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Morocco's Africa-to-Europe Commercial Corridor: Gatekeeper of an emerging trans-regional strategic architecture

Morocco's West-Africa-to-Western-Europe commercial transportation corridor is redefining the geopolitical parameters of the global scramble for Africa and, with it, the strategic architecture of the Mediterranean basin. By massively expanding the port capacity on its Mediterranean coast, Morocco has surpassed Spain and is poised to become the dominant maritime hub in the western Mediterranean. Having constructed Africa's first high-speed rail line, Morocco's extension of the line to the Mauritanian border, will transform Morocco into the preeminent connectivity node in the nexus of commercial routes that connect West Africa to Europe and the Middle East.

While Morocco is commonly referred to as the 'Gateway to Africa', the country's program of ambitious transportation and industrial infrastructure projects, initiated by its visionary monarch King Mohammed VI, has conferred upon Morocco the role of geopolitical gatekeeper in a new global competition for the manufacturing value chains in the West-Africa-to-Western-Europe Corridor. As such, Morocco itself has become an arena of global competition in which China, Russia, and the Arab Gulf states are playing increasingly significant roles.

Although the French-led European industrial manufacturing chain predominates in Morocco, France remains bereft of European partners willing to play a strategic role in Morocco's infrastructure development. This gap creates a potential for Beijing to exploit its expanding role in Morocco's infrastructure development to re-orient manufacturing value chains in Morocco toward China's Belt and Road Initiative. The configuration of Africa-to-Europe value chains that result from how Morocco manages its set of foreign partnerships will establish the geopolitical framework of this emerging trans-regional commercial architecture for years to come.

Morocco's Construction of an Africa-to-Europe Corridor

Situated in the northwest corner of Africa, fronting the Atlantic Ocean on its western coast and the Mediterranean Sea on its northern coast, the Kingdom of Morocco historically has been a geographical pivot for interchange between Europe, Africa, and the Middle East. In recent years, the semi-constitutional monarchy has adroitly combined the soft power resources of Morocco's 'triple heritage' – Arab, African, and Mediterranean – with an ambitious modernization of its transportation and industrial infrastructure to remake Morocco into the hub of a new trans-regional commercial architecture connecting Africa to Europe and the Middle East.

Morocco's largest city, Casablanca, has already become the premiere global capital node for Africa. In conjunction with its commercial transportation projects and special economic industrial zones, Morocco created its Casablanca Finance City (CFC) zone to attract international financial firms, related professional services, and the regional headquarters of multi-national corporations. CFC is recognized as Africa's most important financial center by the Global Financial Centers Index, which ranks Casablanca among the index's top 50 global financial centers.[1]

Morocco's new high-speed rail and the emergence of Africa-to-Europe value chains

Morocco's construction of its al-Boraq high-speed rail line – Africa's first high-speed rail transportation – has established Morocco's unrivaled position in the emerging West-Africa-to-Western-Europe commercial corridor. The November 15, 2018 inauguration of the first segment of the landmark high-speed line was presided over by King Mohammed VI himself, in conjunction with French President Emmanuel Macron.[2] Seven years in construction, the $2.3 billion line was built as a joint venture between France's national railway company Société Nationale des Chemins de Fer Français (SNCF) and its Moroccan state counterpart Office National des Chemins de Fer (ONCF). Outfitted with Avelia Euroduplex high-speed trains produced by French manufacturer Alstom, the initial segment of the *Boraq* line extends 362 km from Morocco's major industrial port city of Tangier to the country's economic center of Casablanca. Taking only 2.2 hours, the high-speed train cuts the previous travel time by more than half.[3]

The *Boraq* line is a component of Morocco's ambitious Plan Rail Maroc 2040 (PRM 2040), a massive program to modernize Morocco's railway system. Announced by King Mohammed VI in 2015, the PRM 2040 includes 1,500 km of additional high-speed rails links that have already started to form the overland transportation backbone of France's Africa-to-Europe industrial chain.[4] In June 2019, French automobile manufacturer Groupe PSA, Europe's second largest automaker, opened a manufacturing plant in Kénitra, north of Rabat, because of the *Boraq* high-speed rail link to the new state-of-the-art Tanger Med port on Morocco's Mediterranean coast 40 km east of Tangier.[5]

Rabat's highest strategic priority in its PRM 2040 railway development program is to create a high-speed rail link from Tangier to Lagouira (La Güera) in the southernmost point of the Western Sahara region, which

Morocco considers its Southern Provinces.[6] Running from Morocco's Tanger Med Port across and down the length of the Atlantic coast to the Mauritanian border, the Tangier-Lagouira line will create a high-speed commercial transportation corridor from the shores of the western Mediterranean to the border of West Africa.[7]

A French-Moroccan joint venture, the *Boraq* high-speed rail line is emblematic of France's traditional role as Morocco's leading foreign investment partner. France provided 51 percent of the financing for the project with Morocco providing another 27 percent. The remaining 22 percent of the project was financed by development funds from the United Arab Emirates (UAE), Saudi Arabia, and Kuwait.[8] Along with France, the GCC nations – in particular the UAE – have been the mainstays of foreign investment in Morocco.[9] The *Boraq* line reflects the fact that France's main partners in facilitating Morocco's transformative infrastructure development are the UAE, Saudi Arabia, and other GCC states.

The EU27 collectively is Morocco's largest trade partner, accounting for 55 percent of Morocco's 2019 total bilateral trade volume.[10] When considering states individually, Morocco's five largest trading partners in 2019 were: Spain (18.2%), France (15.1%), China (6.9%), the U.S. (6.2%), and Italy (5.2%).[11] Despite significant trade relations, particularly in the case of Spain and Italy, France's EU27 partners have not been leading investors in Morocco's infrastructure development, although companies from the other EU member states will invest in opening their own production plants in Morocco and participate in the French-led industrial value chain. France's principal partners for strategic economic engagement with Morocco are Abu Dhabi and Riyadh, not Madrid, Rome, or even Berlin. In this sense, France's involvement in Morocco reflects the larger pattern of its involvement in the Middle East. In Egypt and Libya, as well as in the UAE itself, the absence of EU partners has left France increasingly isolated as it faces the need to cope with Russia's and China's growing presence.[12]

Morocco as a maritime hub of the Africa-to Europe corridor

Morocco's 2030 Strategy port plan seeks to establish Morocco as a dominant connectivity node in the nexus of European-African-Middle-Eastern commercial routes that pass through the Mediterranean.[13] To this end, Rabat is in the process of investing upwards of $7 billion in its network of ports, adding a strategically significant amount of container capacity on its Mediterranean coast.[14] The flagship project of Morocco's effort is the Tanger Med port[15] on the country's Mediterranean coast, approximately 40 km east of Tangier. With the opening of its new terminals in late June 2019, Tanger Med became the Mediterranean's largest port, surpassing Spain's Algeciras and Valencia ports in container capacity. With the 6 million twenty-foot equivalent unit (TEU) capacity of Tanger Med 2, the Tanger Med port's total container capacity stands at 9 million TEU.[16]

The state-of-the-art Tanger Med port is also the largest in Africa and is therefore well-positioned to become a transshipment hub for the Maersk Line and its alliance partners.[17] Setting a precedent for Groupe PSA's 2019 opening of a manufacturing plant in Kénitra, Group Renault, in 2012, located its second Moroccan manufacturing plant in Tangier in order to benefit from the expanded Tanger Med Port and the rail link to it. Within five years of opening its plant, Renault produced its millionth vehicle. Europe's third largest automaker presently sends six trainloads of Renault vehicles daily from its Tangier factory to the Tanger Med port for shipment.[18]

Morocco's other key Mediterranean port project is the Nador Med West industrial port complex in the Bay of Bentoya. Nador Med West's 1,520-meter dock is designed to accommodate the largest container vessels. About halfway completed, the $3.2 billion industrial port complex is intended to be a central energy port in the western Mediterranean. Upon its 2023 completion, the port will have facilities for tankers able to accommodate up to 170,000 tons of oil and chemicals, and will be linked to Morocco's new rail transportation networks.[19] On October 23rd, 2019, Russian state development corporation VEB concluded a deal with Moroccan MYA Energy to build a petrochemical complex and oil refinery with a target capacity of 200,000 barrels per day.[20] The Russian firm will locate the $2.3 billion dollar facility in northern Morocco and use the rail links to the Nador Med West port to ship its products.

Additionally, Morocco is building a $4.5 billion liquefied natural gas (LNG) facility at the country's Jorf Lasfar port, located on Morocco's Atlantic coast about 100 km south of Casablanca.[21] The project includes an LNG import terminal, marine jetty, gas pipeline network and a combined cycle power plant with a capacity of 2,400 MW.[22] Already a hub for phosphate, fertilizer, and chemical production, the addition of 7 billion cubic meters of LNG import capacity will enable Morocco to diversify its natural gas supply mix. Rabat has also allocated $1 billion for the construction of a new port in Dakhla in the southern region of the Western Sahara/Southern Provinces that will augment Morocco's commercial reach into West Africa as well as boost the development of trans-Atlantic trade routes with Latin America.[23]

According to Morocco's National Port Authority, Morocco's sea ports recorded a 6.3 percent increase from January 1st to April 30th, 2020 compared to the same period in 2019.[24] The increase in the volume of goods transiting Morocco during the outbreak of the COVID-19 pandemic and the resulting economic slowdown demonstrates the robustness and long-term growth potential of Morocco's Africa-to-Europe corridor.[25]

The Challenge of China in Morocco's Africa-to-Europe Corridor

Since King Mohammed IV's landmark May 2016 visit to China in which the two countries formally signed a strategic partnership agreement[26] and over fifteen public private partnership agreements,[27] China has been playing an increasingly pivotal role in Morocco's infrastructure development, expanding its involvement in the emerging West-Africa-to-Western-Europe corridor. The 2016 Morocco-China agreements built upon the growing economic relations between Rabat and Beijing that accelerated following the breakthrough 2014 Moroccan-Chinese Investment forum convened in Rabat.[28]

Focusing primarily on the transportation, energy, and real estate sectors, Chinese investments and contracts in Morocco between 2014 and 2019 inclusive totaled $1.26 billion.[29] In 2016, heralding the expansion of China's role in Morocco's infrastructure development, the China Railway Bridge Engineering Group completed its construction of the 950-meter, cable-stayed King Mohammed VI bridge between Rabat and Sale, the longest cable-stayed bridge in Africa. A $32.5 million project that was funded by the European Investment Bank and Morocco's national road authority, the six-lane bridge also stood as symbolic testament to the constructive potential Sino-European-Moroccan cooperation.[30] Later in 2016, China's Chint Group was selected to build 172 MW of photovoltaic (PV) solar power generation capacity under the operational lead of Saudi Arabia's Acwa Power International. Named Noor Ouarzazate IV, the project consisted of three separate PV plants to complement the massive concentrated solar power facilities already built in the first three development phases of Morocco's Noor Ouarzazate solar complex, the world's largest operational solar power facility.[31] The $144 million Noor Ouarzazate IV project was financed by Germany's state development bank KfW and the Moroccan Agency for Solar Energy.[32] Similar to the King Mohammed VI Bridge, the Noor Ouarzazate IV project exemplified a constructive commercial synergy among partners from China, the Arab Gulf states, Europe and Morocco.

Building upon its project successes in Morocco up to that point in time, Beijing was poised to assume a preeminent role in the development of Morocco's Africa-to-Europe commercial corridor with China's Haite Group's construction of the Mohammed VI Tangier Tech City. The $10 billion hi-tech industrial zone project located 20 km from the Tanger Med port was agreed upon during King Mohammed VI's 2016 China visit.[33] Financed by Haite Group, Morocco's major commercial bank BMCE, and the Moroccan government, Tangier Tech City's objective was to create an industrial and technology hub to attract 200 multinational firms and 100 Chinese corporations to open state-of-the-art manufacturing facilities.[34] Tangier Tech City constituted China's opportunity *par excellence* to establish a production base in Morocco; as Haite Group President Li Biao noted at the project's inauguration ceremony, "Morocco's political and social stability, with an economy that is open on [*sic*] the world and well-integrated in international value chains and the presence of world's industrial leaders in competitive sectors make the country the ideal investment environment for Chinese investors."[35]

Intended to be the crown jewel of Morocco's infrastructure development and the main engine of Morocco's continued economic transformation, the Tangier Tech City turned into a debacle for Beijing that has raised questions about China's ability to co-exist in Morocco's international commercial ecosystem. Speaking about the difficulties with China's Haite Group, Ilyas El Omari, head of the Tangier-Tetouan-Alhoceima region, explained, "There were disagreements on the ownership of the city among other issues. Our partners are Chinese but this does not mean that the city belongs to Chinese [*sic*]."[36] Following the Haite Group's withdrawal from the project, the China Communications Construction Company (CCCC) and its subsidiary, the China Road and Bridge Corporation, have taken on the construction of a scaled down version of the industrial and technology zone. Officially designated as the first development phase, CCCC is building only 7 sq. km of the originally planned 20 sq. km zone. CCCC began construction on the project despite the fact that unresolved issues over ownership remained between CCCC and Morocco.[37]

The future nature of Morocco's West-Africa-to-Western-Europe Commercial corridor will be determined by the extent and manner to which foreign companies choose to integrate into existing industrial manufacturing chains or choose to create their own new chains. The sector that is establishing the pattern for industrial chain integration is Morocco's successful automotive industry. As Africa's leading auto manufacturer, with a current capacity to produce over 700,000 vehicles per year,[38] Morocco's automotive manufacturing industry is the current centerpiece of the country's West-Africa-to-Western-Europe Corridor.

Automotive sectors sales are the leading manufacturing component of Morocco's export-driven economy in which foreign trade accounts for approximately 88 percent of Morocco's GDP.[39] In early 2019, automotive sectors sales accounted for 27.6 percent of Morocco's exports.[40] Morocco's automotive industry created nearly 117,000 jobs in Morocco between 2014 and 2018, accounting for 28.8% percent of job creation in the country.[41]

Morocco's present vehicle production is led by French manufacturers Groupe Renault and Groupe PSA, supported by approximately 200 suppliers operating in the country.[42] The leading automotive supplier in Morocco is the American firm Lear Corporation. The Fortune 500 company makes automotive seating and electrical systems, and operates 11 production sites in Morocco.[43] Other leading automotive component manufacturing firms operating in Morocco are headquartered in Japan, Germany, Switzerland, France, Italy, Spain, South Korea, and India.[44]

Some Chinese manufacturers are using the opportunity of Groupe PSA's new car manufacturing plant in Kénitra to integrate into the French-led European value chain. Following Groupe PSA's June 2019 announcement of its intention to build the plant, Chinese manufacturer Nanjing Xiezhong announced it would construct a $15 million facility in Kénitra's automotive manufacturing zone to supply air conditioners to Groupe PSA.[45] Similarly, China's CITIC Dicastal, the world's largest producer of automotive aluminum wheels, announced that it would open a plant in Kénitra. A global leader in the manufacture of lightweight aluminum cast components for automotive powertrain, chassis and body systems, CITIC Dicastal's $400 million plant in Kénitra will have the capacity to produce 6 million pieces annually to supply parts to the PSA Groupe.

For Chinese companies like CITIC Dicastal, their manufacturing plants in Morocco are their first in Africa. The European experience of most Chinese companies derives from their interaction with German firms. Morocco's emerging industries primarily participate in the French industrial system. The ability of CITIC Dicastal and the other Chinese companies to develop African operations through integrating into the French-led value chain through Groupe PSA is facilitated by the Groupe PSA's joint-venture relationship with leading Chinese automaker Dongfeng Motor Company.

At the same time that China's firms are showing some success at integration, China also has an opportunity to set-up its own industrial chain as Morocco attempts to attract two more automakers to the kingdom in order to reach Rabat's 2025 goal of producing one million cars per year. In December 2017, China's electrical vehicle manufacturer BYD inked a deal to build a 2,500-person plant to become Morocco's third automaker.[46] Designated for the troubled Tangier Tech City, the project's implementation has been bogged down with delays to the consternation Moroccan officials.[47]

The Strategic Contours of Morocco's Africa-to-Europe Corridor

The advance of Chinese manufacturing enterprises in Morocco will require most of them to integrate with the French-led European value chain. With France's wariness of an over-reliance on China in its supply-chains increasing in the aftermath of the COVID-19 outbreak, it remains unclear how well Chinese firms will be able to accomplish that integration. The situation is further complicated by China's efforts to underbid France for strategic infrastructure projects, most notably the Marrakech-Agadir high speed rail link project that is the linchpin for extending high speed rail connectivity to Morocco's southern regions.[48]

Morocco is the largest recipient of French foreign aid. Moreover, Morocco's security is intimately bound to its deep military relationships with France and the United States. Rabat views these relationships as essential components of its strategy to cope with the threat posed by global jihadist movements as well as Morocco's perennial security concern stemming from its disputes with Algeria and the latter's support of the Polisario Front. In 2019, Morocco was the United States' largest arms purchaser in the Middle East and North Africa, the total package of advance weapons amounting to approximately $10.3 billion.[49]

Morocco's desire to diversify its strategic relationships has prompted Rabat's significant openings toward China and Russia. A rapprochement between Morocco and Russia has been slowly and cautiously taking place since King Mohammed VI's 2016 visit to Moscow. The resulting 2017 economic and military partnership agreements signed by Moscow and Rabat have resulted in Russian investments in Morocco, particularly in the energy sector, but little security cooperation. Russia is Algeria's largest arms supplier and until Moscow chooses to use its leverage in Algiers to act more as a bridge between Algeria and Morocco, its influence in Morocco is likely to remain secondary. Nonetheless, a China-Russia synergy has the potential to emerge in Morocco as an alternate framework for commercial relations. The extent to which this potential will be actualized will also be dependent on China's and Russia's respective relationships with the Arab Gulf states.

To the extent there is an absence of strategic coordination in Morocco between France and the other members of the EU27, Morocco's Africa-to-Europe corridor will increasingly depend on the strategic relationship between France and its Arab Gulf partners. So long as France remains a principal security guarantor in West Africa, the confluence of strategic interests among Rabat, Paris, Abu Dhabi, and Riyadh as relates to the Maghreb/Sahel region will set the geopolitical framework for participation in Morocco's West-Africa-to-Western-Europe commercial corridor.

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