

An aerial photograph of a vast, arid desert landscape. A winding, light-colored road or path cuts through the sandy terrain, leading towards a small, isolated vehicle in the distance. The horizon is marked by low, rolling hills under a clear sky. The overall color palette is dominated by warm, earthy tones of sand and rock.

2021 Conflict Risk Diagnostic: Morocco and Western Sahara

February 11, 2021

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Executive Summary

In October 2020, Saharawi refugees loyal to the Popular Front for the Liberation of Saguia el-Hamra and Rio de Oro, otherwise known as Polisario Front (PF), blocked a road near the village of Guerguerate, stranding goods and people in the demilitarized border zone in Western Sahara (WS). The emergence of Moroccan forces moving in to restore free movement along the road in November led to clashes with the PF, and the 29-year ceasefire between the two parties inched towards breakdown. This diagnostic used 5-year data trends from the Country Indicators for Foreign Policy Project (CIFP) along with the recent developments to conclude that a return to the pre-October 2020 status quo is likely within the next 6 months, accompanied by low-intensity attacks along the road in Guerguerate.

Background

The conflict over Western Sahara (WS) began in the early 1970s after Spain announced plans to withdraw their occupation over the territory.¹ Rather than holding a referendum of independence as requested by the United Nations, Spain made a private agreement to partition the territory between Morocco and Mauritania.² The PF, a political group who had been fighting the Spanish for independence in the territory since 1973, proclaimed the territory the independent Saharawi Arab Democratic Republic (SADR) after Spain fully withdrew in 1975 and redirected their armed attacks at Morocco and Mauritania.³ Mauritania formed a peace agreement with PF in 1978 and withdrew from the territory. The land it occupied was thereafter seized by Morocco who at the time had been advancing through the territory, causing the Saharawi people to seek asylum around Tindouf, Algeria.⁴ Numerous failed attempts by the UN to resolve the conflict between the PF and Morocco resulted in the UN Security Council establishing a UN Mission for the Referendum in Western Sahara (MINURSO) in 1991 and securing a formal ceasefire.⁵ Since then, differing interpretations between Morocco and the PF over the implications of a referendum, including the voter eligibility criteria, have hampered any further progress.

Stakeholder Analysis (Role in Conflict: positive +, negative -, mixed +/-)	
Primary Internal Stakeholders	
Morocco (-) Morocco remains its assertion of control over WS. In recent years, tensions between the state and the PF have mounted owing to Morocco's extraction of WS resources as part of the EU-trade as well as its military interventions in the demilitarized Guerguerate region. ⁶	Polisario Front / Saharawi Arab Democratic Republic (-) As WS's independence movement, the Polisario is the principal opponent of Morocco, established the SADR as the government of WS, and has been engaged in an armed struggle against Morocco. In November 2020, following Moroccan military activity in the El Guergarat crossing—a buffer zone between the territory claimed by Morocco and SADR—the PF President accused Morocco of breaching the ceasefire and announced the end of the 1991 truce. ⁷
Secondary Internal Stakeholders	
Saharawi refugees (+/-) Having fled in 1975, Saharawi refugees residing in southwestern Algeria have been awaiting their repatriation for 40 years. ⁸ Their return hangs in the balance with a delayed referendum and the continuation of Moroccan control over the territory. ⁹ Given their lack of involvement in the skirmishes between the PF and Moroccan forces, they do not play a direct role in compounding the conflict.	
Secondary External Stakeholders	
Algeria (-) Algeria is a core supporter of the PF and hosts Saharawi refugees. It has expressed its concern about instability caused by foreign maneuvering around the region, particularly along its border. ¹⁰ Algeria's closure of its land borders with Morocco in 1994 raised the significance of the border crossing from WS to Mauritania since that border links Morocco to sub-Saharan Africa. ¹¹ The failure to resolve the WS dispute has strained Morocco and Algeria's diplomatic and economic relations. ¹² Recently, Algeria	United States (+/-) Morocco is the US's long-standing ally and is the only African country to have a free trade agreement with the US in addition to conducting an annual military training with the US military. ¹⁴ The US has supported Morocco's proposed Autonomy Plan from the 1990s, and recently described it as the most credible and realistic solution. ¹⁵ Since Morocco seeks to turn the disputed territory into a trade hub between Morocco and sub-Saharan Africa, US businesses stand to gain opportunities in untapped African markets. ¹⁶ In December 2020, the Trump administration affirmed Morocco's sovereignty over WS in exchange of Morocco

denounced the US's decision to recognize Moroccan sovereignty over WS. ¹³	normalizing ties with Israel, triggering accusations that the move undermines efforts to end the conflict. ¹⁷
<p align="center">United Nations (+)</p> <p>MINURSO aims to monitor the ceasefire, set up a referendum, and reduce the threat of mines and UXOs.¹⁸ The UN did not express support for the US's recognition of Morocco's sovereignty over WS, but instead stressed on the importance of resuming negotiations to avert escalating violence in the region.¹⁹</p>	
<p align="center"><i>Interested External Stakeholders</i></p>	
<p align="center">The European Union (+/-)</p> <p>The EU has engaged in trade deals with Morocco over WS's resources without the consent of the Saharawis. Saharawi groups accuse many trade agreements of violating international law and the verdicts concluded by the European Court of Justice (ECJ) affirming that WS is to be excluded from such deals with Morocco.²⁰ Although the EU has recently moved towards excluding WS from an agreement, many trade practices continue despite the ECJ ruling.²¹ The EU has neither recognized the SADR nor Moroccan sovereignty over WS, electing to label the territory as a "non-self governing territory 'de facto' administered by the Kingdom of Morocco."²²</p>	<p align="center">The African Union (+/-)</p> <p>The AU comprises both the SADR and Morocco, with several AU members recognizing SADR.²³ Morocco's readmission to the Union in 2017 facilitated its concerted attempts to expand its diplomatic relations. In fact, since 2019, many AU members have opened up consulates to Morocco in WS or what Morocco regards as its southern provinces, a move criticized by the PF.²⁴</p>
<p align="center">Conflict Indicators</p>	
<p align="center">History of Armed Conflict: High Risk (Worsening)</p>	
<p>Stabilizing Factors: This is a protracted conflict spanning over 45 years now that has stabilized more with the presence of MINURSO but is not going to end anytime soon. No activity reaching the level of armed conflict with battle-related deaths has taken place in WS since 1989.²⁵ The conflict between the Moroccan government and the PF over WS remains a constant but latent source of tension with the great majority of Moroccans agreeing with their governments claim to the territory.²⁶</p>	
<p>Destabilizing Factors: The Guerguerate demilitarized buffer zone on the border of WS and Mauritania has been a recurrent theatre of tension since 2016 with the Moroccan army in November 2020 removing PF supporters from blocking a road that is an important trade link for Morocco to the rest of West Africa.²⁷ The PF responded shortly after by declaring war on Morocco thus breaking their 1991 ceasefire. In January 2021, the PF launched four missiles at Moroccan positions in Guerguerate that Moroccan officials confirmed did not impact the road link to Mauritania.²⁸ Tensions with Algeria, the main backer of the PF, have been further strained by the US's recognition of Moroccan sovereignty in WS with Algeria holding military exercises near its closed border with Morocco.²⁹</p>	
<p>Assessment: Further low-intensity armed attack, for which the PF armed forces have experience with, is very likely to continue against Moroccan security forces and/or infrastructure along the sand berm.³⁰ It is not clear whether the PF has the capacity to escalate the conflict back into a war without military support from Algeria and the continual strains of strictly managing the 173,600 Saharawi refugees under their administration.³¹ Morocco has made statements that it would react with severity to any attacks in this territory, yet affirmed its commitment to the ceasefire in a statement to the UN.³² In their statements, Morocco also clarified that the removal of PF supporters at Guerguerate by Moroccan armed forces was done in a peaceful manner in order to safeguard the zone and restore freedom of movement.³³</p>	

<p align="center">Governance & Political Stability: Moderate Risk (Worsening)</p>
<p>Stabilizing Factors: Morocco's Fragility index score has remained low, which can be attributed to the state's monopoly on the use of force and particularly the monarchy's ability to maintain a tight grip on power despite significant ongoing protests sparked during the past decade from the regional Arab Spring.³⁴ The level of governance in Morocco is poor and the restrictions on civil, political rights, and freedom of press, particularly related to dissent that Morocco regards as threatening its territorial claims of WS, have remained extremely high.³⁵ Yet, all these factors have remained stable over the last five years.³⁶ As of 2017, both Morocco and the SADR are member states of the African Union, a regional body that seeks cooperation within the continent.³⁷</p>
<p>Destabilizing Factors: Little progress was made in improving the relationship between the Moroccan government and the PF during UN-backed talks that began in December 2018.³⁸ Morocco has taken advantage of the stability from no armed conflicts that have had significant battle related deaths since 1989 to fortify their defensive position along the</p>

sand berm that separate the combatants and relocated hundreds of thousands of Moroccans to the territory in order to tilt any potential referendum vote in their favour. The US's recognition of Moroccan sovereignty over WS, including the planned establishment of a consulate in the Moroccan controlled portion of the territory along with their support of Morocco's autonomy plan for the territory, weakens the UN's plan to organize a referendum about the territory's status and is likely to increase regional instability.³⁹

Assessment: The Constitution of the SADR states that the leader of the PF is the President of WS but Morocco controls fourth-fifths of the territory, the PF governs in exile from Tindouf, Algeria, and have not held regular elections within the territory.⁴⁰ Morocco is likely to leverage US's political support to forestall UN led referendum and advance their autonomy plan for the territory. Morocco rejoined the African Union in 2017 despite originally leaving because of the admission of the SADR as member.

Militarization: Moderate Risk (Stable)

Stabilizing Factors: From 2013 to 2019, Morocco's overall military expenditures (% GDP) steadily decreased (3.8% to 3.1%), although increased in relation to the government's budget.⁴¹ The total number of active armed forces has remained at a modest number, 195,800, or 1.6% of the total labour force.⁴² For the past several years, Morocco has represented the third largest fraction of North African defence expenditure behind Algeria and Egypt.⁴³

Destabilizing Factors: Significant modernization and transformation of Morocco's armed forces is ongoing, including structural changes with the reintroduction of conscription in 2019 along with the procurement of 36 new Apache Attack helicopters and 25 new Block 72 F-16 fighter aircrafts from the US. This has led to a steady increase in the government defense budget with the amount allocated to personnel costs rising significantly in the 2020 budget due most likely to the return of conscription.⁴⁴

Assessment: Morocco's active military personnel remains modest compared to its labour force and the size of military personnel of regional actors. Yet, with the reintroduction of conscription in 2019, the numbers should increase. The armed forces are postured principally against potential challenges from the PF in WS and the Algerian army on the eastern border. While a formal ceasefire between Moroccan armed forces and the PF took effect in 1991, there are still active Moroccan troops stationed at guard posts along the sand berm that separates the two parties.⁴⁵

Population Heterogeneity: Low Risk (Stable)

Stabilizing Factors: While there are 2 ethnic groups in Morocco, the Arab-Berber dichotomy is "meaningless" in Morocco today.⁴⁶ Both communities have mixed over the years and marriage between the two groups is common, with the composition in Morocco being Arab-Berber 99%.⁴⁷ With Morocco recognizing the Berber Tamazight language as an official language in 2011, both Arabic and Berber are now used in Morocco's Parliament. Religion in Morocco-WS is homogeneous and a stabilizing factor as Arabs and Berbers (Saharawi people composed of both) follow Sunni Islam (99%).⁴⁸ Based on Pew Research Center Religious Diversity Index, the RDI scores of Morocco and WS are very low: 0.0 and 0.1 respectively.⁴⁹

Destabilizing Factors: Resettlement of Moroccans in the three southern provinces in WS territory is a destabilizing factor. Moroccans are incentivized to settle in WS through pay raises, food subsidies, and tax exemptions.⁵⁰ The Saharawi people see Morocco's movement of people as an effort to tip the balance in the population in favour of Morocco's position when the referendum eventually takes place.⁵¹ Estimates suggest there are two Moroccans for every one Saharawi in WS.⁵²

Assessment: Berbers present a low risk of ethnic rebellion, especially after having their language recognized in Morocco which was their main unresolved cultural grievance.⁵³ The Saharawis see the resettlement of Moroccans in WS as Morocco's way of gaining an advantage in the future referendum, hence Morocco's delay in moving forward with the referendum. The Saharawis continue to protest and the continued delay of the referendum only increases the likelihood of violence breaking out.

Demographic Stress: Low Risk (Stable)

Stabilizing Factors: Current population is 36.5 million and is growing but at a declining rate. The 5-year annual population growth rate average is 1.3%.⁵⁴

Destabilizing Factors: Population density is steadily increasing annually by about 1/People Per Sq km and urban density is steadily increasing by 0.5% annually.⁵⁵ Morocco's youth bulge in 2019 was 27% but it has been decreasing.

Assessment: The steady increase in population density and concentration in urban centers may present challenges to Morocco in terms of strain on public services and infrastructure and the fair division of resources in major population centers. The youth bulge theory suggests that the presence of more than 20% of young people raises the potential for rebellion and unrest. In this context, this demographic bomb can lead to social and political unrest confined within Morocco as was the case of the 2011 Arab Spring protests, but its effects are unclear in terms of the conflict over WS.

Economic Performance: Moderate Risk (Worsening)

Stabilizing Factors: Inflation has been generally declining since 2008, at 0.196 in 2019⁵⁶. Trade openness is at 87% (2019) which has been rising consistently since 2003, with a slight dip in 2015⁵⁷.

Destabilizing Factors: Morocco is generally considered a lower-middle income country. Morocco has a GDP growth rate of 2.48 (2019) but has a history of very uneven growth⁵⁸. Foreign direct investment as a % of GDP is 1.39⁵⁹, which is much lower than it has been in the last 5 years due to increasing hostility in the area and increasing risks of doing business⁶⁰. The inequality score (GINI coefficient) is 39.5, but minimal data is available on its progress over the years⁶¹. Morocco's level of socio-economic development has been characterized as very limited⁶². The government had been working on reducing the budget deficit and increasing foreign investment, but the global pandemic has caused Morocco to enter its first recession since 1995, with growth contracting and unemployment rising⁶³. This is relevant to the Hirak Rif protests that began in 2016 over unemployment, corruption, and general socioeconomic conditions⁶⁴. The Moroccan economy remains relatively dependent on agricultural output, which varies due to climate change. The Moroccan economy is partially fueled by resource extraction in WS, which is a point of conflict between the two groups⁶⁵. The UN has stated that Morocco can exploit WS resources as long as the benefits go to the territory's inhabitants but as many Saharawis have fled to Algeria, they do not reap the benefits of these trade agreements⁶⁶. In fact, much infrastructure has been set up for Moroccans who have moved to the region to further mine the resources⁶⁷. Multiple European courts have found that due to self-determination over territorial resources, Moroccan trade agreements that include WS territory are not valid under international law⁶⁸.

Assessment: The crisis between PF and Morocco is partially driven by economic tensions, escalating in October 2020 when Morocco launched a military operation to reopen a key trade route blocked by PF at the border of WS and Mauritania, a key access point to trade with the rest of Africa⁶⁹. The road lies on the cusp of the disputed territory, and PF considers the road to be in violation of the 1991 truce⁷⁰.

Human Development: Low Risk (Stable)

Stabilizing Factors: Morocco has a human development index score of 0.6, which has been slowly increasing since 2010⁷¹. Models estimate that maternal mortality ratio has been steadily decreasing over the last decade. However, the ratio still remains moderately high and data is largely unavailable⁷². 70% of the population has access to an improved water source⁷³ and primary school enrollment has slightly increased over the last 5 years⁷⁴.

Destabilizing Factors: Morocco is in the progress of implementing a healthcare scheme for the poor, yet healthcare remains largely inaccessible in rural areas⁷⁵. Few other social safety nets are in place. This is further exacerbated by the continued obstruction of the work of human rights NGOs attempting to operate in Morocco⁷⁶. Gender inequality has remained consistently poor across decades, ranking 137th out of 149 countries as of 2018⁷⁷. The literacy rate remains low and the mean years of actual schooling is 6.5 years for men and 4.5 years for women⁷⁸. Further, levels of economic exclusion for young people (aged 15-24) are high as the economic inactivity rate for this group is almost 70% ⁷⁹

Assessment: Quality of life in Morocco and WS is relatively low but has also been fairly stable. The decline in wellbeing and economic opportunities due to the pandemic could heighten the population's dissatisfaction with their socioeconomic conditions.

Environmental Stress: Moderate Risk (Worsening)

Stabilizing Factors: 119 forest fires alerts reported between 10 February 2020 to February 2021, which is normal compared to previous years.⁸⁰ There have also been steps taken by the Moroccan government towards environmental protection, such

as the plantation of thousands of hectares of forests.⁸¹ Morocco's arable land in hectares has decreased by 8% from 2013 to 2018 but remained stable in the later two years.⁸²

Destabilizing Factors: From 2001 to 2019, Morocco lost 37.4kha of tree cover: 1.9% of tree cover loss occurred in large part due to deforestation.⁸³ The 2020 Environment Performance Index (EPI) assigns Morocco's tree cover loss a score of 35.8 (where 0=worst, 100=best).⁸⁴ Freshwater in cubic metres reduced by approximately 4.4% per capita from 2014 (848.14) to 2017 (811) and forecasts predict it will further drop to 500 m3/capita/year by 2030.⁸⁵ Contrastingly, the demand for water is projected to continue growing, from 14.3 BCM (billions cubic metres) in 2010 to 23.6 BCM in 2030.⁸⁶ Morocco has an overall EPI score of 42.3.⁸⁷

Assessment: Water resources in Morocco are under growing pressure due to an increasing population, economic development, and precipitation decline caused by climate change.⁸⁸ With dwindling groundwater reserves and a heavy dependence on rain-fed agriculture, only 15 percent of total agricultural land is irrigated, resulting in inefficient water use and management.⁸⁹ Furthermore, many Saharawi refugees in Algeria cite environmental stress factors such as deforestation and dry weather as reasons for having fled to the refugee camps.⁹⁰ Living in the refugee camps in the desert with harsh climates and high temperatures has also contributed to their hardship.⁹¹

International Linkages: Low Risk (Stable)

Stabilizing Factors: Morocco demonstrates a strong engagement with international organizations, being a formal member of 56 international organizations—including 15 economic organizations and 20 UN-based organizations—which facilitates trade deals and cooperation in various sectors.⁹² In 2017, the country rejoined the African Union after having departed in 1984 due to its opposition to the Union's recognition of WS's independence.⁹³ The readmission was received positively by the Foreign Minister of WS, who called it a positive step for the people of WS.⁹⁴

Destabilizing Factors: Morocco-EU trade deals recently gained controversy for including resources from WS without the consent of the Saharawi people, attracting the condemnation of Saharawi civil organizations and Polisario-led legal challenges before the ECJ.⁹⁵ Norwegian NGOs have also recently called for the UNSC to impose sanctions on Morocco for its human rights violations.⁹⁶ Morocco is engaged in 4 international disputes: boundary disputes over several islands with Spain, tensions arising from Morocco's role as one of the primary launching areas of illegal migration into Spain from North Africa, political disputes with Algeria as each nation accuses the other of harboring militants and arms smuggling, as well as their ongoing disagreement over WS's political status. Algeria's National Liberation Front also asserts a claim to Chirac Pastures in southeastern Morocco.⁹⁷

Assessment: Notwithstanding its disputes with Algeria, Morocco has been successful in bolstering its alliances with a diverse range of countries (i.e. the Gulf States, the African Union, and Western countries). On the issue of refugee exodus to Europe, the country also cooperates with Spain on border control measures, receiving 140 million euros from the EU Trust Fund in 2018.⁹⁸ On the Moroccan-EU trade deals, the ECJ ruled in 2016 that WS is a separate region and has a different legal status from Morocco and that, accordingly, Morocco does not have the legal personality to conclude trade agreements involving WS's resources.⁹⁹ Recent reporting by Western Sahara Resources Watch illustrates the EU's implementation of some of these trade agreements despite the ECJ ruling.¹⁰⁰

Conflict Risk Scenarios (Forecasting the next 6 months)

Worst Case

Algeria provides military aid to PF, increasing severity of attacks across the disputed region. Morocco drops its commitment to the ceasefire, ramps up its military response, and begins an offensive attack against PF. The US only calls for the two parties to make peace rather than reversing its newly stated support for Morocco's claims over WS. The scope of the heightened conflict endangers the already fragile refugee settlements that house Saharawi people.

Most Likely Case

The conflict does not escalate further and relations return to the pre-October 2020 status quo within the 6 month time horizon. PF continues to sporadically implement low intensity armed attacks against stations along the berm and at the disputed road in Guerguerate. Morocco prevents PF blockages of road and keeps it clear. Morocco continues to uphold the ceasefire, responds to low-level armed attacks in a proportional manner, and does not instigate offensive attacks.

Best Case

Algeria continues to not provide arms to PF. Both Morocco and the PF eventually reinstate the ceasefire, and MINURSO gets the parties to return to negotiations over the referendum. The road in Guerguerate becomes demilitarized again and the region re-stabilizes.

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