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CONTEXT

Morocco–Spain tunnel project (~40 km, of which 28 km underwater at ~300 m depth) has been monitored for several decades. Its realization would open a new era for Euro-Mediterranean mobility and the strategic positioning of Tangier–Tetouan–Al Hoceima (TTA) as a logistics and energy hub.

Recent development (August 2025): signature of a connectivity contract (voice & data) with Vodafone for the international team mobilized to relaunch the studies (24,000 €/year) and another financial feasibility study with ENICO (350 000 €).

A useful but modest financial signal: it reflects a more active study logistics, a necessary but not sufficient condition for project progress.

WHERE DO THE STUDIES STAND?

- **Technical studies:** update of route/corridor, geotechnical and geophysical surveys (seismic risks, depth/current constraints), excavation and safety/ventilation options, terminal interfaces and network connections. Status to be documented by the project owner and engineering firms.
- **Feasibility & socio-economics:** updated cost-benefit analyses (traffic, time, emissions), phasing scenarios and integration with ports/regional logistics zones.
- **Financing & governance:** consolidation of the budget envelope (order of magnitude: several tens of billions of €), identification of funding sources (binational, partnerships, European support), and bilateral governance mechanisms.

Maturity indicators to track (upcoming milestones) :

1. Validation of a corridor and an in-situ investigation program.
2. Launch/completion of geotechnical campaigns and submission of a consolidated preliminary design.

3. Closing of financing for detailed studies and designation of project management teams.
4. Establishment/strengthening of binational governance and a public target timeline.

IMPACT ANALYSIS FOR THE TTA REGION

- **Enhanced international visibility:** the relaunch of studies puts TTA on the radar of financial and institutional actors.
- **Geostrategic positioning:** potential hub between Europe and Africa, in synergy with Tangier Med, industrial zones, and telecom/logistics networks.
- **Spillover effects (scenarios):** upskilling in engineering, opportunities for logistics/transport/telecom value chains, and anchoring of new related investments if technical/financial milestones are confirmed.

POINTS OF VIGILANCE

- **Measuring the event:** do not over-interpret the Vodafone contract; it is a positive signal, not a realization milestone.
- **Feasibility & costs:** extreme technical requirements and costs of several tens of billions of € → need for institutional guarantees and realistic phasing.
- **Environment:** sensitivity of Mediterranean marine ecosystems → impact studies and avoidance/mitigation/compensation measures.
- **Geopolitical governance:** Morocco–Spain–EU coordination is key for financing, authorizations, and future operations.
- **Territorial benefits:** without dedicated mechanisms, impacts may concentrate on a few hubs → plan for spillover mechanisms across the entire TTA region.

OPERATIONAL RECOMMENDATIONS (2025–2026)

1. Structured monitoring of study milestones (quarterly dashboard, ad hoc impact notes).
2. Integration of the project into regional forward-planning (SRAT, PDR) to anticipate land use and connections.
3. Strengthened consultation with Tangier Med, industrial zones, logistics & telecom operators to map synergies.
4. Regional influence strategy to secure participation of Moroccan institutions/companies in future governance and operations.

Sources

Spanish press, August 2025 – Vodafone contract relating to the Morocco–Spain submarine tunnel project studies and Impact Plus analysis