



POLICY BRIEF | JUL 2025

MOROCCO-CHINA-EU RELATIONS ON GREEN TRANSITION MINERALS

By: Stephen Duah Agyeman, Hermas Abudu

ACKNOWLEDGMENTS AND CITATION

This report was produced by APRI – Africa Policy Research Institute, a Berlin-based, independent, non-partisan African think tank researching key policy issues affecting the African continent.

The boundaries, colors, denominations and other information shown on any map in this work do not imply any judgment on the part of APRI concerning the legal status of any territory or the endorsement or acceptance of such boundaries. APRI does not take institutional positions on public policy issues. The views expressed in publications are those of the author and do not necessarily reflect the views of APRI, its staff or its board.

We extend our heartfelt gratitude to our research team, expert contributors, interviewees and reviewers for their invaluable support at every stage of this project. Our thanks go especially to Amandine Gnanguenon, Senior fellow and head of the Geopolitics program, Lili Gabadadze, a project coordinator of the Geopolitics programme, for their assistance and contributions. A special acknowledgement to Judy Hofmeyr Green Transition Minerals Fellow for her careful review and insightful input, as well as to Christopher Ifeanyi-Nwanze and Jojob Faal Sy for their significant contributions to the editorial process. We are deeply grateful to Yaman Tohme for her key role in design. Our sincere thanks also to Stephen Oloh for his technical expertise and support in overseeing publication processes. Finally, a special thank you to Vincent Reich for crafting and sharing the communications that brought this initiative to life. This work is, above all, a testament to the strong team spirit within APRI.

This work is available under the Creative Commons Attribution license 4.0 (CC BY-NC 4.0) <https://creativecommons.org/licenses/by-nc/4.0>. This license allows reusers to distribute, remix, adapt and build upon the material in any medium or format for non-commercial purposes only, and only so long as attribution is given to the creator.

STIFTUNG
MERCATOR

This report is funded by the Stiftung Mercator Foundation as part of the Geopolitics and Geoeconomics of Africa-Europe Relations Project.

Rights and Permissions



Attribution — Please cite the work as follows:

Agyeman, S. D., Abudu, H. (2025). Morocco–China–EU relations on green transition minerals, Policy Brief, APRI- Africa Policy Research Institute.

DOI: <https://doi.org/10.59184/pb025.05>

Creative Commons Attribution CC BY 3.0 IG

Summary

- Morocco has a wealth of 'green transition minerals' (GTMs) vital for clean energy technologies, making it a valuable strategic partner for many economic actors, specifically China and the EU.
- The decades-long EU-Morocco partnership has strengthened in recent years with the EU committing considerable financial resources. There is also substantial investment from the EU private sector in renewable energy infrastructure.
- China has also strengthened its relationship with Morocco through a strategic partnership as part of its Belt and Road Initiative. Their strong bilateral relations allow for the Chinese private sector to easily bring capital and technical expertise to Morocco.
- Within this context, Morocco is positioning itself to take advantage of these economic partnerships and vast mineral wealth, to establish itself as a green energy hub.
- Because the EU and China have different models of engagement, with China offering speed, scale and industrial know-how, while the EU emphasises high standards, long term development partnerships, and capacity building, the authors propose a trilateral framework to draw on these strengths for mutual benefit.
- The proposed five step trilateral framework would create a Morocco-EU-China task force as well as create GTM industrial zones for investment and technology transfer. It would also develop a sustainability charter to harmonise ESG standards and launch a North-West African GTM corridor and enact a GTM local empowerment act to establish a green skills institute. The Trilateral Framework would serve not only to consolidate Morocco's industrial base but also as a test case for inclusive and multipolar governance including the EU and China.

1. Introduction

The adverse effects of climate change have necessitated an urgent transition to clean and sustainable energy sources. Enabling this transition has significantly amplified the need for green transition minerals (GTMs) – sometimes termed ‘critical raw materials’ (CRMs) – which include lithium, cobalt, nickel, rare earth elements (REEs) and phosphate. These minerals are vital components of clean energy technologies, including electric vehicles (EVs), wind turbines, batteries and solar panels.¹ As demand for these resources surge, governments and industries face complex geopolitical and economic pressures to secure their sustainable supply.

Morocco’s vast reserves of GTMs² – including phosphate, manganese, cobalt, nickel, and emerging resources such as lithium and copper – position the country as a critical node in the energy transition.³ Its rich endowment of phosphate in particular simultaneously enables the production of phosphate-based fertilisers and primes the country to participate in the production of lithium-iron-phosphate batteries, commonly used in EVs.⁴ The country’s resource wealth could see it achieve its vision of becoming an industrial hub and diversifying beyond its mining sector.⁵ GTMs already contribute about 25% of Morocco’s mining export revenues, accounts for approximately 10% of the country’s gross domestic product (GDP), and employs more than 49,000 people.⁶

Morocco’s strategic proximity to the EU, its strong bilateral trade agreement with the United States of America (US) and growing Chinese investment in its mining sector could enable access to global markets and therefore foster the competitiveness of local industries. However, it also represents several geopolitical challenges, especially given the increasingly tense competition for resources between the US, the EU, and China,⁷ and each global actors’ own industrial ambitions which require access to GTMs. The landscape is further complicated by the difference in actors’ engagement with the extractive industries in Morocco: whereas China has been known to prioritise efficiency, execution, and rapid project delivery, the EU places greater emphasis on regulatory compliance, transparency, and adherence to environmental and human rights standards. Thus, balancing Morocco’s own developmental aspirations with those of other actors remains a key challenge.

This short analysis focuses on how Morocco can pursue value addition in GTMs while managing external pressures – especially from China and the EU. First, it explores Morocco’s bilateral relationships with both powers, comparing their approaches, interests, and impacts on Morocco’s industrial ambitions. It then considers the potential for a more structured trilateral framework model that harnesses the complementary strengths of both actors. The analysis finds that Morocco’s bilateral engagement with China and the EU offers distinct advantages but remains fragmented, limiting its potential to drive value addition in the green transition minerals sector. A more coordinated trilateral approach could help reconcile competing interests and unlock shared benefits across investment, technology, and sustainable development. Employing a Stakeholder Model (STM) ⁸ to analyse 26 experts’ interviews across Morocco’s policy implementation, policy research, and advocacy fields, the paper outlines a set of strategic recommendations to support Morocco’s vision of becoming a regional hub for green value chains that combines engagements with both the EU and China.

The first two sections of the paper examine Morocco’s bilateral relations with the European Union and China, including recent investment patterns, industrial collaboration, and stakeholder experiences. The following sections review Morocco’s own industrial and policy strategy for GTMs, analyses the rationale for trilateral cooperation and maps the interests, strengths, and tensions between the three actors. Additionally, it presents stakeholder-informed recommendations to support trilateral engagement, and finally it outlines a policy roadmap to guide the design and implementation of a future cooperation model.

2. Morocco-EU bilateral relations

The relationship between Morocco and the EU has evolved over several decades, shaped by trade, political agreements, and strategic cooperation. In 1969, Morocco signed a trade agreement with the European Economic Community, the EU’s predecessor. This was followed by the 1976 Cooperation Agreement, which established a framework for economic and technical collaboration. In 1995, the Barcelona Process, also known as the Euro-Mediterranean Partnership, strengthened political and economic relations between the EU and its southern neighbours, including Morocco. This cooperation deepened in 2000 with the entry into force of the EU-Morocco Association Agreement, which facilitated trade liberalisation and political dialogue. In 2008, Morocco was granted an Advanced Status within the European Neighbourhood Policy, allowing closer integration with EU markets and policies.

In 2022, Morocco and the EU launched the first-ever Green Partnership, marking a significant step in their bilateral relations. This partnership focuses on three main thematic areas: climate and energy, the environment (including marine and maritime issues), and the green economy. It aims to advance the external dimension of the European Green Deal through concrete actions, including early policy dialogue, coordination on energy and climate change, and the development of sustainable, job-creating projects. The partnership also seeks to foster triangular cooperation with other international actors to collectively advance the global climate agenda.

To support these objectives, the EU has committed substantial financial resources. In 2023, the EU launched new cooperation programmes with Morocco worth €624 million. These programmes aim to support Morocco's transition to green energy, enhance cooperation on addressing irregular migration, and support ambitious reform plans in key areas such as social protection, climate policy, and public administration.

These developments underscore the strategic alignment between Morocco and the EU in pursuing sustainable and resilient supply chains for GTMs. The partnership not only aims to reduce the EU's reliance on external suppliers but also to ensure that the transition to a green economy is inclusive and beneficial for both parties.

EU private sector involvement in Morocco

Growing EU private sector involvement is crucial in positioning Morocco as a strategic global partner, particularly in the responsible sourcing of GTMs. TotalEnergies is leading a large-scale 100GW renewable energy project to produce green hydrogen and ammonia for export to Europe, while Engie, in partnership with Morocco's OCP Group, has committed €17 billion to renewable energy infrastructure, green ammonia production, and water desalination. Additionally, the European Bank for Reconstruction and Development (EBRD), in collaboration with the EU, has extended a €13.6 million loan to Morocco to facilitate the acquisition of energy-efficient equipment for phosphate ore extraction. Glencore's partnership with Morocco's Managem Group on a cobalt supply agreement emphasises ethical mining, transparency, and full traceability from the Bou Azzer mine. Another example of deepening cooperation is the partnership between Morocco's OCP Group, the Mohammed VI Polytechnic University (UM6P), and Rainbow Rare Earths. This agreement aims to develop innovative methods for extracting REEs from phosphogypsum, a by-product of phosphate processing. EU-backed research initiatives, such as the SecREEs project, also contribute to the development of sustainable extraction technologies that could be adapted to Morocco's phosphate sector, further strengthening EU-Morocco collaboration in green value chains.

As global focus intensifies on sustainability and ethical sourcing, European investors operating in Morocco must navigate complex regulatory requirements, particularly those related to the EU Green Deal and evolving Environmental, Social and Governance (ESG) standards. These include mandates relating to carbon tracking, sustainable water usage, and biodiversity protection. Despite these requirements, EU investors see Morocco as a strategic partner for advancing Europe's green industrial agenda, especially in sectors aligned with the Critical Raw Materials Act (CRMA).

3. Morocco-China bilateral relations

Morocco's relations with China date back to November 1958, when Morocco became one of the first African countries to establish diplomatic relations with China. Diplomatic ties strengthened over the decades, with increased trade and cooperation in infrastructure, technology, and energy. Notably in 2016, when Morocco and China elevated their ties to a strategic partnership during King Mohammed VI's visit to Beijing.⁹ The agreement facilitated Chinese investments in Morocco's industrial and infrastructure sectors, including the Mohammed VI Tangier Tech City, a large-scale industrial hub to attract Chinese manufacturing firms.

In recent years, the Belt and Road Initiative (BRI) has been a significant factor driving the partnership. This global development strategy aims to improve trade and infrastructure connectivity across Asia, Europe, and Africa. Morocco has established itself as a key partner within this initiative since joining in 2017. China, as a global leader in mineral processing, has strengthened its relationship with Morocco through the BRI to increase investment in green energy and industrial projects to secure GTM supply chains and expand its influence in Africa.¹⁰ A notable example is the partnership signed between Morocco and China's Guchen Hi-tech in building a \$6.4 billion EV battery gigafactory near Rabat.

The experience of Chinese investors in Morocco

Chinese investors operating in Morocco often benefit from a more streamlined investment process due to strong bilateral relations and targeted cooperation agreements, rather than from regulatory leniency. Morocco maintains an investment-friendly environment for a range of partners, including China, offering equal access to key sectors such as cobalt mining and phosphate refining. Chinese firms also benefit from home-country support mechanisms, including financing and diplomatic backing, which enhance their ability to move quickly on large-scale infrastructure and resource projects.

Chinese investors' experience is also observed in areas of strategic access to government-backed incentives due to their trade partnership agreements and large quantum of investment capital they inject into the sector. For instance, Chinese companies are heavily investing in Morocco to establish an integrated battery materials supply chain targeting the European EVs market. Key initiatives include CNGR Advanced Material's joint venture with Morocco's Al Mada to produce battery materials in Jorf Lasfar, to produce lithium iron phosphate and BTR New Material Group's cathode manufacturing plant in Tangier Tech.

In this way, the Chinese private sector plays a pivotal role in advancing GTM beneficiation in Morocco. Chinese private firms such as China Nonferrous Metal Mining Group (CNMC) and China Machinery Engineering Corporation (CMEC) play a key role. CNMC is engaged in exploration and mining initiatives to scale up Morocco's production of critical minerals, while CMEC focuses on developing industrial facilities that support mineral refining and value addition. These companies bring capital investment and technical expertise that strengthen Morocco's industrial capacity in the GTM sector. However, critics note that these partnerships adhere to lower standards in environmental and community engagement practices, confirming the Chinese experience of more streamlined investment processes.

4. Morocco's own GTM ambitions

Morocco is positioning itself as a strategic supplier in the global market, leveraging its geopolitical location between the EU and its trade partnership with the US. Morocco has leveraged its Free Trade Agreement with the United States (in force since 2006) and its Advanced Status with the EU to position itself as a bridge between Western markets and African production. These agreements provide preferential access to large consumer markets and create a favourable climate for foreign direct investment, particularly in value-added manufacturing linked to energy and mobility technologies.

Through initiatives such as the Green Morocco Plan, the National Mining Strategy 2021-2030, and its ambitious renewable energy agenda, Morocco has placed emphasis on value addition and industrialisation in its GTM sectors. The National Mining Strategy aims to double the sector's contribution to GDP by 2030, increase job creation, and transition Morocco from a raw material exporter to a processor and manufacturer. Key pillars include modernising geological mapping, boosting exploration incentives, and updating the regulatory framework to improve investor confidence and operational transparency. The Green Morocco Plan also seeks to address challenges related to discovering new deposits and ensure that the sustainable mining sector has ready access to the required capital investment and a local skilled workforce.

This industrial policy focus is especially evident in Morocco's efforts to move up the battery value chain, from raw phosphate and cobalt extraction to the production of precursors and cathode materials. Recent agreements with global firms aim to establish gigafactory infrastructure, supported by domestic access to renewable energy and strategic logistics corridors such as Tanger-Med.

Morocco is also positioning itself as a key player in the green hydrogen sector. It announced the "Morocco Offer", a plan to develop one million hectares of land for green hydrogen production. This initiative attracted interest from Germany, which signed a deal to further support green hydrogen development in Morocco.

Furthermore, the consistent and stable political climate as a significant incentive to attract capital investment to the Moroccan GTM sector. The country's political stability, coupled with long-term infrastructure planning, has enabled Morocco to attract multi-billion-dollar investments in solar, wind, and desalination projects, which are foundational to the green industrial ecosystem. These conditions are seen as lowering the risk premium for foreign investors in the GTM space.

5. The importance of Morocco-China-EU Trilateral Framework

Realising the Moroccan ambitions will require two core enablers: sustained industrial investment and deep technological cooperation. Both China and the EU have a role to play in enabling this transformation, but they bring different models of engagement. China offers speed, scale, and industrial know-how, particularly in midstream refining and manufacturing. On the other hand, the EU emphasises high standards, long-term development partnerships, and commitments to local content, skills, and institutional capacity building.

However, this potential convergence unfolds against the backdrop of growing geopolitical competition over critical resources. As the EU seeks to diversify away from single-source, Chinese-dominated supply chains under the CRMA, and China works to secure new sources of raw materials to reinforce its industrial dominance, Morocco faces the challenge of managing this tension without being drawn into extractive dependency or zero-sum alignments.

To navigate this landscape, Morocco will need to pioneer a trilateral framework – one that bridges the divergent approaches of China and the EU through coordinated investment, technology transfer, and joint value chain development. Such a model would not only support Morocco's industrialisation goals but could also set a precedent for equitable and multi-polar green mineral governance across the Global South.

The table below summarises the distinct interests, strategic strengths, and points of tension between Morocco, China, and the EU in the context of green transition minerals. It highlights how each actor brings different capabilities and priorities to the partnership. These range from China’s industrial scale and investment speed to the EU’s regulatory leverage and commitment to sustainability standards, and Morocco’s ambitions for local value addition and industrial upgrading. By mapping these dynamics, the table illustrates both the complementarities and the frictions that Morocco must manage as it seeks to shape a balanced and forward-looking trilateral framework.

TABLE 1. Partners’ interest, strength, and divergence in Morocco-China-EU relations in GTMs

PARTNERS	INTEREST	STRENGTH	DIVERGENCE
MOROCCO	<ul style="list-style-type: none"> • Become a regional hub for GTM value addition and EV battery manufacturing • Promote local content and industrial capacity • Attract diversified FDI for upstream and midstream development 	<ul style="list-style-type: none"> • Abundance of key GTMs (phosphates, cobalt, etc.) • Geographic proximity to the EU market • Stable political climate and trade agreements with both the US and the EU 	<ul style="list-style-type: none"> • With China: Concern over raw material export dependency and limited technology transfer in Chinese-led projects • With EU: Slow-moving regulatory alignment and challenges in meeting stringent ESG and traceability requirements
CHINA	<ul style="list-style-type: none"> • Secure long-term access to GTMs for domestic green technology manufacturing • Expand influence in African mineral supply chains via Belt and Road Initiative (BRI) 	<ul style="list-style-type: none"> • Scaled manufacturing capacity across the green tech value chain (EVs, solar, batteries) • Strong state-backed financing and infrastructure deployment capacity 	<ul style="list-style-type: none"> • With EU: Geopolitical rivalry and conflicting supply chain models (concentration vs. diversification) • With Morocco: Perception of extractive investment model lacking local value retention
EU	<ul style="list-style-type: none"> • De-risk and diversify GTMs supply for strategic autonomy • Promote ESG, human rights, and traceability standards in critical mineral sourcing • Support green industrial partnerships in Africa under Global Gateway and CRM Act 	<ul style="list-style-type: none"> • Regulatory and market power in standard-setting (e.g. CRMs Act, CBAM) • Financial and technical assistance for value chain upgrading • High consumer market pull for clean technology products 	<ul style="list-style-type: none"> • With China: Strategic competition and mistrust in critical supply chains • With Morocco: Tension between EU regulatory expectations and Morocco’s need for flexible, growth-oriented industrial policies

SOURCE: Authors’ Design, 2025

This potential trilateral framework could create a mutually reinforcing network, though it must navigate significant asymmetries in interests, capabilities, and governance approaches. The table reveals opportunities for structured cooperation that could address Morocco's need for both industrial upgrading and regulatory credibility, while offering China and the EU a platform to manage strategic competition through shared investment frameworks. Morocco's expanding mineral sector provides the EU with a diversified and secure supply chain, reducing its dependence on traditional mining regions. China's advanced processing and refining capabilities establish a strong industrial base that can effectively handle Morocco's raw materials to meet the EU's growing demand for clean energy technologies. The EU offers regulatory frameworks and sustainability standards that can support Morocco's efforts to build an environmentally and socially responsible mining sector. Furthermore, Chinese investments and technological expertise contribute to the modernisation of Morocco's mining industry, enhancing efficiency and sustainability. The outlook for this trilateral framework is best understood, not as a seamless convergence, but as a space for joint ventures and pragmatic coordination. These efforts could support the development of modern mining infrastructure, facilitate selective technology transfer between Chinese industrial processes and European green innovations, and encourage alignment on ESG practices where interests overlap.

Currently, no established joint GTM project exists among Morocco, China, and the EU, either at the institutional or private company level. Morocco's engagements with China and the EU are often conducted in parallel rather than through a unified framework, highlighting the lack of an integrated trilateral strategy that maximises synergies. While such competition can lead to increased efficiency and enhanced bargaining power for firms in Morocco's GTM sector, the lack of synergy could also result in a situation where the individual competitive advantages of the EU and China are experienced in fragmented form in the GTM sector. For these reasons, Morocco must actively work towards a more beneficial trilateral stakeholder model that combines beneficial inputs and capacities from both the EU and China. This is explored in more detail below.

6. Potential for EU-China collaboration aligned with Morocco's GTMs Strategy

Building on the preceding analysis, this section explores how Morocco could move beyond fragmented bilateral engagements and toward a more integrated trilateral framework involving the EU and China. It draws on interviews with 26 experts from across the policy, research, advocacy, and implementation fields to develop concrete recommendations for trilateral cooperation in Morocco's GTM sector. Given Morocco's ambition to become a regional hub for mineral processing and green industrialisation, the development of a structured trilateral model is both timely and strategically

important. Such a framework could help transform geopolitical competition into pragmatic cooperation by aligning investment flows, facilitating targeted technology transfer, and reconciling regulatory approaches. In doing so, it would not only advance Morocco's industrial goals but also offer a test case for inclusive and multipolar mineral governance in an increasingly contested global landscape.

Experts identified five core areas for trilateral coordination: (1) financing, (2) technology transfer, (3) capacity building, (4) private sector collaboration, and (5) mutual policy learning.

1. *A joint EU-China GTM investment fund should be established to finance projects that meet stringent ESG standards. By pooling resources, such a fund could support Moroccan initiatives that advance local value addition, job creation, and technology adoption while ensuring alignment with both EU sustainability goals and China's infrastructure-led investment approach.*

2. *Trilateral cooperation should prioritise a joint research and technology transfer programme focused on the upstream and midstream GTM value chain, including exploration, refining, and recycling. This would combine the EU's expertise in sustainable processing and regulatory frameworks with China's competitive advantages in large-scale, cost-effective manufacturing. Experts emphasise that Morocco's access to both ecosystems would be critical for fostering homegrown innovation and positioning itself in strategic segments of the global value chain.*

3. *A coordinated capacity-building platform should be launched to support Morocco's workforce development. A China-EU programme focused on upskilling and reskilling workers in advanced mining, materials engineering, and green industrial processes would accelerate the country's ability to meet labour demands in GTM-linked industries.*

4. *Private sector actors from the EU and China should be incentivised to co-invest with Moroccan companies – especially SMEs – through joint ventures and venture capital platforms. Such partnerships could support the scaling of Moroccan firms and promote knowledge sharing. China's experience in cost-efficient industrial scaling, combined with the EU's focus on governance, environmental standards, and quality infrastructure, offers strong complementarities.*

5. *Finally, there is scope for structured cross-learning between China and the EU. Stakeholders highlighted that China's strategic engagement (particularly through the BRI) offers key insights for the EU in areas such as de-risking, project finance, and vertical integration. Chinese financing models, including Build-Operate-Transfer (BOT) and resource-for-infrastructure agreements, have enabled rapid development of industrial and logistics infrastructure in Morocco. While these approaches raise legitimate concerns about long-term dependency, they have contributed to Morocco's commercial viability in the GTM space. By contrast, the EU's commitment to ESG norms, transparent governance, and sustainable development presents a complementary model. Experts noted that if the EU is to remain competitive and influential in Morocco's mineral sector, it must enhance its financial instruments – through blended finance, concessional lending, and investment guarantees – and deepen public-private partnerships that address the capital constraints of Moroccan firms.*

The EU must also go beyond extraction and invest directly in Morocco's refining and processing segments, learning from China's vertically integrated approach. By engaging more deeply across the GTM value chain, the EU can help secure long-term access to critical minerals while advancing its green industrial policy. This would enhance its strategic autonomy and support the creation of more resilient and equitable mineral supply chains.

7. Trilateral Framework Policy Roadmap

To position itself as a credible mediator and strategic hub in a fragmented geopolitical landscape, Morocco must lead in designing the architecture for a new trilateral framework with the EU and China. The authors have developed the following five-part policy roadmap, which outlines concrete steps that Morocco could pursue to operationalise this vision:

STEP 1: Establish a Morocco-EU-China GTM task force

Morocco should initiate a formal trilateral framework by launching a Morocco-EU-China GTM Task Force under the Ministry of Energy Transition. This body would serve as a neutral coordination mechanism to align investment priorities, share information on project pipelines, and foster dialogue between stakeholders from government, industry, and finance. By institutionalising engagement, Morocco can reduce duplication, build trust, and encourage convergence on shared objectives across the GTM value chain.

STEP 2: *Create GTM industrial zones for joint investment and technology transfer*

Morocco should establish dedicated GTM Industrial Zones near key hubs such as Tangier Tech City to attract co-investment from Chinese and European firms in mineral processing and clean technology manufacturing. These zones should offer preferential incentives (including tax benefits and infrastructure access) for consortia that commit to meaningful Moroccan equity participation, local procurement, and technology transfer through on-site training programmes.

STEP 3: *Develop a GTM sustainability charter to harmonise ESG standards*

To enhance investor confidence and environmental credibility, Morocco should lead the development of a GTM Sustainability Charter that integrates principles from the EU's CRMA and China's Green BRI. The Charter would be embedded into Morocco's mining licensing framework and monitored through third-party audits, ensuring that all foreign and domestic actors operating in the sector adhere to transparent, verifiable ESG criteria aligned with international standards.

STEP 4: *Launch a North-West African GTM corridor under the AfCFTA*

Morocco should champion the development of a regional GTM Corridor that links its ports, industrial zones, and logistics infrastructure with mineral-rich countries such as Guinea and the DRC. Using the policy tools available under the AfCFTA - such as harmonised rules of origin, customs facilitation, and investment protocols - this corridor would unlock cross-border industrial clustering, strengthen regional value chains, and reduce reliance on extra-continental processing.

STEP 5: *Enact a GTM local empowerment act and establish a 'green skills' institute*

To maximise domestic value capture, Morocco should introduce a GTM Local Empowerment Act requiring foreign investors to hire a minimum percentage of skilled Moroccan labour and source a defined share of equipment and services from local suppliers. This should be complemented by the establishment of a Green Skills Institute, funded through mineral royalties and public-private partnerships, to train workers in advanced mining, refining, recycling, and battery technologies and ensure a pipeline of skilled talent for the GTM sector.

8. Conclusion

Morocco's strategic position and mineral endowment present a unique opportunity to shape the future of sustainable industrialisation through balanced engagement with both China and the EU. While bilateral cooperation has deepened in recent years, a fragmented approach risks reinforcing extractive dynamics and missing opportunities for structural transformation. A well-designed trilateral framework, anchored in shared investment, technology exchange, and regulatory coherence, would enable Morocco to consolidate its industrial base, attract high-quality capital, and contribute meaningfully to global climate goals. As global competition over resources intensifies, Morocco's ability to mediate, align, and lead may become one of its greatest strategic assets.

About the authors:

STEPHEN DUAH AGYEMAN is a postdoctoral Research Associate at the Centre for Energy Policy (CEP) at University of Strathclyde and UK Energy Research Centre. His current research focuses on green and transition minerals policies, electricity market regulation, technologies for electricity and heat decarbonisation and its social-economic implications. He has previously worked with the World Bank and Xiamen University where he supported energy and climate policy research and have also served as academic peer reviewer for several Elsevier Journals.

HERMAS ABUDU is a Postdoctoral Researcher at Environmental Science Department, Emory University in Atlanta, Georgia, USA. His research centers on the energy transition, climate and sustainability policy, and transition minerals. He previously served as an Associate Researcher and High-End Foreign Expert at Chengdu University, P.R. China, where he supported high-level research, research policy development, and international collaboration focused on sustainable development education and the role of green and transition minerals in driving low-carbon technologies and renewable energy initiatives. He also served as Guest Editor for topics including “Smart Grids and Sustainable Transportation: Integration towards Energy Transition.”

Endnotes:

[1] María Fernández A., Ferrándiz E., and Medina J., (2022). "The diffusion of energy technologies. Evidence from renewable, fossil, and nuclear energy patents". *Technological Forecasting and Social Change*, Vol.178, 121566.

[2] Morocco is endowed with an estimated 1.5 million metric tonnes of manganese and 45 million metric tonnes of combined cobalt and nickel resources. Other reserves include approximately 5 million metric tonnes of copper, with further potential deposits of iron, lithium, and graphite yet to be fully assessed. Furthermore, Morocco also holds approximately 72% of global phosphate.

[3] Azerblou S., (2025). "Toward carbon-neutral transportation: Harnessing Morocco's critical minerals for sustainable lithium-ion batteries". *Sustainable Energy Technologies and Assessments*, Vol. 75,104245

[4] Some commentators warn of a trade-off between these two uses. See El Bamiki, R et al., (2020). "The Moroccan High Atlas phosphate-rich sediments: Unraveling the accumulation and differentiation processes", *Sedimentary Geology*, Vol.403, 105655

[5] *Supra*, 3

[6] Moroccan Economic, Social and Environmental Council (ESEC) (2023). "Opinion of the Economic, Social and Environmental Council on "strategic and critical minerals contributing to the industrial sovereignty of Morocco".

[7] Geissler, B et al., (2019). "Phosphate supply security for importing countries: Developments and the current situation". *Science of The Total Environment*, Vol.677, pp.511-523.

[8] Mahajan R., Weng M. L., Sareen M., Kumar S., Panwar R., (2023) "Stakeholder theory", *Journal of Business Research*, Vol. 166.

[9] Horesh, N. (2023). "China and Morocco: Improbable Partners?" *JANUS NET E-Journal of International Relation*, 14(1).

[10] Lisinge, R. T., (2020). "The Belt and Road Initiative and Africa's regional infrastructure development: implications and lessons", *Transnational Corporations Review*, Vol.12, Issue 4, pp.425-438.



Africa Policy Research Institute is an independent and nonpartisan African think tank. It researches key policy issues affecting African countries and the African continent. APRI provides insights to the German and European Union policy-making processes on Africa. In addition, APRI provides policy options to African policymakers and civil society actors.

Imprint

APRI - Africa Policy Research Private
Institute gUG (haftungsbeschränkt)
Prinzenstraße 85D
10969 Berlin
Germany

Executive Director:

Dr. Olumide Abimbola
Contact: Dr. Amandine Gnanguenon
Senior Fellow and Head of Geopolitics Program
Email: agnanguenon@afripoli.org

License:

Creative Commons (CC BY-NC-ND 4.0) <https://creativecommons.org/licenses/by-nc-nd/4.0>