

POLICY
BRIEF 03

Unlocking the Sahel: Morocco's Advance as Bridge-Builder and Agenda-Setter

GEOPOLITICAL MONITOR

In April 2025, King Mohammed VI hosted the foreign ministers of the Alliance of Sahel States (AES: Burkina Faso, Mali, Niger) in Rabat, under the banner of the Royal Initiative for Sahel Access, a visionary strategy to foster regional stability and economic integration through diplomacy, trade, and security cooperation. Launched to address the Sahel's persistent challenges, including jihadist violence (8,000 deaths in 2024 according to the Armed Conflict Location & Event Data Project) and governance crises, this initiative builds on Morocco's return to the African Union (AU) in 2017 and its \$1.2 billion in trade with Sahel states, which strengthens economic ties and supports regional stability. Complemented by the African Atlantic Initiative, which harnesses Morocco's strategic ports like Dakhla to connect landlocked Sahel states to global markets, and the \$25 billion Morocco-Nigeria Gas Pipeline, set to supply energy to the Sahel by 2030, these efforts underscore Morocco's multifaceted approach. Additionally, Morocco's religious diplomacy, training Sahelian imams since 2015, counters extremism, positioning Rabat as a credible African leader amid the mixed outcomes of international interventions, particularly in the eyes of local populations.

This brief examines Morocco's dual initiatives to "unlock" the Sahel, their implications for fostering stability, and the challenges of balancing great-power competition with national priorities. Can Morocco sustain its advances while navigating regional tensions and resource constraints?



Signals to Decode

The Sahel's geopolitical landscape has transformed since France's withdrawal from Burkina Faso, Mali, and Niger (2023–2024), creating a power vacuum exploited by jihadist groups like the Jama'a Nusrat ul-Islam wa al-Muslimin (JNIM), with attacks doubling in Mali's Mopti region in 2024 (ACLED). Coups in Mali (2020, 2021), Burkina Faso (2022), and Niger (2023), reflect governance failures, exacerbated by economic reliance on volatile uranium and gold exports and food insecurity threatening 20 million people (WFP, 2024). The coups triggered severe economic disruptions due to regional and international sanctions, suspension of aid, and trade restrictions.

Parts of the populations, disillusioned by Western interventions like the French-led Operation Barkhane, favor stability over democracy and thus military approaches. To stabilize the military regimes Russia deployed an estimated 1,500 "security advisors" of its Africa Corps to Mali (2024). They act mainly

in an advisory capacity in Mali, and they are often recruited from former mercenaries of the Wagner Corps. Until its announcement of withdrawal in June 2025, the Wagner Corps, loosely affiliated with the Russian Ministry of Defense, was the main military operator in Mali's North. Whereas Western powers, particularly France, face rejection for their colonial legacy, with protests in Bamako (2023) and Niamey (2024) demanding the expulsion of French and US troops, Russia secured a potential \$500 million uranium deal in Niger via Rosatom and Turkey supplies Bayraktar TB2 drones to Mali and Niger, meeting local security needs. Algeria, once a key Sahel player, sees its influence wane due to tensions, including the downing of a Malian drone in April 2025 and Mali's accusations of terrorism support.

Morocco responds with diplomacy and strategic connectivity. The African Atlantic Initiative, launched in 2023, unites 23 Atlantic African states to enhance trade and cooperation, countering external fragmentation. The Royal Initiative for Sahel Access, announced on November 6, 2023, grants Sahel states access to Moroccan ports like Dakhla, bolstering trade resilience despite risky road infrastructure in the region, where insecurity and poor conditions hinder connectivity. Morocco's positioning becomes even more strategic as Mali's closure of its airspace in a dispute with Algeria forces air traffic through Moroccan routes. Royal Air Maroc (RAM) now operates twice daily flights to Bamako, effectively becoming the primary aviation link between Mali and Europe after Air France's withdrawal. This shift makes Morocco the sole corridor from Bamako to Europe, while Turkish Airlines now faces economically unprofitable detours of two additional hours over Moroccan airspace, demonstrating Morocco's growing importance in regional connectivity. The Morocco-Nigeria Gas Pipeline, a 6,000-kilometer project linking 13 states with a capacity of 15–30 billion cubic meters annually, aims to address energy poverty and potentially connects African markets to Europe, though its success heavily depends on Mauritania, which may seek economic or political concessions. Morocco's diplomatic neutrality towards Sahelian governments positions it as a potential mediator between Sahelian and West African blocs. Key milestones, such as the Rabat Declaration (February 7, 2025) and the finalization of the pipeline's route, signal regional buy-in and Morocco's mediation potential.



Does Morocco have a Role to Play?

Morocco's strategic initiatives position it as a pivotal actor in the Sahel, leveraging its unique identity, historical ties, and diplomatic agility. Morocco's centuries-old ties, rooted in trans-Saharan trade routes and shared Islamic heritage, foster trust with states like Mali and Niger. Since rejoining the AU in 2017, Morocco has been active in regional organizations and maintains ties with ECOWAS, advocating for African solutions to conflicts and economic challenges. Its mediation in the Libyan crisis demonstrates its conflict-resolution capacity, enhancing regional credibility. Religious diplomacy, through the Mohammed VI Foundation of African Ulema, promotes an Islam of the middle path, countering extremist narratives fueling groups like JNIM. This soft power resonates with the Sahel's predominantly Muslim populations, amplifying Morocco's influence without coercive measures. By hosting Sahel coordination meetings, such as the Marrakech conference (December 2023), positions itself as a neutral mediator amid ECOWAS-AES tensions. This diplomatic agility strengthens Morocco's influence, countering rival strategies like Algeria's.

Morocco's economic initiatives in the Sahel center on practical infrastructure development. The Royal Initiative for Sahel Access creates new trade corridors that give landlocked countries alternatives to unstable routes, with the planned Dakhla mega-port serving as a key Atlantic gateway. The Morocco-Nigeria Gas Pipeline represents Morocco's most ambitious regional project, designed to connect 13 countries and deliver 15-30 billion cubic meters of gas annually to nearly 400 million people while linking African energy markets to Europe.

These infrastructure projects complement Morocco's broader energy strategy in the region. Energy cooperation could build on Morocco's expertise in renewable infrastructure, particularly the 2,000 MW Noor solar complex. This could lead to a transfer of expertise from Morocco to help address the Sahel's severe energy deficit, where an important portion of the population lacks reliable access to electricity. Agricultural partnerships

leverage Morocco's position as a leading phosphate producer, providing fertilizers and irrigation technology to combat food insecurity affecting 20 million people across the region. However, Morocco's economic engagement cannot be separated from the region's security challenges. Security cooperation has become equally important as economic partnerships, with Morocco training military personnel from Mali and Niger, drawing on experience from hosting African Lion, the largest U.S. military exercise in Africa. Intelligence sharing within the region would help target groups like JNIM, focusing on disrupting supply networks across porous borders.

Yet, this security cooperation creates its own diplomatic complexities. Morocco faces diplomatic challenges in balancing relationships with competing powers, as its trade with Russia, mainly driven by agriculture exchange, and its balanced diplomatic relations with Moscow continue despite Western pressure to limit Russian engagement. However, US pressure to limit Russian engagement, particularly after Russia's Africa Corps expansion in Burkina Faso and Mali, complicates this balance, risking Morocco's neutrality. Morocco must maintain strategic autonomy through a nuanced approach, advancing its continental initiatives while reinforcing diplomatic agility.



Points of Vigilance

Morocco's Sahel initiatives, while transformative, face significant challenges requiring strategic foresight to align with its vision of regional leadership. Navigating great-power competition, regional rivalries, and resource constraints demands careful management to maximize impact. Securing trade routes and the Morocco-Nigeria Gas Pipeline presents complex challenges, as these projects traverse unstable Sahel regions prone to jihadist attacks, which rose 20% in 2024 (ACLED). Protecting commercial corridors requires robust security measures, including coordination with regional forces, risking entanglement in great-power rivalries. France, seeking reliable partners post-2024 Niger withdrawal, may attempt reengagement through intermediaries like Morocco, as suggested by French Ambassador Christophe Lecourtier's statements in Moroccan media (February 2025). Morocco must carefully manage how its partners perceive its role in the region, Morocco needs to ensure that initiatives like the African Atlantic Initiative appear genuinely African-led. Sahel states remain suspicious of external influence, making this perception crucial to avoid alienation. This challenge becomes particularly acute when dealing with the military governments now ruling much of the Sahel. These leaders are inherently wary of foreign agendas, requiring Morocco to approach each relationship with considerable care.

The most promising strategy appears to be hybrid: strengthening direct country-to-country relationships, working alongside broader regional frameworks, while simultaneously advancing regional projects like the Sahel Access Initiative. This approach allows Morocco to counter competing influences without creating unnecessary tensions, keeping its diplomatic approach both inclusive and practical. Financing these ambitions presents its own set of problems. The \$25 billion Morocco-Nigeria Gas Pipeline alone requires sustained investment across 13 countries, with additional costs for protecting infrastructure from insurgent attacks. Morocco will likely need significant foreign investment to make these projects viable long-term.

OPPORTUNITIES & RISKS



Opportunities



Morocco's Growing Economy as a Gateway

Morocco's economic rise, with African exports growing from \$300 million to over \$3 billion (2004–2024) and \$2.5 billion in investment revenue, positions it as a regional economic powerhouse. The Sahel Access Initiative, leveraging the \$1.2 billion Dakhla Atlantic port (set for 2029), aims to reduce transport costs

(currently 30–40% of Sahel import values), transforming landlocked states like Mali and Niger into competitive global market players. The initiative relies on multimodal transport connections, enabling formal trade routes that enhance economic governance and tax revenues. Moroccan ports, including Tanger Med, can streamline Sahel exports, fostering industrial diversification and job creation. By integrating digital infrastructure, Morocco can formalize informal trade, aligning with AfCFTA goals and positioning itself as a vital trade gateway, reducing Sahel reliance on conflict-prone routes like northern Mali.



Energy Infrastructure Development

The Afro-Atlantic Gas Pipeline (AAGP), a \$25 billion project linking Nigeria to Morocco through West African states, including Mauritania, is a cornerstone of Morocco's regional energy integration vision. This 6,000-kilometer pipeline, with a capacity of 15–30 billion cubic meters annually, addresses the Sahel's critical energy access deficit, where 70% of the population lacks reliable electricity, hindering industrial growth and living conditions. The AAGP's potential to catalyze industrial development along its route, such as manufacturing zones, aligns with the Sahel Access Initiative's commercial corridors. By enhancing energy security, the pipeline could power mining operations in Mali and agricultural processing in Burkina Faso, reducing reliance on costly diesel generators. Morocco's expertise in large-scale infrastructure, exemplified by domestic projects, positions it to lead this initiative, attracting European investment amid demand for diversified gas sources. Transparent coordination with Sahel states is essential to ensure equitable access, aligning with Morocco's co-development goals and reinforcing its role as a regional energy hub.



Diplomatic Influence

Morocco's privileged position enables it to play a central mediation role in Sahel conflicts, as evidenced by its growing engagement in regional development, building trust with states wary of external powers. The African Atlantic Initiative, uniting 23 Atlantic states, counters fragmentation driven by regional dynamics and inconsistent international actors, fostering solidarity and shared prosperity. Its South-South cooperation model prioritizes African unity, reducing reliance on Russia's transactional engagements or China's debt-driven investments.



Risks:



Overreach

Financing the \$25 billion AAGP poses a formidable challenge for Morocco, given the complexity of coordinating this megaproject across 13 states. Mobilizing sufficient capital risks financial strain, particularly as Russia secures gold and uranium concessions in Mali and Niger, offering immediate economic benefits that could complicate regional support. In order to bridge the gap, the UAE contributed significantly to the project. However, reliance on external funding could cede influence to these actors, potentially undermining the African-led nature of Morocco's initiatives if donors impose strict conditions or prioritize strategic interests. Multilateral financing, by involving multiple funders, can distribute costs and ensure lasting impact, but Morocco must be vigilant in structuring terms that preserve its autonomy and prevent external actors from controlling these transformative projects.



Geopolitical Entanglement

Russia's Africa Corps, active in Burkina Faso, Mali, and Niger since mid-2024, consolidates Moscow's influence by training local forces, capitalizing on a transactional approach aligning with AES sovereignty priorities. While not directly competing with Morocco's initiatives, this presence complicates regional perceptions. Russian programs, building on Wagner's infrastructure, offer immediate gains, such as resource access, potentially overshadowing Morocco's long-term cooperative approach focused on economic integration via the pipeline and Sahel access. For example, Russian support in Mali fuels distrust of multilateral frameworks.

Simultaneously, Western powers' determination to counter Russia risks great-power entanglement, requiring Morocco to balance carefully. Suspicion among Sahel regimes of Western agendas further complicates this dynamic. By prioritizing diplomacy focused on mutual benefits, such as reduced energy costs via the AAGP, Morocco can preserve regional credibility, distinguishing itself while maintaining global ties.



Regional Resistance

Algeria's support for the Polisario Front and its regional influence threaten Morocco's initiatives. Mauritania, a key player for Dakhla's port connectivity, adopts a cautious diplomatic stance amid Morocco-Algeria rivalries, potentially hindering regional cooperation. Bilateral trade agreements, provide a foundation by reducing transport costs. However, the Sahel's military regimes' emphasis on sovereignty, evidenced by their 2024 ECOWAS withdrawal, may foster resistance to Moroccan initiatives if adversaries frame them as "neocolonial" or indirect French involvement. To mitigate this, Morocco must intensify technical cooperation, such as port management at Dakhla, aligning projects with Sahelian economic priorities while maintaining its non-interventionist diplomacy.

FORESIGHT

Over the next decade, Mauritania's strategic positioning will be pivotal to the success of Morocco's Sahel initiatives, particularly the African Atlantic Initiative and the Afro-Atlantic Gas Pipeline (AAGP), with its first section set to be operational by 2029. As a geopolitical bridge between North Africa and the Sahel, Mauritania's role as a partner and beneficiary hinges on its ability to navigate regional rivalries and capitalize on economic opportunities, with implications for regional integration and stability.

Mauritania's cautious stance, driven by the need to balance Morocco-Algeria tensions, shapes its engagement. Its ports of Nouakchott and Nouadhibou, handling over 5.2 million tons of cargo in 2022, are vital trade arteries for Sahel states, positioning Mauritania as a critical node in Morocco's Atlantic commercial corridor vision. The \$25 billion AAGP, transiting through Mauritania, promises industrial zones and energy security, offering economic incentives aligned with Mauritania's development goals. Morocco's infrastructure ambitions will benefit Mauritania, paving the way for port specialization and coordinated logistics.

Morocco's proactive diplomacy should further align Mauritania with its initiatives. The AAGP's potential to power Mauritania's nascent industrial sector and Morocco's South-South cooperation focus, rooted in shared African interests, enhance this alignment. While Russia's presence in Mali and Niger offers competing influence, its transactional model lacks the long-term regional integration focus of Morocco's initiatives. Over the next decade, Mauritania's alignment with Morocco's initiatives is expected to strengthen, transforming it into a pivot for Sahel-Atlantic connectivity, boosting economic integration, and reinforcing Morocco's advancement in an African-Atlantic space.

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