

# Implications of the EU's Nearshoring Activities in Morocco



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The political world has undergone extensive changes during its history. Once again, we stand at such a crossroads that will determine what the future will look like. Due to the power shifts and the rise of some developing countries like China, the world has moved away from the Western liberal order (Éliás, 2021). Consequently, a country no longer allies itself only with a fixed group of countries. Instead, countries now have a complex net of diplomatic relationships, even with countries that may be hostile towards each other. Investment-induced alliances will play a pivotal role in the 21st century, where the existing power structure is being renegotiated. This paper examines how the European Union (EU) and Morocco's strategic partnership could serve the EU's goal of diversifying its economic structure and pursuing a more stable geopolitical playing field amidst these global shifts. Specifically, this paper investigates the role of nearshoring activities in achieving these goals. Thus, this paper will aim to answer the question of How the strategic partnership and nearshoring initiatives between the EU and Morocco can serve to address the EU's economic diversification and geopolitical stability goals in the context of 21st-century global shifts.

For the EU, nearshoring could resolve several issues it currently faces. Firstly, by bringing manufacturing closer to its borders, the EU makes itself more geopolitically secured in light of future crises. Secondly, eliminating global shipment of half-produced goods also benefits its vision of becoming a net-zero emitter and thus, a global "sustainable" leader (Ashby, 2016). Lastly, by relocating its manufacturing capacities to Morocco, it can strengthen its ties with the Kingdom. In return, this paper argues that the EU will be able

to politically access the African Union (AU) and, as such, reduce the influence of China in the region.

With this information in mind, this article will begin by exploring the long and complex history that the EU and Morocco share. The second chapter of this paper will dive into Morocco's capabilities and explain why the Kingdom provides opportunities for the EU. The third chapter will pose questions regarding the challenges that will inevitably come with such investments. However, this chapter will also aim to address these challenges and propose possible solutions. The following section will then expand on the proposed strategic implications that were illuminated above. Lastly, the final chapter will conclude this paper and provide a possible future outlook of the EU-Morocco relationship. In conclusion, the EU can reap the economic benefits and stabilise the Maghreb region if it proactively engages with the challenges that come with shifting its diplomatic focus to Morocco.

## 1. Historical Background

The Kingdom of Morocco has a complicated history, being at the frontlines between the influences of Spain (and other European countries) and the Arab world (Barbour et al., 2024). Before the 20th century, neighbouring countries tried to conquer Morocco without success. Thus, Morocco independently served as a gateway between Europe and Africa for hundreds of years. Nonetheless, this status quo was broken when France established a protectorate over Morocco before the beginning of World War I in 1912 (Barbour et al., 2024). This protectorate was then split between the French in the North and the Spanish in the South after the end of the following war, World War II. Although officially independent in 1956, when the French uni-

laterally gave Morocco its new status, the last Spanish troops left the country only in 1975. This has led to a new conflict over the territories of Western Sahara as Morocco asserted its sovereignty over the new territory and fought the indigenous Sahrawi people who demanded independence (Ghaedi, 2023). To this day, this conflict remains unresolved, as only two countries have recognised Moroccan claims over the territory (Ghaedi, 2023). Furthermore, this conflict undermines the stability of the entire region, making it harder to ensure the trust needed to relocate manufacturers into the country.

Nonetheless, after nearly half a century of the renewed independence, in 2000, Morocco and the EU signed an association agreement to face common challenges such as economic development, climate change, and security (Morocco, 2024). Since then, the relations have only grown stronger. In 2008, the two partners signed a 'Joint Document on the Strengthening of Bilateral Relations/Advanced Status', which was meant to strengthen their cooperation even more (Martín, 2009). This document aimed to address the political and security threats, integration of markets, and introduction of new actors within this relationship (EEAS, n.d.). Now, both countries cooperate in the Mediterranean region, a difficult area for cooperation due to the number of countries surrounding it, differences in the regimes governing it, and the issue of conflicting exclusive economic zones. Furthermore, the countries are trying to design their future cooperation on an even deeper level.

The EU needs to sustain and improve its relationship with Morocco in order to sustain its global influence and to improve the stability in the region, both of which will be elaborat-

ed on later in this paper. This is not, however, a one-way relationship. Morocco requires the EU to maintain and enhance its market access, trade, and investment opportunities, given that the Union represents its largest trading partner. Nonetheless, Moroccan elites do not view such deep dependence on the EU as a good step towards their future as they fear the country's overdependency on the Union (European Council on Foreign Relations, n.d.). Furthermore, for many, especially the youth, the EU's continuing support for the existing regime posits an issue, as it failed to address the internal economic inequality and regional tensions (Palacio, 2019; Fakir, n.d.). Nonetheless, the EU remains a strategic partner to Morocco. In the past, the two parties cooperated on a vast array of regional issues.

To illustrate, Morocco played a pivotal role in the migration crisis and can resolve the EU's dependency on Russian oil and gas. In terms of the former, an agreement between the two parties is in place. Similar to the EU-Turkey Deal, Morocco will receive funds in order to strengthen its border controls and, thus, limit the number of people entering the Union through the kingdom (International Rescue Committee, 2023; European Commission, 2023).

When Algeria stopped their supply of natural gas to and through Morocco in 2021, Spain and other importing countries in Europe suddenly experienced a drop in supplied gas (Rashad, 2021). To address this issue, Morocco began talks with other suppliers in the region. Thus, if the discussions succeed, the kingdom could potentially act as a transition state between the EU and other states in the Western part of Africa, thus reducing the EU's dependency on Russian oil and gas (Rahhou, 2024). More specifically, Nigeria and

Morocco plan to build a pipeline that would connect 13 countries in Western Africa and potentially Europe (Onyango, 2024). Furthermore, based on its geographical positioning, it can serve as a source of renewable (wind, solar, and hydrogen) energy that can be supplied to Europe (Josephs, 2023).

#### **Nearshoring:**

Nearshoring is the strategy where a company relocates its production operations closer to its home country. This approach aims to reduce production costs, improve supply chain resilience, and mitigate risks associated with traditional offshoring.

## **2.The Case for Nearshoring in Morocco**

The idea of nearshoring, an activity where a company decides to relocate their production (or a part of it) closer to their home country, has lately become a predominant topic in international discussions (Chaisse & Rodríguez-Chiffelle, 2023). Beginning with the financial crisis of 2008, the increasing global instability has pushed companies to reevaluate their existing strategies – offshore their productions as the costs of production are lower in the developing world (De Lucas et al., 2021). Moreover, crises such as the Covid-19 pandemic, US-China trade tensions, and the war between Russia and Ukraine made the vulnerability of Global Supply Chains (GSC) in critical sectors even more visible (Chaisse & Rodríguez-Chiffelle, 2023; Bontadini et al., 2022). Now, together with the rising costs of production abroad and an alternative to automate manufacturing closer to the home countries, companies

opt more often to offshore production closer to their borders (Chaisse & Rodríguez-Chiffelle, 2023).

Nearshoring is one of the strategies that the EU can use in order to enhance its economic resilience and geopolitical stability. There are several countries that the Union can choose from, such as the Balkans, Turkey, and countries in the South Caucasus or the Maghreb region. Morocco, however, stands out for its unique combination of economic and political advantages.

One of the main reasons for Morocco's position as a potential nearshoring country for the EU is its competitive labour costs. Compared to the employment costs that are expected in the EU as well as in a traditional offshoring destination, Morocco offers significantly lower wages. For instance, the average wage in China for 2023 was approximately \$12,850 annually, while in Morocco, it was around \$3,670 annually in the same period (Worlddata, n.d.). This directly translates into a higher competitiveness of existing companies operating in Morocco as they can lower prices for their products.

These lower wages, however, do not compromise the quality of the workforce available in Morocco. Over the past decades, the kingdom has heavily invested in the education and vocational training of its population (World Bank Group, 2023). The main areas in which the government has invested align with the demands of modern markets and those of the EU – programs that enhance the technical skills and language proficiency of individuals (World Bank Group, 2023). In sum, Morocco possesses a workforce equipped with skills and knowledge that allow it to compete in the automotive, aerospace, and IT sectors while maintaining relatively low wages.

In terms of industries, Morocco already serves as a base for various economic players. One of the most prominent is the automotive industry, which has seen significant growth over the past couple of years, achieving a 27% increase in 2023 (Rahhou, 2024). For instance, large car manufacturers such as Renault have already established their productions in the country, using it as an export base for lines of their electronic vehicles (Hancock, 2023). These companies not only create jobs and capital influx into Morocco but also help to develop local supply chain networks, which in turn reduces the logistical burden for any newcomers (MoroccoNow, 2023). Furthermore, by creating these supply chains in a country near Europe with developed ties to the continent, the likelihood of supply chain disruptions is minimised.

Similarly, the aerospace industry in Morocco has been growing significantly, with over 140 companies established in the country (Oliver, 2024). The government has been instrumental in fostering the right environment through initiatives such as the Industrial Acceleration Plan and the establishment of specialised zones like the Casablanca Aeronautics Free Zone, creating incentives for international investments (tax breaks or support for training programs) (Oliver, 2024). These policies have already attracted many large companies, including Boeing, Airbus, and Bombardier, to establish their operations in Morocco. For the EU, establishing deeper cooperation with Morocco means access to an already well-developed aerospace hub that can support various aspects of its strategy, from R&D to manufacturing.

Moreover, Morocco has heavily invested in infrastructure projects, resulting in one of the largest ports in the region, functioning

as an economic hub (Tanger Med Special Agency, n.d.). This mostly benefits the EU as such a hub serves as an export base for any products manufactured in the kingdom. Additionally, Morocco has invested in roads and railways that connect this hub with major cities and manufacturing bases. This connectivity ensures the smooth transportation of manufactured goods across the country, which is necessary for the easy functioning of businesses (Minster et al., 2024). Thus, not only can companies ensure a reliable supply of goods across the country, but also gain access to international markets.

Morocco has also developed a robust energy infrastructure focusing on renewable energies. The Noor Ouarzazate Solar Complex exemplifies the country's commitment to sustainable energy solutions (African Development Fund et al., 2017). Now, around 8% of Morocco's energy comes from renewable sources (Ritchie et al., 2020). This is a very important factor because the EU aims to eliminate its carbon footprint and, to do so, sometimes enacts controversial solutions. One of them is the Carbon Border Adjustment Mechanism, which is to be fully functional by 2026 and functions as a tax system for goods that release CO<sub>2</sub> into the atmosphere during their production (European Commission, n.d.-a). By manufacturing in a country with a sustainable production of electricity, these costs are minimal, resulting in a higher profit margin for the producers.

While Morocco has some issues regarding internal political stability, which will be elaborated on in the following chapter of this paper, these conflicts do not significantly affect the functioning manufacturing companies. The World Bank defines political instability as "a perception of the likelihood of political instability and/or politically motivated violence"

(World Bank, n.d., para. 3). As illustrated in Figure 1, countries like Turkey and Egypt score lower on the World Bank Political Stability Indicator. A lower score, thereby, indicates a more volatile investment environment. Morocco's stability benefits the willingness of companies to invest in the country. Subsequently, Morocco offers a comparatively stable political situation that benefits businesses.

Lastly, Morocco's geographical location at the crossroads of Europe and Africa means Morocco constitutes a gateway to both continents. Its proximity to the European market reduces transportation costs compared to more distant offshoring locations. Not only do these geographically close supply chains result in a lower probability of disruptions, but they also guarantee enhanced efficiency and ensure

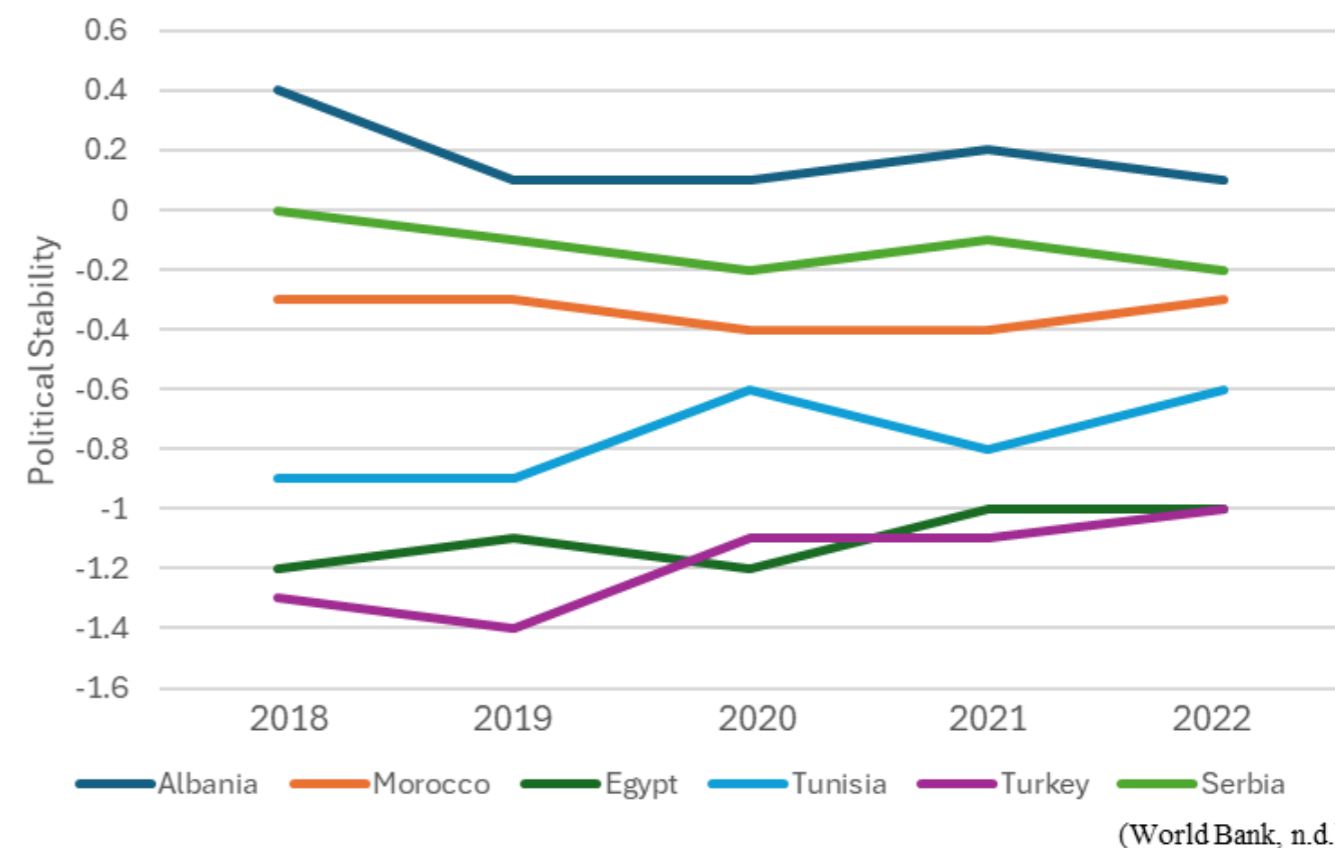


Figure 1: Political Stability

better responsiveness to market demands. Having partial control over one of the busiest critical trade junctures in the world, the Strait of Gibraltar, further enhances Morocco's strategic value. This prime location positions Morocco as an ideal hub for distribution and logistics operations, facilitating smoother and more cost-effective trade flows.

Not only is Morocco important as a trading partner, but by increasing trade, the EU can develop closer relations with the country. Due to its positioning, Morocco can act as a

gateway to the entire African continent. Here, the EU can establish more trade deals over critical materials and rare earth metals found in Africa, essential components for the EU's transition to a sustainable future (Baskaran, 2022).

### 3.Challenges and Considerations

#### 3.a. Legislative Challenges

Although nearshoring to Morocco presents various advantages for the EU, it is cru-

cial to address the inherent challenges that come with such a strategic decision. One of the biggest challenges is the regulatory differences between the EU and Morocco. European regulations are stricter in many ways, including labour laws, environmental standards, and product safety regulations. Such differences can result in two outcomes. Firstly, Moroccan exports to the EU could initially suffer from adjusting to the new regulations. This, however, will not be a large issue as the country already exports over 60% of its total production designated for exports to the EU (Trading Economics, n.d.). Thus, the majority of the products are already aligned with the existing laws.

Secondly, the EU might impose its regulations on the kingdom, which may result in increasing tensions as Morocco perceives it as undermining its sovereignty. These disparities are especially significant for the country's working conditions. Here, again, there are two large points of disagreement. To begin with, two-thirds of Morocco's economy is estimated to consist of informal employment (El-jechtimi, 2023). Although the situation is improving, it is still highly insufficient in the eyes of the EU, which has been actively working on eliminating this aspect of the economy (Vermeulen, 2008). They argue that not only does the state lose revenue, but the workers do not gain legal protection from the state without a legal contract. The second point of contention is gender equality in the workplace. For historical and religious reasons, Morocco has a very poor record of ensuring such equality. With a difference of nearly 50%, the Moroccan economy is employing three men for every woman working (Kolovich & Ndoeye, 2023). Compared, the EU has been pushing for equal participation of women in the economy both within and outside of the region

for decades now (European Commission, n.d.-b). Having closer economic cooperation can result in the EU pushing more regulations onto Morocco, which could create room for disagreement.

To address these challenges, however, it is essential to harmonise the frameworks between the EU and Morocco while retaining space for cultural and religious differences. To do so, the parties should promote bilateral meetings and agreements that cover the key regulatory areas, making it easier for companies to operate across borders. Furthermore, to ensure the implementation of these agreements, joint committees should be established. These committees would ensure compliance and consistency with the implemented regulations.

### 3.b. Infrastructure Shortcomings

Another challenge is logistics. Relocating economic activities into the country will put severe stress on the existing infrastructure. Even though Morocco has made some considerable advances in its transportation infrastructure, to fully support possible nearshoring activities, further investments are necessary. This is especially true for the railroad infrastructure (Statista, 2023). Although the existing network is able to support the current demands, the increased volume of traded goods can create bottlenecks that would hinder the production capacities of the industrial zones.

To overcome these logistical obstacles and adapt the country to the new volume of traded goods, Morocco will require significant investments (Global Infrastructure, n.d.). The Global Infrastructure Outlook (n.d.) group measured a wide array of infrastructure investment indicators, including energy, telecommunication, roads, rails, airports, and ports. The observed

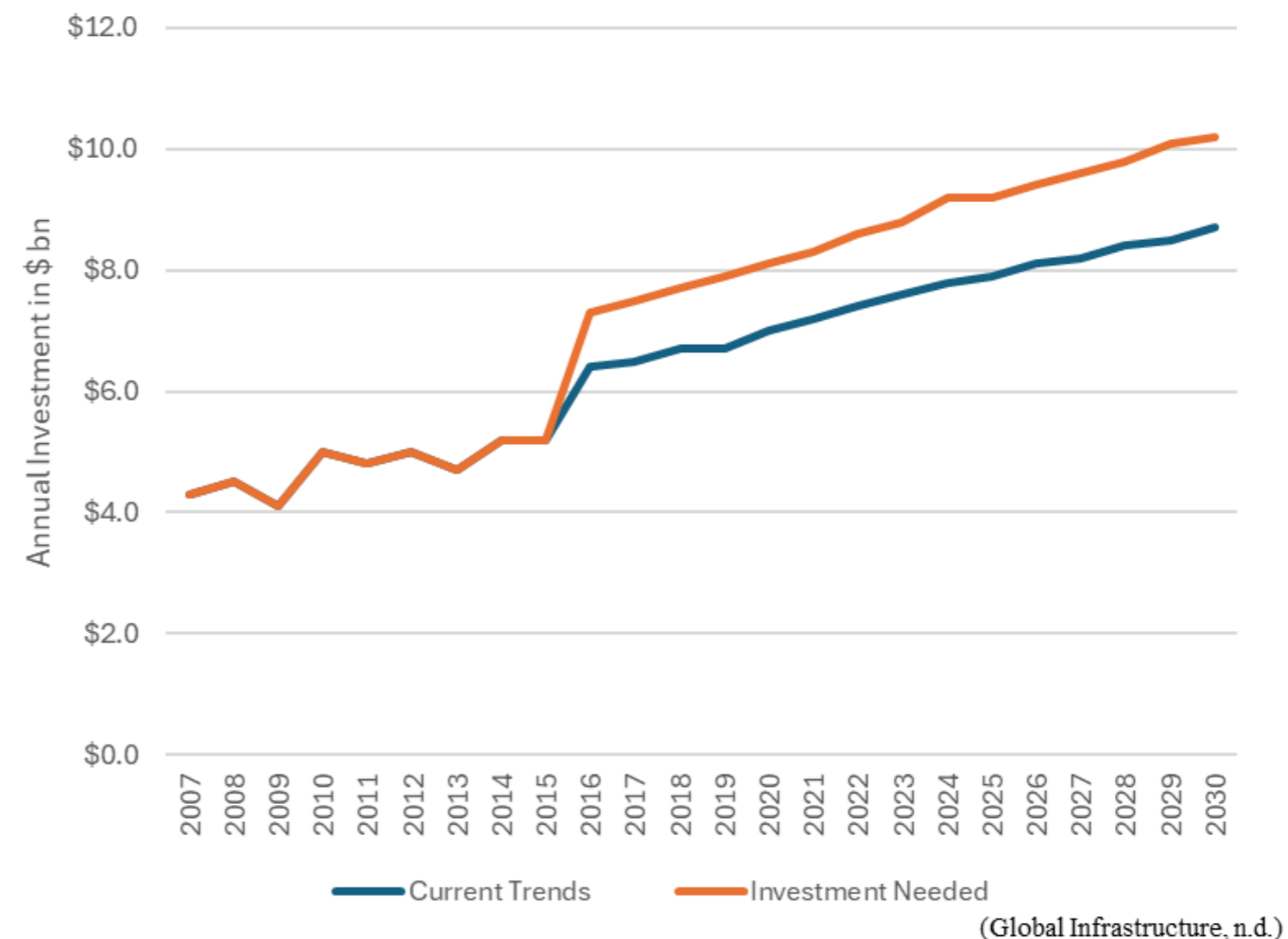


Figure 2: Infrastructure Investment in Morocco

numbers, as portrayed in Figure 2, then suggest a growing gap between the measured and needed investments. Public-private projects could play a vital role in closing this gap as they can support building new infrastructure projects. On the other hand, the EU can provide financial support to Morocco via grants or loans, as successful execution will translate into both economic and political benefits for the Union. Furthermore, the EU can support such investments by transferring technology that would help streamline logistic operations, enhance the efficiency of the system, and reduce overall costs.

### 3.c. Energy Infrastructure

Connected to the logistical hurdles that are present is the issue of energy. Although it is true

that Morocco has been developing capacities for renewable energy, many areas for improvement persist. Firstly, the country remains to be heavily dependent on oil and coal. Together, these two energy sources make up nearly 92% of its energy production (Ritchie et al., 2020). Due to its positioning, Morocco is an ideal country to source its energy from wind and solar, having access to year-round sunshine and vast open spaces to build the needed infrastructure. The issue, however, is the lack of resources that would make that possible. Secondly, also connected to limited funding available, the country lacks a proper electric grid that would be able to transport the produced energy. Similarly, regarding the lack of transportation infrastructure, the EU could step in and promote private investment

in Morocco's energy sector to address these challenges.

### 3.d. Complex Geopolitical Situation

Another issue that needs to be considered is the broader geopolitical context in which nearshoring activities would take place. As explained earlier, Morocco's strategic position offers advantages. This location, however, also places the country in a complex geopolitical environment. The most prominent issue is the high tensions between Algeria and Morocco, which resulted in diplomatic ties being cut in 2021 after the US recognised Morocco's claim over Western Sahara (Dworkin, 2022). The conflict itself goes back nearly half a century to 1963, when both countries fought over a contested piece of land located in Algeria. Due to the possible involvement of outside countries, these fights were suspended, but the relationship deteriorated even further. To this day, both countries view each other as rivals due to the land dispute and because of the different types of government (Dworkin, 2022). Although the tensions were recently reignited and intensified, the broader global community does not fear an outburst of an open conflict, as both countries depend on maintaining good relations with the EU in order to sustain their diplomatic position and economic growth. Nonetheless, as Algeria severed its diplomatic ties with Morocco and retained its closed borders ever since 1994,

Morocco's strategic location and competitive labor market make it an ideal nearshoring destination for the EU, promising both economic benefits and improved geopolitical ties

having restricted access through the Algerian territory limits the possible transportation routes (Reuters, 2023). As such, even greater stress would be put on the existing railroad and sea transportation infrastructure.

Furthermore, the ongoing conflict in Western Sahara remains an issue that affects international perception and investments. Even though the conflict has seen periods of relative peace, the ceasefire, established in 1991, was broken in 2020, and the conflict was renewed (Fabini, 2023). This factor negatively impacts the perceived political stability of Morocco. As neither of the conflicts shows room for improvement, companies must be prepared to navigate potential disruptions. They have to work with local and international entities to mitigate the risks and ensure sustainable operations.

In sum, while Morocco presents a compelling case for nearshoring, certain challenges must be addressed before its potential is fully realised. The country requires immense investment from the private sector and is currently hindered by geopolitical and legislative disparities. To address those, the EU and Morocco must harmonise their regulatory frameworks and jointly navigate the geopolitical complexities. By addressing these challenges, the EU and Morocco can equally benefit from economic growth, enhance geopolitical stability, and foster closer ties between Europe and Africa.

### 4. Strategic Implications for EU Foreign Policy

As illustrated earlier in this paper, the partnership between the EU and Morocco carries significant economic and political implications for both parties. One crucial aspect of this cooperation for the EU is the potential for economic diversification. Diversification is a necessary component of the EU's vision of economic resilience and strategic autonomy.

Economic diversification is crucial for the EU as it mitigates the risks associated with global fluctuations of markets. By relocating some of its production to Morocco, the EU will be able to better oversee and secure the supply chains of its economy. This shift would lead to a more stable economic environment, especially during global crises, such as the recent Covid-19 pandemic or the Russian invasion of Ukraine. By shifting its focus towards the northern part of Africa, the EU can further develop closer trade relations within the Euro-Mediterranean region. Through trade and spillovers associated with them, the EU could then further improve their relations with said countries and establish a more comprehensive response to coming crises. Thus, for example, managing any future refugee crises. Lastly, by establishing itself in the Maghreb region, the EU may become a more influential leader, which would enable it to promote the Union's labour laws and gender equality in Morocco. In sum, the relocation of manufacturing industries to Morocco can result in various outcomes that contribute to the regional stability the EU is seeking.

The cooperation between the EU and Morocco also provides an opportunity for the EU to access the broader African continent

and improve its relationships with the countries located there. Morocco, being a member of the African Union (AU), can act as a gateway between European values and interests and those of the African nations.

By leveraging Morocco's strategic position, the EU can increase its presence in the region and establish deeper economic cooperation or joint development projects. To illustrate, the EU could cooperate with the countries of the AU on renewable energy and infrastructure. By doing so, the EU would not only enhance cooperation regarding global challenges such as climate change. Furthermore, it would also balance the scales of influence that China is currently skewing towards them. In terms of investments, China, having a negative reputation from the EU, only requires minimal conditions to lend. Thus, many countries or leaders are able to gain access to outside funds. Firstly, these funds can be easily misused, and without foreseeing the consequences, they may result in greater political and regional instability. Secondly, as the ability of the borrower to repay is not assessed, many are unable to pay back. This debt trap diplomacy consequently leads to countries having to cede infrastructure assets to China (Himmer & Rod, 2022). Thus, by developing better relationships with African countries, the EU may prevent these negative outcomes from taking place.

Nonetheless, such partnerships are also desirable for another reason. Currently, countries in Africa are experiencing economic growth. To retain its leading position, the EU must cooperate with the AU to maintain its global influence. Furthermore, some of the members of the AU boast significant deposits of rare earth metals. These materials

are a necessary component of many crucial products of the modern society. They can be found in electronics, electric cars, or wind turbines, making them essential for a successful "green transition" (Baskaran, 2022).

In conclusion, the strategic cooperation between the EU and Morocco, achieved through deeper economic cooperation, brings various benefits to both parties. By nearshoring to Morocco, the EU is able to diversify its trade, enhance its economic resilience and strengthen its geopolitical influence. Additionally, by promoting investments in Morocco, the EU gains access to a secondary source of renewable energy. Furthermore, the EU can improve its relations with the broader African continent, improve regional stability, and address global challenges in a more comprehensive manner. However, to reap the potential, it is essential to address regulatory, logistical, and geopolitical challenges that lay ahead. By proactively tackling these issues, the EU can create a mutually beneficial partnership with Morocco.

## 5. Conclusion and Future Perspectives

This paper has discussed the importance of nearshoring for the EU in order to secure its geopolitical and economic success in the near future. To do so, Morocco was identified as the ideal country in proximity to the European Union because of its geographical position and recent economic advancements. By nearshoring to Morocco, the EU can significantly reduce production costs for the companies and protect its supply chains. Furthermore, Morocco's strategic position provides logistical benefits that facilitate smoother and more cost-effective trade flows.

From a political perspective, this partnership holds a significant promise of reducing the EU's dependency on traditional trade partners and mitigating risks associated with global economic fluctuations. Furthermore, by fostering closer ties with Morocco, the EU indirectly enhances regional stability and development in the area. This is especially important in preventing future crises during the ongoing geopolitical shifts and the influence of other global powers in Africa.

Nonetheless, there are several challenges that must be addressed before fully realising Moroccan potential. Firstly, the two parties need to approach the topic of regulatory differences that lie between them. To do so this paper believes that the most efficient way to do so is by fostering dialogue, aligning regulatory frameworks, and creating joint committees to oversee the implementation of such frameworks.

Furthermore, the cooperation must resolve the ongoing geopolitical tensions in order to ensure the safety of the investments. To do so, Morocco will be required to promote dialogue with its geopolitical rivals in order to come to peaceful solutions. Additionally, in case the talks fall apart, as seen previously, it will have to provide security for the international businesses based in the kingdom. The EU can leverage its influence in the region and act as a mediator to increase the chances of success.

In conclusion, Morocco's strategic advantages make it an ideal nearshoring hub for the EU. The partnership promises significant economic and political benefits, including cost reductions, improved supply chain efficiency, and enhanced geopolitical influence. However, realising these benefits will require addressing regulatory, logistical,

and geopolitical challenges. By proactively tackling these issues, the EU and Morocco can create a mutually beneficial partnership that supports economic growth, enhances

regional stability, and positions the EU as a strong and influential player in the new power century.

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