ice coverage and increasing temperatures in Antarctica, krill spawning and nursery areas are decreasing. Experts believe the numbers have declined by 80 percent since the 1970s. It is estimated that the current krill population is between 100 million tons and 500 million tons. Although the annual allowance for krill catch is set at 4 million tons under the Convention on the Conservation of Antarctic Marine Living Resources (CCAMLR), until recently the catch was usually less than 20 percent of the quota. It has been proposed that mandatory scientific observers, which are common in all other Antarctic fisheries, be placed aboard krill fishing vessels, a move opposed by North Korean and Japanese fishing operators. Disputes over krill fisheries are likely to become more prominent on the Atlantic scene, alongside more traditional fisheries debates, including the contentious issue of restrictions on the blue fin tuna catch. The latter dispute pits the interests of southern European and Japanese fishing interests against the environmental preferences of northern

European and North American governments. The blue fin dispute spans Mediterranean, Atlantic, and Asian settings.

Moroccan frictions with Spain over fishing rights are longstanding. The issue became more contentious in the 1970s when countries began to declare Exclusive Economic Zones. The European Community declared a 200 mile fishing zone in 1977, and Morocco followed suit in 1981. In 1988, Morocco signed a four-year agreement with the EU that restricted EU vessels to a catch of 95,000 tons annually in Moroccan waters. The agreement has been renewed several times since, generally in a contentious atmosphere. The most recent agreement was extended to January 2012 but was then suspended. Looking ahead, the fishing issue is increasingly bound up with Morocco's wider relationship with the EU, beyond the bilateral relationship with Madrid. A closer overall relationship with Brussels — a likely scenario as Europe pays more attention to its southern neighborhood in the wake of the 2011 events — could reduce the prominence of fishing as a difficult item on the north-south agenda in and around the Mediterranean.

Disputes over fishing also affect relations further south along the West African coastline. There have been violent confrontations between Guinea-Bissau and Senegal over fishing rights. Over 100 Senegalese fishermen have been apprehended for alleged illegal fishing in Guinea-Bissau's waters. One such incident resulted in the death of two coast guardsmen. To the extent that traditional fishing comes under pressure from reduced yields and political disputes, there is a risk that some groups will turn to piracy and trafficking as an alternative, along the lines of the situation in coastal Somalia. As in Somalia, chaotic political conditions ashore would add to this risk.

A Sea of Diffuse Challenges

The unresolved disputes and new sources of insecurity around the southern Atlantic pose important challenges for actors around the region. They can complicate security planning for Morocco and others, and can inhibit efforts to redefine the region as a coherent geopolitical space. At the same time, the trans-regional nature of some of the new challenges, not least the rise of Atlantic trafficking and criminality and the piracy problem, should encourage new

patterns of security cooperation between north and south on both sides of the Atlantic basin.

One important and positive feature of the strategic environment around the southern Atlantic is that it lacks the defining conflicts, cleavages, and existential flashpoints evident in other settings such as the Asia-Pacific region and the Indian Ocean. The level and pace of military spending is much lower, and the region is essentially denuclearized. The problem of insecurity in the Atlantic looking south is relatively diffuse and benign in global terms. There is no wider Atlantic equivalent to the risk of nuclear war on the Korean peninsula, the India-Pakistan conflict, or the looming U.S.-Chinese strategic competition. Yet, looking ahead, the growing commercial role of China and others in Africa and South America, and their accompanying stake in maritime security, is likely to bring new blue-water navies into southern Atlantic waters. At a minimum, the future is likely to see a more diverse set of security actors in the region, with the risk of new geopolitical competitions. This, in turn, could reinforce the tendency of Atlantic Latin America to assume — and be wary of — the “securitization” of relations in the wider Atlantic.

For the past century, at least, international relations in the Atlantic space have been dominated by the overwhelming weight of political, economic, and security ties along north-north lines. The continued weight of financial, trade and strategic interaction along an axis from the northeast coast of the United States to northwest Europe — from Washington to Brussels — suggests that this reality is unlikely to be overturned anytime soon. But some key developments on the international scene suggest that the future of transatlantic relations may well be more diverse and balanced in north-south terms. An expanded concept of Atlanticism, with relatively greater attention to the southern Atlantic and north-south relations, may be on the horizon. This wider Atlanticism may be the next big thing in transatlantic strategy, even if its contours are as yet unclear.¹⁰ At a minimum, a more expansive and inclusive approach to Atlantic policy, embracing emerging actors and issues around the Atlantic basin as a whole, is virtually inevitable. An Atlantic future along these lines, and the shifts in U.S. and

¹⁰ See Ian O. Lesser, “Southern Atlanticism: Geopolitics and Strategy for the Other Half of the Atlantic Rim,” Brussels Forum Paper, German Marshall Fund of the United States, 2010.

European policy it might imply, will have important implications for Morocco. It may alter policymakers' mental maps and their perceptions of the kingdom's role.

Rediscovering the Southern Atlantic

To the extent that this shift occurs, it will mean a rediscovery of historic patterns subsumed by developments over the last few centuries. Atlanticism was not always the northerly project it became during the Anglo-Saxon ascendancy in the 19th and 20th centuries.¹¹ Until the 19th century, the North and South Atlantic were both areas of intense international political and economic activity. Among other factors, capitalist development and industrialization gave prominence to the North Atlantic area and North Atlantic players in the 19th and 20th centuries. Southern Europe declined together with the South Atlantic. Western and Northern Europe rose together with the North Atlantic.

¹¹ Bernard Bailyn, *Atlantic History: Concept and Contours*, Harvard University Press, 2005

2. Rethinking Atlanticism

Millions of years ago, the Americas, Africa, and Europe were part of a single landmass. The separation and appearance of the Atlantic Ocean happened gradually, but the geographic and cultural “fit” between Africa and South America is still evident today. In terms of more recent history, the most important linkages between Europe, Africa, and the Americas began in the 15th century with the Spanish and Portuguese conquest of the Americas, and European migration to the Eastern seaboard of the United States. This paralleled the early European settlements and along the coast of West Africa — the first great Atlantic explorations. Subsequently the continents were linked in the notorious slave trade between Europe, Africa, and the Americas, which persisted for over 200 years. For centuries, the Atlantic system included a strong southerly dimension. The earliest U.S. diplomatic missions were established in Morocco and the Azores, not least because of their critical location at the western approaches to commercial centers in the Mediterranean. Yet despite economic and ethnic ties, proximity, and colonization, Latin America and West Africa have rarely been central to the strategic outlook of contemporary Europe and the United States.¹²

For much of the 19th century, a primary concern of the United States was to prevent European powers from establishing a further colonial and commercial presence in Central America, the Caribbean, and South America. The Monroe Doctrine enshrined this interest as a principle of U.S. foreign policy. It led naturally to a more activist idea of U.S. “manifest destiny” in the Western hemisphere. Later, this outlook acquired a specific Cold War dimension, shaping policy toward Cuba and the Panama Canal. Echoes can still be heard in Washington’s approach to Venezuelan activism around the region. As the military balance in Europe became the focus of Cold War concern, NATO’s southern limit of responsibility, the Tropic of Cancer, also marked a rough

¹² World War II offered a few exceptions, from the importance of Latin American food and raw material imports, encouraged through large scale U.S. aid, to the vital Atlantic air-bridges from Miami to Cairo, and via Dakar for the transport of aircraft to distant theaters.

limit of places and issues at the core of transatlantic relations. Preoccupation with Cold War imperatives also allowed many traditional U.S. foreign policy assumptions about Latin America, Africa, and the Atlantic to go unchallenged. This legacy of traditional thinking persists as an obstacle to more imaginative thinking about wider Atlanticism. As a result, much of the intellectual impetus for a reassessment may have to come from other quarters, from southern Europe or Brazil — or Morocco.

During the slave trade, approximately 430,000 Africans were brought to the United States, the majority from West Africa. In the case of West Africa in the 19th century, the primary U.S. involvement, aside from the slave trade and missionary activity, was to help establish the Republic of Liberia.¹³ Europe by contrast, was deeply enmeshed in the “scramble for Africa,” with the resources and ports of West Africa as leading colonial prizes for France, Britain, and Portugal. Brazil’s reliance on slave labor from West Africa lasted well into the late 19th century and Brazil now has the largest population of African descendants outside of the continent itself.

The last three U.S. presidents have, in different ways, contributed to more active and open policies toward both sides of the southern Atlantic. Both Bill Clinton and George W. Bush were popular in sub-Saharan Africa, and some of the Latin American countries. Both were determined to address the HIV epidemic in Africa and supported more generous U.S. aid to the region. Barack Obama has followed in this tradition. In a speech in Rio de Janeiro on March 20, 2011, President Obama insisted that not only do the United States and Brazil share the historical similarities of immigrant nations with a common African heritage dating back to the Atlantic slave trade, but they also share a history of struggle against injustice and inequality with regard to civil and political rights. As he completed his tour through Latin America, Obama expressed similar sentiments in Chile and El Salvador.

¹³ In 1819, the U.S. Congress set aside \$100,000 for this purpose. Freed slaves began settling there in 1822. It was declared an independent country in 1847. Many freed slaves were paid to resettle in Liberia following the American Civil War. The United States has maintained close diplomatic, economic, and military ties with Liberia, though relations weakened in the 1990s due to internal instability in the country resulting from the autocratic rule of Charles Taylor and the Liberian Civil War.

U.S. demographic and immigration patterns offer one reason for enhanced U.S. interest in the wider Atlantic. California, Texas, New Mexico, Arizona, and Colorado have many long-established Hispanic communities. More recent immigrants from Mexico, Puerto Rico, Cuba, the Dominican Republic, and South America are now part of the demographic tapestry across the country. They have brought important cultural and commercial ties to a wider and more southerly Atlantic world.

Major cities of the U.S. eastern seaboard — Boston, New York, Philadelphia, Baltimore, and Washington — are historically and ethnically linked to Europe. On the west coast, Los Angeles and San Francisco have strong ties to Asia and Mexico. The mental maps of leaders in the U.S. west are strongly shaped by commercial and personal ties to the Pacific Rim. Today, the southern cities of Charleston, Miami, New Orleans, and Houston are more strongly oriented toward Latin America. These regional influences on America's global outlook are somewhat less visible from Washington or New York, which may explain the relatively weak discussion of this phenomenon among foreign policy elites in general. But the potential of a more geographically expansive approach to transatlantic relations is growing, partly in relation to the "global" NATO debate, partly as a response to emerging actors and new policy demands outside traditional partnerships.¹⁴

Practical concerns are also at work. The rise of energy, environment, and food security issues in the Atlantic basin is playing a role in the evolution of mental maps. During the 2006 State of the Union Address, President Bush stated his hope to replace 75 percent of U.S. oil imports from the Middle East by 2025 by seeking stronger ties and trading relationships in Africa and Central Asia. The Bush and Obama Administrations have expanded cooperation on maritime security with West Africa. More recently, the U.S. Navy has increased its presence in the Gulf of Guinea, and "African Law Enforcement Detachments" use U.S. ships to conduct searches and seizures in their water. The Obama administration has made it clear that strengthening the U.S. role in African security and development is a priority,

¹⁴ See, for example, Anne-Marie Slaughter, "America's Edge: Power in the Networked Century," *Foreign Affairs*, January/February 2009, Vol. 88, No.1; and Ivo Daalder and James Goldgeier, "Global NATO," *Foreign Affairs*, September/October 2006, Vol. 85, No. 5.

including peacekeeping, counter-terrorism, conflict prevention, and promotion of the rule of law and open markets. Today Africa provides the United States with approximately the same amount of crude oil as the Middle East. Taken together with large-scale imports from the Western Hemisphere, the Atlantic component of U.S. energy security is of overwhelming importance.

Like the United States, Europe has its own long checkered history in the Atlantic basin. Over the past century, it has been much more concerned about its presence and legacy in West Africa. Today, French troops play a military role in former colonies such as Côte d'Ivoire. But more important to Europe is the reality that millions of poor people live in Africa, and Africa is on their doorstep. Just as Americans argue about the benefit and costs of Hispanic immigration to the United States, Europeans are of mixed minds about the surge of African immigrants coming to their shores. Like the United States, most European leaders accept that the only way to stop the long term flow of illegal immigrants is to work even more closely with African countries to improve their economies and thereby reduce the incentives for people to leave their homelands. In this context, West Africa has emerged as a leading area for EU and bilateral European development assistance.

Spurred by countries with a traditional interest, especially Spain and Portugal, Europe has paid growing attention to Latin America. EU assistance to Latin America amounts to around €3 billion and the European Investment Bank may lend up to €2.8 billion. The EU is the most prominent investor in the region, and Latin America's second largest trading partner.¹⁵ In 2009, trade in goods with Latin America amounted to €71 billion for imports and €63.4 billion for exports (6 percent of total EU trade). Trade in services was worth €19 billion for imports and €28 billion for exports. The EU invested €275.4 billion directly in Latin America in 2009. As recently as April 2011, the EU finalized a trade deal with prominent members of the Andean Community, which will facilitate the opening up of markets and create a more stable trade environment. Since 2000, trade between the EU and Latin America has more than doubled.¹⁶

¹⁵ http://eeas.europa.eu/la/index_en.htm

¹⁶ <http://trade.ec.europa.eu/doclib/press/index.cfm?id=573&serie=344&langId=en>

Official and NGO cooperation between Europe and Latin America, especially Brazil, is growing rapidly at all levels.

The European Union aims to strengthen regional integration in Latin America by promoting regional agreements such as the Andean Community of Nations and the Central American Integration System. The example of European economic integration inspired the creation of free trade areas in Africa, Asia, and the Americas as early as in the 1960s and 1970s. With the emergence of “new regionalism” in the 1980s, the European experience has continued to influence region-building in other parts of the world. The Andean Community, and later the African Union have taken the EU as a model. The Common Market of the South (Mercosur) has taken on some of the EU’s institutions and aspects of its general regulatory approach.

The EU is also supporting efforts in the Caribbean to establish a common market, as well as the Caribbean Forum aimed at promoting Caribbean integration into global markets. By far the most significant initiative has been EU-Mercosur, the world’s first bi-regional free trade agreement, encompassing EU nations and Mercosur, the Latin American bloc of Argentina, Brazil, Uruguay, and Paraguay. Negotiations for a more comprehensive Mercosur-EU Association Agreement are ongoing, and a separate EU-Brazil “strategic partnership” was launched in 2007.¹⁷ From technology to peacekeeping, the last decade has seen a steady increase in structured cooperation between Europe and Latin America. Brazil participates in Galileo, the European satellite navigation system. Argentina and Chile have contributed forces to European-led peace support operations in Bosnia and Kosovo.¹⁸

South-South Dynamics in the Atlantic Basin

West Africa and Latin America share an important historical legacy defined by the experience of slavery, colonization, de-colonization, and a complicated legacy of cultural and political ties with Europe and North America. West Africans identify especially with Brazil because many Africans were brought to the country as slaves.

¹⁷ http://ec.europa.eu/europeaid/infopoint/publications/europeaid/documents/178a_latinam_dev_coop_guide_2010_en.pdf

¹⁸ <http://www.eurunion.org/News/eunewsletters/EUFocus/2006/EUFocus-LAC.pdf>

Because of this history, most people of African descent living in Latin America live in Brazil. Another commonality that arose due to their shared history of imperialism is a common language. Many Latin Americans and West Africans speak, in addition to their native language, English, Spanish, Portuguese, or French. That said, commerce between at least two major Atlantic actors, South Africa and Brazil, is hindered by the fact that few South Africans speak Portuguese, and English is not widely spoken outside the upper reaches of Brazilian business circles.

There are bilateral cooperation agreements between several African and South American countries including Angola and Argentina, Nigeria and Colombia, Kenya and Brazil, and Rwanda and Brazil. Commercial activity has increased by an estimated \$1.5 trillion since 2002 due to the more stable trade relationship between Africa and South America.¹⁹ Not surprisingly, Brazil and South Africa lead the way in both bilateral and regional cooperation. The economic dimension predominates, but there is also a growing body of cooperation on traditional and nontraditional security concerns, from naval cooperation to the marine environment. In a moment of flux in the external policy outlooks of emerging countries like South Africa and Brazil, the option of reinforced ties with Atlantic partners in the south is potentially attractive, alongside more global ambitions. And even in a globalized age, proximity is a factor in shaping mental maps and political and commercial opportunities on both sides of the Atlantic. West Africa is closer to Brazil than many neighboring Latin American centers. In certain sectors, notably agribusiness, south-south trade, and investment in the Atlantic are growing rapidly and have become an important part of the food security equation.

Emerging Actors

Beyond history and geography, several elements are shaping the geopolitical scene in the Southern Atlantic, and could contribute to the rise of a new, wider notion of Atlanticism. Emerging economies, changing energy markets, and new communications hubs linking Atlantic regions are key parts of the picture.

¹⁹ <http://www.afropresencia.com/id42.html>

The rise of Brazil, a country that increasingly casts its international policy in Atlantic terms, will be a leading driver. Brazil's economy is the largest in South America and has well developed agriculture, mining, manufacturing, and service sectors. In areas such as biofuels and aerospace, Brazil is a world-class player. Since 2003, Brazil has strengthened its economy by building foreign reserves, reducing debt, keeping inflation under control, and remaining committed to fiscal responsibility. In 2007 and 2008, Brazil experienced unprecedented growth until the global financial crisis finally hit. However, Brazil was one of the first emerging markets to recover from the crisis, and GDP quickly returned to impressive levels.²⁰ The new president, Dilma Rousseff, plans to continue the commitment to low inflation and fiscal restraint.

Brazil is not alone. South Africa is now a major emerging market thanks to its abundant supply of natural resources, well-developed financial, legal, energy, and transport sectors, and relatively modern infrastructure. South Africa acts as a gateway to other regional markets in Africa. It provides energy, relief aid, transport, communications, and investment throughout the continent. Until the 2008 financial crisis, South Africa experienced 62 quarters of uninterrupted economic growth.²¹ Over the years, South Africa has cut taxes, dropped tariffs, decreased the fiscal deficit, lowered inflation, and relaxed exchange controls. Despite many unresolved domestic challenges, South Africa's democratic transition has given it considerable credibility abroad.²² Like Brazil, India, Indonesia, and Turkey, South Africa is becoming a fashionable partner for global investors, and a more active player on the international political scene. South African attempts to broker a ceasefire in Libya are just one example of this new activism.

Nigeria is a more troubled case, but its population, energy resources, and economic dynamism make it another driver of change in the wider Atlantic region. Despite serious problems of income distribution and underdevelopment outside the energy

²⁰ <http://www.propertyinbrasil.com/Brazilian-News/IMF-forecasts-Brazilian-economic-growth-of-4.7/19582952/>

²¹ <https://www.cia.gov/library/publications/the-world-factbook/geos/sf.html>; <http://www.nationmaster.com/country/sf-south-africa/eco-economy>

²² See Celia W. Dugger, "South Africa Exults Abroad, But Frets at Home," *New York Times*, April 20, 2011.

sector, Nigeria is still a powerful actor on the regional scene, and could be more influential in the years to come. The petroleum industry accounts for close to 80 percent of Nigerian GDP and over 90 percent of total exports. It is the world's 12th largest producer of petroleum and ranks 33rd in terms of GDP, largely due to the increase in international oil prices.²³ Nigeria is a bellwether for the future of sectarian and ethnic relations in West Africa. The challenges of rapid growth in cities like Lagos will be another key test for the evolution of societies in Africa, and across the Atlantic in places like Sao Paulo, Brazil. To the extent that Nigeria is able to forestall a drift toward religious and political friction, and achieve a more broadly based prosperity, the country could well emerge as a more important and visible international actor. This new role will be felt in the Atlantic neighborhood.

In a more modest fashion, the energy-fueled prosperity in Angola is giving the country new significance in West Africa, and beyond. In the past few years, there has been a marked increase in Angolan investment outside the country, notably in Portugal, where Angolans are acquiring stakes in the country's real estate and banking sectors. The economic crisis in Portugal may well reinforce this phenomenon as new sources of capital are sought by business and government.²⁴

In addition, several other actors of indeterminate power and influence, but considerable potential, will likely rejoin the larger Atlanticist community in the near future, as political change makes their isolation less sustainable. Cuba and Venezuela are the most notable players on this list.

Energy Security and the Atlantic

Is an Atlantic energy system emerging?²⁵ Five oil exporting countries account for 70 percent of U.S. crude oil imports as of January 2011 — Canada, Mexico, Saudi Arabia, Nigeria, and Venezuela. Canada exported 1.9 million barrels per day to the

²³ http://www.economywatch.com/world_economy/nigeria/

²⁴ See Raphael Minder, "Looking to Grow, Portugal Turns to its Former Colony of Angola," *New York Times*, July 14, 2010, p. B3.

²⁵ This question is addressed in a companion GMF report by Paul Isbell, "Energy and the Atlantic: Mapping the Shifting Energy Landscape of the Atlantic Basin," forthcoming 2012.

United States, Mexico 1 million, Saudi Arabia 958,000, and Venezuela exported 827,000 barrels per day to the United States. The United States imports oil from 15 countries including the five countries listed above and Iraq, Algeria, Colombia, Angola, Brazil, Ecuador, Kuwait, Russia, Argentina, and Azerbaijan. Today, 51 percent of U.S. oil imports come from the Western hemisphere and 22 percent from Africa. The Persian Gulf accounts for 17 percent of U.S. oil imports.²⁶ In short, at least as far as U.S. energy imports are concerned, the Atlantic matters. The place of the Atlantic in overall energy security is a more complex question, of course, not least because global energy prices can still be driven by developments in critical high-production areas such as the Persian Gulf. But the prominence of the Middle East in the energy security debate tends to obscure the large and expanding role of Atlantic basin energy trade.

Atlantic energy production is far less significant for Europe. The European Union imports oil from five major regions. Africa accounts for 21.62 percent of total oil imports, the Middle East for 17.09 percent, and the United States for 3.3 percent. Various European countries account for 15.59 percent, and the Former Soviet Union supplies some 42.4 percent of the EU's total oil imports. The Atlantic component of European energy use could increase in the years ahead, possibly driven by the expansion of offshore oil and gas production in Brazil.

Brazil's state-run oil company, Petrobras, recently discovered what is probably the world's largest oil-field find in 25 years. The Tupi field has oil reserves between 5 and 8 billion barrels, and the entire Santos Basin could have up to 50 billion barrels of oil. To be sure, the technical, financial, and political obstacles to exploiting these vast new resources are substantial. But over time, their impact could be revolutionary for Brazil and the region. In general, the steady expansion of global liquid natural gas (LNG) trade, a significant portion of which is Atlantic, and the prospect of large-scale shale gas production on both sides of the basin will contribute to the prominence of the Atlantic in energy security over the next decades.²⁷ The shale gas revolution in the U.S. market — and

²⁶ http://www.eia.doe.gov/energy_in_brief/foreign_oil_dependence.cfm

²⁷ These developments are addressed in detail in a companion report by Paul Isbell and Geoffrey Kemp.

potentially in Central European countries like Poland — frees up Atlantic LNG resources that can increasingly serve the European market, contributing to the emergence of a more self-reliant Atlantic system including North America and Europe.

On a less dramatic, but significant scale, renewable energy sources are also being developed. Solar energy is a growing in popularity in Africa as an alternative to liquid fuels. Morocco is pursuing a particularly ambitious solar energy program aimed at domestic use, and eventually the export of electricity to Europe via submarine cables. Cape Verde is focusing on wind energy to fill its growing electric power generation needs. Cabeólica, a state-private venture, has ordered 30 units of wind turbines to be located on four of the country's islands.²⁸ The Cabeólica wind power plant is expected to generate approximately 120,000 MWh, reportedly saving almost 46,000 tons of carbon emissions annually.

From conventional sources to renewables, the Atlantic basin is the scene of important new developments in the energy sphere. Whether these add up to a new Atlantic energy “system” is a matter for debate. But, taken together with West Africa's substantial nonenergy resources, from strategic minerals to phosphates, developments in oil, gas and renewables will drive much new attention to the Southern Atlantic over the next decade. They are also likely to be the basis for significant new geo-economic partnerships, both north-south and south-south.

²⁸ <http://www.newenergyworldnetwork.com/renewable-energy-news/by-technology/wind/vestas-wins-cape-verde-turbine-order.html>

3. Regional Infrastructure — Morocco as an Atlantic Hub?

Turmoil in North Africa and the Middle East, and continued impediments to regional integration in the Maghreb, reinforce the geopolitical logic of Morocco's Atlantic vocation. Morocco is an Atlantic actor by virtue of geography. Located just to the north of the nexus of the northern and southern basins, Morocco has a long Atlantic coastline of 1,835 kilometers (2,945 km including the Western Sahara).²⁹ In addition, Morocco is roughly equidistant to South America and North America, a reality that is not readily apparent from the traditional "mental maps" of policymakers and observers. But a nontraditional projection illustrates this clearly.

Europe is an overwhelmingly important economic and political partner for Morocco, and the strategic link to North America remains critical. But Brazil is also among the country's leading trading partners, and West Africa holds significant potential as a regional partner for economic development. Investment from the Gulf and from Asia is already a key element in the geo-economics of North Africa, West Africa, and the Mediterranean. By many measures, the economic and geopolitical future of Morocco is likely to see more diverse global ties, and a more pronounced role for regionalism in various settings.

The prospects for Morocco's Atlantic and regional ties will be shaped by the "soft" infrastructure of finance, rule of law, regulation, political cooperation, and affinity. But it will also depend on the development of hard infrastructure for land, air, and sea transport, telecommunications, and the shipment of energy and nonenergy raw materials. A survey of some of the most prominent current and proposed projects highlights the dynamic nature of developments in this area, and their potential geopolitical implications.

²⁹ <http://www.nationmaster.com/country/mo-morocco/geo-geography>

Infrastructure, Development, and Regional Connections

Morocco has made substantial investment in large-scale infrastructure projects over the past ten years. In the field of solar energy alone, the Moroccan government has recently committed \$9 billion for the creation of new plants relying on advanced technology for the exploitation of solar power, especially concentrated solar power (CSP).³⁰ Infrastructure development has been seen as a catalyst for economic and social development, helping Morocco overcome regional disparities within the country, and, ideally, generating much-needed jobs for a young population.

Key concerns behind the development of Morocco's infrastructure have been energy security — Morocco depends on foreign sources for over 90 percent of its energy needs — and climate change. Studies suggest that Morocco could be particularly affected by climate change-related developments in North Africa, including severe water scarcity, desertification of rural areas, and new natural challenges along the country's coasts, where much of Morocco's population and economic activity is concentrated.³¹

While projects such as the expansion of Casablanca's Mohammed V international airport and the creation of the Tanger-Med port complex near Tangier are clearly meant to provide Morocco with a new global projection, much of the infrastructure development of the past years has been directed at reinforcing Morocco's traditionally strong orientation towards Europe and European markets. Several projects in the transport sector have also focused on connecting and integrating Morocco internally, as a first priority, with international implications as a secondary concern. Other projects have an explicitly regional and international role.

Energy Security

Morocco can use new infrastructure to not only pursue diversification of energy sources — a long-time priority of the kingdom — but also to reduce its energy dependency. It can also use new technology and energy policy to explore new partnerships

³⁰ http://www.masen.org.ma/index.php?Id=42&lang=en#/_

³¹ http://www.gmfus.org/galleries/ct_publication_attachments/Busby_MappingClimateChange_Oct10_final.pdf

and test the possibility for regional integration, especially with energy-rich West African countries beyond the Sahara. Although rising oil prices and the post-Fukushima nuclear allergy seem to have given a new boost to the development of alternatives, Morocco's shortage of traditional hydrocarbon resources will invariably affect its future energy position. Morocco's national energy bill has risen dramatically in recent years, from 48 to 62 billion dirhams between 2008-2009 alone. Volatile energy prices are widely seen as a leading constraint on Morocco's economic growth.

The Moroccan Office of Hydrocarbons and Mining is optimistic about finding new hydrocarbon reserves, particularly offshore, following discoveries in neighboring Mauritania. Discoveries of oil and gas in 2010 in the Talsmt Region East of Morocco have also fueled optimism, and countries like India have already expressed interest in providing assistance for further exploration and possible exploitation. In addition, large unexploited reserves of bituminous shale are beginning to attract interest from investors. Morocco has signed agreements with Brazilian and other major energy industry players to evaluate the full potential of these reserves. Morocco also holds potentially significant shale gas resources, and the presence of substantial reserves, if confirmed, could bring about a small revolution in Morocco's energy situation.

The energy equation is complicated by the dim outlook for cooperation between Morocco and energy-rich neighbors in the Maghreb, including Algeria and Libya. Whereas for crude petroleum Morocco can rely on traditional partners such as Saudi Arabia (mainly because of its oil exports to Morocco, Saudi Arabia is among Morocco's leading trade partners), Morocco has had a long-standing problem with the import of natural gas. Morocco suffers from the poor regional integration of the gas market, and particularly from bilateral tensions with Algeria. This has had the effect of reinforcing Morocco's reliance on coal. Only 8 percent of gas produced in the Arab countries is marketed beyond national boundaries, and gas is a negligible fraction of the already very low level of intra-Maghreb trade (currently estimated between 1.2 and 2 percent — one of the lowest levels recorded for regional trade in the world — although some unofficial trade undoubtedly exists). Algeria's energy trade with neighboring countries is very limited. In 2005, Algeria exported only 1 metric ton of liquefied

petroleum gas to Morocco, representing 4.6 percent of its exports. Small quantities of energy from Algeria cover just above 10 percent of Morocco's needs. In July 2011, a deal between Algeria's energy company, Sonatrach, and Morocco's National Office for Electricity (ONE) was signed, allowing for the sale of Algerian gas to fuel two of Morocco's thermal plants. The gas will come from the Maghreb-Europe pipeline connecting Algeria to Spain through Morocco. But Algeria's new direct connection with Spain, Medgaz, and plans for gas exports directly to Italy via Sardinia seem to confirm Algeria's inclination to bypass, or sideline, regional partners in the Maghreb.³²

Algeria's pivotal role in providing energy to Europe, and as an alternative to European imports from Russia, could be further strengthened by Algeria's possible integration with West African actors. A memorandum of understanding was signed in July 2009 between Nigeria, Niger, and Algeria for the construction of the "Trans-Sahara gas pipeline." The pipeline would connect Nigeria across the Sahara Desert to Algeria. The 2,580 mile pipeline is estimated to cost at least \$10 billion for the pipeline and perhaps \$3 billion for related facilities. The target completion date is 2015. France's Total and Anglo-Dutch energy giant Royal Dutch Shell have also expressed interest in the project. Gazprom and Nigeria's state-run oil company, NNPC, agreed to invest at least \$2.5 billion to explore and develop Africa's biggest oil and gas conglomeration, including building the first part of the Trans-Sahara pipeline. Nigeria has estimated natural gas reserves of 2.22 trillion cubic meters, the eighth largest in the world, but has had to rely on relatively expensive LNG exports. The new pipeline could more than double the country's exports, sending up to 30 billion cubic

³² The construction of Medgaz started in March 2008 in Almeria, and the subsea stretch was finished in December 2008. The pipeline was officially inaugurated in April 2011. Medgaz stretches over 1,050 km, including 550 km on Algerian soil. Each year it will carry up to 8 billion cubic meters of gas (the current capacity of Maghreb-Europe pipeline, or "Pedro Duran Farrell" pipeline) to Europe, expanding to perhaps 16 billion cubic meters through the construction of a second pipeline. Algeria's Sonatrach owns 36 percent of the pipeline, while Spanish companies Iberdrola and Cepsa own 20 percent each. Endesa (Spain) and Gas de France have roughly 12 percent stakes. The Algeria-Sardinia connection, "Galsi," is still in the phase of technical studies to identify the investment potential. The pipeline will extend from Hassi al-Raml all the way to El Kala, at a 640 km distance, and then to the Italian city of Cagliari under sea, extending for 310 km. It will transfer an estimated 8 billion cubic meters annually, according to Sonatrach projections. At the same time, Algeria is also expanding the Enrico Mattei pipeline, which links Algeria to Italy via Tunisia. This capacity will be lifted to 32 billion cubic meters.

meters a year to Europe. The Trans-Sahara link would connect the rich gas fields of the Gulf of Guinea (where Nigeria alone holds 32 percent of Africa's total proved resources) with the Mediterranean region (where Algeria holds another 42 percent) creating an enormous complex supplying the growing energy consumption of Europe. Other regional projects involving Nigeria include the West African Gas Pipeline, a 678 km line to transport gas from Nigeria to Benin, Togo, and Ghana. Taken together, these potential links could create a vast new economic complex stretching from West Africa to the Maghreb.

Progress on the Trans-Saharan pipeline and related projects cannot be taken for granted, and many experts are openly skeptical about the prospects. Foreign investors in Nigeria have long suffered from attacks on their energy facilities. Since December 2005, Nigeria has experienced increased pipeline vandalism, kidnappings, and militant takeovers of oil facilities in the Niger Delta. Nigeria's main militant group active in the Delta region, which has conducted terrorist attacks on oil fields and oil facilities, has already threatened to sabotage the Trans-Saharan line. Moreover, Nigeria and Algeria are effectively competitors in the world gas market, and the long-term management of revenues could prove contentious. Nonetheless, the concept is fostering a dialogue among interested countries from which Morocco risks being excluded or play only a very minor role.

In theory, Morocco could benefit from access to these new lines. But the prospects are clouded by bilateral tensions not only with Algeria but also with Nigeria, mainly around the issue of the Western Sahara. Nigeria had an estimated 37 billion barrels of proven oil reserves as of 2010 but it does not export any oil to Morocco. Over 40 percent of Nigerian oil goes to the United States, 10 percent goes to Brazil and 11 percent to India. The prospect for the Trans-Saharan pipeline to be extended to Morocco is dismissed by many as politically impractical.

The picture is different, but not substantially so, when it comes to electricity. The World Bank estimates that the installed generation capacity of the electricity sector in the Middle East and North Africa is some 20 percent below region's aggregate projected

demand for electricity.³³ Morocco's energy demand is rapidly increasing due to economic growth, urbanization, tourism, and population growth. Morocco faces a likely doubling of its electricity consumption by 2020, and a four-fold increase by 2030. In this context, regional integration of electric grids could partly offset looming problems of supply and distribution.³⁴

Intra-Maghreb cooperation on electric power is more effective than cooperation on energy in general. There has been an electricity line between Libya and Tunisia since 2003 but no use has been made of it. A new 400kv line linking Algeria to Morocco has been operational since 2010, but it is mostly meant to make it easier for Spain to get Algerian electricity. The only significant amount of electricity exchanged within the region is between Morocco and Spain.³⁵ There are plans to lay another cable between Tunisia and Italy, amid a growing debate about the feasibility of long-distance cables of this kind. Optimists point to the case of China, which has successfully built links over distances of more than 5,000 km, and the rapid improvement in efficient, high voltage transmission technologies.

Morocco plans to host pilot projects for Desertec, one of the world's most ambitious green energy projects in the world. The German-led Desertec Industrial Initiative was launched in July 2009 and envisioned as a \$550 billion program. The aim is to turn the Sahara's sunlight into carbon-free electricity that will supply 15 percent of Europe's power and lessen its dependence on natural gas from Russia and Algeria.³⁶ EU countries have signed up to ambitious targets of 20 percent renewable energy by 2020. The new

³³ <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/MENAEXT/0,,contentMDK:22455880~menuPK:2246554~pagePK:2865106~piPK:2865128~theSitePK:256299,00.html>

³⁴ There are four projected electricity grids: 1) the Maghreb group uniting the electric utilities of Algeria, Tunisia, Libya, Morocco, and Mauritania; 2) the North-Eastern group comprising the electric utilities of Iraq, Jordan, Lebanon, Syria, and Egypt; 3) the Saudi Arabian group integrating the four major local electric utilities; and 4) the Yemen Group and the Gulf Group (information from 1993).

³⁵ The interconnection capacity of Morocco with Spain, started in 1998, has doubled over time, from 700 MW to 1,400 MW, while the capacity with Algeria has quadrupled from 400 MW to 1,700 MW (AFDB data).

³⁶ A second group working to develop a Mediterranean electricity network stretching to Europe, Paris-based Medgrid, has shareholders that include the French engineering company Alstom, the nuclear company Areva, and the energy companies Electricite de France and GDF Suez, along with backers in Syria and Jordan.

EU Renewable Energy Directive 2009/28/EC allows for physical import of renewable electricity from non-EU member states to count towards that target, subject to certain conditions. By 2013, Desertec will decide whether to seek the necessary resources to make the project a full-scale reality.

Many observers are doubtful about Desertec as a commercial enterprise, but elements of the scheme undertaken on a national basis, or via the official Med Solar Plan (envisioned as a key project by the Union for the Mediterranean), are more likely to move ahead in the coming years. Quite apart from technology and subsidies, regulatory arrangements in Europe will be a major variable. At present, the European energy market is not configured to allow ready access for Maghrebi electricity in the key markets of central and northern Europe. Moreover, if economies in North Africa manage to sustain high levels of growth in the coming years, the largest portion of electricity generated by renewable projects could end up being sold locally.

The Moroccan national solar energy project is set to save perhaps 1 million ton oil equivalents annually, and to avoid the emission of 3.7 million tons of CO₂. The ambitious goal is to produce around 40 percent of the country's electricity needs from renewable sources by 2020. The plan involves five solar power generation sites across Morocco producing 2,000 MW of electricity. Funding will be from a mix of private and state capital. The planned 500 MW concentrated solar power plant at Ouarzazate in eastern Morocco is the leading element, and could be the world's largest concentrated solar power plant.

By 2020, Morocco plans to have completed both solar and wind energy programs, generating 2,000 MW each. Wind energy is the most promising alternative energy resource beside solar power.³⁷ Because of its geographic location and meteorological conditions, Morocco is said to have the largest wind potential in North Africa. The two North African countries with significant power generation from wind farms are Egypt (375 MW) and Morocco (240 MW),

³⁷ <http://renewableenergydev.com/red/wind-power-tarfaya-wind-farm-morocco/>

while wind farms are under construction in Tunisia (120 MW) and South Africa (120 MW).³⁸

In theory, cooperation in renewable and other energy projects could be an engine of Moroccan-Algerian *détente*, regional economic integration, and African development. There seems to be a natural complementarity between Algeria's abundant gas resources and Morocco's raw materials (especially phosphates), banking, and manufacturing strengths. This cooperation could also contribute to the development of electricity-poor countries in West Africa. With a few notable exceptions, only 20 percent of the sub-Saharan population has access to electric power. But the reality is highly constrained. Even in Desertec, the outlook for a truly regional approach is dim. Algerian authorities have expressed reservations about their participation in the initiative. This might leave Morocco as the key southern hub for the project, but it does little to promote a more integrated Maghreb.

Sea Ports

Morocco has 30 ports. But the most significant development in this sector has been the opening of the Tanger-Med complex. Tanger-Med has rapidly risen to rank among the main ports of the Mediterranean and one of the largest trans-shipment ports on the globe. The geography of its traffic already highlights Morocco's role as an intercontinental hub between the Americas, West Africa, Asia, and Europe.

Tanger-Med I was launched in 2003 and became fully operational in the summer of 2007. It is a deep draft port located around 30 km east of Tangier, only 14 km from Spain, in the Gibraltar Strait. The container terminals are nestled in a natural bowl in the Rif Mountains. The new port had a turnover of \$21.4 million in 2008, its first full year of operation. Its traffic is 85 percent trans-

³⁸ In the summer 2010, Morocco launched the largest African wind farm, near Melloussa, 21 miles from Tangier. It cost \$300 million and has 165 turbines. The 140 MW Tangier-1 wind farm was installed by Spain's Gamesa Corp., with partial funding from the Spanish government. Three smaller wind farms were completed previously (60 MW; 50 MW; 30 MW). The project was partly financed by the EIB, which invested €80 million. Spanish and German banks also contributed €150 million. Wind farms under development are Tarfaya at 300 MW, Akhfenir at 200 MW, Jbel Khalladi at 120 MW, BabEL Oeud at 50 MW, and Koudia El Baida at 50 MW. They are all expected to be completed around 2020.

shipment and 15 percent for domestic import-export requirements. Container activity accounts for some three-quarters of the port's income. Tanger-Med also accommodates Roll On-Roll Off (RO-RO), bulk, and general cargo, as well as hydrocarbons. In the first half of 2010, as global trade recovered, Tanger-Med experienced an increase in traffic of around 76 percent over the same period in 2009.

The port complex aims at exploiting economies of scale for large containerships, while attracting value-added industries to surrounding industrial and logistics parks. Physical separation from the traditional city of Tangier allows for the latter's reinforcement as a marina for cruise activities and passenger transport.

New terminals for Tanger-Med II, are already under construction and are set to become operational in 2014. Tangier II will provide 5 million more TEUs (20-foot equivalent units), bringing the total capacity of the facility up to 8 million TEUs. Tanger-Med II involves the construction of two new container terminals (TC3 and TC4) and some 30 buildings. Terminal 3 is dedicated to a shipping line and Terminal 4 is a multi-user terminal.³⁹

When it reaches 8 million TEUs, Tanger-Med will likely be the largest container port in the Mediterranean, and a leading hub for shipping from the Americas to Europe and Asia, offering shipping to Houston, Mobile, Jacksonville, Miami, Savannah, Charleston, and Norfolk in the United States (shipping time ranges between 11 and 19 days). Shipments from Morocco to Saudi Arabia used to take several weeks, requiring trans-shipment at another European port. Now these shipments take around six days through Tanger-Med. The transit time from Tangier to Hong Kong has been reduced from around 30 days to 18 days. While the origin of cargos varies widely, the destinations are concentrated in Europe and West Africa. The heaviest traffic for Tanger-Med is between Asia and Europe, but much trans-shipment is toward West Africa. Tanger-Med is competing actively with north European ports such

³⁹ The port complex is the product of international cooperation. The expansion of the port was funded by the Morocco's Tangier Mediterranean Special Agency (TMSA) and the Arab Fund for Economic and Social Development (AFESD). The European Investment Bank contributed €40 million to Tanger-Med I. It will lend considerable financial support to the Tangier Med II project via a long-term loan of €200 million (FEMIP — Facility for Europe-Mediterranean Investment and Partnership).

as Hamburg, Rotterdam (often described as the “largest port of the Mediterranean”), and Antwerp, as well as southern European ports such as Algeciras, Marseille, Malta, Gioia Tauro, and Genoa. In sum, Tanger-Med benefits from heavy East-West trade, and is well placed to serve as a trans-shipment hub for growing north-south trade in the Atlantic over the next decades.

In addition to further development of Tanger-Med, other new ports are planned in Morocco, including a coal terminal at Safi and a petroleum shipment and storage facility at Nador. Additional port upgrades and expansions are planned for Casablanca as well as Agadir, Jorf Lasfar, Tanger, and Mohammedia.

Jorf Lasfar, in particular, could be central to Morocco’s future Atlantic projection. It is located 17 km south of El Jadida on the Atlantic coast and is set to become the largest platform for phosphates in the world. The goal is “a plug and play infrastructure,” capable of attracting foreign direct investment, letting international operators process phosphates on site. Over the next ten years, the Morocco’s OCP Group plans to invest €6.3 billion to increase raw phosphate production from 28 million metric tons per annum (MMt/a) to 47 MMt/a. A 235 km slurry pipeline is designed to transport phosphates from the Moroccan central mining region of Khouribga to the Jorf Lasfar port complex. When complete, it will have a capacity of 38 MMt/a. The pipeline is part of a broader plan to enhance Morocco’s phosphate export capacity, and to reduce energy use and environmental risks. An LNG terminal is also contemplated at Jorf Lasfar.

Morocco’s investment in ports gives it a key role in a market that is central to the African economy but that still suffers from poor infrastructure. More than 95 percent of Africa’s international trade passes through ports. Yet African ports handle only 6 percent of global traffic, with six ports (three in Egypt and three in South Africa) handling about 50 percent of Africa’s total container traffic. Africa as a whole has some 90 major ports, but the majority of these are small by international standards, or inefficiently managed. Ports in sub-Saharan Africa anchor the transport corridors, which radiate to the interior and the 16 landlocked countries. North African ports are generally larger and more modern but do not easily serve the landlocked African countries. Damietta in Egypt

is the oldest container terminal in the region. In addition to the Moroccan plans discussed above, new container terminals are under development at Djen Djen in Algeria and Enfidah in Tunisia. These projects tend to differ from Tanger-Med in that they do not incorporate manufacturing facilities ashore, and lack significant private participation.

Airports and Air Routes

Morocco's rise as a regional and Atlantic hub is also sustained by its growing role in air transport. The rise is mainly due to three factors: the integration of Morocco's market with the EU through an Open Skies agreement; growing tourist flows to North Africa; and a strategy aimed at making Casablanca's Mohammed V airport the regional hub for air traffic between West Africa and Europe. The growth of the air travel sector is also closely linked to Morocco's future as a financial hub.

Casablanca International Airport is Morocco's busiest airport, with 26 airlines and almost 7.25 million passengers passing through in 2010.⁴⁰ It is the hub for Royal Air Maroc, Air Arabia Maroc, and the low-fare airline Jet4you. Royal Air Maroc operates scheduled international flights from Morocco to Africa, Asia, Europe, and North America, and a domestic and charter network. In addition, Royal Air Maroc has expanded to create the discount airline Royal Air Maroc Express. The airline has ambitious plans for further expansion of its international network, and has chartered new routes to Verona, Zurich, Munich, Berlin, Malaga, Warsaw, Moscow, Point Noire, and Bangui in the hope of promoting Morocco as a destination in the international market as well as reinforcing Casablanca's position as a hub for traffic to and from Africa with Europe, the Middle East, and North America.⁴¹ Air Arabia is also planning to expand by investing \$50 million in its second hub, to be located in Casablanca. Air Arabia already flies to Italy, France,

⁴⁰ The airport has a long history as an Atlantic hub. Originally named Berrechid Airfield, it was built by the United States in early 1943 as an auxiliary airfield for Casablanca's Anfa Airport. Flights went across the Atlantic to the Azores on the Mid-Atlantic route, which connected to Nova Scotia or East Coast U.S. airfields.

⁴¹ <http://www.onetravel.com/travel/airlines/royalairmaroc-at.html>

the U.K., Germany, the Netherlands, Spain, and destinations in North Africa, all within a five-hour radius of Casablanca.⁴²

The kingdom's Open Skies policy was implemented in the mid 2000s and has led to a big increase in European flights and the upgrading of regional airports. In 2006, the total international traffic was of 8.4 million passengers, an increase from 5.5 million in 2003. Between 2004 and 2008, passenger traffic in Morocco rose by 17 percent, freight by 7 percent, and over flights by 14 percent. Passenger traffic is projected to grow to 15 million by 2015. Since 2004, 22 new companies have entered the Moroccan market, 19 of which are European. Low-fare airlines such as Easy Jet, Ryanair, and My Way have operated in Morocco together with major European airlines such as Air Berlin and Brussels Airlines. Turkish Airlines is also expanding its operations in Casablanca.

Before the Open Skies agreement, Moroccan airlines could not link two destinations within the EU and EU companies could not reach Morocco from a different EU country. In 2006, after a successful lobbying campaign for a single comprehensive agreement, Morocco became the first non-EU country to conclude a complete aviation agreement with the EU. The agreement abolished restrictions and limits regarding passenger transport between the EU and Morocco for both Moroccan and European carriers.

Plans for construction of a new terminal at Mohammed V Airport in Casablanca are under way. The goal is for the airport to cover 65,000 square meters, reach the level of 10 million passengers per year, and attain better separation of flows through the construction of a freight terminal. Aviation infrastructure development has been supported also by U.S. Trade Development Agency, which has awarded grants to Royal Air Maroc.

Morocco's air traffic liberalization has led to the expansion of other airports. A new terminal is under construction at Marrakesh's Menara International Airport that would double its capacity (adding a capacity of 4 million per year). The Fes Saiss Airport is going through a €56 million upgrade. Both projects are being financed by loans from the African Development Bank. The

⁴² <http://irhal.com/Irhal-Travel-News/Airline/Air-Arabia-Will-Invest-50mm-In-Casablanca-Hub.html>

growing popularity of Marrakech as a holiday and retirement venue for affluent Europeans may explain part of this increase in arrivals.⁴³ Turmoil in North Africa and the perception of security risks may affect this growth, but perhaps only temporarily.

Casablanca is expected to become the leading international hub between Europe and West Africa by 2012. As far as North Africa is concerned, a draft convention on the liberalization of air transport has been prepared but no agreement is in place. Here, as in other sectors, Maghreb integration lags behind, with potentially significant opportunity costs for regional actors. In the meantime, Morocco continues to consolidate its position as a hub for Atlantic air travel and transport. The trend here has parallels elsewhere, including the rise of Dubai as a hub for travel to the Middle East and Asia, and the rise of Istanbul as a major center for travel across Eurasia.

Undersea Cable Networks

West Africa has a long history as part of the undersea cable expansion that revolutionized communications between North America, Europe, and colonial regions in the year before World War I. The role of new fiber optic lines is no less important today than in the age of the telegraph — indeed, much more so, given the ability of high speed communications to enhance mobile telephony across Africa as a whole, linking individuals and enterprises as well as governments.

A number of projects are underway that will significantly improve internet communication between South America, Africa, and the rest of the world, with implications for Morocco. The West Africa Cable System will run 22,530 km from London to South Africa, with connections to 12 African countries in between. Given that Africa is the world's least wired continent, this should make an important difference to inhabitants.

The South Atlantic Express Cable is an undersea cable line that will link Brazil with Angola and South Africa, and continue northward with a connection to North America. It is being supported by

⁴³ In the 2011 British Airlines ranking of destinations, Marrakech outclassed such popular destinations as San Diego, St Kitts & Nevis, Puerto Rico, Maldives, Las Vegas, Mauritius, and St Lucia.

Brazil, China, Russia, India, and South America, none of which are directly funding the project. This will be the shortest route to date to connect Africa with the Americas. The project is being funded privately, with the Bank of China seeking to invest 60 percent of the cost and the Industrial Development Corporation in South Africa showing interest in investing as well. It is estimated to cost \$440 million.⁴⁴

Roads, Railways, and Regional Integration

A significant aspect of Morocco's transport infrastructure is that some of the projects that have been designed to integrate the country internally could also contribute to better links with Morocco's neighbors. When planning new infrastructure projects in the early 2000s, one of the understandable priorities of the kingdom was to reduce or overcome regional economic disparities within the country.

The improvement of the road network at the local level has been accompanied by a steady upgrade and expansion of Morocco's system of highways. Morocco is a leader on the African continent in the pace of development of its highway network. Before King Mohammed VI, only a 90 km section of the Rabat-Casablanca highway was in place, completed in 1987. Now, there are three main highways: Casablanca-Rabat-Tangier; Rabat-Fes; and Rabat-Casablanca-Marrakesh-Agadir. The Casablanca-Rabat-Tangier route is integrated in the North-South axis of the kingdom and the link with Europe. The Rabat-Fes-Oujida route connects the center with the East and forms part of what could become a longer Trans-Maghreb highway.

The Moroccan section of a future Trans-Maghreb highway is, therefore, substantially completed. The main obstacles to the realization of a Trans-Maghreb highway are not so much the missing physical links (with the exception of a still poor road system in Libya), but the closed border between Morocco and Algeria. The Trans-Sahara highway (from Algiers to Lagos) is still incomplete (including over 200 km of desert track in Niger) but

⁴⁴ <http://www.telecoms.com/26631/bank-of-china-to-fund-africa-america-submarine-cable-system/>

is fast expanding. This highway could be an alternative axis of integration together with the Trans-Saharan pipeline.

There are still important missing links in other parts of the Trans-African Highways (TAH) network, defined as early as the 1970s along six mainly east-west routes, and three mainly north-south routes. The percentage of missing links is much lower in Northern Africa (1 percent of ca. 13,000 km of roads) compared to Central Africa (65 percent), Eastern Africa (17 percent), Southern Africa (15 percent), and Western Africa (9 percent). Roads matter in Africa. They remain the dominant mode of transportation, accounting for more than 90 percent of passenger and freight transport, compared with around 50 percent for freight in Europe.

Rail transport is another potentially transformative sector for Morocco and the region. Morocco is set to invest \$1.6 billion in the period 2010-2015 for development of new logistic platforms, renewal of rolling stock, modernization of railway stations, and upgrades to existing railway infrastructure in Casablanca, Fes, Oujda, Settat, and Marrakesh.⁴⁵ Investments in railways also envisage multi-modal platforms and construction of dry-port networks at key distribution and consumption sites.

Construction on the Casablanca-Tangier high-speed rail line began in June 2010. It is expected to be completed by 2015 and enter commercial use a year later. The project will eventually be extended to Marrakesh. The first section of the TGV project will cover 200 km, and the operational speed of the new train will be 320 km. The completion of the first section will reduce the travel time between Casablanca and Tangier to 2.5 hours and between Rabat-Tangier to 1.5 hours. By 2030, Morocco plans to have 1,500 km of TGV rail. The main line will be Tangier to Agadir via Rabat, Casablanca, Marrakesh, and Essaouira (less than four hours from end to end).

Ideally, this could form the Atlantic section of a trans-Maghreb high-speed rail line across North Africa. The notion of a trans-Maghreb rail system is relatively advanced. A notional project linking member countries was approved by the Arab Maghreb Union in 2007. While Morocco is investing in TGV, Algeria and Tunisia are upgrading their own railways to standard-gauge electric

⁴⁵ <http://www.marketresearch.com/Rail-Infrastructure-Construction-Morocco-6367185/>

systems, and also introducing TGV on some routes. Libya has had an ambitious plan to build a modern coastal rail line from Tunisia to Egypt. Not surprisingly, this project is now on hold, but could well be revived as part of post-conflict reconstruction plans.

Regional projects in the Maghreb could also include a Maghreb-Europe freight corridor in which Maghreb countries would work together on a single, direct Trans-Maghreb connection for cargo. The project, which has been discussed in various contexts at the regional and European levels, would connect the Tanger-Med port to Tunis and cover a distance of over 2,000 km, crossing the three Maghreb countries. There has also been a debate on a Europe-Maghreb Freight Corridor through Spain.

Over the Horizon, and Under Gibraltar?

For the past 30 years, politicians and engineers have debated the possibility of a tunnel linking Morocco and Spain under the Strait of Gibraltar. The most practical variant of this scheme would be a rail line linking the trans-Maghreb and European systems. In 1995, the Joint Committee for the Continental Link turned away from the earlier idea of a suspension bridge due to safety and security fears. In July 2007, the idea of a tunnel was raised during a visit by Spanish Prime Minister Zapatero to King Mohammed VI.

The project faces substantial technical challenges. Not unlike the Channel Tunnel between Britain and France (opened in 1994), the project envisions twin rail tracks in parallel tunnels with a service tunnel between. The tunnel would be around 40 km long, with 28 km running deep under sea level. At points, the depth in the Strait is around 300 meters, some five to six times deeper than the English Channel. At an estimated cost of over \$10 billion, and over 20 years of construction, the economics as well as the politics of the project are simply daunting. The example of the technically simpler Channel Tunnel, which has struggled financially, is discouraging to private investors. In sum, a fixed link between Morocco and Spain remains a visionary, over-the-horizon project. Barring striking new developments in this field, the existing ferry-based “water bridge” between Morocco and Spain is likely to remain the focal point for communication between the continents.

A More Integrated Atlantic Basin?

These projects in and around Morocco are mirrored by ongoing infrastructure investments elsewhere around the Southern Atlantic, including new high-speed rail projects within Nigeria and Ghana, a line linking the ECOWAS members, and extensive rail modernization in South Africa. On the other side of the Atlantic, both Brazil and Argentina have made substantial commitments to modern rail development. The future pace and extent of all these projects is difficult to predict, but if even some of these significant projects are completed, the result could be a much more efficient and integrated system for trade and travel around the southern basin. In effect, this may echo the role of railway development in the rapid economic integration of Europe in the later 19th century.

Some additional examples are worth noting. Arawak Port Development is currently completing their marine works in the Bahamas, which will allow them to operate as an international container port by the end of 2011. The Arawak Cay Port will facilitate international container freight transportation and storage, including import and export services to larger North American container ports requiring higher security measures. Construction is also underway on the Lekki port in Lagos, Nigeria. It will be located in the Lagos Free Trade Zone along the Atlantic coastline. When complete, Lekki will be the first deep water port in Nigeria, and able to accommodate container vessels up to 8,000 TEU, alongside liquid and dry bulk cargoes. In Uruguay, Montes del Plata has plans to build a new \$1.9 billion container, chemical, and bulk cargo facility.

Road development is also moving rapidly in South America. The Pasto Mocoa Road Project, in the development stage, is designed to connect the Latin American interior with the Caribbean and the Pacific. The goal is to promote the development of southern Colombia, northern Ecuador, Peru, and Brazil by facilitating trade and access to the sea. In December 2010, the Inter-Oceanic Highway spanning South America was completed. The highway links road networks from the Atlantic and Pacific coasts and crosses the Peruvian Amazon. The project cost a reported \$900 million (and was strongly opposed by environmentalists). The highway gives the world access to the Amazon region of Peru, and facilitates Brazilian exports to China, Korea, and Japan.

The pace and extent of infrastructure development around the wider Atlantic, including the southern basin, provides a new context for Morocco's Atlantic vocation in economic and geopolitical terms. In Morocco's neighborhood, there is the potential for a more effective series of links between regions, with implications for economic development across West and North Africa. As this analysis suggests, many of the key obstacles are political and legal, rather than technical or financial. At the same time, a more integrated, wider Atlantic may change the leading global actors view of the Atlantic space. A wider conception of Atlanticism is now receiving some attention in Washington and Brussels, as well as Lisbon and Madrid, where there have always been strong ties to the southern Atlantic. The growing economic and political activity of China and India in Africa and Latin America is also making these countries potentially important strategic actors (i.e., actors with a range of long-term interests, from commerce to security) in the Atlantic space. These developments are likely to increase the attractiveness as well as the complexity of Morocco's future role as an Atlantic hub.

4. Some Alternative Scenarios

This analysis has traced some of the political, economic, and security features likely to influence Morocco's geopolitics over the coming decade, including important trends in communications and infrastructure around the Southern Atlantic. But the evolution of this environment across multiple regions, and a vast maritime space, can follow different paths in the coming years. A net assessment of what policymakers in Morocco and elsewhere can expect should take into account alternative scenarios or futures. These are not meant to be an exercise in prediction, but simply a tool to illuminate some of the leading dynamics and variables shaping the big picture in North Africa, West Africa, the Mediterranean, and the Atlantic — areas of key concern for Moroccan interests. The scenarios are illustrative of what could unfold under various conditions. They are not, strictly speaking, mutually exclusive. Indeed the most likely scenario may well be a hybrid. The common question is whether the next decade will encourage greater integration in Morocco's neighborhood, including closer ties around the wider Atlantic, or work against this future. What are the drivers? What are the potentially transforming events? What are the critical uncertainties?

Unsettled Europe

Our analysis suggests that Europe will remain the leading external partner for Morocco over the next decade, even as other regions acquire new significance in economic and perhaps in political and security terms. The overwhelming importance of European trade and investment will remain. Europe will also continue to be a leading destination for Moroccan migrants (even if conditions for their migration and integration vary over time). The Moroccan diaspora will matter as a source of remittance income, but also as a transnational community between north and south. In this context, the future of European societies and policies will be a key variable influencing the kingdom's strategic options.

There are risks inherent in this close relationship. Morocco will benefit heavily from a more open and integrated Europe, willing

to envision more expansive free trade with North Africa, and with a cooperative approach to immigration and security issues. But this future cannot be taken for granted, especially under conditions of economic stress. A less integrated, renationalized EU, lacking a common and cooperative strategy toward the southern Mediterranean, will be a difficult partner for Rabat. A mood of nationalism and xenophobia, already evident in many European societies, will complicate the position of the Moroccan diaspora — the wellbeing of which is a Moroccan national interest — and encourage a security-driven approach to relations with North Africa. Under these conditions, it may also be difficult to attract the investment and attention required for new infrastructure and regional integration projects in the Maghreb and West Africa. A Europe with no obvious center point will generate a number of challenges for Morocco.

A troubled Europe is also less likely to think strategically with the United States, Brazil, and African countries about opportunities in the wider Atlantic. To the extent that Morocco is a stakeholder in the future of leading Euro-Atlantic institutions such as the EU and NATO, these too may be negatively affected by an inward looking European decade, or a Europe that declines to invest in the hard security assets that underpin these institutions. Morocco derives a measure of strategic reassurance from the effectiveness of Euro-Atlantic security institutions, and close transatlantic relations more generally. What if these institutions and relationships atrophy in the face of an inward looking Europe? Morocco might well find itself called upon to play a more active and overt role in aspects of Atlantic security, including the maritime dimension.

Growing security concerns, including a new wave of terrorism in Europe seen as emanating from the Middle East and North Africa, could reinforce an arms-length approach to Morocco and the Maghreb. If the turmoil and transitions in Egypt, Libya, and Tunisia lead to sustained insecurity or regional chaos, this too could have an isolating effect. Algeria could be a leading variable in this context, as it was in the 1990s. Finally, an unsettled and insecure Europe could leave a vacuum in terms of investment in Africa, north and west, a vacuum that might be filled by China and other actors — not necessarily a negative development, but with rather different implications for regional development.

The factors working against an unsettled Europe of this kind would include a return to reasonable growth rates in Europe, a reinvigorated commitment to the EU as a political imperative in core Europe, a more cohesive European external policy, and not least, the successful, cooperative management of migration flows from and through the Mediterranean.

Europe Looks South

A contrasting future, with multiple positive consequences for Morocco and the neighborhood, assumes a more cohesive and prosperous Europe, with stronger ties to the United States and a well-financed and effective strategy toward the continent's southern neighborhood. The revolutions and crises around the Middle East and North Africa give Europe powerful incentives to develop a new approach to the South — toward the southern Mediterranean, but also toward Africa as a whole. But while the need to reinvent the Euro-Mediterranean partnership is widely acknowledged, this project also faces formidable obstacles, including financial constraints at a time of economic stringency. There will also be competing political and development priorities to Europe's east, where there remains much unfinished business in terms of reform and security. Nonetheless, if Europe moves toward a more concerted external policy, strategy toward the South will almost certainly be at the top of the agenda over the next decade.

Morocco is set to be a leading beneficiary of a more active European and transatlantic strategy for North Africa and the Mediterranean. Simply put, Morocco is consequential, a viable partner, and, in the view of most observers, has already embarked on some of the reforms Europe (and the United States) seek for the future of the region. The Euro-Atlantic option serves to set Morocco apart from its troubled neighbors. Tunisia and Egypt will also be on Europe's southern agenda; the former because it seems a manageable prospect for change, the latter because its scale makes it even more consequential for European interests and the future of the Middle East as a whole. Libya will be a special case, with strong incentives for Europe to remain engaged in the post-intervention reconstruction of the country, despite clear political and financial limits on attention. After Afghanistan and Iraq, it is unclear that key European countries, or the United States, will have the patience

for a protracted strategy of nation building. Unlike Morocco, all three countries will likely be fixed firmly in the Middle Eastern orbit as seen from Washington and Brussels.

What might flow from a scenario in which Europe and Euro-Atlantic institutions make a serious commitment to development and security in the South? A short list would include completion of a Mediterranean free trade area, with free access for agricultural products, in addition to advanced arrangements for people's mobility. This could also affect the propensity for private sector investment in the Maghreb, on a scale that might offset the daunting employment gap across the region. In security terms, this scenario could see a useful reinvention of the tentative NATO engagement with southern Mediterranean partners. This could imply moving beyond the Mediterranean Dialogue to more active Partnership for Peace-like cooperation in securing borders and addressing new and nontraditional risks (including those emanating from Latin America, West Africa, and maritime insecurity). In short, this is a future in which Morocco's existing and substantial links to Europe would be reinforced, and this, in turn, could bolster the country's financial and political position as a hub for cooperation in Africa and the Southern Atlantic.

New Atlanticism

The notion of a new approach to Atlanticism, with a more prominent southern and south-south dimension, is a key theme of this study. There are many reasons to desire and to anticipate a shift of this kind. But the likelihood of a new Atlantic future along these lines will be influenced by a number of variables. This scenario is unlikely to replace longstanding patterns of cooperation with Europe, or transatlantic relations in the more traditional sense. But under the right conditions, the southern Atlantic dimension could become more important for Morocco's future and contribute to a diversification of the country's external ties. Indeed, Morocco's interest in wider Atlantic strategy need not depend on European interest in this approach, and over time, the U.S. leg of this Atlantic triangle may actually turn out to be a more promising vehicle for promoting a new notion of Atlanticism.

The drivers of a new Atlantic future have been discussed earlier, but may be summarized as the rise of new actors — especially Brazil — changing patterns in energy and resource trade, new maritime and other infrastructure, and growing “Western,” particularly U.S., interest in a wider definition of Atlanticism. It is also worth noting some factors that could work against this scenario. These include instability flowing from old and new security risks around the southern Atlantic basin, the potential fragility of growth in key emerging economies, and southern wariness about closer political and security ties to northern actors. In this context, the evolution of Brazilian, and to a lesser extent South African, views will be critical.

It is also possible to envision a limited form of Southern Atlanticism, with growing commercial links both south-south and north-south, that stops short of more formal and systematic cooperation. Here, policymakers and others will simply pay more attention to the South, and think more imaginatively about transatlantic relations for the other half of the Atlantic space — a shift in mental maps rather than a change in policy *per se*. This, too, would be meaningful for Morocco to the extent that it creates new frames for partnership and puts some distance between the country and the turmoil associated with North Africa and the Middle East. It will also offer new geometries in relations with traditional economic, political, and security partners on both sides of the Atlantic. Not least, this is an approach that can help to reinvigorate the Atlantic perspective in the face of rising attention to Asia, and the growing presence of China in the Atlantic world.

A Troubled Neighborhood

Closer to home, Morocco cannot ignore the potential for a more troubled and insecure future in the Maghreb and West Africa. Algeria will be a leading variable, although not the only one. Continuing socio-political and economic crises throughout the region could have an isolating effect, and would inhibit many of the integrative schemes discussed in this analysis. Borders would remain closed, infrastructure projects would be put on hold, investors and tourists would be discouraged, and Europe and the United States might come to see the region as too difficult a challenge. Chaotic conditions may also serve as a magnet for other external actors, including violent nonstate actors, some of which

are already established in the region. Morocco would be affected by these conditions even if the country itself remained stable and prosperous. The risk of spillovers, both physical and perceptual, is substantial.

The events of 2011 have raised the stakes considerably by demonstrating the potential for rapid and unpredictable change. The uncertain future of both Egypt and Libya is particularly worrisome given the very real potential for protracted instability and civil strife. Other risks may flow from West Africa, where the potential for political, ethnic, and sectarian violence and transnational criminality is already evident. Under these conditions, there is also a greater likelihood of uncontrolled migration flows through Morocco and onward to Europe, further complicating an already difficult north-south dialogue on refugees, economic migrants, and human security. Taken together, developments of this kind would foster a climate in which security considerations drive bilateral relations as well as north-south and south-south relations. Under these conditions, greater regional integration and wider Atlantic ties would be difficult or impossible to pursue.

What can be done to hedge against a scenario of this kind? Operationally, the risk of instability on or across Morocco's borders should put a premium on the ability to make such risks visible and transparent, including an improved capacity for intelligence, surveillance, air and maritime sovereignty, and warning. These are technical challenges, but they also imply expanded political and security cooperation with neighbors, where possible, and European and Atlantic security partners.

In a strategic sense, the key hedges are likely to be economic. First, to the extent that new regional projects, even of a modest kind, can be developed, this will extend the political constituency for cooperation (Algeria is the obvious case, but there are opportunities in West Africa, too) and reduce the likelihood that incidents will spark more serious bilateral or regional conflicts. Greater energy trade and interdependence is a leading example. Second, the risk of regional instability and further deterioration in the already troubled climate for cooperation in the Maghreb only reinforces the logic of other geometries as a hedge. Europe is an obvious angle, together

with an expanded agenda for cooperation with North America. But the wider Atlantic vocation also becomes meaningful in this context, and is arguably the facet of relations least likely to be captured by security considerations.

An Integrated Neighborhood

The opportunity costs imposed by the extremely limited nature of trade, investment and other forms of cooperation within the Maghreb has been well documented. The core bilateral disputes between Algeria and Morocco often seem intractable. But it is possible to imagine circumstances that would transform this picture, in whole or in part. The key variable will be the future of Algerian politics and governance, a topic largely beyond the scope of this analysis. Observers of the Maghreb scene and regional business leaders have long been aware of the potential for change. A new generation of economic elites appears to have a stronger interest in *détente* with Morocco, and sees the potential in an open border. In the wake of recent events, more focused European and U.S. strategies toward the region will almost certainly feature an overt interest in promoting regional integration through investment and other levers. Even the potential for sharp political change and a reformist outlook in Algiers cannot be dismissed. In short, the persistence of political obstacles to regional integration cannot be assumed over the next decade.

What would a shift of this kind imply? At a minimum, it would greatly increase the prospects for completion of some of the most prominent infrastructure schemes, above all, the Trans-Maghreb Highway. It could also pave the way for greater energy trade and economic complementarity between Morocco and Algeria. The prospects for stability, reconstruction, and development in Libya and Tunisia would improve. Perhaps most significantly, open borders would alter the European, U.S., and Gulf states' outlook toward the region in subtle and not so subtle ways, enhancing the prospects for a durable and well-financed strategy toward the region. All of which could make Morocco and its neighbors more interesting partners for African and Latin America actors over the longer-term — a regional transformation with extra-regional consequences. Maghreb integration along the main Algeria-Morocco axis could also reinforce the prospects for wider

Atlanticism by creating an economic pole in North Africa capable of real Atlantic projection. Some argue that Algeria's interest in the Western Sahara is at least partly linked to a desire for access to the Atlantic.

Again, these scenarios are simply illustrative of various potential paths for Morocco's neighborhood, its near abroad (Europe, West Africa), and southern Atlantic partners. They point to some of the geopolitical dynamics at work, and the likely interplay of local, regional, and global forces. Reality is unlikely to be so clear-cut. Morocco and its international partners are most likely to confront a strategic environment with multiple influences and unpredictable wild cards, transforming events both positive and negative. A short list of the wild cards likely to be most significant for the future evolution of Morocco's geopolitics would include a new global financial crisis that would inhibit new Atlantic projects and reinforce nativist and nationalist trends in the neighborhood, north and south, and limit U.S. activism; a sudden opening of the Algerian system, and a *détente* in relations between Rabat and Algiers; a new period of violent upheaval in Algeria; or a major terrorist incident affecting north-south and Muslim-Western relations. It is evident that while there is scope for specific developments reinforcing more positive scenarios, Morocco faces an environment in which many of the longer-term trends are positive and many of near-term "wild cards" are negative. Clearly, greater integration and multiple geometries in external strategy are likely to pay dividends as drivers of development and security, and hedges against near-term instability.

Conclusions and Policy Implications

Our analysis of Morocco's new geopolitical environment suggests a number of conclusions and policy implications for the country and Morocco's international partners.

First, recent events underscore the reality that stability in Morocco's neighborhood cannot be taken for granted, and the pace of change may be uncomfortably quick. Above all, Rabat will be affected by the potential for further turmoil in the country's near abroad — the Maghreb and West Africa. The revolt in Libya and the fall of the Gaddafi regime is likely to leave that country with an uncertain path to stability and reconstruction, and perhaps years of instability. The reservoir of potential instability in Algeria is substantial, and a crisis there, by virtue of its proximity and effect on other Moroccan interests, could have significant and direct consequences for Moroccan security and prosperity. The implications of protracted instability in the Maghreb would be substantial, adding to the opportunity costs of poor integration in the region, and strengthening the logic of an Atlantic vision. The potential for a positive revolution in cross-border relations, to parallel the political changes occurring across the region, exists and would be transforming — but it remains a potential development rather than a near-term reality.

Second, by virtue of their scale and relative stability, the existing economic and strategic ties to Europe and, secondarily, to the United States, will remain critically important. There is little in our analysis to suggest a decrease in the importance of these connections, at least in absolute terms. That said, their weight in Morocco's international engagement may vary in relative terms with the rise of ties elsewhere, from Africa to Latin America, and by Europe's resilience, or lack thereof, in dealing with a pervasive and debilitating economic crisis. The revolutionary developments in the Middle East and North Africa pose some risks for Morocco, but to the extent that they spur a revolution in European and U.S. attention to the region, Morocco may well benefit. In particular, Morocco will be a leading stakeholder in any wholesale re-invention of Euro-Mediterranean strategy, through the Union for

the Mediterranean, or completely new initiatives. Indeed, Morocco, along with Egypt and Tunisia, is likely to be a leading beneficiary of reshaped aid, trade, and security relations. A European neighborhood strategy of “more for more” is likely to favor Morocco. That said, there are some risks on the horizon, including some emanating from Europe, where crises in southern Europe, financial stringency, and the rise of xenophobic politics could threaten the Moroccan interest in an open and internationally engaged Europe. Europe may well aim at “more for more,” but will it be willing or able to put more on the table?

Third, given the uncertainties around the prospect of Maghreb integration, it is natural that Morocco should seek alternative geometries in its international policy and economic development. Some of these new geometries will emerge within the neighborhood, above all in West Africa, where new infrastructure could open opportunities for economic development, with Morocco as a hub for integration and commerce in the region. As in the Maghreb, much will depend on the outlook for stability, access to international finance, and attitudes toward cross-border cooperation. And if the political situation in the Maghreb allows, the potential exists for regional integration over a much wider space — from Cairo to Lagos. Indeed, regional rather than purely bilateral initiatives may be the hallmark of future cooperation in the neighborhood.

Fourth, and looking beyond the immediate neighborhood, the area with the greatest future potential for Morocco as an international actor will be the wider Atlantic, including the southern Atlantic *per se*. For various historical reasons, the southern basin of the Atlantic has featured less prominently in modern transatlantic relations and international affairs. This may be changing. From the rise of Brazil, South Africa, Nigeria, and even Angola as emerging economies, to developments in offshore energy production and trade, the notion of southern, or more properly, *wider* Atlanticism may finally come to the fore. It will not replace the weight of transatlantic relations on a north-north axis, but it could mean a marked diversification of geopolitics and geo-economics around the Atlantic space. Many of the key trends affecting global economics and security are being played out to the south of the prevailing Washington-Brussels axis. At a minimum, this prospect will give greater weight to north-

south and south-south relations, and Morocco is well placed to serve as a hub in this wider Atlantic world — in logistical terms, but also in terms of the evolving mental maps of policymakers.

Infrastructure will matter in this new environment. The eventual completion of the Trans-Maghreb Highway would be the cornerstone of an integrated Maghrebi economic space, if regional politics permit. Similarly, trans-Sahara pipelines and highways would extend this space to West Africa, and create new avenues for energy and nonenergy trade. High-speed rail is part of this equation, along with undersea fiber optic cables and high efficiency, high voltage electric power transmission lines. Many of these elements are being developed on a national basis, but they can also be part of a larger system for regional trade and development, looking ahead. In the maritime and air spheres, the potential for Morocco to serve as a hub is already at hand. The Tanger-Med container port is well placed to serve both east-west and north-south trade, and is especially well located to serve a wider Atlantic shipping system. Morocco is also fast becoming a leading hub for air travel and transport to and from Africa, in much the same way that Dubai serves the Middle East and South Asia, and Istanbul serves Eurasia. Continued progress in the realm of infrastructure may be the leading vehicle for Morocco to strengthen its role in West Africa, the Mediterranean, the Atlantic, and potentially the Maghreb.

Fifth, there is a dark side to this new Atlantic geopolitics. The southern basin of the Atlantic lacks the high-stakes flashpoints and organizing conflicts of Asia and the Indian Ocean. But there are many unresolved disputes, political cleavages, and persistent suspicions. U.S. policy is unformed, and the assumptions that guide what policy does exist are often outdated caricatures. At a minimum, these can impede regional cooperation and wider Atlantic initiatives. In the worst case, they can produce crises affecting energy, human, and border security. A concrete example can be seen in the new Atlantic character of the international drug trade, and the related spread of criminality and terrorism. Morocco is highly exposed to the consequences of this new system of trafficking from Latin America to Europe via West Africa and the Sahel. Dealing with this phenomenon is an inherently

multinational endeavor in which wider Atlanticism faces a concrete test.

Finally, these new facets of the strategic environment are likely to bring Morocco into closer contact with, and give Rabat an increasing stake, in the behavior of global actors such as China, India, and South Africa — all relative newcomers to the Atlantic system. Brazil, an old Atlantic actor, but with a new ability to project its power and influence, will also be part of this equation. New actors will need to be understood and accommodated, alongside traditional Atlantic powers such as the United States and Europe. Future patterns of cooperation and conflict among these new Atlantic actors may also affect Moroccan interests.

Some Policy Directions

These overall conclusions suggest some more specific policy implications; developments to anticipate, reinforce, or hedge against in Morocco's international strategy. These points are also relevant to the policy concerns of Morocco's transatlantic partners, and can be discussed in terms of core, environment shaping, and hedging strategies.⁴⁶ Here, the "core" refers to key policy objectives — "must do" items on Morocco's policy agenda. "Environment shaping" includes actions aimed at achieving the core objectives, or making their accomplishment more likely. "Hedging" refers to strategies that can minimize the consequences of failure or reversals in the policy environment.

Core Elements

- *Consolidate relations with the EU and capture the potential gains from a reshaped European approach to its southern neighborhood.* This remains the center of gravity in economic, political, and security terms. These are the core relationships from which other excursions can be pursued, and which new regional geometries can actually reinforce. There is now a window for Rabat to press its own ideas on this front with interlocutors in Brussels and key national capitals. Institutions

⁴⁶ This three-level approach to strategic planning is adapted from a methodology employed in various RAND studies in the 1990s. It is especially well suited to planning when external variables are an important part of the picture.

with a growing role, including the European Parliament, should be priorities for engagement.

- *Encourage policymakers in the United States and Europe to think more imaginatively about Morocco's role in the Atlantic and elsewhere.* In particular, officials and observers should be spurred to revise their mental maps to put the country's role as an Atlantic hub at the core. The tendency to place Morocco, institutionally and intellectually, in a "MENA" frame can be an obstacle. For this reason, initiatives oriented toward the Middle East and the Gulf, including the question of Moroccan membership in the GCC, should be treated with caution in the absence of a strong material and political rationale. At the same time, Morocco is well placed to serve as an intellectual as well as a physical hub, with a special focus on issues affecting development and security around the Atlantic basin.
- *Take a leading role in thinking about the Atlantic future.* As a key stakeholder in the new Atlanticism, Morocco's officials should make scenario planning a routine part of their strategic thinking. Scenarios, as noted, are not predictive or exclusive. But they do help to reveal powerful driving forces of change and transformation, challenges and opportunities, as well as their strategic implications and policy relevance, which are often lost in conventional analysis. In a broader sense, Morocco can take the lead in convening and networking around the idea of wider Atlanticism and its policy implications in key sectors.

Environment Shaping

- *Focus on infrastructure, especially in the maritime and air realms where the regional political obstacles are minimal.* These are the elements that create the necessary physical links to encourage a more diverse Moroccan engagement with the global economy, and in particular, Morocco's ability to serve as a hub for the region and the wider Atlantic. Ideally, national investments in road and rail infrastructure can eventually contribute to wider regional integration in the Maghreb and West Africa. The completion of the much-discussed Trans-Maghreb Highway should be a key objective.

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- *Anticipate energy security developments in the Atlantic basin.* Trends in energy trade and investment, offshore and shale gas production, and environmental policy may or may not add up to the emergence of an Atlantic energy “system,” but they will be consequential for global energy security and Morocco’s own development. There will be multiple opportunities for Morocco to participate in this increasingly significant Atlantic energy picture, and these will contribute directly to Morocco’s Atlantic vocation. Morocco’s large-scale investment in renewable energy production, and potential regional cooperation in this area, will be one key initiative.
 - *Work with partners in West Africa and Latin America to address the growing problem of trans-regional criminality in the Atlantic space.* In the absence of an effective regional — actually trans-regional — strategy to contain this problem, Morocco will face the prospect of an increasingly unstable hinterland in West Africa and the Sahel, a more difficult relationship with European neighbors, and the threat of violent spillovers on Moroccan territory. As an exposed state with a stake in Atlantic cooperation, Rabat can take the lead in pressing for a multi-continent approach to this problem.
 - *Lead the regional debate on security sector reform and the control of potentially chaotic spaces.* In a related fashion, a successful regional strategy for Morocco will be influenced by the nature and effectiveness of civil-military relations and security establishments across the Maghreb-West Africa space, especially in light of the revolutions and crises affecting the region. NATO is likely to make security sector reform in the southern Mediterranean a new focus for its Mediterranean Dialogue. Rabat can and should play an active role in this initiative, as well as similar efforts that may be launched by the EU. Human security, the control of borders, and air and maritime sovereignty and security should be priorities for cooperation.
 - *Foster conditions for internal development that will underscore the durability of Morocco’s distinctiveness, regionally and in the perception of Atlantic partners.* This analysis has not focused on Moroccan domestic policy. But in a period of rapid and

revolutionary change in the neighborhood, it is obvious that officials and observers will judge Morocco's potential to play new external roles in large measure on the basis of internal conditions. The success of Morocco's own reform efforts will be a key enabler in strengthening and diversifying Rabat's international position.

Hedging

- *Pursue a portfolio approach to Morocco's international engagement, including infrastructure investments.* Our discussion of possible geopolitical scenarios highlights the extraordinary flux in the strategic environment across multiple regions. These uncertainties can affect the viability of regional infrastructure as well as geopolitical relationships (consider the effect of a closure of the Suez Canal on transits through the Tanger-Med port). Morocco will need to balance its European, Maghrebi, Mediterranean, West African, and Atlantic relations to hedge against risks from any of these quarters. Diversification should be the order of the day.
- *To the extent that Morocco aims to reinforce its Atlantic strategy, closer ties with Brazil and key African states will be an essential component — and a hedge against potential U.S. and European reluctance.* This analysis suggests that there is every reason, in principle, for leading transatlantic partners to develop a stronger interest in wider Atlanticism, with a stronger north-south dimension. But strategic realities, from political distraction to resource constraints, may well limit U.S. and European initiatives in this sphere. In this case, Morocco can still benefit from closer commercial and political links to key emerging actors around the Atlantic basin, including Brazil and South Africa. Relations with the latter may be complicated by that country's stance on the Western Sahara issue. But if this question can be overcome, closer ties can pay dividends as South Africa comes to play a more active role on the international scene, not least because policies there may be central to the growing participation of China and India in the Atlantic space.

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