RESEARCH PAPER

FEBRUARY 2026

UNLOCKING THE SAHEL, RECONFIGURING THE WESTERN MEDITERRANEAN: MOROCCO'S ATLANTIC INITIATIVE AS AN INTEGRATION CORRIDOR

This Paper was originally published on orient-online.com

AMINE GHOULIDI AND RIDA LYAMMOURI

POLICY CENTER FOR THE NEW SOUTH

RP -02/26

POLICY CENTER FOR THE NEW SOUTH

The Western Mediterranean's exposure to the Sahel is usually framed in terms of security spillovers and crisis management. This paper argues that this framing misreads how Sahelian access conditions now shape Mediterranean integration. Morocco's Atlantic Initiative is a state-led corridor strategy combining Atlantic port infrastructure, inland transit routes, and energy systems to connect landlocked Sahelian economies to maritime access through Moroccan territory. Examining this initiative, the paper shows how Sahelian access conditions now shape routing decisions, risk pricing, and gateway hierarchies inside the Western Mediterranean itself. The Atlantic Initiative functions not as a development scheme or a basin institution, but as a corridor architecture designed to reduce the structural penalty of landlockedness and convert hinterland access into Mediterranean-relevant trade and energy flows. Its credibility rests on three elements: a scale-setting Atlantic gateway anchored at Dakhla, transit governance through Mauritania as a non-bypassable hinge, and demonstrable Sahel-side demand for diversified external access. Where these elements align, corridor reliability alters planning horizons and competitive dynamics well before trade volumes visibly rebase. The paper concludes that Mediterranean integration is increasingly produced through corridors that originate beyond the basin and re-enter it through gateway states.

AMINE GHOULIDI AND RIDA LYAMMOURI

I. INTRODUCTION

The Sahel has long been treated in Mediterranean policy and scholarship as a zone of externality rather than integration. Landlocked, politically fragile, and institutionally peripheral, it appears in Western Mediterranean debates mainly as a source of security spillovers, while its economic geography and access constraints are treated as secondary. That framing is no longer adequate. Sahelian access conditions now shape risk premia on trade routes, investment decisions, and mobility governance across the Western Mediterranean's southern flank. Morocco's Atlantic Initiative responds to this shift by advancing a state-led corridor strategy that seeks to internalize Sahelian access within Moroccan-controlled gateways. Articulated from late 2023 onward and operationalized through coordinated port, transport, and energy planning, the initiative targets the structural penalty of landlockedness by redirecting Sahelian connectivity toward the Atlantic through Moroccan territory.

Most existing commentary treats the Atlantic Initiative either as a Sahel-Saharan development project or as an Atlantic Africa integration scheme. Both framings are incomplete because they underestimate Morocco's role as a dual-coast interface economy whose gateway assets already operate at global scale. Tanger Med handled more than 10 million TEUs and over 140 million tons of cargo in 2024, confirming that Morocco is extending an existing gateway hierarchy rather than constructing a speculative platform. [1,2] The Atlantic Initiative builds on this baseline by extending Morocco's gateway function southward through Dakhla Atlantique, while deepening the Atlantic-Mediterranean interface through Mediterranean-facing infrastructure at Nador West Med. [3,4]

In this paper, "the Sahel" refers specifically to Mauritania, Mali, Niger, Burkina Faso, and Chad. These states share a common structural condition: high dependence on external transit routes to reach ports and energy markets, which exposes them to high transport costs and frequent disruption. The paper advances a single argument: Morocco's Atlantic Initiative functions as a mechanism of Western Mediterranean integration by proxy, operating not through new basin institutions or formal Mediterranean treaties, but through the reconfiguration of trade routes, gateway hierarchies, and energy optionality that follow when a corridor becomes credible. The relevant question is therefore not whether Sahelian trade volumes surge in the short term, but whether corridor reliability begins to alter how Mediterranean actors plan infrastructure, price risk, and allocate capacity.

This logic is politically and territorially plausible in a way that would not have held a decade ago. The initiative's flagship Atlantic infrastructure is located in Morocco's southern provinces, making the handling of Western Sahara a material condition for corridor credibility. United Nations Security Council Resolution 2797 (2025) establishes a negotiating framework that treats autonomy under Moroccan sovereignty as the most feasible basis for a political

1. "Tanger Med Port surpasses 10m TEU in 2024," Container Management (24 January 2025), https://container-mag.com/2025/01/24/tanger-med-port-surpasses-10m-teu-in-2024/

2."Tanger Med Slips to Second in Africa but Stays Among World's Top Five Ports," Morocco World News (September 2025), https://www.moroccoworldnews.com/2025/09/260431/tanger-med-slips-to-second-in-africa-but-stays-among-worlds-top-five-ports/

3."Morocco to begin tendering process for LNG terminal, minister," Reuters (21 April 2025), https://www.reuters.com/sustainability/boards-policy-regulation/morocco-begin-tendering-process-lng-terminal-minister-2025-04-21/

4."Morocco LNG terminal leaves it over-exposed to imports: experts," Gas Outlook, https://gasoutlook.com/analysis/morocco-lng-terminal-leaves-it-over-exposed-to-imports-experts/

settlement and mandates negotiations on that footing.[5] This framework lowers long-horizon uncertainty for infrastructure planning and third-party engagement. For corridor analysis, this reduction in political risk is decisive. Western Sahara therefore functions not as a detachable political footnote, but as a territorially anchored hinge that conditions whether Atlantic-Mediterranean spillovers can be treated as plausible rather than hypothetical.

This paper seeks to reframe Mediterranean integration away from basin-centric models toward a corridor-based understanding of interdependence, and demonstrates how Sahel access enters the Western Mediterranean system through gateway infrastructure and the governance demands that sustain it. Under this lens, Western Mediterranean integration cannot be understood solely through interactions among littoral states.

II. CONCEPTUAL FRAMEWORK: CORRIDOR INTEGRATION VERSUS BASIN INTEGRATION

Mediterranean integration is most often analyzed through a basin-centric lens. Across existing Mediterranean policy frameworks, integration is typically understood as a function of proximity to the sea, participation in shared institutions, and coordination among littoral states.[6] Within this view, integration deepens through formal platforms, regulatory alignment, and intergovernmental cooperation. While this approach has generated important insights into institutional design, it systematically underplays how connectivity beyond the coastline shapes integration outcomes in practice. Economic and security dynamics originating outside the basin are therefore treated as external pressures rather than as elements that actively structure Mediterranean interdependence.

This perspective obscures a central reality that is critical to this analysis. Mediterranean integration is increasingly driven by flows rather than by membership. Trade and energy move across the basin not because actors belong to Mediterranean institutions, but because infrastructure, logistics systems, and regulatory conditions make certain routes viable and others prohibitively costly. As connectivity, costs, and political risk change well beyond the basin itself, the Mediterranean's effective hinterland expands and contracts accordingly, even if its formal geography does not.

To capture these dynamics, this paper treats corridors as mechanisms of integration. Corridor integration occurs when a route becomes investable because transport costs and, crucially, uncertainty fall far enough to support scheduled commercial activity. The relevant indicators are practical rather than abstract: transit-time reliability, border dwell-time dispersion and insurability.[7] This lens is especially important for landlocked economies, where trade volumes respond more to transit governance and reliability than to tariff preferences.

Within this framework, "unlocking the Sahel" is not a rhetorical objective but a measurable economic process. Landlocked Sahelian states face a well-documented penalty arising from distance to maritime access and dependence on transit through neighboring countries,

5. United Nations Security Council, Resolution 2797 (2025) Adopted by the Security Council at its 10030th meeting, on 31 October 2025, https://docs.un.org/en/S/RES/2797(2025)

6. Council of the European Union and European Commission, Barcelona Process: Union for the Mediterranean, Summary of EU Legislation, EUR-Lex, accessed December 17, 2025, https://eur-lex.europa.eu/EN/legal-content/summary/barcelona-process-union-for-the-mediterranean.html

7. World Trade Organization, Easing Trade Bottlenecks in Landlocked Developing Countries (Geneva: World Trade Organization, December 8, 2021), accessed November 10, 2025, https://www.wto.org/english/res_e/booksp_e/00_landlocked2021_e.pdf ; Nuno Limão and Anthony J. Venables, Infrastructure, Geographical Disadvantage, Transport Costs, and Trade (Washington, DC: World Bank, 2001), accessed November 12, 2025, https://openknowledge.worldbank.org/server/api/core/bitstreams/43714eab-d8ca-5d65-a1b9-f749a3c010ee/content

with logistics costs often reaching 30 to 40 percent of import value.[8] This penalty is not simply geographic. It reflects compounded inefficiencies in infrastructure quality, border procedures, security conditions, and financing.

From a corridor perspective, unlocking the Sahel refers to reducing the cost and uncertainty associated with moving goods and energy between Sahelian economies and maritime gateways. This is achieved not through isolated projects, but through coherent corridor bundles that combine physical connectivity with predictable transit governance and risk mitigation. These bundles change expectations among firms, financiers, and logistics operators, often before large increases in trade or energy flows are observed. Integration effects therefore emerge first in planning behavior, investment decisions, and risk pricing, rather than in headline volume statistics.

This framework also clarifies where integration can fail. Because corridor-based integration depends on specific routes and nodes, it is vulnerable to breakdowns in transit governance, infrastructure sequencing, security conditions, or rivalry-driven fragmentation. These vulnerabilities do not invalidate the corridor logic; they define its limits. By foregrounding corridors rather than basin institutions, the analysis shifts attention from formal aspiration to practical plausibility. It is within this analytical frame that Morocco's Atlantic Initiative can be evaluated as a strategy capable of reshaping Western Mediterranean integration by altering access, routing, and risk, rather than by expanding institutional membership.

III. THE ATLANTIC INITIATIVE AS CORRIDOR ARCHITECTURE

Morocco's Atlantic Initiative is best understood as a corridor architecture rather than as a collection of discrete infrastructure projects. Its organizing logic is to reduce the structural penalty imposed by Sahelian landlockedness by assembling a system in which maritime gateways, inland connectivity, and transit governance reinforce one another. In practice, the corridor rests on four links: a scale-setting Atlantic gateway at Dakhla, redundant land access to Mauritania, Mauritanian transit and port services that stabilize variance, and a conversion spine into Morocco's Mediterranean logistics and gas infrastructure.[9]

For landlocked Sahelian economies, the landlockedness penalty is driven less by tariff regimes than by fragmented corridors, unreliable transit conditions, and weak logistics infrastructure.[10] Empirical analyses of African trade patterns consistently show that realized trade flows respond more strongly to corridor reliability and transit governance than to preferential trade arrangements.[11] The Atlantic Initiative therefore targets a binding structural constraint rather than a marginal policy variable, seeking to alter the conditions under which Sahelian economies connect to global markets.

Dakhla Atlantique functions as the Atlantic anchor of the corridor by establishing a southern

8. World Trade Organization, Easing Trade Bottlenecks in Landlocked Developing Countries (Geneva: World Trade Organization, December 8, 2021), accessed November 10, 2025, https://www.wto.org/english/res_e/booksp_e/00_landlocked2021_e.pdf

9. Nuno Limão and Anthony J. Venables, Infrastructure, Geographical Disadvantage, Transport Costs, and Trade (Washington, DC: World Bank, 2001), accessed November 12, 2025, https://openknowledge.worldbank.org/server/api/core/bitstreams/43714eab-d8ca-5d65-a1b9-f749a3c010ee/content

10. Rida Lyammouri and Amine Ghoulidi, *Morocco's Atlantic Initiative: A Catalyst for Sahel-Saharan Integration*, Policy Brief No. 68/24 (Rabat: Policy Center for the New South, December 2024), accessed November 12, 2025, https://www.policycenter.ma/sites/default/files/2024-12/PB_68-24_Rida%20Lyammouri.pdf

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

gateway designed to alter routing expectations. At roughly 35 million tons per year, its relevance is not early throughput but whether it enables scheduled maritime services, industrial adjacency, and predictable security provisioning on Morocco's southern coastline.[12] The corridor becomes real when Dakhla reduces variance enough for logistics services, insurance coverage, and project finance to scale.[13]

A defining feature of the Atlantic Initiative is that its viability cannot bypass Mauritania. Transit through Mauritanian territory and ports constitutes a structural hinge on which the corridor depends. Effective coordination with ports such as Nouakchott and Nouadhibou is therefore central rather than ancillary to the initiative's success.[14] Moroccan gateway capacity alone is insufficient to unlock Sahelian access. Corridor durability depends on incentive alignment across national jurisdictions, particularly with respect to transit procedures, port services, and security conditions along routes.

Evidence from Mauritania supports this hinge logic. Mauritanian port authorities have articulated a strategy to position Nouakchott as a transit and logistics connector between inland African markets and Atlantic shipping lanes, signaling an intention to capture value from corridor flows rather than merely to host them.[15] At the same time, Morocco has moved to expand and formalize its southern land corridors. The Guerguerat crossing has emerged as a significant trade node, facilitating more than one billion US dollars in Moroccan exports annually.[16] The opening of a second crossing at Amgala, together with the expansion of official checkpoints along the Morocco-Mauritania frontier, indicates a deliberate effort to scale corridor capacity, introduce redundancy, and reduce dependence on a single transit node. These measures point to corridor construction as an incremental process rather than a single-point intervention.

The Atlantic Initiative also enters an environment characterized by active corridor competition. For Mali, Dakar long handled the majority of trade flows, but this reliance proved vulnerable to political disruption, with traffic via Dakar declining sharply following the 2021 coup.[17] In response, trade was rapidly diverted toward alternative corridors through Conakry, Abidjan, and Lomé. During the ECOWAS embargo, Conakry's share of Malian trade rose markedly, aided by reductions in fees and clearance times, while Lomé consolidated its role as a dominant transit hub for Alliance of Sahel States members.[18] Sahelian demand for maritime access is active and responsive to changes in cost, reliability, and governance, underscoring that corridor credibility, not geography alone, determines routing outcomes.

The initiative's energy pillar centers on the African Atlantic Gas Pipeline linking Nigeria's

12. "AES Corridors: A New Rivalry with Traditional Trade Routes," Logistafrica, https://logistafrica.com/en/highlights/aes-corridors-a-new-rivalry-with-traditional-trade-routes/ ; Assahifa, "Politika: Dakhla Atlantic Port, Africa's New Gateway to the Ocean," 24 September 2024, https://www.assahifa.com/english/morocco/politika-dakhla-atlantic-port-africas-new-gateway-to-the-ocean/

13. Assahifa, "Politika: Dakhla Atlantic Port, Africa's New Gateway to the Ocean," https://www.assahifa.com/english/morocco/politika-dakhla-atlantic-port-africas-new-gateway-to-the-ocean/ ; MAP, "Royal Atlantic Initiative Is Visionary Approach Mobilizing New Potential for Cooperation, Co-development," 10 May 2024.

14. Rida Lyammouri and Amine Ghoulidi, "Morocco's Atlantic Initiative: A Catalyst for Sahel-Saharan Integration," December 2024, https://www.policycenter.ma/sites/default/files/2024-12/PB_68-24_Rida%20Lyammouri.pdf

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

16. "Morocco Builds an Empire in West Africa," Vizier, https://vizier.report/p/morocco-builds-empire

17. "AES Corridors: A New Rivalry with Traditional Trade Routes," Logistafrica, https://logistafrica.com/en/highlights/aes-corridors-a-new-rivalry-with-traditional-trade-routes/

18. Ibid.

gas base to Morocco via an Atlantic route across 13 states. As a corridor-scale project, its significance lies less in guaranteed delivery than in its capacity to function as a northbound energy backbone.[19] It would stitch fragmented coastal gas markets, support baseload power and industrial feedstock along the route, and give Morocco a hedge against single-corridor dependence after the Maghreb-Europe pipeline shutdown in 2021. Even before completion, the project's multi-state governance architecture and financing search can realign planning around grid extension, industrial siting, and future offtake, which is how energy corridors generate integration effects ahead of molecules.

Taken together, the Atlantic Initiative engages Sahelian demand for maritime and energy access through a corridor architecture whose credibility rests on three interlocking conditions: the availability of a scalable Atlantic gateway, effective transit governance through Mauritania, and demonstrable Sahel-side demand for diversified external connectors. Where these conditions align, the initiative reduces the structural penalty of landlockedness and establishes the preconditions for spillover effects into Mediterranean trade, energy, and governance systems. It is this system-level corridor configuration, rather than any single port or pipeline, that renders the Atlantic Initiative analytically relevant to Western Mediterranean integration.

IV. THE ATLANTIC-MEDITERRANEAN INTERFACE

The Atlantic Initiative generates Mediterranean effects not because it targets the Mediterranean directly, but because it is anchored in a state whose infrastructure system already links Atlantic and Mediterranean façades. Morocco occupies a structurally distinctive position as a dual-coast gateway state, and this internal continuity is the condition that allows Sahel unlocking to propagate into the Western Mediterranean system.

The interface is a domestic conversion spine: Atlantic reception, inland consolidation, then Mediterranean redistribution through a single jurisdiction that can align port operations, industrial zoning, and security provision. This is what makes Sahel access Mediterranean-relevant. It turns a hinterland problem into a routing choice that can plug into European-linked shipping and energy systems.

Within this architecture, Nador West Med occupies a pivotal role. Located on the Mediterranean coast, the port is being developed as a deep-water terminal with substantial industrial space and explicit energy infrastructure components. Moroccan authorities have moved to establish the country's first liquefied natural gas import terminal at Nador West Med in the form of a floating storage and regasification unit, with an indicative regasification capacity of approximately 0.5 billion cubic meters per year. [20] The terminal is designed to connect to the national gas network and adjacent industrial zones, positioning Nador as a Mediterranean-facing energy and logistics interface rather than as a stand-alone container facility. In corridor terms, Nador functions as the point at which Atlantic-origin access, whether in the form of energy options or processed goods, becomes integrated into Western Mediterranean systems.

19. Energy Partnership Morocco-Germany, "Nigeria-Morocco Gas Pipeline Finalises Route as Morocco Advances National Gas Infrastructure Plans," https://energypartnership.ma/news/default-26a64a8026238c37f7fe0d9dfb21b25b/

20. "Morocco to begin tendering process for LNG terminal, minister," Reuters, 21 April 2025, https://www.reuters.com/sustainability/boards-policy-regulation/morocco-begin-tendering-process-lng-terminal-minister-2025-04-21/ ; "Morocco LNG terminal leaves it over-exposed to imports: experts," Gas Outlook, https://gasoutlook.com/analysis/morocco-lng-terminal-leaves-it-over-exposed-to-imports-experts/

The LNG dimension is analytically central because it reshapes energy planning before any West African pipeline gas reaches Moroccan territory. Morocco's domestic gas consumption remains modest, but demand is projected to rise as coal-fired power generation is phased down and industrial gas use expands. [21] The sequencing of LNG infrastructure ahead of pipeline delivery is therefore significant. It reorganizes planning horizons and contractual expectations in advance of physical supply.

This interface must be situated against the baseline configuration of Western Mediterranean energy politics. The closure of the Maghreb-Europe Gas Pipeline in 2021 and Spain's subsequent reliance on the Medgaz pipeline and liquefied natural gas imports exposed the fragility of existing supply arrangements. In 2023, Spain imported approximately 11.9 billion cubic meters of Algerian gas via Medgaz supported by extensive LNG regasification capacity.[22] Since 2022, Morocco has imported LNG indirectly through Spain by reversing flows on the Maghreb-Europe pipeline, receiving approximately 9.7 terawatt-hours of gas in 2024, equivalent to around 0.9 billion cubic meters.[23] These flows establish Morocco as an active participant in Western Mediterranean gas circulation prior to the commissioning of its own LNG infrastructure, rather than as a future entrant.

The port dimension of the Atlantic-Mediterranean interface operates according to a similar logic. Moroccan Mediterranean ports, including Nador West Med and Tanger Med, are structurally connected to Atlantic gateways through domestic logistics corridors and industrial networks. As Sahelian access to Atlantic routes becomes more reliable, gateway functions increasingly concentrate in ports capable of offering scale, predictability, and integration into European shipping networks. Integration in this configuration becomes less a function of littoral status and more a function of gateway performance. Ports that can combine Atlantic access with Mediterranean connectivity acquire strategic weight, while others face pressure to specialize or reposition within a competitive basin.

The Atlantic-Mediterranean interface also generates governance externalities that extend into the Mediterranean space. As corridors channel trade and energy toward Moroccan gateways, demands increase for customs coordination, port security, and maritime awareness. Disruptions along Atlantic-facing segments do not remain localized. They propagate into Mediterranean markets through delays, risk premia, and contingency routing. Corridor integration is therefore inseparable from the governance capacity that sustains it, and Atlantic-side vulnerabilities acquire direct Mediterranean relevance as reliance on interface infrastructure deepens.

Finally, this interface rests on a stabilized territorial context. The initiative's flagship Atlantic gateway is located in Morocco's southern provinces, and recent diplomatic developments have lowered long-horizon uncertainty for infrastructure planning and third-party engagement. For corridor analysis, this reduction in political risk is decisive. It transforms the Atlantic-Mediterranean interface from a speculative configuration into a plausible conduit through which Sahelian access can generate durable Mediterranean effects.

21. Ibid.

22. "Spain's Role as a Natural Gas Importer and Re-Exporter," RBAC Inc., https://rbac.com/spains-role-as-a-natural-gas-importer-and-re-exporter/

23. "Morocco LNG Terminal Leaves It Over-Exposed to Imports: Experts," Gas Outlook, May 2025, https://gasoutlook.com/analysis/morocco-lng-terminal-leaves-it-over-exposed-to-imports-experts/.

V. MEDITERRANEAN SYSTEM EFFECTS OF SAHEL UNLOCKING

Sahel unlocking matters to the Western Mediterranean because it changes routing economics and risk pricing on the basin's western flank without formal enlargement. The system adjusts through marginal reallocation of traffic, capacity reservation, and energy planning long before trade volumes visibly rebase. The Atlantic Initiative is consequential because it creates a credible new set of options.

This adjustment occurs within a basin that is already structurally fluid. Western Mediterranean ports operate in a competitive transshipment environment marked by volatility rather than steady expansion. Recent stagnation and redistribution across major ports underscore that gateway hierarchy in the basin is not fixed, but sensitive to marginal changes in routing and carrier strategy.[24] This reshapes the competitive field by introducing new options for consolidation, transshipment, and risk management.

The first system effect concerns gateway hierarchy. As Sahelian access to Atlantic maritime routes becomes more reliable, gateway functions increasingly concentrate in ports capable of offering scale and predictability while interfacing smoothly with European shipping networks. Morocco is positioned unusually well because it combines Atlantic access and Mediterranean connectivity within a single national logistics system. This lowers coordination costs across gateways and allows Moroccan ports to function as conversion points where Sahel-origin flows can be consolidated or redirected into Mediterranean routes. The operative mechanism is not large-scale diversion from any single port, but marginal reallocation. In a basin already characterized by volatile transshipment patterns, small changes in perceived reliability can accelerate differentiation among gateway and transshipment functions.

A second effect concerns the extension of the Mediterranean's functional hinterland. Sahelian economies are not passive transit spaces; their trade patterns respond sharply to changes in corridor reliability, as demonstrated by rapid rerouting during periods of political disruption in West Africa.[25] As firms and intermediaries begin to treat Sahelian markets as accessible through Moroccan gateways rather than exclusively through Gulf of Guinea routes, the Western Mediterranean's economic hinterland extends southward through corridor logic rather than territorial inclusion.[26]

Energy-system effects operate primarily through optionality. The development of LNG import infrastructure at Nador West Med, combined with Morocco's rising gas demand and its existing participation in Western Mediterranean gas circulation via Spain, reshapes

24. inforMARE, "In 2023, cargo traffic in the port of Genoa decreased by -4.1% and in the port of Savona-Vado it fell by -2.5%," 5 March 2024, https://www.informare.it/news/gennews/2024/20240331-porti-Genova-Savona-Vado-traffico-Y-2023uk.asp.; Kyriacos Nicolaou, "EU Sea Port Freight Stagnates as Volumes Remain Below 2019 Peak," Cyprus Mail, December 9, 2025, https://cyprus-mail.com/2025/12/09/eu-sea-port-freight-stagnates-as-volumes-remain-below-2019-peak

25. "AES Corridors: A New Rivalry with Traditional Trade Routes," Logistafrica, https://logistafrica.com/en/highlights/aes-corridors-a-new-rivalry-with-traditional-trade-routes

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

planning horizons before any West African pipeline gas arrives.[27] Infrastructure and contractual arrangements reorganize expectations in advance of physical supply. Its progress matters because it changes what Iberian and Moroccan planners can credibly model as future supply and transit options, directly affecting contracts, grid extensions, and industrial siting decisions.[28] For Western Mediterranean actors, this shifts how diversification narratives, investment sequencing, and bargaining positions are assessed.

Industrial and value-chain effects follow from corridor credibility rather than from trade volumes alone. When access becomes predictable, processing, storage, and logistics functions can locate closer to interfaces that combine maritime connectivity with energy availability and industrial space. Morocco's port-industrial configurations, together with Sahelian export-oriented sectors such as mining and hydrocarbons, create feasibility conditions for partial reorganization of value chains toward Moroccan gateways.[29] This is not a claim about inevitable industrial relocation. It is a structural claim about expanded option sets. Corridor credibility widens the range of locations that firms consider viable for intermediate processing and consolidation within Western Mediterranean-linked supply chains.

Governance and security externalities intensify as corridor use scales. Even where initial volumes remain modest, reliance on corridor infrastructure increases sensitivity to disruption. Delays, informal practices, and weak interoperability along inland routes translate into risk premia that propagate downstream.[30] At sea, gaps in information sharing and maritime awareness along Atlantic-facing segments acquire Mediterranean relevance as trade and energy interfaces become more interdependent.[31] In this configuration, corridor integration is inseparable from governance capacity. Weaknesses along one segment are transmitted across the system through insurance costs, contingency routing, and capacity reservation behavior.

A final effect concerns governance bargaining rather than outcomes. Sahel unlocking does not mechanically reduce irregular mobility pressures, nor does this analysis treat migration flows as a predictable function of connectivity. The relevant implication is positional. States that control key gateways and transit nodes acquire greater leverage in negotiations over border management, returns, and funding, because they sit astride infrastructure that conditions both trade and mobility routes. This leverage is structural rather than instrumental. It derives from corridor centrality rather than from deliberate linkage.

---

27. Ahmed Eljechtimi, "Morocco to Begin Tendering Process for LNG Terminal, Minister Says," Reuters, April 21, 2025, https://www.reuters.com/sustainability/boards-policy-regulation/morocco-begin-tendering-process-lng-terminal-minister-2025-04-21/ ; RBAC Inc., "Spain's Role as a Natural Gas Importer and Re-Exporter," https://rbac.com/spains-role-as-a-natural-gas-importer-and-re-exporter/ ; Gas Outlook, "Morocco LNG terminal leaves it over-exposed to imports: experts," https://gasoutlook.com/analysis/morocco-lng-terminal-leaves-it-over-exposed-to-imports-experts/

28. Energy Partnership Morocco-Germany, "Nigeria-Morocco Gas Pipeline Finalises Route as Morocco Advances National Gas Infrastructure Plans," https://energypartnership.ma/news/default-26a64a8026238c37f7fe0d9dfb21b25b/ ; S&P Global Commodity Insights, "CERAWEEK: FID expected on Nigeria-Morocco gas pipeline by year-end, NNPC head says," 20 March 2024, https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/natural-gas/032024-ceraweek-fid-expected-on-nigeria-morocco-gas-pipeline-by-year-end-nnpc-head-says

29. U.S. International Trade Administration, "Mali Country Commercial Guide: Mining," 6 June 2024, https://www.trade.gov/country-commercial-guides/mali-mining ; Alex Kimani, "Niger Aims to Become Major Oil Exporter," 19 August 2024, https://oilprice.com/Energy/Crude-Oil/Niger-Aims-to-Become-Major-Oil-Exporter.html

30. Globalia Logistics Network, "How freight forwarders in Africa are powering inland logistics," 18 June 2025, https://blog.globalialogisticsnetwork.com/2025/06/18/inland-logistics-in-africa-building-a-seamless-network/ ; Logistafrica, "AES Corridors," https://logistafrica.com/en/highlights/aes-corridors-a-new-rivalry-with-traditional-trade-routes/

31. Christian Bueger, Developing blue economy, addressing maritime insecurities: information sharing for the Atlantic (Digital Atlantic Initiative, 2024); Christian Bueger, Information Sharing for the Atlantic: Strengthening Maritime Domain Awareness (ABI-HSWG Policy Brief, 2024).

These system effects remain conditional. They intensify only if corridor credibility is sustained through transit governance, financing discipline, and risk management. Where these conditions weaken, integration effects attenuate or reverse. The Atlantic Initiative therefore reshapes Western Mediterranean integration not by guarantee, but by altering the configuration of incentives and options through which integration now occurs.

VI. CONSTRAINTS AND FAILURE MODES

The Atlantic Initiative's capacity to reconfigure Western Mediterranean integration is conditional rather than automatic. Corridor architectures generate integration effects only insofar as political, financial, and governance constraints are managed across their full length. Failure at specific nodes does not merely slow progress. In practice, failure shows up first as rising transit-time variance, higher insurance and security costs, and widening border dwell-time dispersion. Identifying these failure modes is therefore essential to assessing the durability of the integration effects outlined above.

The first and most immediate constraint concerns transit governance through Mauritania. The Atlantic corridor cannot bypass Mauritanian territory or ports, which makes alignment between Moroccan gateway ambitions and Mauritanian transit incentives decisive.[32] While Mauritanian authorities have articulated a strategy to position Nouakchott as a logistics connector between inland African markets and Atlantic shipping lanes, strategic intent does not automatically translate into predictable transit conditions.[33] Corridor viability depends on sustained coordination over customs procedures, fee structures, and security practices. Administrative bottlenecks, informal barriers, or localized insecurity along this segment would fragment the corridor and reinstate the landlocked penalty the initiative seeks to reduce.

A second constraint arises from financing and sequencing risk across heterogeneous infrastructure components. Deep water ports, LNG terminals, domestic gas grids, and transcontinental pipelines differ sharply in capital intensity, timelines, and exposure to political and market risk. Partial build out is therefore likely. While incomplete delivery can generate localized benefits, mismatches between gateway capacity, hinterland connectivity, and energy offtake dilute corridor coherence and limit system effects. The risk is not underinvestment per se, but misalignment across components that are intended to function as an integrated architecture.

Energy infrastructure introduces a distinct failure mode related to timing and market structure. The African Atlantic Gas Pipeline is institutionally active but remains a long horizon project subject to political, financial, and security risks across multiple jurisdictions.[34] Even if completed, its relevance to European markets will depend on demand trajectories shaped by decarbonization policies, alternative supply routes, and evolving regulatory frameworks. The principal risk is not non delivery, but delivery into a market whose structure has shifted. In such a scenario, energy optionality may persist, but its integration effect within the Western Mediterranean would be attenuated.

32. Fadoua Ammari and Rida Lyammouri, "The Atlantic Initiative and Morocco-Mauritania Relations," 12 September 2025, https://www.policycenter.ma/publications/atlantic-initiative-and-morocco-mauritania-relations

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

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

Regional rivalry and counter corridor dynamics constitute a further constraint. Corridor architectures rarely operate in a neutral geopolitical environment. The Western Mediterranean is shaped by sustained competition between Algeria and Morocco, which has already influenced energy transit arrangements and diplomatic alignments.[35] Alternative routes through existing North African corridors or Gulf of Guinea ports can dilute volumes, political buy in, and investor attention directed toward the Atlantic Initiative. Fragmentation does not require overt obstruction. It can emerge incrementally through diversion of capital, regulatory preference, or carrier strategy, weakening integration effects without halting projects outright.

Governance capacity represents another critical failure node. As corridor use scales, exposure to risk increases across maritime, logistical, and digital domains. Demands intensify for customs interoperability, port security, and infrastructure protection.[36] Current Atlantic facing governance arrangements remain fragmented, with limited mechanisms for systematic information sharing and coordinated response. Where governance capacity lags behind infrastructure expansion, risk premia rise, insurance costs increase, and corridor credibility erodes. Under these conditions, disruptions along Atlantic facing segments propagate into Mediterranean supply chains and energy planning, generating negative spillovers rather than integration gains.

Finally, political volatility within Sahelian states themselves constrains corridor durability. While demand for maritime access is evident, export regimes and regulatory frameworks remain vulnerable to abrupt policy shifts, nationalization pressures, and security disruptions. Episodes such as sudden export restrictions or contract renegotiations illustrate how quickly corridor assumptions can be undermined at the origin point.[37] Corridors depend not only on physical access but on predictable rules governing what moves through them. Instability at the source weakens downstream integration effects regardless of gateway capacity.

Taken together, these constraints clarify that the Atlantic Initiative does not guarantee Western Mediterranean integration outcomes by default. It establishes a corridor architecture whose performance depends on transit governance, financing discipline, energy market timing, rivalry management, governance capacity, and political stabilization over time. Where these conditions hold, integration effects propagate through gateways and planning horizons. Where they fail, corridor logic collapses back into fragmentation.

35. Amine Ghoulidi, "Ending in Rabat": France's Moroccan Pivot and the Future of Western Sahara, Commentary (The Heritage Foundation, September 12, 2024), accessed December 10, 2025, https://www.heritage.org/global-politics/commentary/ending-rabat-frances-moroccan-pivot-and-the-future-western-sahara

36. Christian Bueger, Information Sharing for the Atlantic: Strengthening Maritime Domain Awareness (ABI-HSWG Policy Brief, 2024).

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

VII. CONCLUSION

This paper has argued that Morocco's Atlantic Initiative reshapes Western Mediterranean integration not by extending existing basin frameworks, but by altering the structural conditions through which integration now occurs. By targeting the landlocked penalty of the Sahel through a corridor architecture anchored in Moroccan Atlantic gateways and linked to Mediterranean-facing infrastructure, the initiative expands the Mediterranean's functional hinterland without formal enlargement. The stakes are practical: corridor credibility in the Sahel changes how the Western Mediterranean allocates capacity, prices risk, and negotiates energy and border governance.

The analysis has shown that these effects operate through identifiable mechanisms. Corridor credibility reorders gateway hierarchies in a Western Mediterranean basin already characterized by volatile transshipment patterns. Trade and logistics behavior adjust as Sahelian firms and intermediaries reassess routing options based on reliability and risk rather than proximity alone. Energy planning incorporates new forms of optionality as LNG infrastructure, long-horizon pipeline projects, and cross-basin gas circulation reshape expectations before physical supply materializes. Governance demands intensify as corridor use increases exposure to disruption across inland and maritime segments.

The plausibility of these integration effects rests on a political and territorial context that has evolved in ways often underappreciated in Mediterranean analysis. The initiative's core Atlantic infrastructure is anchored in Morocco's southern provinces, making the management of Western Sahara a material condition for corridor credibility. Recent diplomatic developments have reduced long-horizon uncertainty sufficiently to enable infrastructure planning and third-party engagement at scale, even in the absence of a final legal settlement. In corridor terms, this stabilization transforms a residual political risk into a territorially anchored hinge through which Atlantic–Mediterranean spillovers become plausible rather than speculative.

At the same time, the paper has identified clear constraints and failure modes. Corridor performance depends on sustained transit governance through Mauritania, disciplined financing and sequencing of heterogeneous infrastructure, careful management of regional rivalry, adequate governance capacity, and political stability at origin points. Where these conditions weaken, integration effects attenuate or reverse. The Atlantic Initiative therefore does not guarantee Western Mediterranean integration outcomes. It conditions them by reshaping incentives, expectations, and option sets.

The broader implication is analytical. Mediterranean integration can no longer be treated as a closed, basin-bounded process explained primarily through institutional design among littoral states. It is increasingly shaped by corridors that originate beyond the sea itself and re-enter the basin through gateway states capable of converting access into systemic effects. Morocco's Atlantic Initiative illustrates how hinterland unlocking, when coupled with interface infrastructure and political risk recalibration, can reconfigure the Western Mediterranean system. Future analysis of Mediterranean integration will need to take these corridor-driven dynamics seriously if it is to capture how integration now occurs in practice.

BIBLIOGRAPHY

1. "Tanger Med Port Surpasses 10m TEU in 2024," *Container Management*, January 24, 2025, https://container-mag.com/2025/01/24/tanger-med-port-surpasses-10m-teu-in-2024/ .

2. Sara Zouiten, "Tanger Med Slips to Second in Africa but Stays Among World's Top Five Ports," *Morocco World News*, September 24, 2025, https://www.moroccoworldnews.com/2025/09/260431/tanger-med-slips-to-second-in-africa-but-stays-among-worlds-top-five-ports/.

3. Ahmed Eljechtimi, "Morocco to Begin Tendering Process for LNG Terminal, Minister Says," *Reuters*, April 21, 2025, https://www.reuters.com/sustainability/boards-policy-regulation/morocco-begin-tendering-process-lng-terminal-minister-2025-04-21/ .

4. "Morocco LNG Terminal Leaves It Over-Exposed to Imports: Experts," *Gas Outlook*, May 2025, https://gasoutlook.com/analysis/morocco-lng-terminal-leaves-it-over-exposed-to-imports-experts/ .

5. United Nations Security Council, *Resolution 2797 (2025)*, adopted October 31, 2025, https://docs.un.org/en/S/RES/2797(2025) .

6. Council of the European Union and European Commission, *Barcelona Process: Union for the Mediterranean*, Summary of EU Legislation, EUR-Lex, accessed December 17, 2025, https://eur-lex.europa.eu/EN/legal-content/summary/barcelona-process-union-for-the-mediterranean.html .

7. World Trade Organization, *Easing Trade Bottlenecks in Landlocked Developing Countries* (Geneva: World Trade Organization, December 8, 2021), https://www.wto.org/english/res_e/booksp_e/00_landlocked2021_e.pdf .

8. Nuno Limão and Anthony J. Venables, *Infrastructure, Geographical Disadvantage, Transport Costs, and Trade* (Washington, DC: World Bank, 2001), https://openknowledge.worldbank.org/server/api/core/bitstreams/43714eab-d8ca-5d65-a1b9-f749a3c010ee/content .

9. Rida Lyammouri and Amine Ghoulidi, *Morocco's Atlantic Initiative: A Catalyst for Sahel-Saharan Integration*, Policy Brief No. 68/24 (Rabat: Policy Center for the New South, December 2024), https://www.policycenter.ma/sites/default/files/2024-12/PB_68-24_Rida%20Lyammouri.pdf .

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

11. "AES Corridors: A New Rivalry with Traditional Trade Routes," *Logistafrica*, 2024, https://logistafrica.com/en/highlights/aes-corridors-a-new-rivalry-with-traditional-trade-routes/ .

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

13. Moroccan News Agency (MAP), "Royal Atlantic Initiative Is Visionary Approach Mobilizing New Potential for Cooperation, Co-Development," May 10, 2024.

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

15. "Morocco Builds an Empire in West Africa," *Vizier*, 2024, https://vizier.report/p/morocco-builds-empire .

16. Energy Partnership Morocco-Germany, "Nigeria-Morocco Gas Pipeline Finalises Route as Morocco Advances National Gas Infrastructure Plans," 2024, https://energypartnership.ma/news/default-26a64a8026238c37f7fe0d9dfb21b25b/ .

17. S&P Global Commodity Insights, "CERAWEEK: FID Expected on Nigeria-Morocco Gas Pipeline by Year-End, NNPC Head Says," March 20, 2024, https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/natural-gas/032024-ceraweek-fid-expected-on-nigeria-morocco-gas-pipeline-by-year-end-nnpc-head-says .

18. RBAC Inc., "Spain's Role as a Natural Gas Importer and Re-Exporter," 2024, https://rbac.com/spains-role-as-a-natural-gas-importer-and-re-exporter/ .

19. David Koke, "5 Largest Container Ports in Spain," *Beacon*, May 19, 2025, https://www.beacon.com/resources/largest-container-ports-spain .

20. inforMARE, "The Growth of Containerised Transhipment Traffic in the Ports of Algeciras and Valencia Continues," May 2024, https://www.informare.it/news/gennews/2024/20240882-porti-Algeciras-Valencia-traffico-maggio-2024uk.asp .

21. Artur Lysionok, "Container Traffic Falls Across Mediterranean, but Spanish Ports Buck Trend," *trans.info*, 2024, https://trans.info/en/container-traffic-spain-398141 .

22. inforMARE, "In 2023, Cargo Traffic in the Port of Genoa Decreased by 4.1% and in the Port of Savona-Vado It Fell by 2.5%," March 5, 2024, https://www.informare.it/news/gennews/2024/20240331-porti-Genova-Savona-Vado-traffico-Y-2023uk.asp .

23. inforMARE, "Lo Scorso Anno le Merci Movimentate dal Porto di Marsiglia Fos Sono Diminuite del 7%," January 22, 2024, https://www.informare.it/news/gennews/2024/20240099-porto-Marsiglia-Fos-traffico-Y-2023.asp .

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

25. Alex Kimani, "Niger Aims to Become Major Oil Exporter," *OilPrice*, August 19, 2024, https://oilprice.com/Energy/Crude-Oil/Niger-Aims-to-Become-Major-Oil-Exporter.html .

26. Globalia Logistics Network, "How Freight Forwarders in Africa Are Powering Inland Logistics," June 18, 2025, https://blog.globalialogisticsnetwork.com/2025/06/18/inland-logistics-in-africa-building-a-seamless-network/ .

27. Christian Bueger, *Information Sharing for the Atlantic: Strengthening Maritime Domain Awareness*, ABI-HSWG Policy Brief (Digital Atlantic Initiative, 2024).

28. Fadoua Ammari and Rida Lyammouri, "The Atlantic Initiative and Morocco-Mauritania Relations," *Policy Center for the New South*, September 12, 2025, https://www.policycenter.ma/publications/atlantic-initiative-and-morocco-mauritania-relations.

29. Amine Ghoulidi, "Ending in Rabat: France's Moroccan Pivot and the Future of Western Sahara," *The Heritage Foundation*, September 12, 2024, https://www.heritage.org/global-politics/commentary/ending-rabat-frances-moroccan-pivot-and-the-future-western-sahara .

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

31. Kyriacos Nicolaou, "EU Sea Port Freight Stagnates as Volumes Remain Below 2019 Peak," Cyprus Mail, December 9, 2025, https://cyprus-mail.com/2025/12/09/eu-sea-port-freight-stagnates-as-volumes-remain-below-2019-peak

ABOUT THE AUTHORS

RIDA LYAMMOURI

Rida Lyammouri is a senior fellow at the Policy Center for the New South (PCNS). He is also a senior West Africa and Lake Chad Basin researcher and advisor, with expertise in regional conflicts, violent extremism, climate change, migration, and trafficking. His research activities focus on geopolitics and international relations in the West African Sahel and Lake Chad Basin, regions he has worked on for 14 years, including in the field. He has extensive experience supporting both governmental and non-governmental organizations in the areas of international development, security, countering violent extremism and terrorism, preventing conflicts, ensuring humanitarian access, and migration. Mr. Lyammouri has contributed to in-depth research and analysis reports aiming at building a deeper understanding of regional and domestic challenges. He is often solicited by various stakeholders to provide policy recommendations on how to address various security, economic, and political challenges related to the West African Sahel and Lake Chad Basin.

AMINE GHOULIDI

Amine Ghoulidi is a Visiting Fellow at the Shelby Cullom Davis Institute for National Security and Foreign Policy, where he focuses on North African affairs. He is currently completing a PhD in international security at King's College London, researching the geopolitics of critical minerals. For nearly two decades, Amine has advised international organizations and Fortune 100 companies on operational and security risks across Africa and the Middle East. His background spans political risk consulting, Big Four forensic threat management, and regional initiatives that advance economic and political integration and counter illicit networks in the Middle East and North Africa. A Fulbright Scholar, Amine holds an MA in Geopolitics, Territory and Security from King's College London and an MA in International Conflict Resolution from American University in Washington, DC.

ABOUT THE POLICY CENTER FOR THE NEW SOUTH

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

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

Policy Center for the New South

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

www.policycenter.ma

POLICY CENTER FOR THE NEW SOUTH